

THE ILLUSION OF STABILITY

What Worries the World?

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WHAT WORRIES THE WORLD?

It is no small challenge to provide a comprehensive answer to the question of what worries the world, given the multiple social and political issues it raises at local and global levels. But, to build an idea of the biggest global concerns, we have narrowed down the possibilities to 17 issues (*see figure 3*) and, each month, ask citizens in 28 countries which are the most worrying in their country today.

It is often said that we live in highly politicised times, where there is a dominant sense of anxiety and uncertainty about the rate and nature of change in an interconnected world. So we might not expect our *What Worries the World* survey to produce anything resembling stable or predictable results.

Yet, the headlines are consistent over time. According to citizens across the world, the five most worrying issues in society are: Unemployment, Poverty & social inequality,

Financial/political corruption, Crime & violence and Healthcare (*see figure 2*). This is not only true today but also over the past 100+ months of measurement: the order of the top five rankings has remained almost unchanged since our series began in 2010.

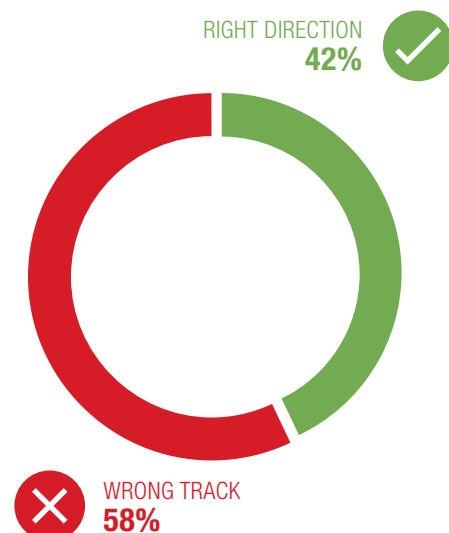
But we argue that the stability of these results masks some very real and dramatic changes to the social, political and economic fabric of many countries over the past nine years, with effects at regional and global level.

The illusion of stability is the theme of this paper. As such, we will try to understand why our global ranking of the top concerns has been so consistent over a decade, despite a reality of constant shifts and uncertainty, and some hard-hitting political and economic developments.

Figure 1 The top five concerns globally



Figure 2 Global right direction vs. wrong track monitor



Base: Representative sample of adults aged 16-64 in 28 participating countries. c.18,000 per month.
Source: Global Advisor What Worries the World survey. March 2019 results

EXECUTIVE SUMMARY

This paper finds:

- The illusion of stability that we observe is disrupted as we observe long-term trends, such as the steady decline of Unemployment as the one dominant global concern since 2010.
- Although the majority of respondents globally think that their country is heading in the wrong direction (*see figure 2*), there are record levels of global optimism today, which correlates with widespread economic improvement over the past nine years and is most strongly represented by the case of the U.S.
- There is a rise in prominence of issues other than Unemployment, such that the top three are now of near-equal weighting (*see figure 6*). Poverty & social inequality emerges as a dominant economic concern (especially in developed countries) and worries about Financial/political corruption) is prevalent across the countries surveyed.
- Referring to other Ipsos studies, there is evidence that some concerns reported in the survey may be influenced by flawed perceptions of reality, for example around immigration and crime, and driven in part by the media.
- Early indications of increasing concern about environmental issues, which to date have failed to occupy a space amongst the top global concerns but are incrementally moving upwards in the ranks.

Figure 3 - The 17 social and political issues measured by *What Worries the World*

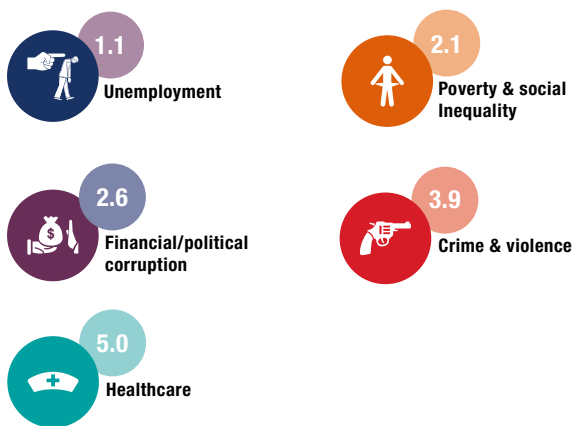


Source: Global Advisor What Worries the World survey (see appendix)

100+ MONTHS OF MEASUREMENT... WHAT'S CHANGED?

Looking back on nine years and over 100 months of measurement, it could appear at first glance that not much has changed. The top five concerns at global level have stayed the same all but six times. We can see this ordering in the average ranking of the top five concerns to date (see figure 4).

