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**From:** [REDACTED]  
**Sent:** Monday, October 28, 2024 1:47 PM  
**To:** [REDACTED]  
**Subject:** RE: UNDER EMBARGO: 2024 FII Priority Compass Report

Hi [REDACTED],

Thanks for agreeing to the embargo of 10/29 at 3am ET. Please see attached for the FII Institute's PRIORITY Compass 2024 report, which is in its third year of iteration.

This year's findings highlight stark differences from last year, painting a disappointing global picture in several core areas including world satisfaction, political stability, healthcare access and technological preparedness:

- There is an **11% decline in citizens' satisfaction with the state of world affairs from 2023-2024**, with over half of respondents indicating they are dissatisfied with the situation in the world.
- This is further compounded by a **majority of respondents (71%) stating dissatisfaction with the level of corruption in their country**, with the global north reporting more dissatisfaction than the global south.
- **Less than half of respondents stated they feel their country is prepared for the digital age**, and there is a clear gap between the global south (57%) versus the global north (35%).
- **Cost of living and quality of life topped the charts as the #1 concern for global respondents (40%)** compared to only 19% for the next highest category, governance.
- **Concern about the environment is the top issue for only 13% of respondents**, only in India is the environment the top concern of citizens

While these statistics may be a disappointing reality, they serve as a call to action for global leaders to invest in targeted technologies and collaboration across borders to create a more connected and in sync global effort.

FII's CEO, Richard Attias, would be happy to sit down with you to discuss where global solutions lie to address the pain points outlined in the report.

Would you be interested in covering the findings in the report? Let me know as you review.

Thanks,

[REDACTED]

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**From:** [REDACTED]  
**Sent:** Monday, October 28, 2024 1:27 PM  
**To:** [REDACTED]  
**Subject:** Re: UNDER EMBARGO: 2024 FII Priority Compass Report

Yes please

On Mon, Oct 28, 2024 at 1:22 PM [REDACTED] wrote:

Hi [REDACTED] - As a reminder, **this report will go live at 3 am ET** and we would love to give you an early look at the data. Let me know if you are interested.

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**From:** [REDACTED]  
**Sent:** Friday, October 25, 2024 4:00 PM  
**To:** [REDACTED]  
**Subject:** UNDER EMBARGO: 2024 FII Priority Compass Report

Hi [REDACTED] – Hope you are doing well.

I work with FII, the global thinktank and nonprofit which is going to be releasing its PRIORITY Compass report on **Tuesday, October 29<sup>th</sup> at 3:00 am ET during FII8 in Riyadh**. We would love to work with you on an embargo basis so that you could have an early look on the findings, which surveys **global citizens representing 62.5% of the global population** and their thoughts on life satisfaction levels, technological developments and preparedness, healthcare deserts, and how specific countries are addressing the global challenges in society.

Please let me know if you agree to this embargo and I can share additional information.

Thanks,

[REDACTED]

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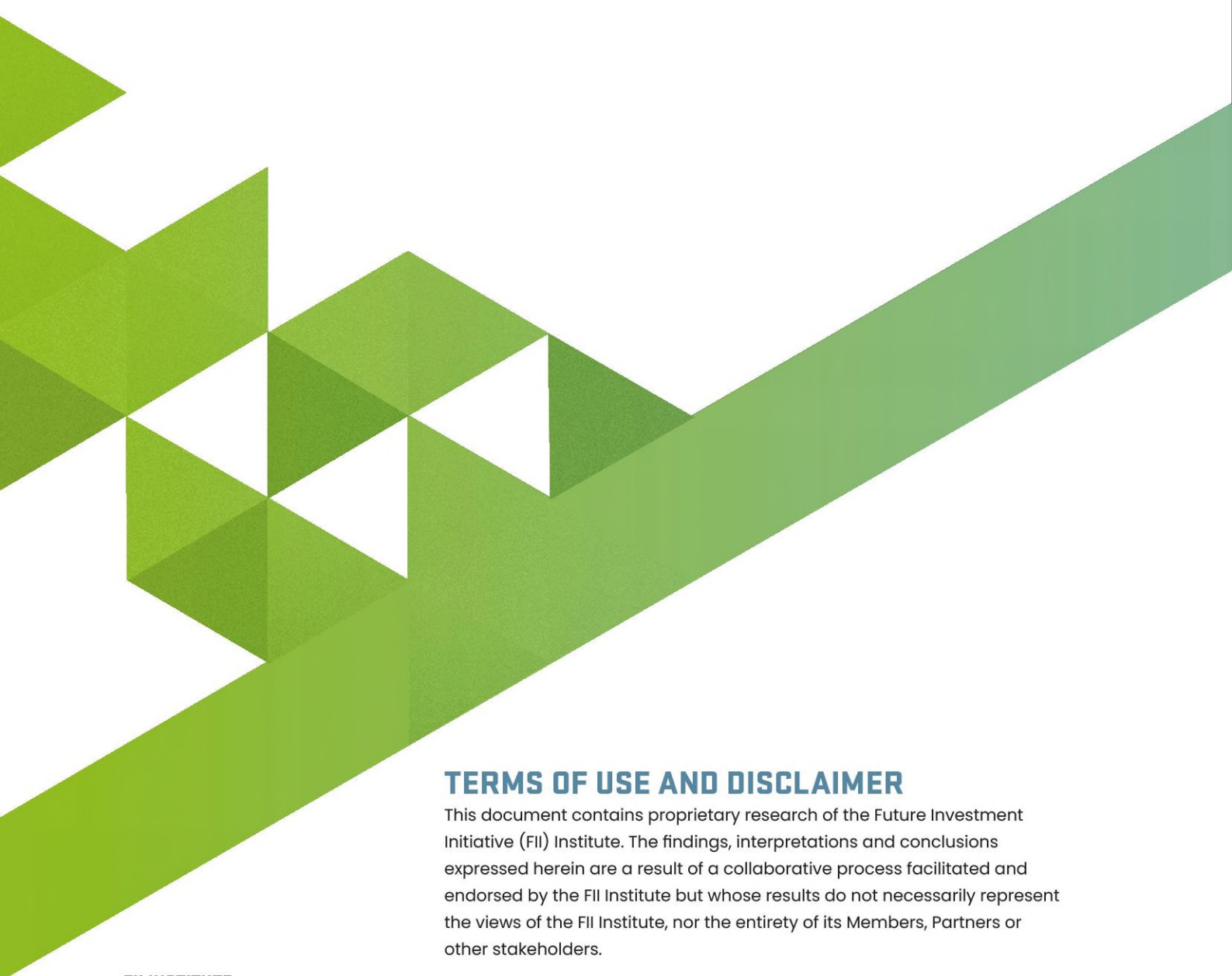
# FII Priority compass

powered by FII Institute

# Full Report

October 2024  
3<sup>RD</sup> EDITION





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# INTRODUCTION

Amid the geo-political transformations, changing geo-economics, conflicts, and pandemic aftershocks, the world is set on its course for the **new global order**. In these uncertain times, it is more important than ever for humanity's priorities and concerns to act as the guiding voice to address the multitude of challenges that face the world.

## FII PRIORITY 2024

**FII PRIORITY AIMS TO UNCOVER HUMANITY'S PRIORITIES AND HELP WORLD LEADERS IDENTIFY THE RIGHT PATHWAYS TO ADDRESS THESE PRIORITIES.** We reached out to approximately 60% of the representative population of the world through our **FII PRIORITY Global Survey**, to capture people's concerns, aspirations and expectations. These findings are provided in the insights report, **FII PRIORITY Compass**, and an interactive webtool, **FII PRIORITY Compass Navigator**, both powered by FII Institute.

### → FII PRIORITY COMPASS

FII PRIORITY Compass, the **insights report**, highlights findings and interpretation of humanity's top priorities. FII PRIORITY Compass has a full report available at [www.FIIPRIORITYcompass.org](http://www.FIIPRIORITYcompass.org)

### → FII PRIORITY COMPASS NAVIGATOR

FII PRIORITY Compass Navigator, an **interactive web-tool**, allows interested stakeholders to explore the data of FII PRIORITY Global Survey through an interactive and digital interface. FII PRIORITY Compass Navigator may be accessed at [www.FIIPRIORITYcompass.org](http://www.FIIPRIORITYcompass.org).



# ABOUT FUTURE INVESTMENT INITIATIVE (FII) INSTITUTE

The Future Investment Initiative (FII) Institute is a global non-profit foundation, driven by data, with an investment arm and one agenda: Impact on Humanity.



## OUR VISION

Bringing together the brightest minds and most promising solutions to serve humanity



## OUR MISSION

Creating a purposeful present and a promising future

## Our pillars



### THINK

Laboratory of ideas



### XCHANGE

Curator of platforms



### ACT

Investment arm

## Our focus areas



AI & ROBOTICS



EDUCATION



HEALTHCARE



SUSTAINABILITY

# MESSAGES FROM CHAIRMAN AND LEADERSHIP



As we embark on the third edition of the FII Priority Compass, we reaffirm our commitment to providing evidence-based insights that inform the deliberations of world leaders and decision-makers. This year's report offers an extensive review of humanity's most pressing challenges, including the impact of extreme weather events, inequality and economic hardship. It provides clear-eyed perspectives on where collective action is needed. By amplifying the voices of global citizens, this report illuminates the path toward a more sustainable and equitable future.

In the face of a constantly evolving global landscape, both the economic situation and widespread geopolitical instability continue to be primary concerns globally, reflecting the ongoing volatility of our world. The dramatic rise of economic instability across the globe underscores the timeliness of this third edition. It highlights the urgent need for solutions.

At FII8, we as global leaders will have another opportunity to delve deep into those challenges and explore innovative solutions together. Through focused discussions on investment, partnership, collaboration and results.



**H.E. YASIR O. AL-RUMAYYAN**

Governor of PIF,  
Chairman of the Board of Trustees of FII Institute



The FII Priority Compass is an essential roadmap for navigating the complexities of our interconnected world.

More than just a report, it serves as a powerful index for understanding the shifting priorities of global citizens and pinpointing where urgent action is needed.

Our rigorous methodology ensures that the data accurately reflects perspectives from both the Global North and South, providing a balanced and comprehensive view of global trends. The findings underscore the need for immediate action on critical issues like economic stability, governance, and technological advancement.

