June **2017**

IPSOS VIEWS

What Worries the World

By **Michael Clemence and Harriet Fowler**

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1. What worries the world?

The everyday concerns of the global population are the focus of one of Ipsos' flagship global surveys. Each month we ask an online sample of over 18,000 citizens in more than 25 countries[1] about the key issues they believe are facing their country, asking them to pick up to three from a diverse array of topics, ranging from unemployment to access to credit.

Which three of the following topics do you find the most worrying in your country?

In this paper we review the data for January to December 2016 – a year of great disruption and change – to try to understand how the world's worries are changing. We make use of Ipsos' long-term trends to see how concerns have shifted over time, what people are worried about right now, and what we might worry about in the future.

The research is updated regularly throughout the year, so please do look in at our website if you are interested in the latest results.

Some headlines:

1. Unemployment remains the biggest concern globally – as it has been since the start of our survey series in 2010. What's worth noting, though, is that its lead on other issues has slowly but surely reduced over this time.

2. In European countries, unemployment is clearly the chief worry. Crime and violence is the core issue for Latin American countries, whilst in North America healthcare is the leading concern (33%). Concerns about terrorism are also rising.

3. Around the world, men and women have similar worries – both place unemployment as their main concern. But there are differences as well For example, men are more likely than women to single out financial/political corruption as something which worries them, while women are more worried about crime and healthcare.

4. Citizens' worries do not always reflect the reality of life in their country, at least as measured by "official indicators". Whilst concern about unemployment is typically higher in countries with greater levels of joblessness, there appears to be no relation between worries over corruption or inequality and the level of corruption or income disparity present in the surveyed countries.

5. In the near future, unemployment may fall from being the top worldwide concern. It is unclear what might replace it, but the concerns of large emerging economies – especially about the environment and cost of living – seem likely to rise.

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[1] The precise number varies by month - there are a minimum of 26 countries in each wave of the survey.

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What Worries the World?
Summary of topics and Country Coverage

Topics covered
Immigration control
Healthcare
Poverty & social inequality
Terrorism
Rise of extremism
Unemployment
Maintaining social programmes
Crime & violence
Moral decline
Financial/political corruption
Education
Taxes
Inflation
Climate change
Threats against the environment
Childhood obesity
Access to credit

Country	Sample size (per month)	Audience
Argentina	500	Full
Australia	1,000	Full
Belgium	500	Full
Brazil	1,000	Partial/middle class
Canada	1,000	Full
China	1,000	Partial/middle class
France	1,000	Full
Germany	1,000	Full
Great Britain	1,000	Full
Hungary	500	Full
India	500	Partial/middle class
Israel	500	Full
Italy	1,000	Full
Japan	1,000	Full
Mexico	500	Partial/middle class
Peru	500	Partial/middle class
Poland	500	Full
Russia	500	Partial/middle class
Saudi Arabia	500	Partial/middle class
South Africa	500	Partial/middle class
South Korea	500	Full
Spain	1,000	Full
Sweden	500	Full
Turkey	500	Partial/middle class
US	1,000	Full

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2. Are we on the right track?

A key contextual factor is the extent to which people feel that their country is headed in the right (or wrong) direction. And it is one area where there is great country-level variance. At one extreme, over the year 89% of Chinese citizens said they felt their country was headed in the right direction. At the other, a near-identical proportion in Brazil (88%) felt that their country was off on the wrong track.

Overall, close to two-thirds (63%) feel that their country is off on the wrong track – somewhat sombre mood-music. But nor is this a new trend: in March 2010, 62% also felt that their country was off on the wrong track. In terms of how people felt on the ground, 2016 was no different to any other year.