Figure 4 The world's top 5 worries

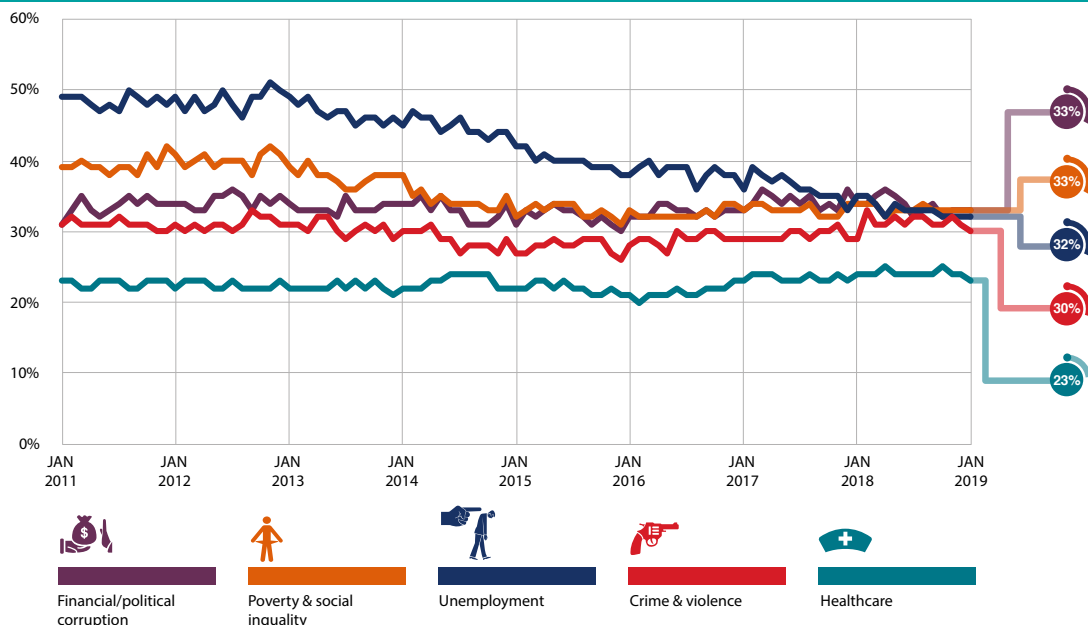


Terrorism is the only 'outside' issue to have made its way into the top five world worries so far. This happened six times in almost consecutive months at a time when terrorist attacks hit France, the UK, Belgium and Germany between December 2015 and August 2016.

But, if the rankings themselves haven't changed much, the margins between each issue certainly have. While Unemployment has consistently been the top global issue, the gap between this and the second and third most worrisome issues had been closing until it fell behind both Poverty & social inequality and Corruption (which had also switched places) for the first time in late 2017. Since then, the three top issues have continued to rank in near-equal proportions.

As can be seen below, the top-level converging of results in recent years indicates the absence of a singular dominant global issue, which has given way to a more crowded environment where more concerns are now being voiced with greater and more equal strength.

Figure 5 The world's top 5 worries: Long-term trends



Source: Global Advisor What Worries the World survey. Base: Representative sample of adults aged 16-24 in 28 participating countries. c.18,000 per month. January 2011 – January 2019 results.

THE ABSENCE OF A SINGLE GLOBAL CONCERN AND THE EMERGENCE OF MANY

We can see this recent disruption to the long-term rankings, driven by the fall in concern about Unemployment, by looking at aggregate results for global respondents over the last three years. In 2018, Unemployment for the first time fell behind Financial/political corruption as the greatest worldwide worry and has remained around the same level since.

This marked the beginning of a new dynamic that persisted through 2018 and into 2019 where the top three issues regularly share equal weightings of worry.

The rise in reported worry about Crime & violence also means that, at the end of 2018, it was also not far behind the top three.

Figure 6 What Worries the World: changes in rankings 2016 - 2018

	Worry	% mentioning in 2016	% mentioning in 2017	% mentioning in 2018	Movement since 2016
1	Financial/political corruption	33%	34%	34%	+1 ▲
2	Poverty & social inequality	33%	33%	33%	=
3	Unemployment	38%	36%	33%	-5 ▼
4	Crime & violence	29%	29%	31%	+2 ▲
5	Healthcare	21%	23%	24%	+3 ▲
6	Education	19%	19%	20%	+1 ▲
7	Taxes	16%	17%	18%	+2 ▲
8	Moral decline	14%	15%	15%	+1 ▲
9	Immigration control	13%	13%	14%	+1 ▲
10	Terrorism	20%	20%	13%	-7 ▼
11	Inflation	11%	10%	11%	=
12	Threats to the environment	9%	10%	11%	+2 ▲
13	Climate change	8%	9%	10%	+2 ▲
14	Maintaining social programmes	10%	9%	9%	-1 ▼
15	Rise of extremism	10%	10%	9%	-1 ▼
16	Childhood obesity	3%	3%	4%	+1 ▲
17	Access to credit	2%	2%	2%	=

Based on global average scores for each year

SNAPSHOT OF THE WORLD'S WORRIES

The world map below shows which issue caused each of the countries surveyed the most concern in 2018, and produces a mixed picture: it sees nine of the 17 issues asked in the survey feature. This reminds us of the more complex and varied pictures that exist at country level than the top global rankings suggest.