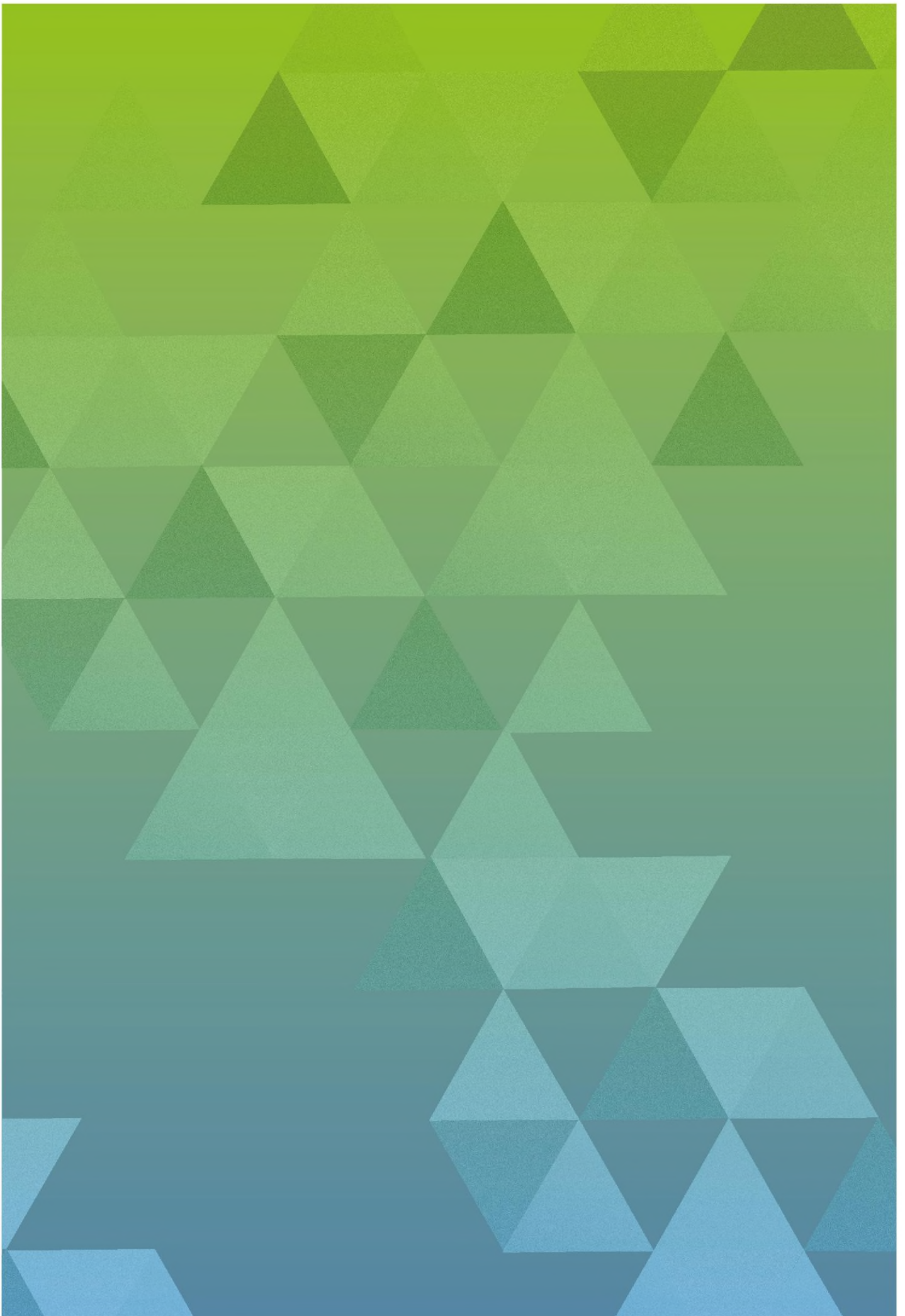
For instance, the report highlights the growing digital divide between developed and developing nations, emphasizing disparities in digital literacy and access to technology. It also raises concerns about the societal impact of AI, calling attention to the need for responsible development and regulation. To tackle these pressing challenges, we must prioritize investments in education, infrastructure, and emerging technologies.

International cooperation remains vital to ensure the equitable distribution of technological benefits. By leveraging insights from this report, global leaders can craft effective policies and strategies that drive a more sustainable future. It's the FII- Institute 's modest contribution to serve our Humanity.



**RICHARD ATTIAS**

Chief Executive Officer of FII Institute



# METHODOLOGY

→ We conducted the FII PRIORITY Global Survey in partnership with Ipsos between 15 June – 27 July 2024, covering 50,700 respondents from 24 countries. These countries were chosen to represent both the geographic and socio-economic diversity of the world.

**24**  
Countries

**50,000+**  
Respondents

**62.5%**  
of the Global Population

## GEOGRAPHIC COVERAGE



Online interviews with adults aged 18+ with quotas set on gender, age, occupation, region and urban/rural.

## COUNTRIES SURVEYED

ARGENTINA 	ITALY 	SAUDI ARABIA 
BRAZIL 	IVORY COAST 	SOUTH AFRICA 
CHINA 	JAPAN 	SOUTH KOREA 
EGYPT 	KENYA 	SPAIN 
FRANCE 	MEXICO 	SWEDEN 
GERMANY 	MOROCCO 	TURKIYE 
INDIA 	NIGERIA 	UK 
INDONESIA 	POLAND 	USA 

## GLOBAL AVERAGE

The “**Global Average**” used in this report reflects the average result for all the countries where the survey was conducted. It has not been adjusted to the population size of each country. The report provides broad coverage of Global South and Global North countries:

### THE GLOBAL NORTH

#### (24,000 interviews in 10 countries)

France, Germany, Italy, Japan, Poland, South Korea, Spain, Sweden, UK, USA. These countries are characterized by a higher level of economic and industrial development.

### THE GLOBAL SOUTH

#### (26,700 interviews in 14 countries)

Argentina, Brazil, China, Egypt, India, Indonesia, Ivory Coast, Kenya, Mexico, Morocco, Nigeria, Saudi Arabia, South Africa, Turkiye. These countries are characterized by a lower level of economic and industrial development.

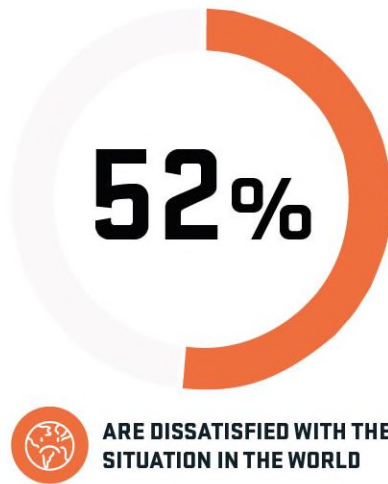
These 24 countries account for 62.5% of the world’s population. The survey therefore provides a good approximation of public opinion at the global level. However, there are two caveats to be made.

→ Due to very low internet coverage, the survey was not conducted in any of the least developed countries (LDCs).

→ The samples from Brazil, China, Egypt, India, Indonesia, Ivory Coast, Kenya, Mexico, Morocco, Nigeria, and South Africa predominantly reflect urban, educated, and affluent demographics.

This focus offers valuable insights into these segments, contributing to a broader understanding of internet usage in these countries.

# KEY FINDINGS AND COMPARISON 2023 VS 2024

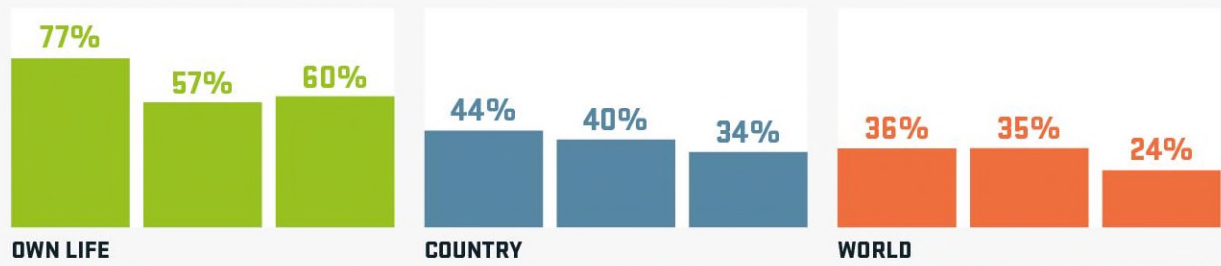


There is widespread and growing dissatisfaction about the current state of affairs in people's countries and the world as a whole.

→ Global citizens are likely to feel a sense of disquiet about how things are going globally (52% are dissatisfied). Citizens in the Global South are almost twice as likely to be satisfied with the situation in their country compared to citizens in the Global North (42% vs 22%) and almost three times

more likely to be satisfied with the situation in the world (34% vs 12%). In contrast to how people feel about the national and global picture, most are satisfied with their own lives (60%). Satisfaction is again higher in the Global South but less markedly so (64% vs 55% in the Global North).

## SATISFACTION - EVOLUTION SINCE 2022

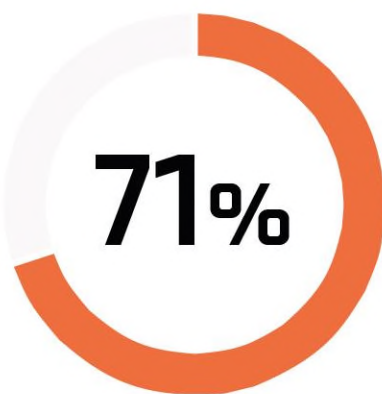
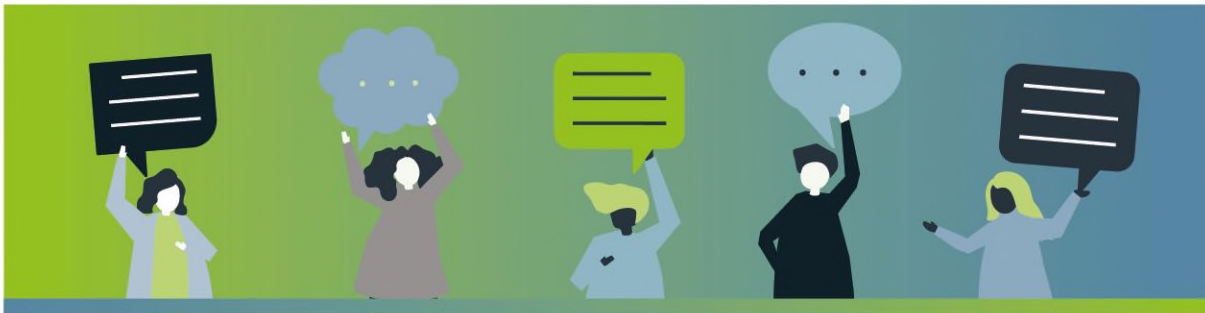


Cost of living and inflation are pressing concerns for global citizens.

→ Financial stability is a key element of the quality of life (cited by 53%) and the top determinant of future health (according to 48%). As in 2023, the economic situation is the clear winner of the six issues of concern we asked respondents about, with those in the Global South putting even more emphasis on this than in the Global North (42% vs 37%). Inflation and rising prices are a particular problem, with most (57%) feeling that this has got worse in recent years.

Citizens in the Global North are not convinced that things will improve in the future – only 22% feel positive about the future of the global economy, while 41% are pessimistic. Optimism is much higher in the Global South, with 51% optimistic compared to 26% who are pessimistic. Half of global citizens are optimistic about the prospects of improving people's living conditions through innovation and technology (49%, rising to 60% in the Global South compared to 34% in the Global North).





**ARE DISSATISFIED WITH THE LEVEL OF CORRUPTION IN THEIR COUNTRY**

Global citizens are deeply disillusioned with politics.

→ This helps explain why governance comes second in world citizens' list of concerns. Levels of dissatisfaction with corruption are particularly high. Other areas attracting high levels of dissatisfaction are transparency of political leaders (68%) and economic policies/political stability (62%). A majority are also

dissatisfied with unemployment assistance (56%), social housing and help for young people entering the job market (both 54%). Citizens of the Global South tend to be more satisfied than citizens of the Global North with different elements of their political systems.

Good health is regarded as key to living a good quality of life, but many people around the world face accessibility and affordability issues in relation to healthcare.

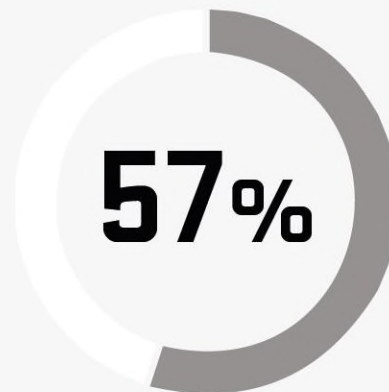


Physical and mental health are regarded as an important part of living a good quality of life (both 53%).