Right direction or wrong track?
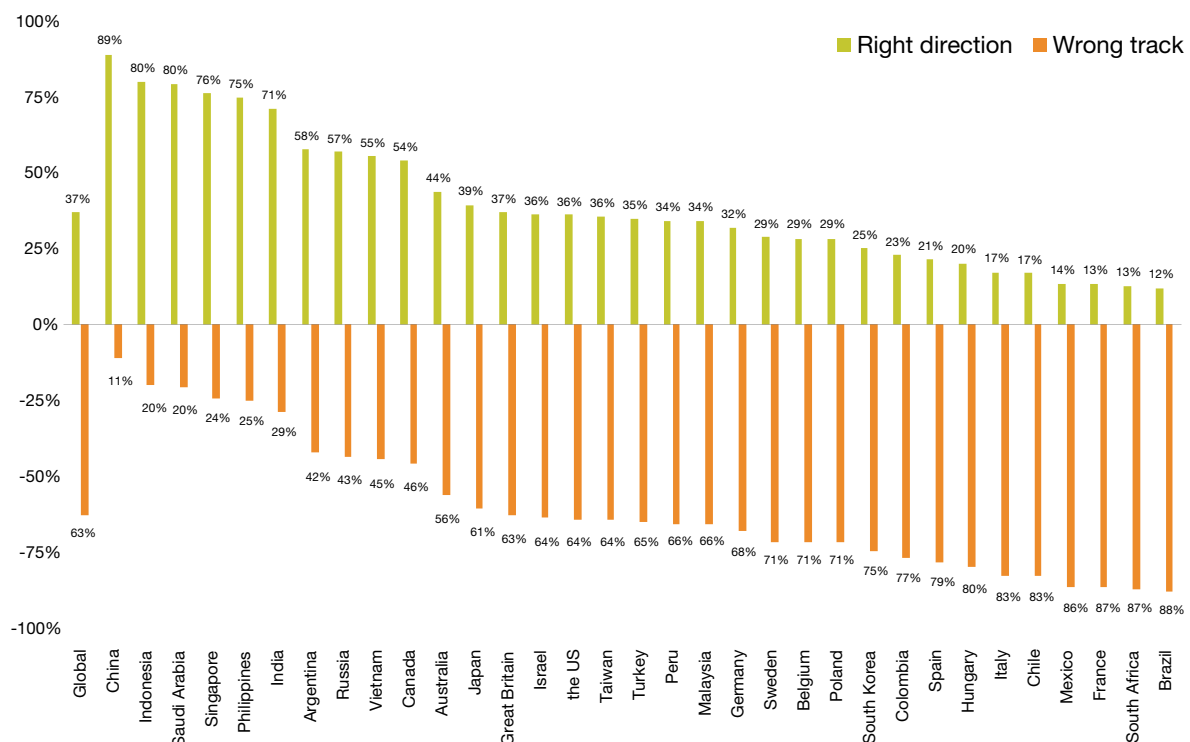
Base: 249,820 participants across 30 countries, Jan-Dec 2016

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3. The past twelve months

What was the world worrying about in 2016? Unemployment is a constant presence, starting and ending the year on 38% and not shifting more than two percentage points away from that figure at any point.