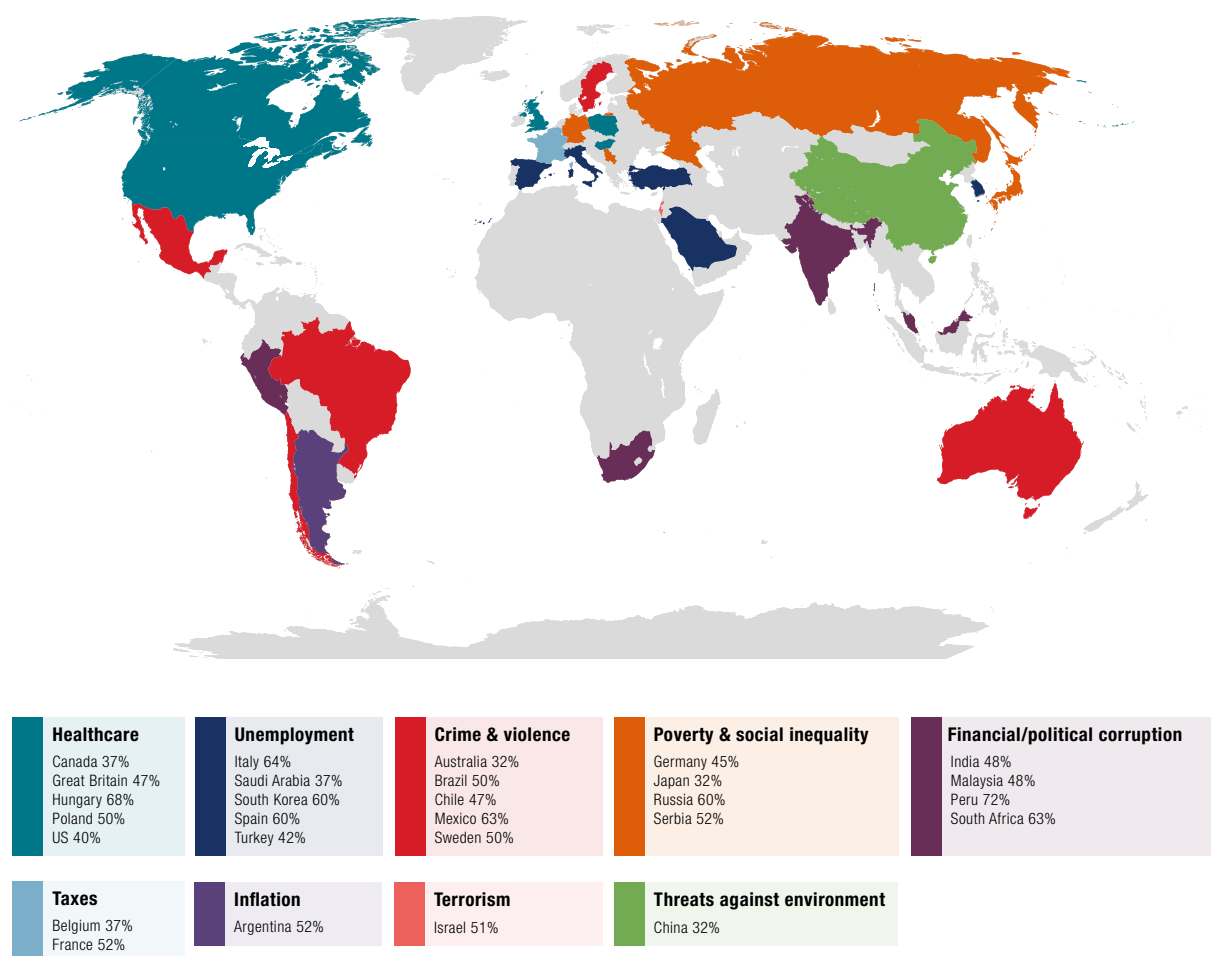
As we ask who worries about what around the world, we can see that unemployment anxiety is shared by people in a range of different countries.

While Financial/political corruption tends to be a more dominant issue in emerging economies, Poverty & inequality seems to be a more common preoccupation for citizens in established economies.

But beyond these broad groupings, we also see variance and commonalities across geographies and contexts.

For example, further clustering analysis on the data groups together Brazil, Mexico and South Africa, where there is a demand for law, order and honesty.

Figure 7 Top worries by country 2018



Source: Global Advisor What Worries the World survey. Base: Representative sample of adults aged 16-24 in 28 participating countries. c. 18,000 per month. Average results for 2018 in each country.

LONG-TERM ECONOMIC SHIFTS

Beneath this illusion of stability are nine years of economic and political turbulence which have had some very specific local developments.

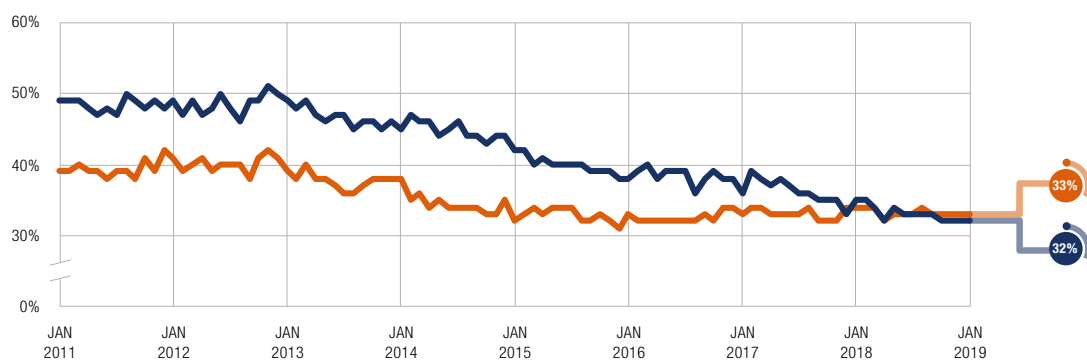
A major long-term global pattern has been the decline of the weight of economic concerns such as Unemployment and Poverty & social inequality as an effect of economic recovery after the 2008-9 crisis. As a result, economic concerns are moderated. But we have seen a slight increase in concern

about Taxes and Inflation (cited by 18% and 10% of global respondents respectively in the May 2019 results).

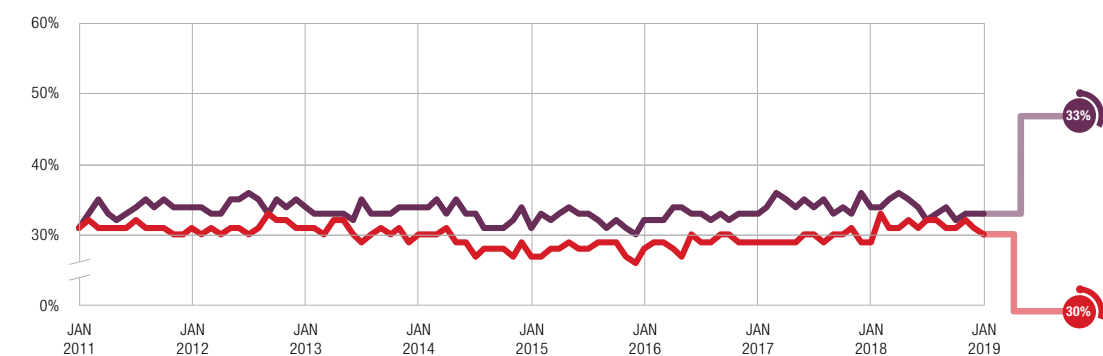
This decline is driving a 'levelling out' of the world's top worries, as we observe in parallel that law & order concerns like Corruption and Crime & violence have maintained fairly steady levels over the same time period, somewhat closing the historical gap with these economic worries.