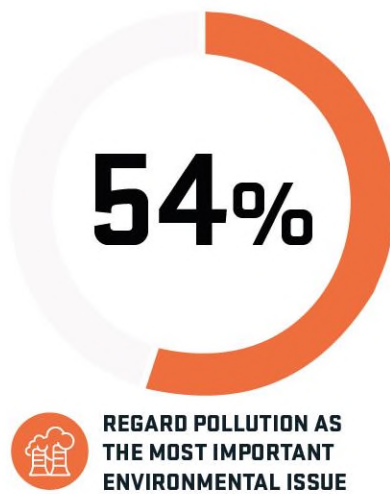
An adequate number of doctors is considered the most important element of healthcare (42%), particularly in the Global North compared to the Global South (50% vs 36%). It is also the element of healthcare where world citizens are most dissatisfied, especially in the Global North where this is of particular importance (65% are dissatisfied compared with 50% in

the Global South). Affordable healthcare is also one of the key elements of healthcare, especially in the Global South (44% vs 34%). Global citizens are evenly split between being satisfied (51%) and dissatisfied (49%) on this, with no differences here between the Global North and Global South.

Waiting times (45%) and cost (28%) are seen as the main barriers to accessing health.



**ARE DISSATISFIED WITH THE NUMBER OF DOCTORS IN THEIR COUNTRY**



Citizens in the Global North are pessimistic about tackling climate change.

→ Pollution is a particular concern in the Global South compared to the Global North (58% vs 48%). This reflects the fact that countries with the worst air quality are in the Global South. Confidence in addressing climate change in the coming years is not particularly strong, with optimism (40%) not far ahead of pessimism (31%). In the Global South, attitudes are much more positive (52% are optimistic, 22% are pessimistic). In the Global

North, on the other hand, citizens are almost twice as likely to be pessimistic (44%) as optimistic (22%).

More positively, almost all global citizens have done something in their lifetimes to help the environment. People want to see tangible action from companies, notably reducing waste (48%) and offering environmentally sustainable products (37%).

People around the world generally feel positive about social ties.

→ Most people think social cohesion is good in both their local area (77%) and their country (69%). This is particularly the case in the Global South where 83% feel positive about social cohesion in their local area (vs 69% in the Global North), and 79% in their country (vs 55% in the Global North). Citizens in the Global South (91%) are also more likely than citizens in the Global North (71%) to have people in their close circle they disagree with. However, concerns about polarization, intolerance and even violence are raised by world citizens when asked about their priorities and concerns. On average, slightly less than

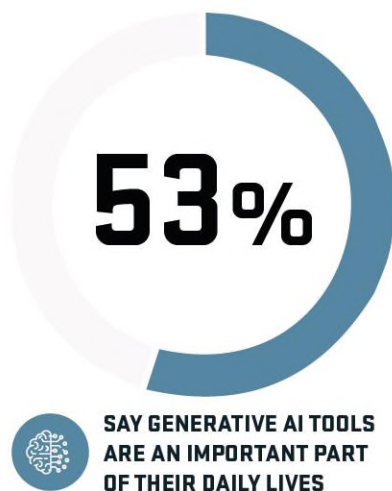
half of citizens (46%) report participating in community/voluntary activities at least once a month. Citizens in the Global South are considerably more likely than those in the Global North to do so (56% vs 32%).

There are clear links between social cohesion, community participation and likelihood to regularly socialize with people you disagree with. Global citizens believe that cultural events linked to heritage and local traditions/history (50%) would be most likely to increase community participation.



## FII Priority compass

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Technology brings both benefits and concerns to global citizens.

→ On the one hand, digital services are an important part of daily life for a majority of respondents. This is particularly the case for high-speed internet (86%), financial services (84%) and e-commerce (81%). Technology has been particularly beneficial in terms of increased convenience in everyday tasks (52%) and improved access to news and knowledge (46%).

There is also optimism about the impact of digital technologies on employment. Almost half (48%) agree that 'digital technologies create more jobs than they destroy' and only 16% disagree.

Although generative AI tools such as ChatGPT have not long been publicly available, already half (53%) of global citizens say they are an important part of their daily lives. This is particularly the case in the Global South (67%) compared to the Global North (33%).

→ However, there is some alarm about AI. The citizens surveyed are more likely to agree (37%) than disagree (24%) that 'technologies like ChatGPT and AI are a threat to society'. But a high proportion (39%) are neutral on this issue, suggesting that the jury is still out.

There are other areas of unease about technology. More than two-fifths are dissatisfied with data privacy and protection, cybersecurity measures and censorship standards (43% in all cases).

Misinformation is a particular concern, with more than half (56%) dissatisfied with how much misinformation there is on the internet and social networks. This is particularly true in the Global North (64%) compared to the Global South (51%).

Another concern is citizens and countries being left behind. Only 48% say their country is prepared for the digital age and, as in other areas, there is a clear gap between the Global South (57%) and the Global North (35%).



**OUR RESEARCH FINDINGS PAINT A CONCERNING PICTURE** about the current state of the world. But the results also give us reason to feel positive about humanity's ability to tackle the challenges we face. A sense of optimism has inspired our six Calls to Action for key stakeholders

such as governments, corporations and non-profit organizations to make the world a better place. These Calls to Action can be found in the final section of this report.



# **MAIN FINDINGS**

# HOW SATISFIED ARE GLOBAL CITIZENS?

Most global citizens are satisfied with their own lives, with three in five satisfied (60%) and one in five dissatisfied (21%). But levels of satisfaction with the situation in their country are much lower on 34%. Satisfaction with the situation in the world is even lower at 24%. Around half are dissatisfied with the situation in both their country and the world (48% and 52% respectively).



→ **SATISFACTION WITH LIFE, COUNTRY AND THE WORLD** is higher in the Global South than in the Global North. A quarter (24%) of citizens in the Global South are satisfied with all three, compared to 9% in the Global North (the overall figure is 18%).

**THE GAP IN SATISFACTION** is particularly pronounced when we look at satisfaction with the situation in your own country and the world more broadly. Citizens in the Global South are almost twice as likely to be satisfied with the situation in their countries (42% vs 22% in the Global North) and almost three times as likely to be satisfied with the situation in the world (34% vs 12%).

## FII Priority compass

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### SATISFACTION BY COUNTRY

#### → WHEN WE LOOK AT SATISFACTION AT A COUNTRY LEVEL, we see a great deal of variation.

Satisfaction with citizens' own lives is highest in Saudi Arabia on 84% and lowest in South Korea on 39%. However, it is only in South Africa, the Ivory Coast, Argentina, Japan, Turkiye and South Korea that less than half of citizens are satisfied with their lives. Turning to dissatisfaction, there is less of a range, with a low of 7% in Saudi Arabia compared to 38% in Turkiye, which has the highest levels of dissatisfaction measured.

**THE PICTURE IS DIFFERENT** when we examine satisfaction with the situation in your country, where there is even more variation in scores. China comes top on 80%, while levels are lowest in France, Argentina and South Korea (all 14%). Levels of dissatisfaction with the national situation are highest in Turkiye (72%) and lowest in China (7%).

**CHINA IS THE ONLY COUNTRY** where satisfaction with your country (80%) is higher than life satisfaction (70%). In the United States, Mexico, Brazil, the United Kingdom, Sweden Poland and France, the gap between country and life satisfaction is particularly wide. For instance, in Mexico, 67% are satisfied with their lives but only 28% with their country.

**TURNING TO SATISFACTION WITH THE SITUATION IN THE WORLD**, it is India which scores highest on 65%. Japan and Sweden are lowest on 7%. Sweden also has the highest level of dissatisfaction on 76%, while India has the lowest on 16%.





























**FOR MOST COUNTRIES**, satisfaction with the situation in their country is higher than with the situation in the world. There are three exceptions to this, all African countries – Kenya, Nigeria and South Africa. For instance, in Kenya 33% are satisfied with the situation in the world but only 20% with the situation in their country. In both cases, levels of satisfaction are low.

**LOOKING AT REGIONAL DIFFERENCES**, mena stands out as having higher levels of satisfaction on all three elements, while Europe scores below average in terms of life, country and the world. For other regions, the picture is more mixed. For instance, Africa is above average on satisfaction with the situation with the world but below average on life and country. For North America, it is the opposite: life satisfaction is higher than average but satisfaction with the situation nationally and globally is lower.

# FII Priority compass

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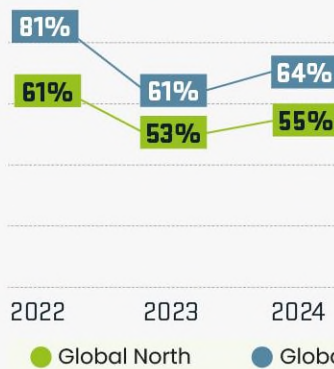
Q. How satisfied are you with...

	 ...YOUR OWN LIFE	 ...THE SITUATION IN YOUR COUNTRY	 ...THE SITUATION IN THE WORLD			
	Satisfied %	Not satisfied %	Satisfied %	Not satisfied %	Satisfied %	Not satisfied %
GLOBAL 	60	21	34	48	24	52
AFRICA	54	30	29	56	30	47
NORTH AMERICA	69	13	31	47	22	52
SOUTH AMERICA	57	21	21	58	16	58
ASIA	57	23	42	41	31	42
EUROPE	57	19	21	56	11	67
MENA	77	12	63	24	44	36
SAUDI ARABIA 	84	7	78	13	51	28
EGYPT 	81	11	60	29	51	35
INDIA 	76	9	68	15	65	16
INDONESIA 	75	13	52	31	46	30
UNITED STATES 	71	15	35	51	26	56
CHINA 	70	10	80	7	40	25
MEXICO 	67	11	28	43	17	48
BRAZIL 	65	20	29	53	23	57
MOROCCO 	65	19	52	29	30	45
NIGERIA 	63	25	32	59	41	44
UNITED KINGDOM 	63	18	26	56	19	62
SWEDEN 	60	20	24	55	7	76
POLAND 	59	16	21	46	10	59
GERMANY 	58	19	23	54	10	68
SPAIN 	56	18	23	54	10	68
KENYA 	54	30	20	66	33	41
FRANCE 	52	21	14	68	9	73
ITALY 	50	23	19	56	9	70
SOUTH AFRICA 	49	33	19	64	22	53
IVORY COAST 	49	31	43	38	25	52
ARGENTINA 	49	22	14	62	9	59
JAPAN 	43	36	21	56	7	63
TURKIYE 	41	38	17	72	15	66
SOUTH KOREA 	39	31	14	63	12	50

## EVOLUTION SINCE 2023

→ **COMPARED TO THE SURVEY CONDUCTED IN 2023, LIFE SATISFACTION HAS SLIGHTLY INCREASED** both in the Global North (55%, +2 points) and in the Global South (64%, +3 points). The most significant increases are in Nigeria (+17 points), the United States (+15 points), and in the United Kingdom (+13 points).

### ...YOUR OWN LIFE



### ...THE SITUATION IN YOUR COUNTRY



### ...THE SITUATION IN THE WORLD



→ On the other hand, satisfaction is clearly down when it comes to aspects that are more collective than personal: in Global South countries, 42% are satisfied with the situation in their country, down 4 points, and 34% are satisfied with the situation in the world, down 11 points. The changes are even more pronounced in Global North countries: satisfaction with their country's situation has dropped by 12 points, to only 22%, and satisfaction with the global situation has decreased by 14 points, barely reaching 12%. Pessimism about the global situation has thus risen sharply this year.

The decline in satisfaction with the global situation affects almost all countries, with sometimes extremely sharp drops: -19 points in Japan, -20 points in China and the United States, and -29 points in Sweden. But when it comes to people's judgment of the situation in their own country, there is more of a mixed picture. In some cases, there has been a clear improvement compared to 2023, as in China (+15 points), Morocco or Nigeria (+11 points) or Egypt (+10 points). Conversely, the deterioration has been very pronounced in some countries in just one year: -25 points in Sweden, -20 points in France, -13 points in Japan. National situations therefore show considerable variations.