Next in the top ten of global worries come "poverty/ social inequality" and "corruption and financial/ political scandals". Crime, violence and healthcare round out the top five. At the very foot of the table we find access to credit and childhood obesity, with climate change and threats to the environment also prioritised by less than ten per cent of the global public.
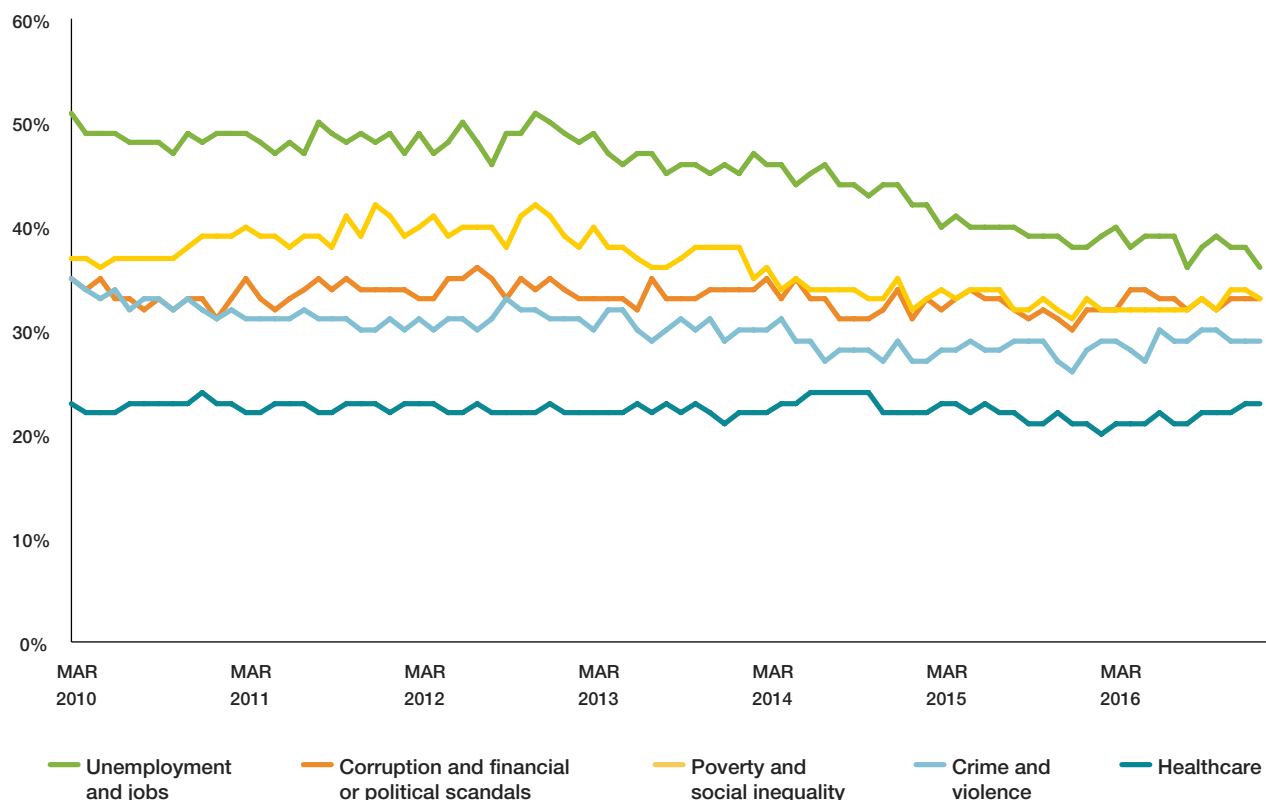
	Worry	% mentioning
1	Unemployment/jobs	38%
2	Corruption and financial/ political scandals	33%
3	Poverty/social inequality	33%
4	Crime and violence	29%
5	Healthcare	21%
6	Terrorism	20%
7	Education	19%
8	Taxes	16%
9	Moral decline	14%
10	Immigration control	13%
11	Inflation	11%
12	Rise of extremism	10%
13	Maintaining social programmes/Welfare state	10%
14	Threats to the environment	9%
15	Climate change	8%
16	Childhood obesity	3%
17	Access to credit	2%

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Looking further back to March 2010, when this survey began, a longer-term trend of falling concern with unemployment reveals itself. At that point, coming off the back of the global recession, 51% of the surveyed publics were worried about unemployment. Since that time we have seen a steady decline in concern to today's 38%.

In fact, throughout this period the same five issues have occupied the top five slots. Concerns about inequality, corruption and healthcare are at similar levels to 2010, whilst there has been a small drop in the global level of concern about crime and violence. Beneath the top five there have been some shifts too; the proportion who worry about terrorism has risen from 11% in March 2010 to 21% in January 2017, and concern about immigration, taxes and the rise of extremism have gone up by three percentage points over the same period. These appear to echo some of the developments in the real world over this period; we will examine some of these against secondary data later in this report.

Overall, the primacy of unemployment has slipped

Legend:
- Unemployment and jobs
- Corruption and financial or political scandals
- Poverty and social inequality
- Crime and violence
- Healthcare

Base: 249,820 participants across 30 countries, Jan-Dec 2016

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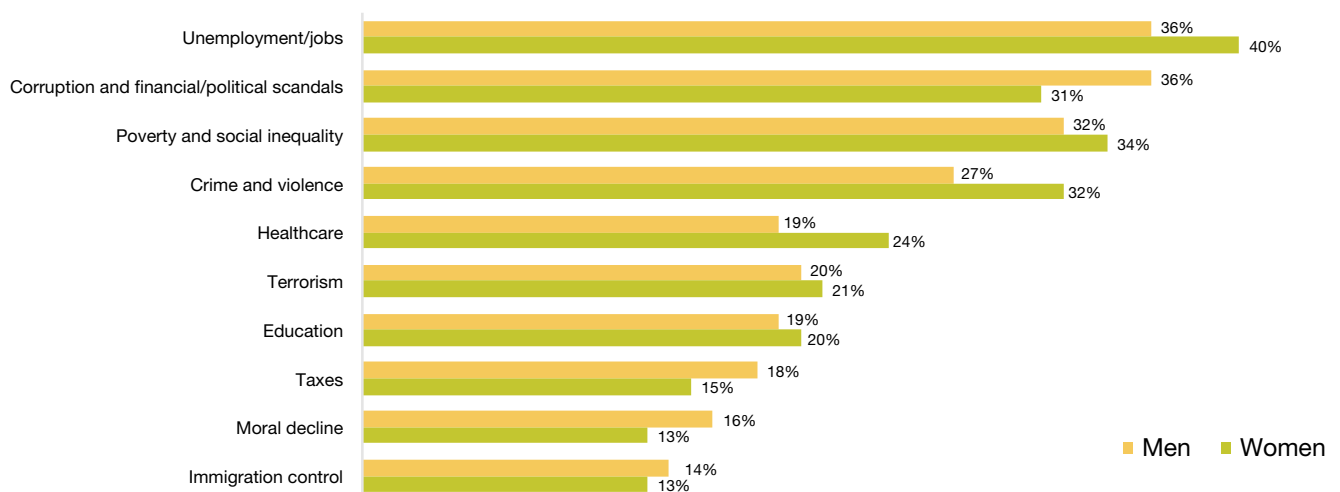
4. Who worries about what?