Figure 8 Long-term trends

Poverty & Social Inequality and Unemployment



Financial/Political Corruption and Crime & Violence



Poverty & social inequality



Unemployment



Financial/political corruption



Crime & violence

Source: Global Advisor What Worries the World survey. Base: Representative sample of adults aged 16-24 in 28 participating countries. c. 18,000 per month. January 2011 – January 2019 results.

HAVE WE EVER HAD IT SO GOOD?

In a context marked by successive phases of improvement in the general economic conditions from 2012-2015 and 2017-2018, our 28 countries have shown an overall, albeit incremental, rise in optimism in recent years. On average, 42% of respondents across our 28 countries believed their country was heading in the right direction in 2018, up from 40% in 2017 and 37% in 2016 (*see figure 9*).

ECONOMIC CAUSES?

Our data shows a strong correlation between general positivity (country heading in the right direction) and the appraisal of the economic situation of the country as “good”.

The heightened optimism of 2018 can be explained by the perceived improvement of economic conditions in the 3 geographic zones that we cover in their entirety: North America, the G8 countries and the BRIC Economiss. All areas experienced an improvement in the perception of the economic situation between the trough of February 2016 and the end of 2018, at which point it started to plateau.

The U.S. evidences the economic causes argument most sharply with a correlation score of 0.8 for the period March 2010-December 2018 (*see appendix*).

It is quite revealing to see how Americans' worries were very different to what they were eight years before by the autumn of 2018, as a result of this quasi-linear economic improvement trend. A major shift in the ranks took place during this time. Unemployment experienced an extremely sharp fall from 63% of American respondents citing this as a top issue of concern to barely 13%. Meanwhile, non-economic concerns such as crime and violence and moral decline increased to enter the top five issues (*see Appendix*).

Looking to Europe, this trend is being played out in different ways. While Northern Europe (illustrated by Germany, Sweden, and Belgium) has followed a similar trend to the US, in that economic concerns were very salient in the early 2010s and then continuously eased off as economic

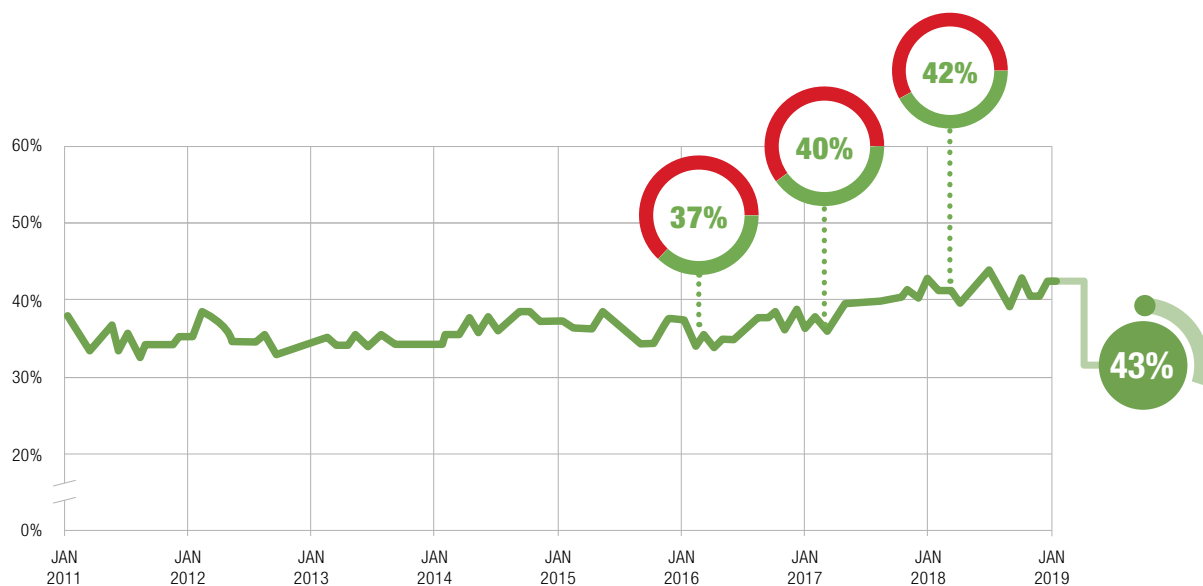
And 2018 was the best year of the decade so far: in this time, the world reached peak positivity of 44% in July. There were also three other occasions in the year where it reached 43%, never yet seen in the decade. This trend continues into 2019, as in January 2019, our global sample posted 43% again.

conditions significantly and tangibly improved, this has not been the case for a second European group (France, Italy and Spain) where the major economic concerns did not significantly shift. Unemployment and Poverty & social inequality persisted as French respondents' top two concerns by the end of 2018, although with diminished strength, with just over one third reporting worry for each, down from half of respondents eight years earlier.

Meanwhile, in Italy and Spain, Unemployment remained a top concern for more than 60% in both countries, only slightly down from a high of 74% in Italy and 79% in Spain over the past eight years.