### COUNTRIES WHERE PERCEPTION OF THE NATIONAL SITUATION HAS **IMPROVED** SINCE LAST YEAR

	CHINA	+15
	MOROCCO	+11
	NIGERIA	+11
	EGYPT	+10
	SAUDI ARABIA	+5
	INDIA	+5

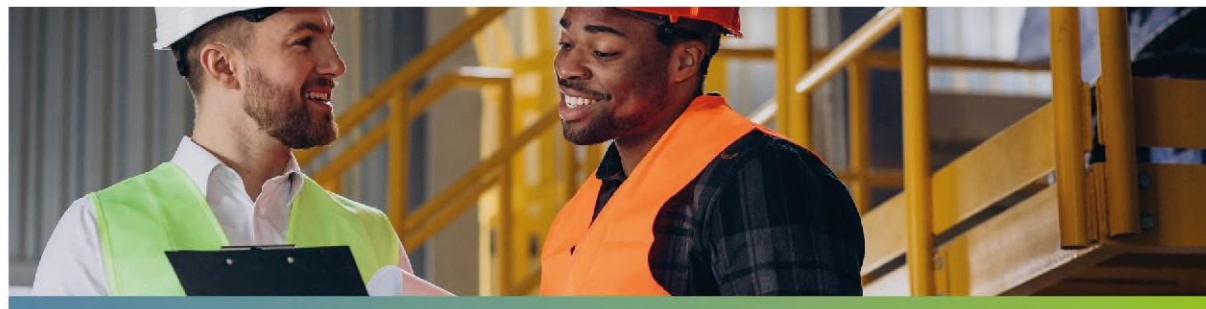
### COUNTRIES WHERE PERCEPTION OF THE NATIONAL SITUATION HAS **WORSENE**D SINCE LAST YEAR

	SWEDEN	-25
	FRANCE	-20
	JAPAN	-13
	GERMANY	-10
	MEXICO	-9
	ITALY	-8

## DEMOGRAPHIC DIFFERENCES IN SATISFACTION

**ALTHOUGH LEVELS OF SATISFACTION VARY A GREAT DEAL GEOGRAPHICALLY**, there are less clear patterns when we look at demographics. On the whole, there are not many differences. There are two clear exceptions though. The first is satisfaction with your own life. Here, occupational status makes a difference. Almost three-quarters (72%) of managers and professionals are satisfied with their own life, compared to only 55% of manual workers. Between the two are service workers on 62%.

**AS WE SHALL SEE IN THE NEXT SECTION**, financial stability is a key determinant of life satisfaction. Citizens in higher occupations are generally better paid and often also have more job security, which appears to have a positive impact on life satisfaction.



**THE OTHER KEY DEMOGRAPHIC DIFFERENCE IS AGE.** The younger someone is, the more likely they are to be satisfied with both the situation in their country and in the world. So, 38% of under 35s are satisfied with the situation nationally compared to 28% of over 55s. The difference is even more stark when we look at satisfaction with the situation in the world. Citizens under 35 are more than twice as likely as over 55s to be satisfied (32% vs 15%).

**ALTHOUGH THIS EVIDENCE OF YOUTHFUL POSITIVITY** is encouraging, it is important to note that levels of satisfaction with the situation both nationally and globally are low among all age groups.



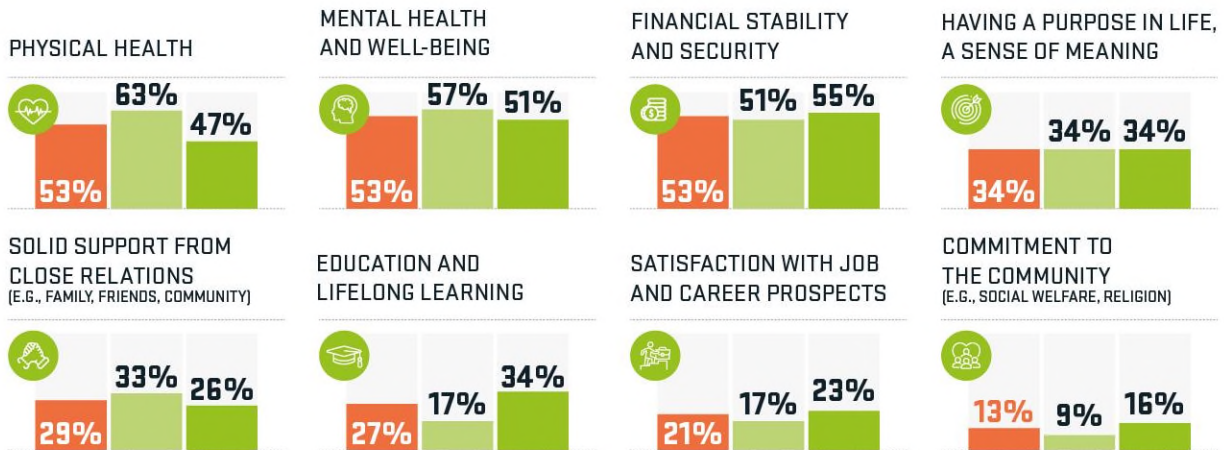
## DETERMINANTS OF LIFE SATISFACTION

→ **HEALTH – BOTH PHYSICAL AND MENTAL** – and financial security are the three key ingredients for a good quality of life in the opinion of global citizens. These are the top three answers, each mentioned by 53%.

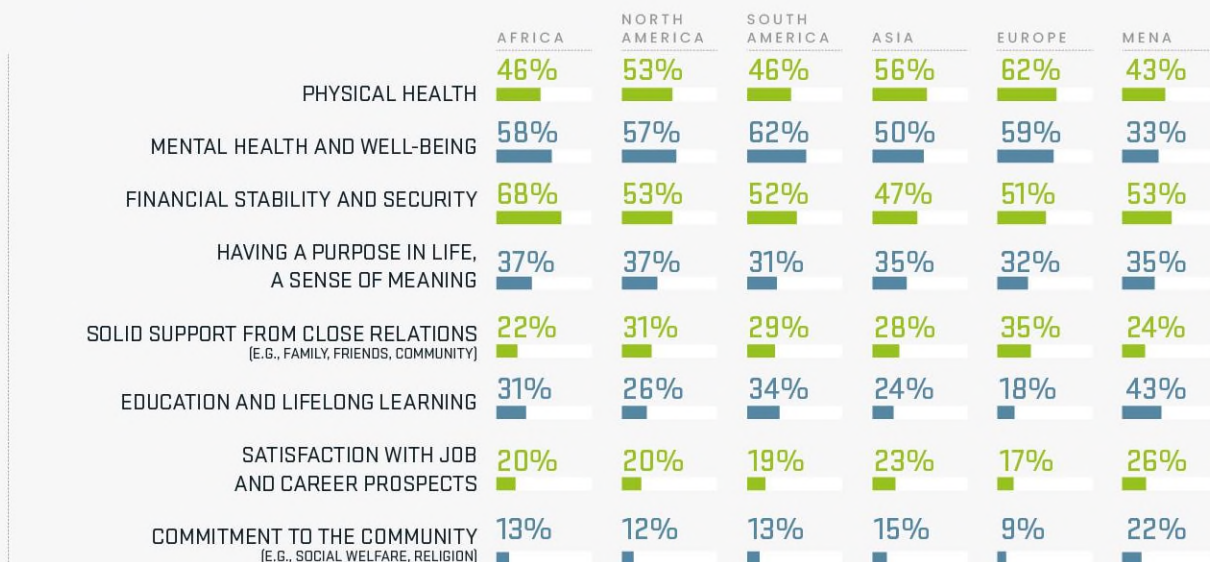
**CITIZENS FROM THE GLOBAL SOUTH** are most likely to mention financial stability (55%, rising to 68% in Africa). Financial stability is chosen less often than average by citizens in Asia in particular (47%).

**PHYSICAL (63%) AND MENTAL (57%) HEALTH** are cited more often by citizens of the global north. while there is little difference by age in the proportions saying physical health is one of the most important factors for a good quality of life, citizens over 55 are more likely than those aged under 35 to believe this to be the case for physical health (64% vs 46%).

Q. Which of the following factors do you believe are the most important for a good quality of life?



● Global ● Global North ● Global South



## SATISFACTION WITH DIFFERENT ELEMENTS OF LIFE

**MOST GLOBAL CITIZENS ARE SATISFIED** with the elements of life satisfaction we asked about. In particular, most are satisfied with their basic needs being met, with 71% satisfied with their clothing, 70% with their household amenities, 65% with their access to a variety of good-quality food and 62% with their housing. Satisfaction levels are lowest with sleep quality (58%) and access to leisure activities (56%), although a majority are satisfied.

**SATISFACTION LEVELS AMONG CITIZENS** from the Global North and the Global South are broadly similar, although citizens from the Global North tend to be more satisfied with most elements. However, when we drill down to a country level, we see some variations which do not neatly map onto a North-South dimension.

- In the North, the United States, United Kingdom, and Sweden have higher than average satisfaction levels, while in Japan and Italy satisfaction is lower than average. For instance, 77% of citizens in the United States are satisfied with their access to a sufficient diet compared to 54% in Japan.
- In the South, China, India, Saudi Arabia, Egypt, and Nigeria have higher than average satisfaction levels, but levels are lower in Turkiye and Argentina. For instance, 78% of citizens in Saudi Arabia are satisfied with their ability to clothe themselves adequately compared to 45% in Turkiye.

**OVER 55s TEND TO BE MORE SATISFIED THAN YOUNGER GROUPS.** For example, 75% of over 55s are satisfied with the equipment in their home compared to 66% of 35–54-year-olds and 68% of under 35s.

Q. To what extent are you satisfied with these different aspects of your life?

	GLOBAL		GLOBAL NORTH		GLOBAL SOUTH	
	Satisfied	Not satisfied	Satisfied	Not satisfied	Satisfied	Not satisfied
YOUR ABILITY TO CLOTHE YOURSELF ADEQUATELY	71%	11%	72%	9%	70%	13%
THE BASIC EQUIPMENT OF YOUR HOME (E.G., HEATING, LIGHTING, WATER)	70%	13%	72%	10%	69%	14%
THE EXTENT TO WHICH YOU FEEL SAFE IN THE PLACES YOU REGULARLY FREQUENT	66%	14%	67%	11%	65%	16%
YOUR ABILITY TO HAVE A SUFFICIENT, GOOD QUALITY AND VARIED DIET	65%	15%	66%	12%	64%	17%
THE QUALITY OF THE ENVIRONMENT WHERE YOU LIVE (E.G., AIR QUALITY, WATER QUALITY, ACCESS TO GREEN SPACES)	64%	16%	65%	13%	63%	18%
YOUR ABILITY TO ACCESS SAFE AND COMFORTABLE HOUSING	62%	18%	64%	14%	61%	21%
THE DURATION AND QUALITY OF YOUR SLEEP	58%	21%	50%	26%	63%	18%
YOUR ABILITY TO HAVE ACCESS TO LEISURE ACTIVITIES (PRICE, ACCESS)	20%	20%	53%	19%	58%	20%