What do different types of people worry about? The broad global picture is informative, but it is the comparisons by gender and generation that help us build a more complete picture.

Men/women: of a broadly similar mind

There are some differences in concern by gender. Globally, men rate corruption and unemployment as their joint-top worries, whilst women rate unemployment top.

Women are more worried about crime and poverty/ inequality than they are about political or financial corruption. Overall however, both genders share broadly similar concerns – except for healthcare, which features in the top five worries for women, but not men.
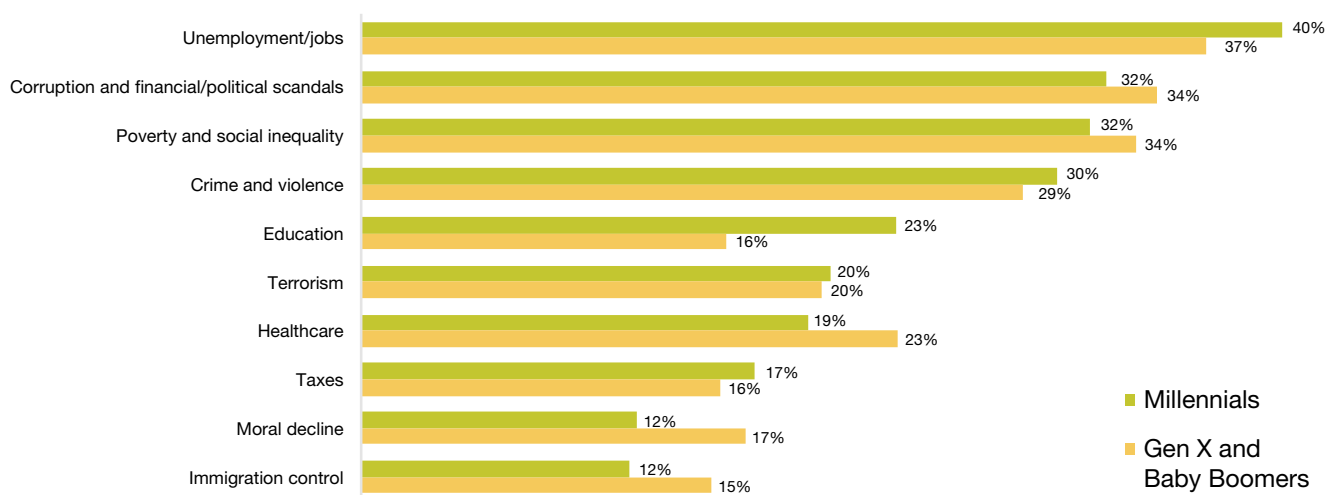
Global top ten by gender

	Men	Women
Unemployment/jobs	36%	40%
Corruption and financial/political scandals	36%	31%
Poverty and social inequality	32%	34%
Crime and violence	27%	32%
Healthcare	19%	24%
Terrorism	20%	21%
Education	19%	20%
Taxes	18%	15%
Moral decline	16%	13%
Immigration control	14%	13%

Base: 249,820 participants across 30 countries, Jan-Dec 2016

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Generational concern: old and young united, but education more important to Millennials

Much is written these days about how the "Millennial generation" differs from those that went before them. But, when it comes to the issues they find worrying, Millennials – those born between 1980 and 1995 – are thinking broadly along the same lines as their elders. They rate unemployment, corruption, poverty/inequality and crime as their top four issues. This is the same order as displayed by Generation X and the

Baby Boomers. The only "Millennial difference" is that they are more concerned about education, ranking it fifth, above healthcare which is rather more of a concern for Generation X and Boomers.