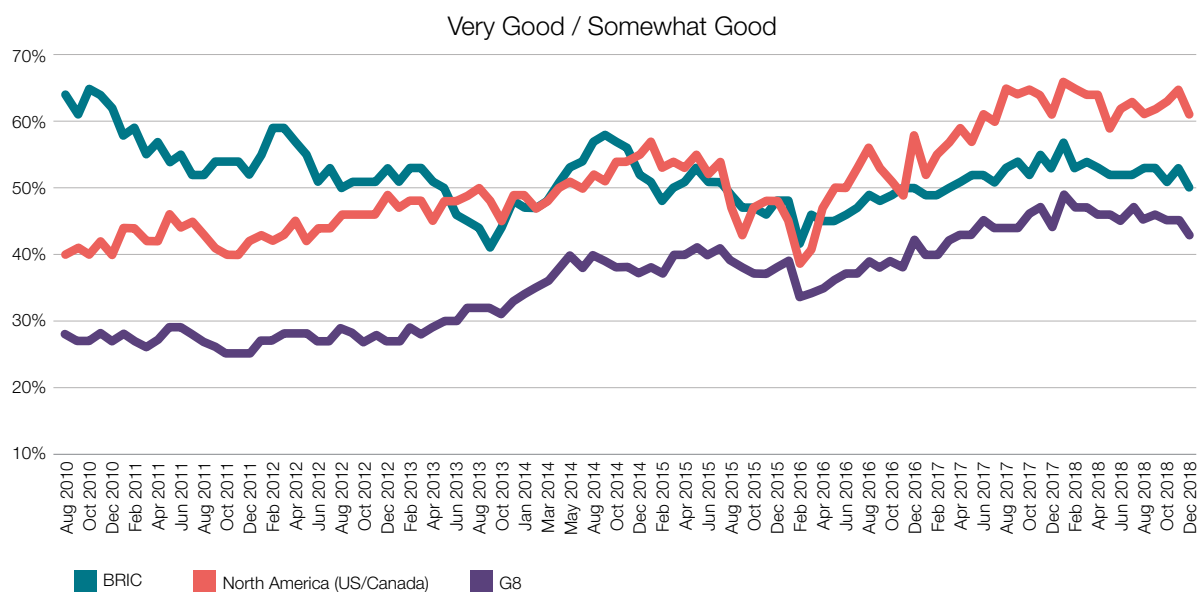
It is important to note that a rise in optimism about the direction of the country is not always and only the result of economic improvements but can also relate to political developments. We see, for example, how changes in government can strongly affect the perception of right/wrong track, in Mexico and Brazil in 2018, and Argentina in 2015. And where the dominant concern reported is Financial political corruption, government changes have a strong impact on national mood.

Figure 9 % of respondents globally that say their country is heading in the right direction



Source: Global Advisor What Worries the World survey. Base: Representative sample of adults aged 16-24 in 28 participating countries. c. 18,000 per month. January 2011 – January 2019 results.

Figure 10 How would you describe the economic situation in your country?



Source: Global Advisor. Ipsos Economic Pulse of the World January 2019
<https://www.ipsos.com/sites/default/files/ct/publication/documents/2019-03/g118-economic-pulse-january-2019.pdf>

CAUSE FOR CONCERN?

The results of our *What Worries the World* survey logically reflect the reality of conditions in the respondents' respective countries, and any actual changes experienced or observed by them. Spain's reported concern about employment mirrors actual levels, for example (see appendix).

We also see that terrorism comes to dominate public attention and concern at isolated moments following terror attacks before receding again beneath the more 'regular' worries.

But worries are by nature subjective and prone to emotional response. So, it may not always be the case that reported concerns reflect reality, but instead a fallible perception of it. To lend perspective on how this may impact upon citizens' concerns as reported in *What Worries the World*, we turn to Ipsos' *Perils of Perception* survey which reveals the extent of some such misperceptions of social issues held by those in many of the same sample countries.

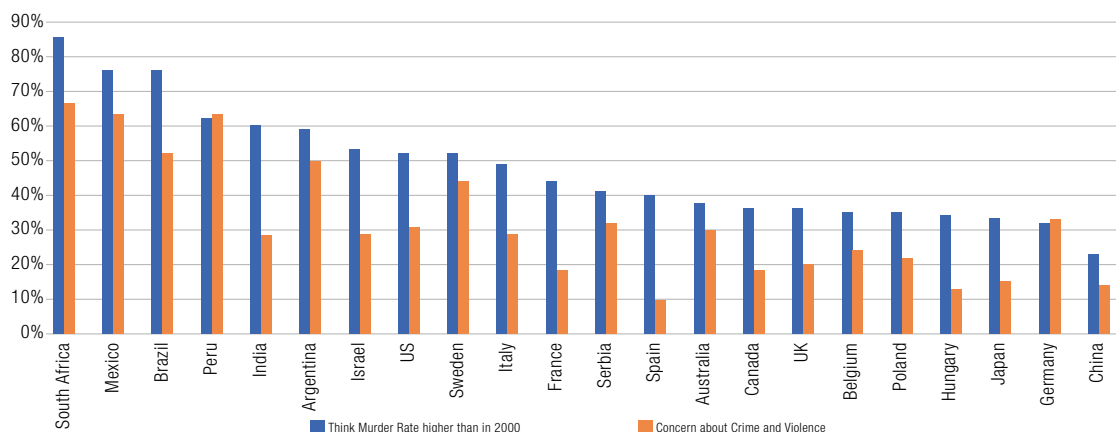
Immigration is an archetypal example of how perceptions of our realities can be far from fact-based. Countries consistently overestimate the number of migrants that constitute their populations, a finding that provides an important angle for understanding levels of concern about immigration found by *What Worries the World*.

Perils of Perception shows that several South American countries guess that close to 30% of their populations are immigrants when the actual figure is under 1%. This perception-reality gap also exists in Spain (31% vs. 10%) and Italy (28% vs. 11%) and may be driving the elevated level of concern about immigration control in these countries - seen in particular since the migration 'crisis' of 2015. Perhaps widespread alarmism in the media has contributed both to increased concern and heightened misperception of the scale of actual immigration in these countries.

We can observe in figure 11 a rather logical correlation between the proportion of respondents in each country who think that the local murder rate has increased in the previous decades and the level of concern about Crime & violence (coefficient of 0.86).

But *Perils of Perception* finds that such perceptions were generally wrong, since in most of these countries the overall murder had in reality declined, and by as much as 29% across the sample countries. This is at odds with the results of *What Worries the World*, where concern about crime and violence worldwide has remained steadily around 30% over the years.

Figure 11 % of people that perceive the murder rate has increased vs concern about crime and violence



Source: Ipsos *Perils of Perception* survey, 2017 results. Base: Representative sample of individuals aged 16-64 in 38 countries.