# WHAT ARE THE CONCERNS AND PRIORITIES OF GLOBAL CITIZENS?

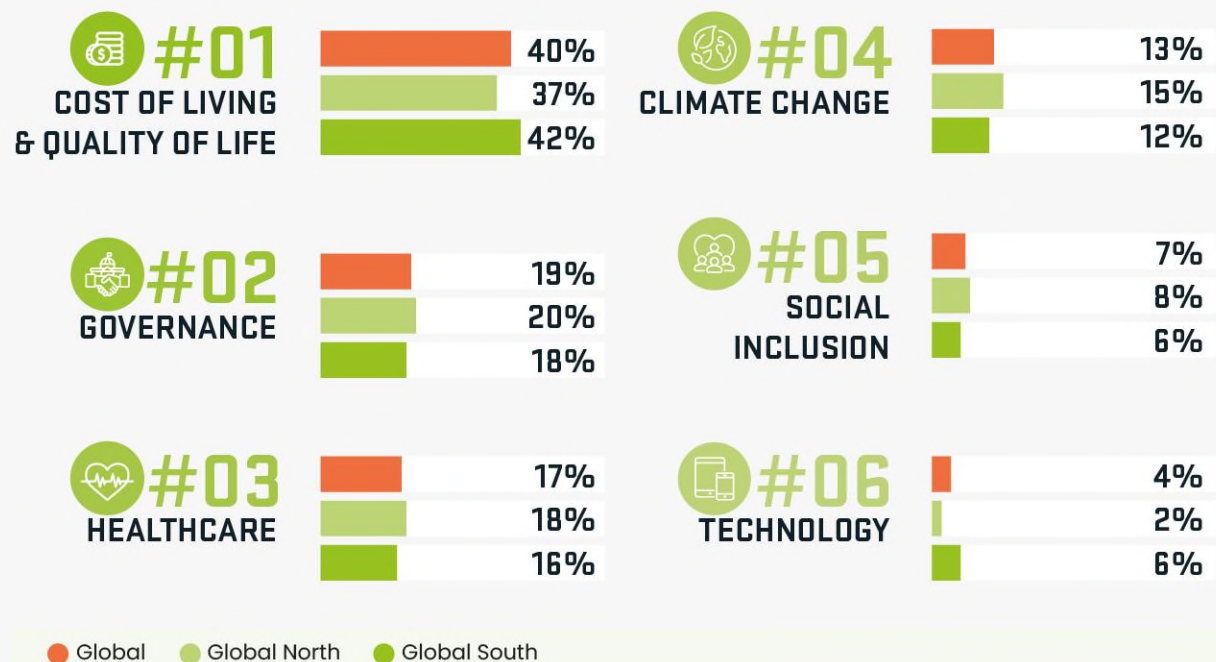
The economy is the clear winner when global citizens are asked about their main concerns for their country and the world. Two in five (40%) cite the economic situation as the main issue. This is twice as many as the second most popular issue, governance (19%). Healthcare is not far behind on 17%. Environment is fourth on 13%, followed by relationships between citizens (7%) and technology (4%).

→ **CITIZENS OF THE GLOBAL NORTH AND THE GLOBAL SOUTH** rank the issues in the same order. There is a slight difference of emphasis though, with the economic situation even further ahead than governance among citizens of the Global South (a 24 percentage point lead, compared to a 17 percentage

point lead in the Global North). Citizens of the Global North are more likely to cite governance, the healthcare system, the environment and relationships between citizens. Technology is mentioned more often by citizens of the Global South. None of these differences are particularly big.

Q. Which of the following issues concern you the most for your country and the world?

% SELECTING FIRST



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→ The overall pattern of concerns is consistent when we look at individual countries. For almost all countries, the economy is the top priority. The exceptions are India, where the environment comes first, and the Ivory Coast, where governance tops the list (likely because of the two civil wars which have occurred since the start of the century). The economy is in second place in both countries.

Q. Which of the following issues concern you the most for your country and the world?

### MACRO PRIORITIES 2023



### MACRO PRIORITIES 2024



→ The high priority given to economic issues confirms the results of the 2023 survey, when this topic was already clearly at the top of the list. Inflation remains a priority in many countries, while in others unemployment, poverty and social inequality are of particular concern. However, this year, governance ranks second among citizens' priorities, whereas it was in fourth place in 2023—likely reflecting the impact of geopolitical crises. Similarly, health-related issues have also gained importance this year.

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**THE ECONOMY STANDS OUT AS BEING A PARTICULAR CONCERN** in Turkiye (64%) and Argentina (63%).

























Both countries are grappling with longstanding macroeconomic challenges such as high inflation and economic stagnation.







**CONCERNS ARE GENERALLY SIMILAR ACROSS DIFFERENT REGIONS.** In Asia, the environment comes third, cited by 17%, ahead of healthcare, while in Europe, healthcare is in second place (22%), ahead of governance (19%).

**FOR MOST COUNTRIES, GOVERNANCE AND HEALTHCARE**

vie for second place, although in Mexico the environment is in second place on 25%.

**TOP 6 MACRO PRIORITIES IN 2023**


























	1ST	2ND	3RD	4TH	5TH	6TH
GLOBAL 	65%	55%	53%	49%	44%	34%
ARGENTINA 	76%	60%	54%	51%	34%	24%
AUSTRALIA 	64%	60%	50%	47%	43%	36%
BRAZIL 	68%	59%	54%	48%	45%	27%
CANADA 	65%	60%	56%	48%	43%	28%
CHINA 	59%	56%	49%	49%	47%	41%
EGYPT 	61%	56%	52%	48%	46%	36%
ETHIOPIA 	66%	54%	52%	44%	43%	41%
FRANCE 	68%	58%	55%	49%	45%	25%
GERMANY 	60%	57%	57%	54%	44%	28%
INDIA 	64%	57%	51%	44%	42%	41%
ITALY 	70%	63%	52%	49%	42%	24%
JAPAN 	59%	54%	53%	49%	44%	42%
JORDAN 	64%	56%	48%	47%	43%	43%
MEXICO 	69%	66%	54%	41%	41%	29%
MOROCCO 	60%	57%	49%	48%	44%	41%
NIGERIA 	79%	58%	51%	42%	38%	31%
POLAND 	68%	63%	55%	53%	40%	21%
SAUDI ARABIA 	62%	55%	50%	47%	45%	42%
SOUTH AFRICA 	82%	59%	45%	43%	42%	29%
SWEDEN 	59%	54%	15%	15%	49%	35%
THAILAND 	67%	62%	54%	43%	39%	34%
UNITED KINGDOM 	68%	62%	52%	49%	45%	23%
USA 	69%	60%	53%	45%	45%	27%

-  Cost of living and quality of life
-  Social inclusion
-  Governance
-  Climate change
-  Healthcare
-  Technology

## FII Priority compass

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### TOP 6 MACRO PRIORITIES IN 2024

		COST OF LIVING AND QUALITY OF LIFE	GOVERNANCE	HEALTHCARE	CLIMATE CHANGE	SOCIAL INCLUSION	TECHNOLOGY
GLOBAL		40%	19%	17%	13%	7%	4%
ARGENTINA		63%	12%	12%	7%	5%	1%
BRAZIL		40%	13%	22%	18%	5%	2%
CHINA		39%	21%	14%	17%	5%	4%
EGYPT		42%	16%	15%	11%	7%	9%
FRANCE		38%	18%	15%	15%	13%	1%
GERMANY		27%	27%	16%	17%	10%	3%
INDIA		20%	13%	19%	26%	10%	12%
INDONESIA		49%	16%	10%	12%	7%	6%
ITALY		39%	12%	26%	17%	5%	1%
IVORY COAST		28%	35%	18%	8%	7%	4%
JAPAN		46%	27%	7%	15%	2%	3%
KENYA		43%	20%	20%	7%	4%	6%
MEXICO		50%	12%	5%	25%	6%	2%
MOROCCO		30%	15%	30%	12%	6%	7%
NIGERIA		46%	18%	18%	5%	5%	8%
POLAND		29%	29%	22%	10%	9%	1%
SAUDI ARABIA		30%	25%	15%	11%	9%	10%
SPAIN		41%	21%	19%	9%	5%	5%
SOUTH AFRICA		47%	23%	8%	16%	3%	3%
SOUTH KOREA		39%	17%	22%	14%	6%	2%
SWEDEN		28%	15%	24%	20%	11%	2%
TURKIYE		64%	9%	10%	8%	5%	4%
UK		34%	14%	29%	14%	6%	3%
USA		39%	23%	14%	10%	10%	4%

● 1st priority ● 2nd priority ● 3rd priority

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### TOP PRIORITIES FOR FAMILY AND COUNTRY

We asked global citizens to tell us, in their own words, their top priority for both their family and their country in 2024.



**THE TOP PRIORITIES FOR FAMILIES ARE FINANCIAL - COST OF LIVING AND JOB SECURITY** come up most often.

Financial security in old age is also a common theme. Health, education and political stability are the other priorities respondents highlight in relation to their families.

Q. What is your top priority concern for you and your family in 2024?

THEMES RANKED IN ORDER OF MENTIONS

<p><b>#01</b> INFLATION AND RISING COST OF LIVING</p>		<p>"To be able to pay my bills. With the current inflation this is a serious concern." GERMANY</p>
<p><b>#02</b> JOB SECURITY AND FEAR OF UNEMPLOYMENT</p>		<p>"Having a stable job to support my family." EGYPT</p>
<p><b>#03</b> HEALTH OF SELF AND FAMILY</p>		<p>"My parents' and my own health. I'm very worried about caring for my elderly parents." JAPAN</p>
<p><b>#04</b> ACCESS TO QUALITY EDUCATION FOR CHILDREN</p>		<p>"Giving my children better opportunities than I had through education." KENYA</p>
<p><b>#05</b> POLITICAL STABILITY, SECURITY AND ABSENCE OF CONFLICT</p>		<p>"Peace and security for my family." MEXICO</p>
<p><b>#06</b> FINANCIAL SECURITY IN OLD AGE</p>		<p>"Putting away money for the future and old age." SWEDEN</p>

The economy also tops the list of priorities for global citizens' countries, with respondents highlighting inflation, unemployment and poverty in relation to this. Political instability and polarization is the second most common theme. Other themes relate to inequality, security threats, healthcare, education and the environment.

## FII Priority compass

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### Q. And what is your top priority concern for your country in 2024?

THEMES RANKED IN ORDER OF MENTIONS

#### #01

##### ECONOMIC CONCERNS

Global citizens mention inflation, cost of living, unemployment, poverty and economic instability.



"Inflation and the cost of living."

ARGENTINA

#### #02

##### POLITICAL INSTABILITY AND POLARIZATION

Concerns here relate to divisive politics, corruption, and ineffective governments.



"Lack of firmness and cohesion from politicians of all stripes"

FRANCE

#### #03

##### SOCIAL ISSUES AND INEQUALITY

Citizens highlight poverty, lack of opportunities, discrimination and social divisions.



"Political radicalization and social radicalization that does not end in social conflicts."

SPAIN

#### #04

##### SECURITY THREATS

These encompass crime rates, violence, terrorism and war.



"Safety from terrorism."

INDIA

#### #05

##### HEALTHCARE AND EDUCATION

Global citizens want improvements in both.



"Improve school education and give young people more opportunities to work with decent wages."

ITALY

#### #06

##### ENVIRONMENT AND CLIMATE CHANGE

Mentions include environmental degradation, pollution, global warming and the need for climate action.



"Climate change and environmental problems."

TURKIYE



# COST OF LIVING AND QUALITY OF LIFE

The economic situation is the number one concern for global citizens. And, as we explain in other sections of this report, financial security is regarded as central both to a good quality of life and to future health.

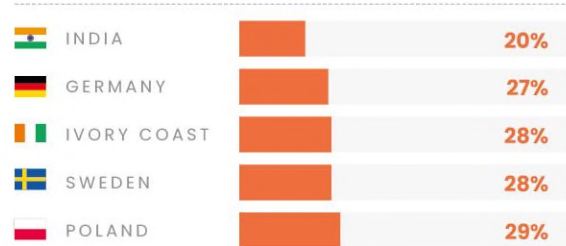
**LIKELIHOOD TO SELECT THE ECONOMIC SITUATION** as the most important concern varies geographically. It is more likely in the Global South than in the Global North (42% vs 37%). Concern is particularly high in South America (52%) compared to Europe and MENA (33% and 34%). As we have seen,

Turkiye (64%) and Argentina (63%) are the top-ranking countries, a reflection of the macroeconomic problems both have been experiencing. India comes bottom (20%).