Millennials' top five - education in, healthcare out

Base: 249,820 participants across 30 countries, Jan-Dec 2016

	Millennials	Gen X and Baby Boomers
Unemployment/jobs	40%	37%
Corruption and financial/political scandals	32%	34%
Poverty and social inequality	32%	34%
Crime and violence	30%	29%
Education	23%	16%
Terrorism	20%	20%
Healthcare	19%	23%
Taxes	17%	16%
Moral decline	12%	17%
Immigration control	12%	15%

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Regional concerns:
The importance of geography

Across four world regions – Latin America, Asia/Pacific, Europe and North America – we see very different issue hierarchies. In Europe, unemployment is the chief concern, followed by poverty/inequality, corruption and healthcare, with control of immigration the fifth biggest worry. In Asia the picture is similar, with unemployment topping the list, followed by poverty/inequality and corruption; however here we also see higher concern about crime and moral decline.

By contrast, in Latin America crime is seen as the biggest issue, followed by corruption and then unemployment. And in North America, healthcare tops the worries for 2016, narrowly ahead of unemployment – and poverty, taxes and terrorism occupy third to fifth place respectively.

Top five concerns - by region

	Europe	Latin America	North America	Asia-Pacific
1	Unemployment and jobs (40%)	Crime and violence (54%)	Healthcare (33%)	Unemployment and jobs (38%)
2	Poverty/social inequality (37%)	Corruption and financial / political scandals (45%)	Unemployment and jobs (32%)	Poverty/social inequality (30%)
3	Corruption and financial / political scandals (28%)	Unemployment and jobs (38%)	Poverty/social inequality (24%)	Corruption and financial / political scandals (29%)
4	Healthcare (25%)	Education (32%)	Taxes (24%)	Crime and violence (22%)
5	Immigration control (25%)	Poverty/social inequality (32%)	Terrorism (24%)	Moral decline (21%)

Base: 249,820 participants across 30 countries, Jan-Dec 2016

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5. What *should* we be worrying about?

How justified are we in worrying about different issues? Our previous investigations into the "Perils of Perception"[2] show that we often overestimate things that are unlikely to happen, and underestimate things that are more likely to occur. Asking people what they are worried about in their country provides another opportunity to test this hypothesis.

We have therefore been looking at **external data sources** to compare the level of public concern against the relative prevalence of each of the top three issues – unemployment, corruption and poverty/inequality – to understand if there is any correlation at all between the level of concern and prevalence in different countries.

Are unemployment levels and concern with unemployment related?

Here the answer is yes – just about. Looking at the data from all countries, concern about unemployment can be seen to rise with the unemployment rate. For instance, in Spain, where the adult unemployment rate is 18%, 71% say unemployment is one of their biggest worries. This contrasts with the situation in Germany, where unemployment is 4% and just 14% name it as a concern.