THE UNCERTAIN RISE OF A TRULY GLOBAL CONCERN: THE ENVIRONMENT

Damage to the natural world may qualify as a global cause for concern in the trust sense, as it is not a localised or containable issue, but crosses natural borders and impacts the entire global population - despite its effects being more pronounced in certain locations. Yet environmental concerns, represented as both Climate change and Threats against the environment appear to be outlier issues in the *What Worries the World* survey.

While 30% of global citizens point to climate change as one of their country's major environmental issues (Global Views on the Environment – 2018), only 13% of global citizens, on

average, consider it to be one of the top three biggest issues facing their country today.

This could be down to a sense of deferred responsibility given its profound and global scope, or detachment from the reality of this in comparison to other issues that feel more immediate and close to home. But we have seen the power of social and political movements in raising awareness around the urgency of an impending environmental disaster, for example the actions and messages of Extinction Rebellion, formed at the end of 2018, have reached a global audience.

Figure 12 Threats against the environment

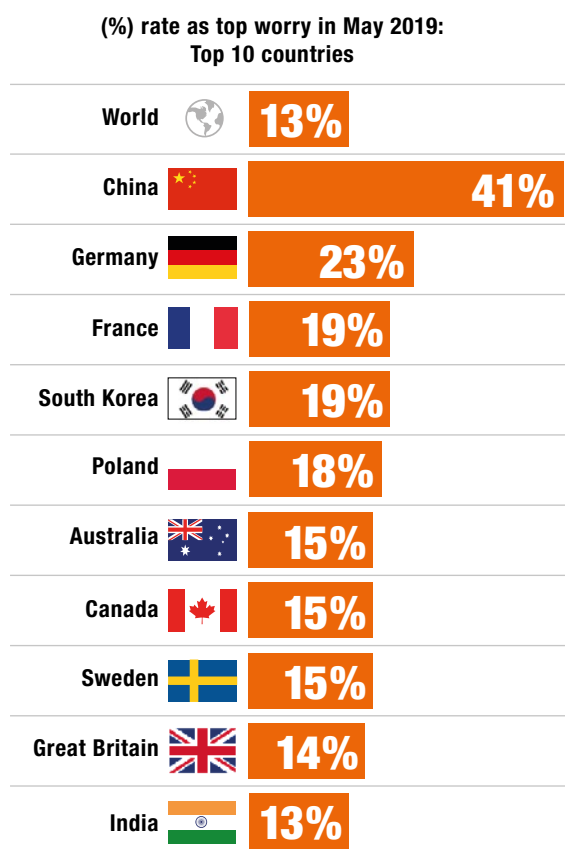
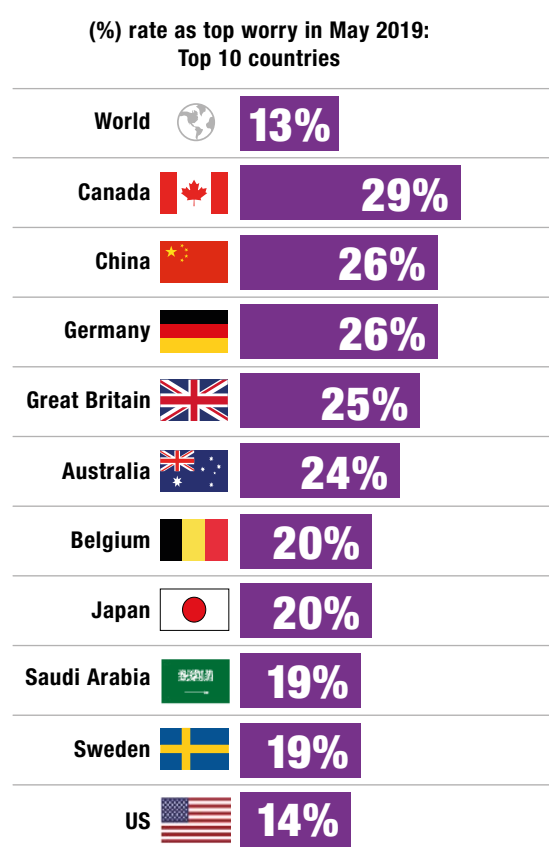


Figure 13 Climate change



Source: Global Advisor What Worries the World survey. Base: Representative sample of adults aged 16-24 in 28 participating countries. c. 18,000 per month. May 2019 results.

The global results for Climate change is being driven by a handful of more concerned countries including Canada, China, Germany, Great Britain and Australia (see figure 13). However, threats against the environment ranks as a significantly bigger concern in China than elsewhere (41% vs. 13% global average).

But in recent months, *What Worries the World* is showing an upward shift in concern about environmental issues, possibly following the increasing public salience in many Western countries. Out of the total 17 issues, they are now edging into the top ten.