## HIGHEST RANKING COUNTRIES



## LOWEST RANKING COUNTRIES



**THERE ARE ALSO SOME DEMOGRAPHIC DIFFERENCES.** The economic situation is more likely to be selected by global citizens in urban areas than in rural areas (42% vs 35%), those who are working compared to those who are not working (41% vs 37%) and the middle aged (43% of 35–54-year-olds vs 38% of under 35s and 36% of over 55s).

## FII Priority compass

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**WE ASKED GLOBAL CITIZENS TO TELL US IN THEIR OWN WORDS** why the economic situation is a particular concern of theirs. The responses paint a picture of widespread economic anxiety, frustration and discontent. Six key themes emerge.

Q. And when you think about this subject (the economic situation), what specifically is concerning you?

THEMES RANKED IN ORDER OF MENTIONS

### #01

**RISING PRICES AND INFLATION**



"Cost of living, people are struggling to afford a house, turn on their heating and even afford to eat."

UNITED KINGDOM

### #02

**UNEMPLOYMENT AND JOB SECURITY**



"Lack of work. Not having enough to eat decently. I can't get a pension."

ARGENTINA

### #03

**ECONOMIC INSTABILITY**



"The economy is very bad right now and everything is costly."

TURKIYE

### #04

**GROWING INCOME AND WEALTH INEQUALITY**



"Poverty increases while big business and leaders get richer and richer."

FRANCE

### #05

**INABILITY TO AFFORD BASIC NECESSITIES**



"Being able to buy the items your household needs. Having a safe place to live and buying groceries and gas."

UNITED STATES

### #06

**DISCONTENT WITH GOVERNMENT ECONOMIC POLICIES**



"The government should be able to provide good security, jobs for the youths."

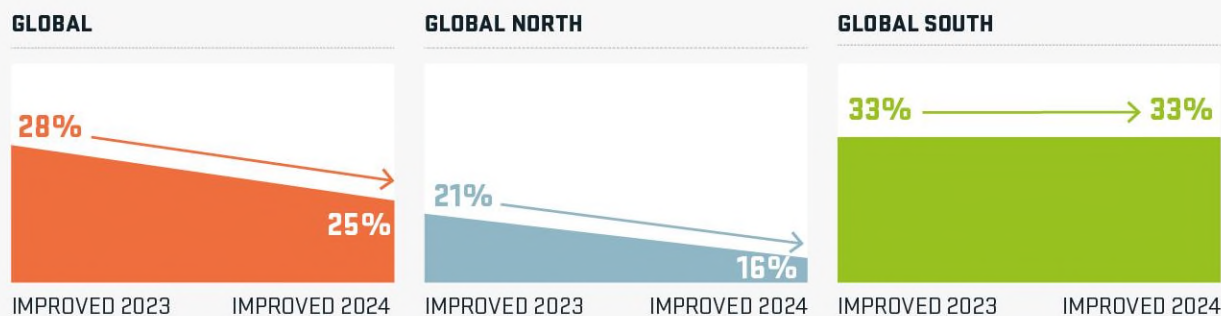
NIGERIA

## WHAT IS IMPROVING AND DETERIORATING

**INFLATION STANDS OUT AS THE AREA OF LIFE** most likely to have deteriorated over the last few years. A majority (57%) of global citizens say this has worsened. This is particularly the case among citizens in the Global North (66% vs 50% in the Global South).

**THE PERCENTAGE OF THE POPULATION** that believes things have improved in this area has further declined, dropping from 28% in 2023 to 25% in 2024. This decrease is mainly due to a significant drop in Global North countries: -5 points, down to 16%.

Q. To what extent have the following areas of your life improved or worsened over the last few years? Inflation.



**AROUND THREE IN TEN THINK THAT** job opportunities (33%), social protection systems (31%) and education systems (30%) have got worse over the past few years, while similar proportions believe these areas have improved (33%, 36% and 36% respectively).

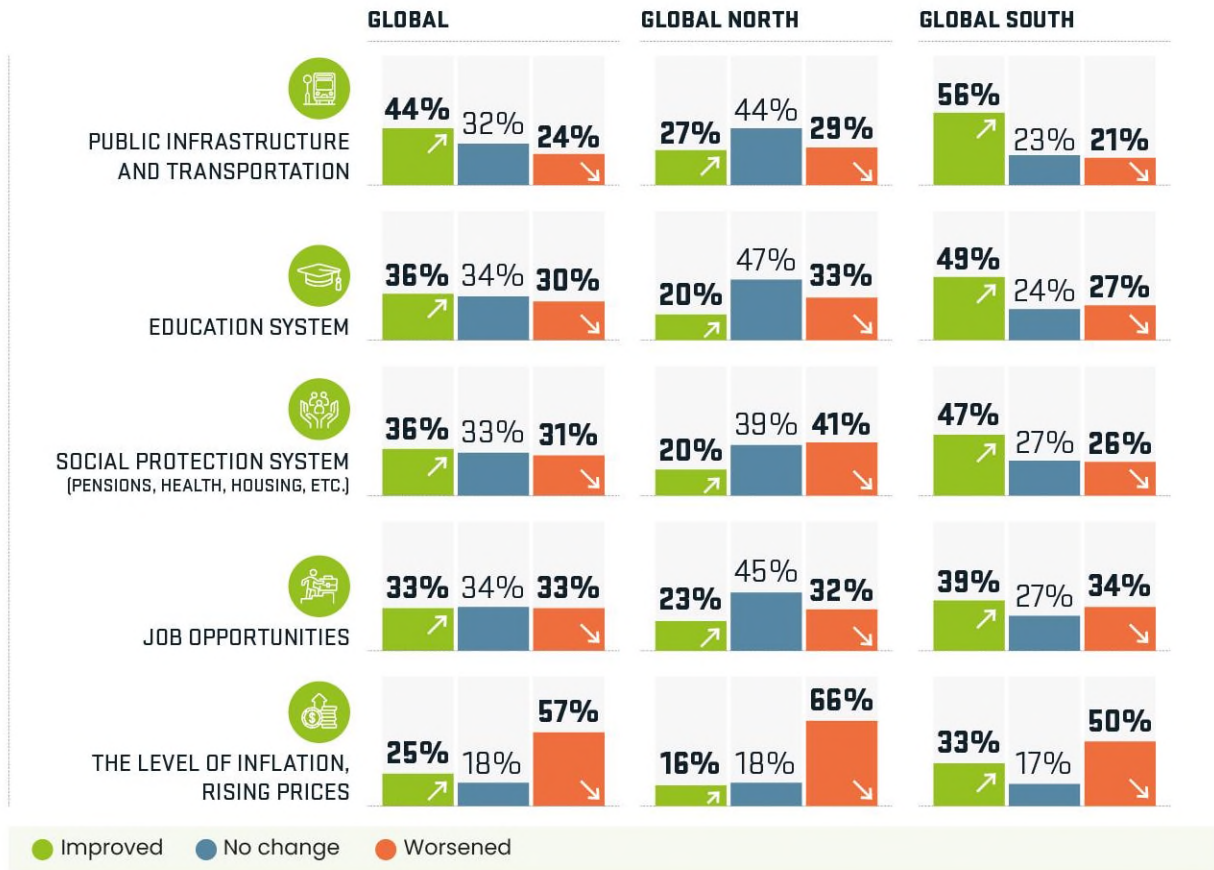
**CITIZENS OF THE GLOBAL NORTH** are more likely to feel education and social protection systems have worsened, with 41% feeling social protections have worsened compared to 26% of citizens in the Global South. On job opportunities, citizens of the Global South report more change, with only 27% saying there has been no change compared to 45% of citizens in the

Global North. Citizens in the Global South are especially likely to say job opportunities have improved (39% vs 23% in the Global North).

**PUBLIC INFRASTRUCTURE AND TRANSPORTATION** have the most positive perceptions of all the areas asked about, with almost half (44%) saying this element has improved while only 24% feel it has got worse. As with all the other areas asked about, citizens in the Global South are more likely to feel there have been improvements, with a majority doing so (56%) compared to only 27% in the Global North.

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Q. To what extent have the following areas of your life improved or worsened over the last few years?



## FII Priority compass

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**CITIZENS ARE MORE LIKELY TO SAY** something has got worse in recent years than has got better. Taking all these areas together, 61% say that at least one aspect has improved in recent years, but 67% say that at least one thing has got worse. This pattern is particularly marked among citizens of the Global North, with 76% thinking at least one thing

has got worse, but only 45% that something has got better.

**THE PROPORTION OF CITIZENS** who believe at least one thing has improved varies considerably from country to country, ranging from 28% in Japan to 92% in the Ivory Coast. There is a clear North-South divide, with countries from the

Global South generally ranking above countries from the Global North. The exception is Turkiye on 37%, the only country in the Global South without a majority of citizens saying at least one of the areas asked about has improved in the past few years.



## PROMOTING ECONOMIC INCLUSION

**JOB CREATION PROGRAMS** are seen to be the most effective measures in promoting economic inclusion, cited by 33% in total. There is a clear difference between the Global North and South on this, with 38% of citizens in the Global South naming job creation (rising to 46% in Africa) compared to 25% in the Global North.

**EDUCATION/SKILL DEVELOPMENT** comes second, chosen by 29%. There are no clear North/South differences on this measure, but it is more likely to be favored by citizens in the Americas (38% in North America and 33% in South America) and Europe (31%) compared to Asia and MENA (23% and 24%).

**HOWEVER, CITIZENS IN THE GLOBAL NORTH** are more likely than those in the Global South to select universal basic income (25% vs 17%) and progressive taxation policies (21% vs 16%) as the most effective measure in promoting economic inclusion.

Q. Among the following, what measure do you believe is most effective in promoting economic inclusion of all parts of society (especially poor or socially disadvantaged groups) and reducing income inequality?

[ONE ANSWER ALLOWED]

	GLOBAL	GLOBAL NORTH	GLOBAL SOUTH	AFRICA	NORTH AMERICA	SOUTH AMERICA	ASIA	EUROPE	MENA
JOB CREATION PROGRAMS	33%	25%	38%	46%	31%	40%	29%	26%	37%
ACCESSIBLE EDUCATION AND SKILL DEVELOPMENT	29%	29%	29%	29%	38%	33%	23%	31%	24%
UNIVERSAL BASIC INCOME	20%	25%	17%	12%	15%	15%	26%	22%	25%
PROGRESSIVE TAXATION POLICIES [% TAX PAYABLE INCREASES WITH INCOME]	18%	21%	16%	13%	16%	12%	22%	21%	14%

## SATISFACTION WITH WORK

**WE ASKED GLOBAL CITIZENS WHO WORK ABOUT THEIR SATISFACTION WITH THEIR WORKING LIFE** across a range of dimensions. In every case, satisfaction surpasses dissatisfaction, and figures are consistent with last year's levels. However, income and incentives stands out as an area where satisfaction is relatively low on 43% and is only just ahead of dissatisfaction on 31%.

**THE SATISFACTION GAP ON INCOMES AND INCENTIVES IS EVEN NARROWER AMONG CITIZENS** from the Global North, with 38% satisfied and 33% dissatisfied. In contrast, 46% in the Global South are satisfied and 30% dissatisfied. This mirrors a general pattern where citizens in the Global South have higher levels of satisfaction and are less likely to be dissatisfied, although this tendency is most marked on this particular measure.

**TWO OTHER AREAS WHERE SATISFACTION IS LOWER** are career advancement and training opportunities (48%, with 23% dissatisfied) and space to be innovative and creative (49% satisfied, 22% dissatisfied). Satisfaction levels are highest for workplace location (61%) and comfortable working conditions (57%).