This correlation is not perfect however, with a R squared correlation score of 0.27[3]. Notable outliers from the relationship include countries such as South Korea where unemployment is low but concern is high, and others like Turkey where the reverse is the case.
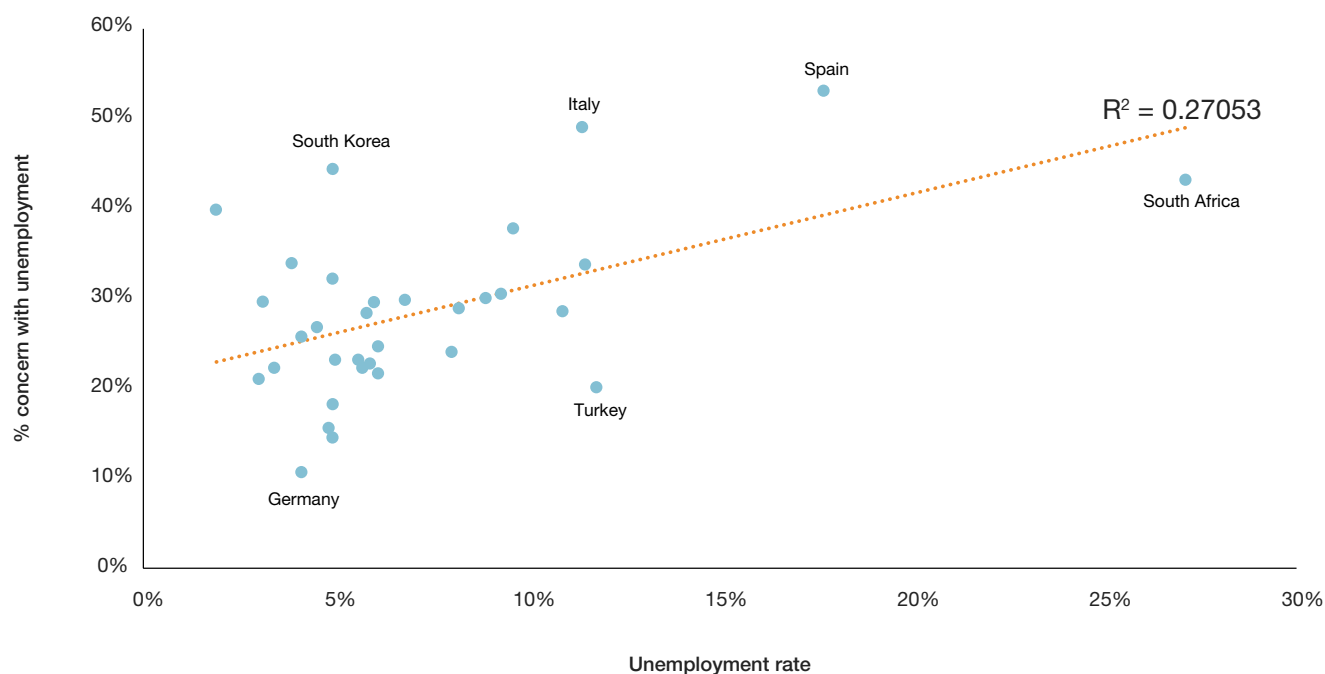
Further reading:

In this white paper, Ipsos explores how accurate people are in estimating a range of key social realities. This international survey entitled Perils of Perception covers 33 countries, and shows just how wrong we often are.

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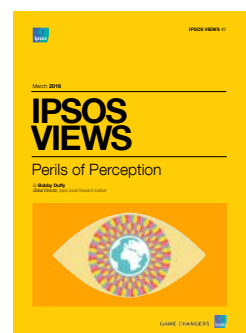
[2] https://www.ipsos.com/sites/default/files/2016-06/015.1_
PerilsOfPerception_March2016.pdf

[3] On this scale a score of 1 means a perfect correlation, and
0 means no correlation whatsoever.

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Concern with unemployment against unemployment rate

$R^2 = 0.27053$

Base: 249,820 participants across 30 countries, Jan-Dec 2016

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Does the concern with corruption correlate with what's happening on the ground?