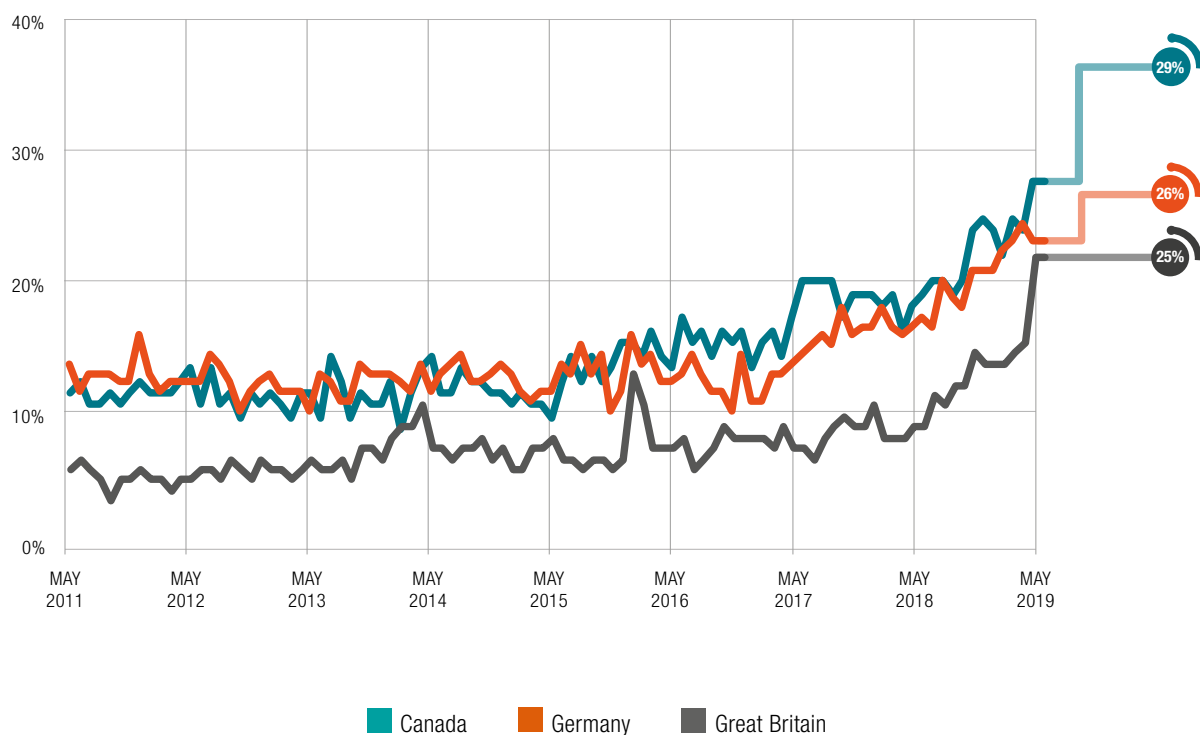
Before 2015, when the Paris Agreement declared steps towards global action to combat climate change, this issue was not mentioned by more than 8% of respondents globally. So, although still low, today's 13% does mark an

increase. This perhaps put the issue higher on the global agenda, and international backlash against President Trump's announcement in 2017 that the U.S. will withdraw from the accord further generated increased concern about climate-related issues.

This increase in concern is being driven in particular by a handful of countries, where climate change has been firmly placed as a salient political issue. In addition to China, climate change is now a top five issue for Canada, Great Britain and Germany (see figure 14).

With these recent spikes, and considering Threats against the environment and Climate change together, perhaps environmental issues are beginning to occupy a larger space in the worries of the world than is apparent at first glance. Time will tell whether this trend continues.

Figure 14 Increasing concern about climate change



Source: Global Advisor What Worries the World survey. Base: Representative sample of adults aged 16-24 in Great Britain, Canada and Germany. Results from May 2011 – May 2019.

CONCLUSION

Our What Worries the World survey findings provide a window into understanding how people feel about the direction of their country and the most important issues facing them. The multiple and interrelated social and political drivers mean that the key stories are not immediately apparent from the headlines. And indeed, the headlines are not always the most interesting takeaway.

With the help of hindsight, we have identified that the long-term decline of Unemployment from its position as clear frontrunner of overall global concerns marks the gradual yet dramatic trend of slow economic recovery. Supported by our Economic Pulse data, this is a significant long-term trend with far-reaching implications.

But this has played out in different ways within Europe. The effects of changes in the global environment on the ground are not as straightforward as the trendline, and although we see a concurrent increase in optimism globally, the story doesn't stop there.

As economic concerns have receded, a more complex environment has emerged, with crowding and convergence in the top-level rankings of concerns. This has brought to our

attention the strong presence of Financial/political corruption for example, as a top concern for many global citizens. The relative salience of the top issues is also conditioned by the emergence of other sporadic but equally serious concerns in many locations around the world.

On the other hand, environmental concerns are notable for their lack of prominence. But if we look more closely down the rankings, we learn that in a select few countries, Climate change and Threats against the environment are featuring more in respondents' reported concerns. This could mark the beginnings of a shift in perceptions about the most pressing issues that we face in our respective countries and shared world.

One shift that we are now seeing is our propensity to be wary about the realities of what is happening in our countries. Our Perils of Perception framework serves to remind us of what shapes public attitudes. A review of these insights alongside the reported global concerns helps to put what people think into sharper focus and contributes to a better understanding of the complexities of what shapes public anxiety.

FURTHER READING

- Ipsos What Worries the World: www.ipsos.com/en/what-worries-world-may-2019
- Ipsos Economic Pulse of the World: www.ipsos.com/en/economic-pulse-world-january-2019
- Ipsos Perils of Perception: perils.ipsos.com/
- Extinction Rebellion: rebellion.earth/

APPENDIX

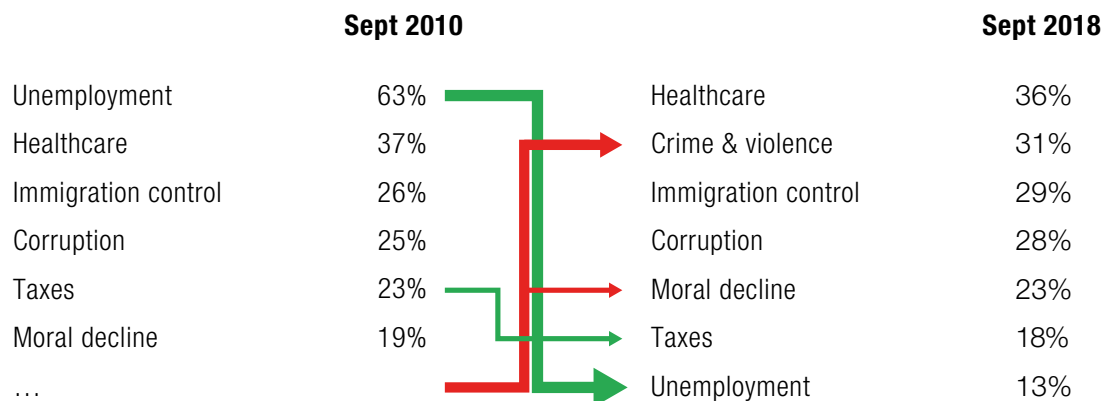
In every month of the year since 2010, Ipsos' What Worries the World survey series asks an online sample of over 18,000 citizens in 28 core countries which three from a list of 17 concerns are the most worrying for their country (see below).