**WHITE COLLAR WORKERS ARE MORE SATISFIED** than blue collar workers on all the dimensions asked about. For instance, 50% are satisfied with career advancement/training opportunities compared to 38% of blue-collar workers.

Q. How satisfied are you with your work and professional life across these parameters?

	GLOBAL		GLOBAL NORTH		GLOBAL SOUTH	
	Satisfied	Not satisfied	Satisfied	Not satisfied	Satisfied	Not satisfied
WORKPLACE LOCATION (E.G., PROXIMITY TO HOME, COMMUTE TIME, TRANSPORT FACILITIES)	61%	17%	61%	16%	62%	17%
COMFORTABLE WORKING CONDITIONS (E.G., SAFETY OF WORKING CONDITIONS, AMENITIES)	57%	19%	55%	18%	58%	19%
SUPPORTIVE LEADERSHIP AND CONNECTION WITH COLLEAGUES	55%	18%	49%	20%	58%	18%
FLEXIBLE WORK ENVIRONMENT (E.G., FLEXIBLE WORKING HOURS, ABILITY TO WORK REMOTELY)	53%	22%	49%	23%	56%	21%
WORK-LIFE BALANCE (E.G., WORKLOAD, MENTAL STRESS, LEAVES)	52%	23%	49%	24%	54%	22%
FAIR POLICIES AND PRACTICE (E.G., GENDER AND CULTURAL DIVERSITY, FEEDBACK MECHANISM)	51%	19%	46%	19%	56%	18%
VALUES AND COMMITMENT OF THE COMPANY TO SOCIETAL ISSUES (E.G., DIVERSITY, SUSTAINABILITY, LOCAL COMMUNITY, CHARITIES)	51%	19%	44%	19%	56%	18%
SPACE TO BE INNOVATIVE AND CREATIVE	49%	22%	42%	23%	54%	21%
CAREER ADVANCEMENT PROSPECTS AND TRAINING OPPORTUNITIES	48%	23%	40%	26%	52%	23%
INCOME AND INCENTIVES	43%	31%	38%	33%	46%	30%

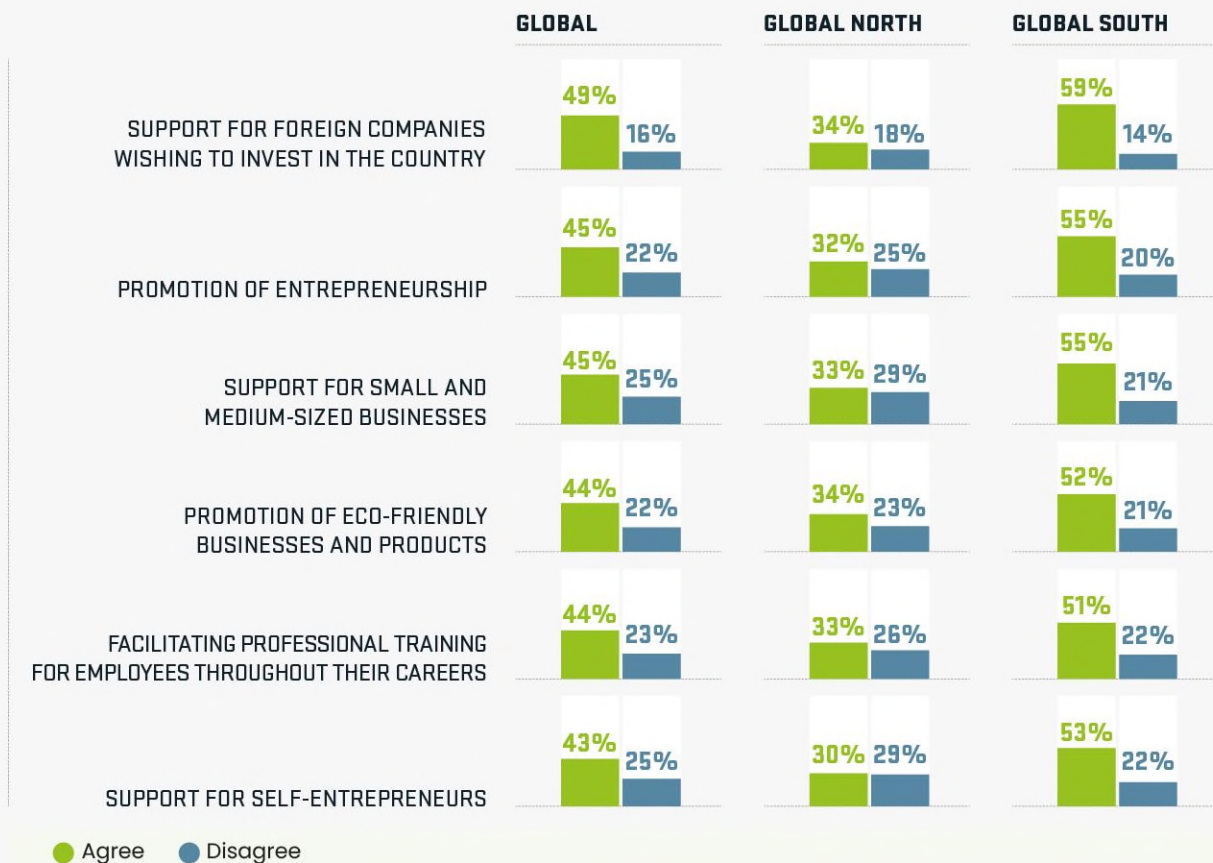
BASE: ALL WHO WORK (31,112 OVERALL, 13,600 IN GLOBAL NORTH, 17,512 IN GLOBAL SOUTH)

## GOVERNMENT ASSISTANCE TO BUSINESSES AND ENTREPRENEURS

**→ GLOBAL CITIZENS ARE MORE LIKELY TO AGREE** than disagree that their government provides support to businesses and entrepreneurs in their country. However, it is only in the Global South that a majority agree that the government provides support in all the areas asked about. In contrast, the figure is around a third in the Global North.

**LEVELS OF BOTH AGREEMENT AND DISAGREEMENT** are similar for all the areas asked about. However, it is notable that respondents are less likely to disagree that their government provides support for foreign companies wishing to invest in the country (16%) than small and medium-sized businesses (25%) and entrepreneurs (also 25%) in their own country. Overall, the impression is that governments could be doing more to support the businesses in their country.

Q. Do you feel that the government provides the following support to businesses and entrepreneurs in your country?

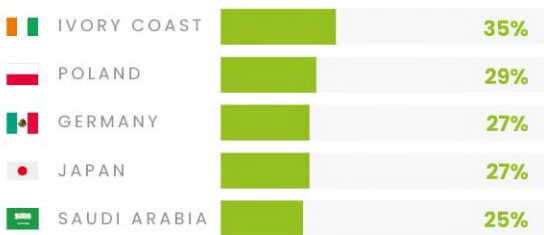


Base: All who work (31,112 overall, 13,600 in Global North, 17,512 in Global South)

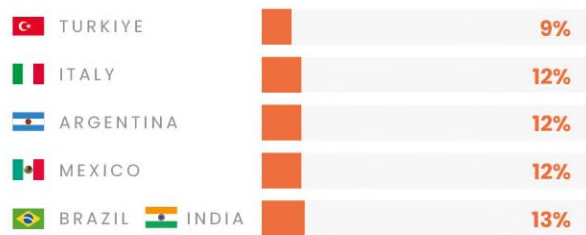
# GOVERNANCE

**GOVERNANCE RANKS SECOND IN GLOBAL CITIZENS' LIST OF CONCERNS.** It is more likely to be mentioned in Africa (24%) than in all the other areas, especially South America (13%). It is selected most often in the Ivory Coast (35%) but also comes up more frequently in countries such as Poland (29%), Germany (27%) and Japan (27%) which have had reputations for political stability.

## HIGHEST RANKING COUNTRIES



## LOWEST RANKING COUNTRIES



## GOVERNANCE IS ALSO MORE LIKELY TO BE MENTIONED BY OVER 55s (23%)

compared to under 35s- and 35-54 year olds (both 17%) and men compared to women (20% vs 17%).







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**WHEN WE ASKED GLOBAL CITIZENS TO EXPLAIN IN THEIR OWN WORDS**

why they are concerned about governance, corruption and lack of trust in politicians is the theme mentioned most often. Polarization, the potential for violence and the rise of extremism are other common themes. Economic impact is another area of anxiety in relation to political instability.

Q. How satisfied are you with each of the political aspects in your country?

<p><b>#01</b> CORRUPTION AND LACK OF TRUST IN POLITICIANS</p>		<p>"Politicians are only fighting for power. Everyone thinks they know what's best for South Africa, they don't want to work together and make South Africa a better country."</p> <p>SOUTH AFRICA</p>
<p><b>#02</b> POLARIZATION AND DIVISION IN SOCIETY</p>		<p>"How polarizing the situation is due to the actions of the federal government that have been creating a division among the population."</p> <p>MEXICO</p>
<p><b>#03</b> ECONOMIC IMPACTS AND CITIZEN WELFARE</p>		<p>"Stability in politics affects how the society I live in is conducive for thriving financially and other aspects of life."</p> <p>NIGERIA</p>
<p><b>#04</b> POTENTIAL FOR VIOLENCE, WAR AND UNREST</p>		<p>"Rising of political temperatures. Tribal instigated violence."</p> <p>KENYA</p>

## SATISFACTION WITH POLITICAL LEADERS AND SYSTEMS

**THERE IS WIDESPREAD DISSATISFACTION** among global citizens with corruption, political stability, economic policies, and the transparency and accountability of political leaders. More than three-fifths express dissatisfaction with each of these elements, with corruption recording the highest level of dissatisfaction on 71%. Only 22% are satisfied.

**RELATIONS/DIPLOMACY WITH OTHER COUNTRIES** and national security/defense are the only political aspects where global citizens are more likely to be satisfied than dissatisfied.

**CITIZENS OF THE GLOBAL SOUTH** are more likely than citizens of the global north to be satisfied with each of the aspects asked about, the one exception being corruption. The biggest gap is on immigration policy where 43% in the Global South are satisfied compared to only 21% in the Global North.

Q. How satisfied are you with each of the political aspects in your country?

	GLOBAL		GLOBAL NORTH		GLOBAL SOUTH	
	Satisfied	Not satisfied	Satisfied	Not satisfied	Satisfied	Not satisfied
RELATIONS WITH OTHER COUNTRIES AND DIPLOMACY	52%	41%	40%	50%	60%	34%
NATIONAL SECURITY AND DEFENSE	49%	45%	39%	52%	57%	39%
CITIZEN PARTICIPATION AND REPRESENTATION	34%	59%	28%	63%	41%	55%
IMMIGRATION POLICY	34%	56%	21%	69%	43%	47%
POLITICAL STABILITY	33%	62%	26%	68%	40%	57%
ECONOMIC POLICIES AND INEQUALITY	32%	62%	24%	69%	39%	56%
TRANSPARENCY AND ACCOUNTABILITY OF POLITICAL LEADERS	27%	68%	21%	72%	31%	65%
LEVEL OF CORRUPTION	22%	71%	22%	68%	22%	74%

## RELIABILITY OF PUBLIC SERVICES

Opinions are fairly evenly split on the reliability of public services, with 53% agreeing public services in their country are reliable and 42% disagreeing. There are no differences between the Global North and South overall, but agreement is lower in Africa and South America (36%), and higher in MENA (68%).

## SATISFACTION WITH SYSTEMS OF SOCIAL PROTECTION

### → GLOBAL CITIZENS' LEVELS OF SATISFACTION

with social protection systems in their country are also relatively low, although do not plumb the depths of dissatisfaction seen in relation to governance.