In short, no: the level of concern with corruption in countries operates independently of the relative level of corruption measured by third party organisations.
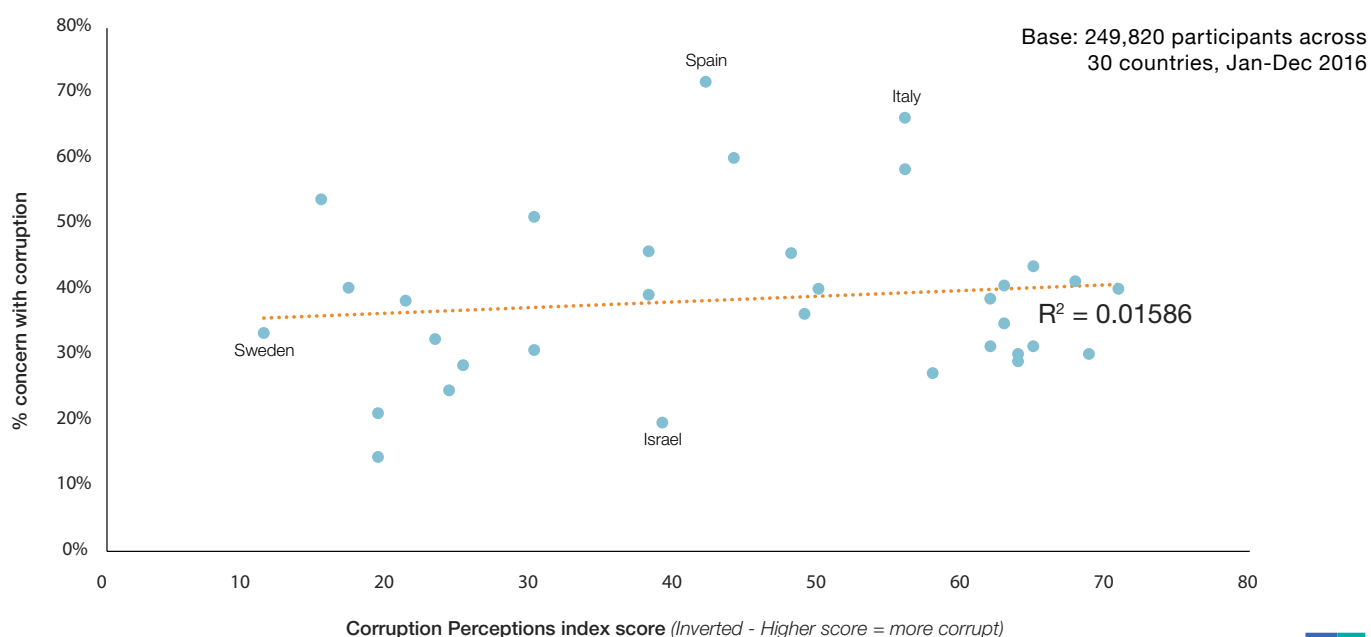
Political and financial corruption is by nature much harder to define and measure than unemployment. As an external reference point we use Transparency International's 2015 Corruption Perceptions Index[4]. This index combines multiple data sources to give each country a score between 0 and 100, where 0 is most corrupt and 100 is least corrupt. Whilst this measure is of *perceived*

corruption, it uses the same methodology across countries, providing a standardised measure of corruption to compare the countries in our sample.

When we chart this against stated concern about corruption the relationship is virtually flat, meaning that concern isn't higher in countries considered "more corrupt" by the index. Additionally, the R squared measure of correlation is miniscule – at 0.02. This confirms further that concern about this topic operates independently of perceived corruption.

Perhaps this is unsurprising. Without a "hard" external measure, perceptions of corruption are bound to be relative – so an incident of light pilfering in Sweden (considered the least corrupt country in our sample) might be viewed as seriously by the Swedish public as more serious corruption in countries where it is more of an issue.

Concern with corruption against *corruption index*

Base: 249,820 participants across 30 countries, Jan-Dec 2016

$R^2 = 0.01586$

Y-axis: % concern with corruption (0% to 80%)

X-axis: Corruption Perceptions index score *(Inverted - Higher score = more corrupt)* (0 to 80)

Labelled points: Spain, Italy, Sweden, Israel

[4] http://www.transparency.org/cpi2015#downloads

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How does concern with poverty/inequality line up with actual inequality?

Focusing on inequality, we see a similar story to corruption, with little to no correlation between concern and prevalence.

When measured against the UN's Gini coefficient[5] – a measure of income distribution, rather than poverty, within countries – there is little sign of a positive or negative relationship. Furthermore, the R squared score of correlation is very close to zero, at 0.009. This suggests there is no link between actual levels of inequality and concern about the issue.

By way of example, the country most concerned about inequality – Hungary (57%) – is ranked fourth *most equal* in our sample by the Gini coefficient. In contrast, in the most unequal country in the list (South Africa), half that proportion (29%) considered poverty/inequality to be an issue, a figure slightly below the national average. One caveat here: our online survey approach means that the sample is likely to be more middle-class than the population overall. Perhaps poverty and inequality is considered less of an issue for this audience.