Respondents are also asked whether they feel their country is on the "right track" or "heading in the wrong direction".

In this way, our *What Worries the World* survey diagnoses the biggest social and political problems on both local and global levels and provides a snapshot of the national mood in the countries surveyed. It serves as a tracker that allows us to see any changes in focus from month to month, as well as longer-term shifts in what the public deems to be priority issues.

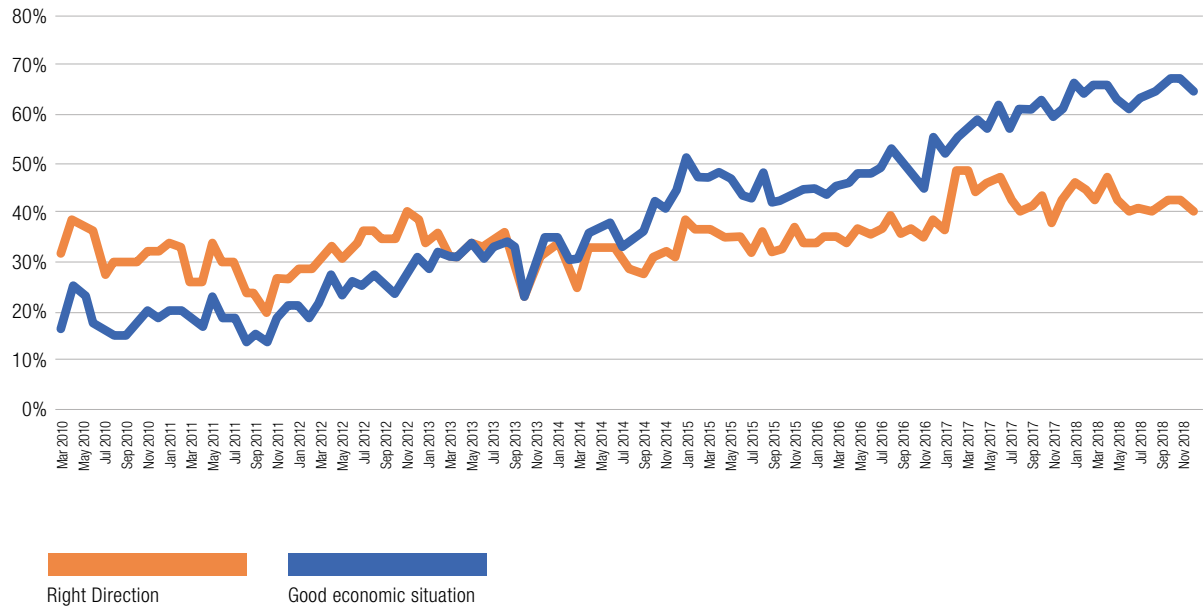


Figure 15 Long-term shift in concerns in the United States



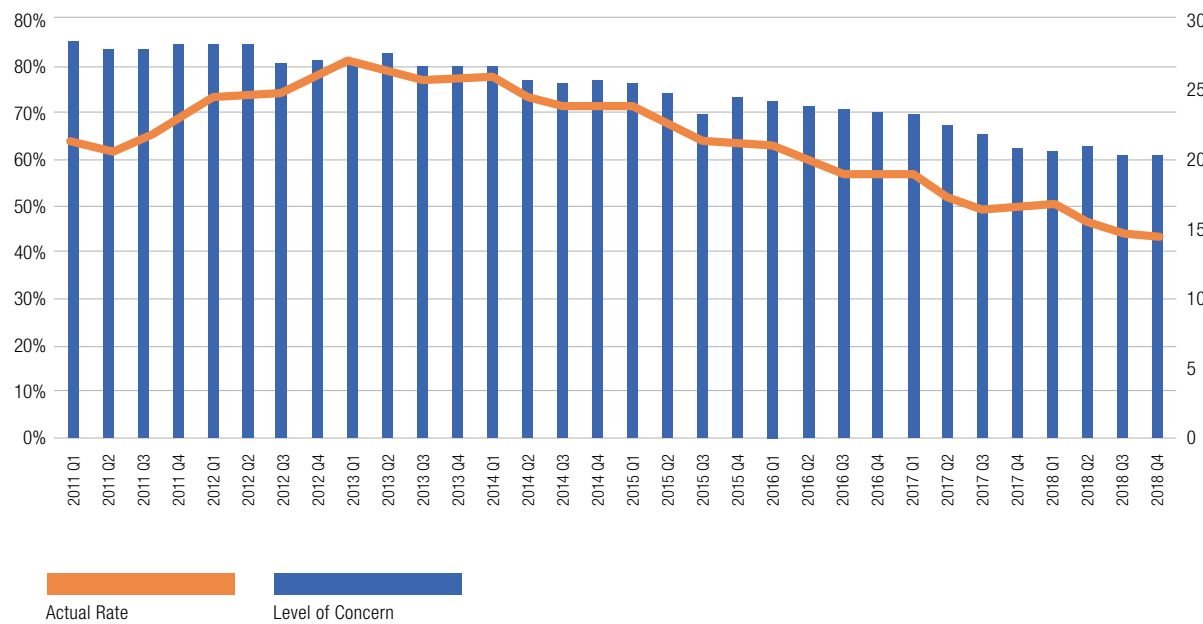
Source: Global Advisor What Worries the World survey. Base: Representative sample of adults aged 16-24 in United States.

Figure 16 Economic situation in the US



Source: Global Advisor What Worries the World survey. Base: Representative sample of adults aged 16-24 in United States.

Figure 17 Unemployment in Spain



Source: Global Advisor. Base: 500 adults aged 16-64 in Spain.

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