Concern with poverty/inequality against *Gini coefficient*

Base: 249,820 participants across 30 countries, Jan-Dec 2016

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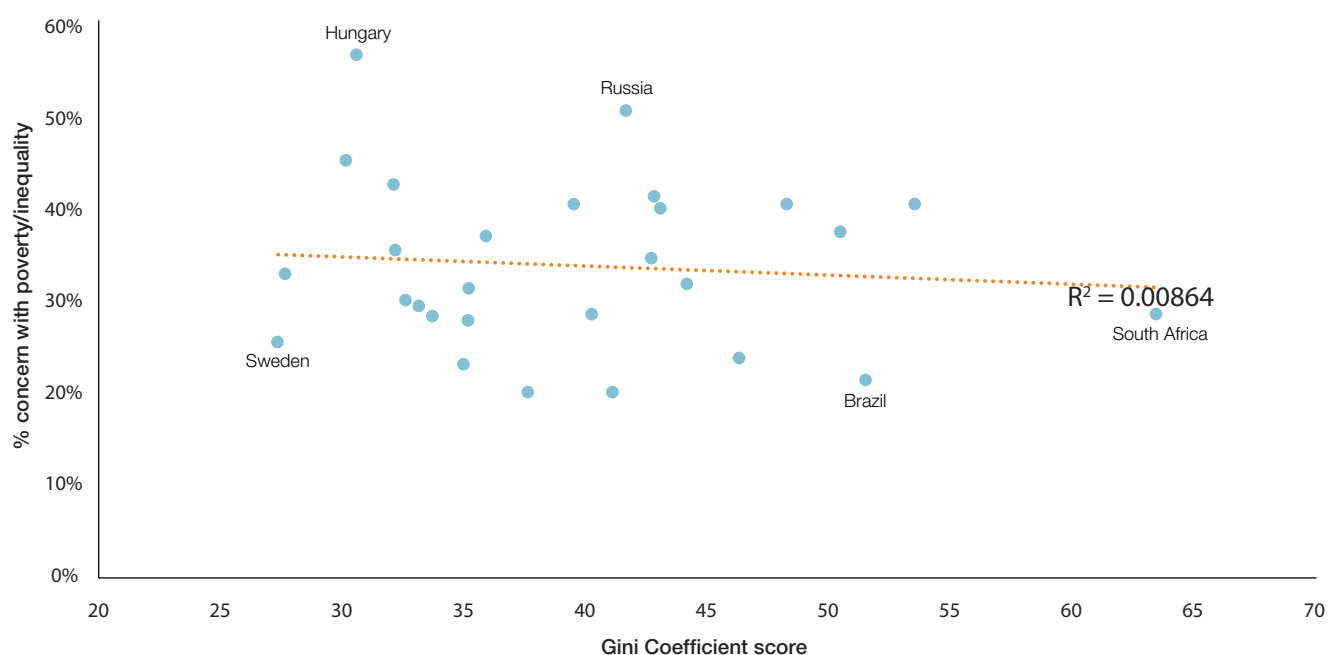
6. What *will* we worry about next?

What will the concerns of the future look like? If 2016 has shown us anything, we appear to be entering a more unpredictable and disruptive era, which makes forecasting the world's worries more difficult. If the trend over the past six years is anything to go by, perhaps we may see – for the first time in this series – unemployment falling from the top of the global worry list.

We can also look to the "macro" influences acting in the world. As part of our recent work on the Ipsos Global Trends Survey[6], we have identified five key megatrends – external factors that we believe will have a profound impact on society. These are:

- **Technology:** Ever-increasing ubiquity; solving old problems but creating new ones

- **Population dynamics:** Ageing population, falling birth rates and more megacities

- **Geo-political uncertainty:** A multi-polar world

- **Economic power shifts:** Rebalancing east and south

- **Climate change:** A growing concern, especially in the developing world. e.g. China

Although our data shows that perceptions do not always match reality, it would be odd if none of these megatrends were reflected in public concern. At the same time, public opinion has a way of making itself heard if ignored for too long a time – we can just look back at the events of 2016 as proof of that.

Country	Top worry for 2016
Argentina	Crime and violence (51%)
Australia	Unemployment and jobs (38%)
Belgium	Terrorism (39%)
Brazil	Corruption (52%)
Canada	Unemployment and jobs (40%)
China	Threats against the environment (42%)
France	Unemployment and jobs (50%)
Germany	Poverty/social inequality (45%)
Great Britain	Immigration (42%)
Hungary	Healthcare (60%)
India	Corruption (46%)
Italy	Unemployment and jobs (65%)
Japan	Poverty/social inequality (35%)
Mexico	Crime and violence (54%)
Poland	Healthcare (47%)
Russia	Poverty/social inequality (51%)
Saudi Arabia	Unemployment and jobs (45%)
South Africa	Corruption (65%)
South Korea	Unemployment and jobs (59%)
Spain	Unemployment and jobs (71%)
Sweden	Crime and violence (40%)
Turkey	Terrorism (71%)
US	Terrorism (36%)
Israel	Terrorism (53%)
Peru	Crime and violence (74%)

[6] Ipsos Global Trends 2017

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