**UNEMPLOYMENT ASSISTANCE** (56% dissatisfied), social housing (54%), help for young people entering the job market (54%) and pensions (also 54%) are the worst rated

social protections. Only between 35%-40% are satisfied with each.

**OPINION IS EVENLY DIVIDED** on public health insurance, the best rated social protection, with 47% satisfied and 48% dissatisfied.

There is a similar picture on support for the disabled (45% satisfied and 46% dissatisfied) and childcare support (43% satisfied and 45% dissatisfied).

### CITIZENS FROM THE GLOBAL SOUTH

are more likely than citizens from the Global North to be satisfied with all the elements asked about. The gap is narrowest on unemployment assistance, with 37% satisfied compared to 34% in the Global North. Unlike other elements of social protection, dissatisfaction levels with unemployment assistance are higher in the Global South at 58%, compared to 52% in the Global North.

Q. How do you rate the following elements of the social protection system in your country?

	GLOBAL		GLOBAL NORTH		GLOBAL SOUTH	
	Satisfied	Not satisfied	Satisfied	Not satisfied	Satisfied	Not satisfied
PUBLIC HEALTH INSURANCE	47%	48%	44%	48%	50%	47%
SUPPORT FOR THE DISABLED	45%	46%	32%	53%	53%	42%
CHILDCARE SUPPORT	43%	45%	35%	46%	50%	44%
PANDEMIC OR DISASTER RELIEF FUND	43%	46%	34%	47%	49%	46%
ASSISTANCE FOR MIGRANTS ARRIVING IN THE COUNTRY	40%	44%	30%	49%	48%	40%
PENSIONS	40%	54%	29%	63%	48%	48%
HELP FOR YOUNG PEOPLE ENTERING THE JOB MARKET	38%	54%	29%	56%	44%	52%
SOCIAL HOUSING	36%	54%	24%	58%	45%	50%
UNEMPLOYMENT ASSISTANCE	35%	56%	34%	52%	37%	58%

# HEALTHCARE

➔ **HEALTHCARE RANKS THIRD OUT OF THE SIX CONCERNS WE ASKED GLOBAL CITIZENS ABOUT.** as we have seen in section 1, physical and mental health, along with financial stability, are the factors most likely to be associated with a good quality of life.

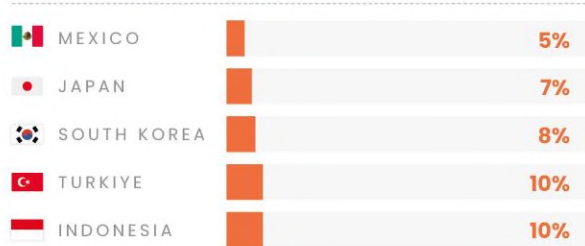
**CITIZENS IN EUROPE (22%),** are more likely than those in North America (9%) and Asia (13%) to select healthcare as their most important concern. Concern is highest in Morocco (30%) and the United Kingdom (29%) and lowest in Mexico (5%) and Japan (7%).

Women (19%) are more likely than men (15%) to select healthcare, as are those living in rural areas (19%) compared to those in urban areas (16%), where healthcare is often harder to access.

## HIGHEST RANKING COUNTRIES



## LOWEST RANKING COUNTRIES



## FII Priority compass

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**WHEN WE ASKED GLOBAL CITIZENS TO TELL US** why they are concerned about healthcare, accessibility and affordability is the most common theme. Other themes broadly relate to this as well, with respondents also

mentioning quality of care, shortage of healthcare workers, health insurance coverage, public health funding and the general capacity of the healthcare system.

Q. And when you think about this subject (healthcare system), what specifically is concerning you?

THEMES RANKED IN ORDER OF MENTIONS

### #01

ACCESSIBILITY AND AFFORDABILITY OF HEALTHCARE SERVICES



"The health system has collapsed, there is not enough capacity and number of doctors, access to health is very expensive."

TURKIYE

### #02

QUALITY OF CARE AND PATIENT EXPERIENCE



"Lack of proper medical facilities and medical staff."

SOUTH KOREA

### #03

SHORTAGE OF HEALTHCARE WORKERS



"Too few specialists."

GERMANY

### #04

HEALTH INSURANCE COVERAGE AND COSTS



"Lack of health coverage and poor care."

ARGENTINA

### #05

PUBLIC HEALTH FUNDING



"Worry the public healthcare will become private."

UNITED KINGDOM

### #06

HEALTH SYSTEM CAPACITY AND PREPAREDNESS



"Increase in average life expectancy, increase in technological medicine, increase in defensive medicine = increase in healthcare costs."

ITALY

## FII Priority compass

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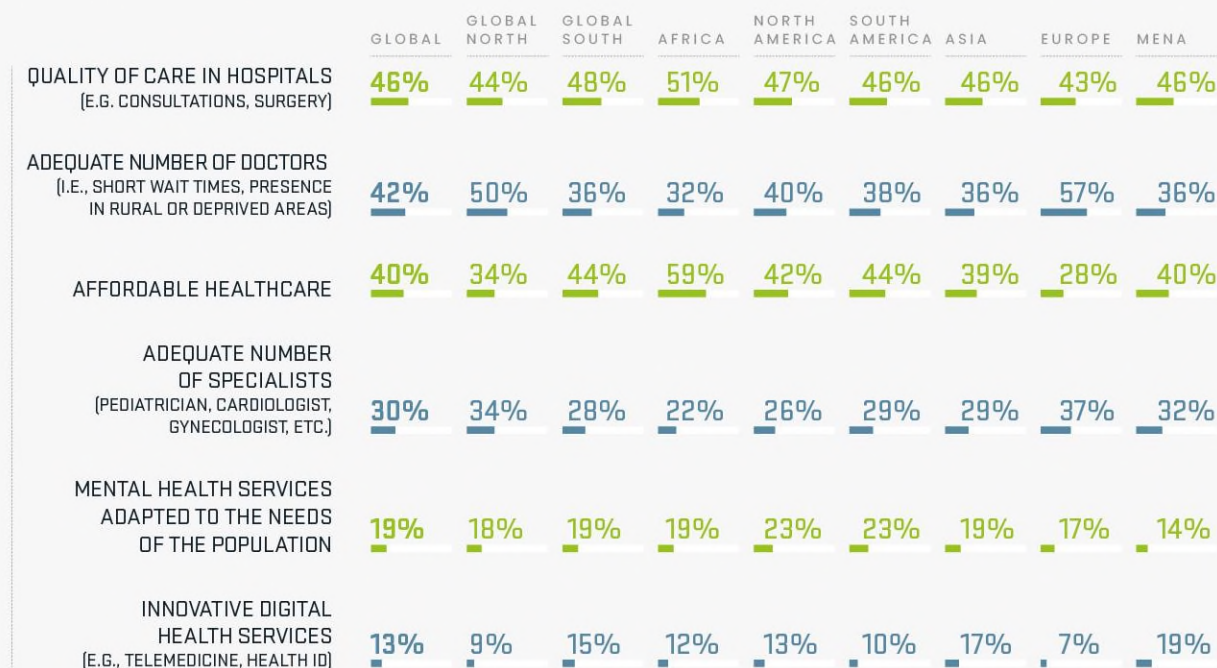
### KEY ELEMENTS OF HEALTHCARE

**FOR CITIZENS IN THE GLOBAL SOUTH**, quality of care (48%) is the most important element of healthcare, followed by affordable healthcare (44%, rising to 59% in Africa) and adequate number of doctors (36%). In contrast, for citizens in the Global North, adequate number of doctors comes top (50%, rising to 57% in Europe), followed by quality of care (44%). Affordable healthcare and adequate number of specialists tie in third place on 34%.

**INCOME LEVELS APPEAR TO BE A FACTOR**, with 47% of high-income countries prioritizing doctor numbers compared to 33% of low-income countries. For low-income countries, affordable healthcare is much more of a priority (52% compared to 35% of high-income countries). For medium income countries, quality of care is the most important element, cited by 49% (also mentioned by 49% in low-income countries vs 44% in high income countries).

**AGE ALSO PLAYS A ROLE** in attitudes, with 49% of over 55s considering an adequate number of doctors to be important, compared to 38% of under 35s. Conversely, under 35s are more likely than over 55s to cite mental health services (22% vs 14%).

#### Q. Which do you consider the most important elements of healthcare?



## SATISFACTION WITH HEALTHCARE



### LEVELS OF SATISFACTION

with healthcare are mixed. Global citizens overall are more likely to be satisfied (56%) than dissatisfied (44%) with the quality of care in hospitals in their country. Satisfaction varies widely by country, with India (78%) and the United States (74%) scoring highest, while Poland (37%) and Mexico (38%) have the lowest scores.

**CITIZENS ARE ALSO MORE LIKELY TO BE SATISFIED** (53%) than dissatisfied (47%) with innovative digital health services. The United States (79%) and India (78%) again lead, while Mexico (35%) and Argentina (31%) record the lowest scores.

**HOWEVER, GLOBAL CITIZENS** are as likely to be satisfied as dissatisfied with affordable healthcare (51% satisfied, 49% dissatisfied), a key area of concern in the Global South and Africa in particular. Only 44% are satisfied with this

in Africa, with scores particularly low in South Africa (39%) and Kenya (41%). In contrast, 58% are satisfied in MENA and 56% in Asia, rising to 74% in Saudi Arabia and 75% in India, two countries where healthcare is publicly funded. Other countries with publicly funded healthcare systems with high levels of satisfaction for affordability are Sweden (68%) and the United Kingdom (61%). In the United States, on the other hand, only 48% of citizens are satisfied with the affordability of healthcare.

**LEVELS OF SATISFACTION** with adequate numbers of specialists are similar (49% satisfied, 51% dissatisfied). Dissatisfaction with adequate number of specialists is particularly high among citizens from the Global North (60% vs 45% in the Global South), who, as we have seen, are more likely to regard this as an important element of healthcare.

**DISSATISFACTION IS HIGHEST** on adequate numbers of doctors (57%) and is notably higher in the Global North (65%, rising to 72% in Europe compared to 50% in the Global South). This is the most important element of healthcare in the Global North but is the area where dissatisfaction levels are highest. Levels of dissatisfaction are highest in Poland (80%) and Italy (77%) and are lowest in Saudi Arabia (20%) and India (22%).

**OLDER CITIZENS TEND TO BE** more dissatisfied with the different elements of healthcare asked about. For instance, 67% of over 55s are dissatisfied with the number of doctors compared to 47% of under 35s.

Q. To what extent are you satisfied with each of the following in your country?

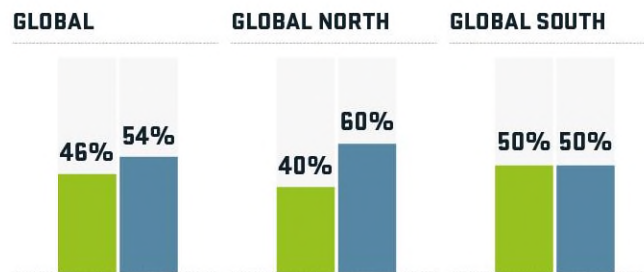
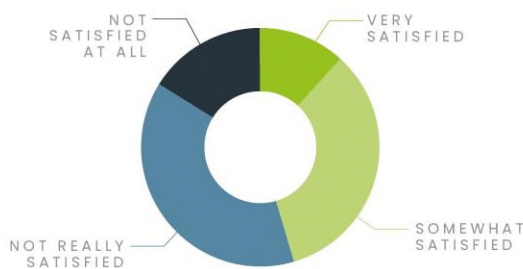
	GLOBAL		GLOBAL NORTH		GLOBAL SOUTH	
	Satisfied	Not satisfied	Satisfied	Not satisfied	Satisfied	Not satisfied
QUALITY OF CARE IN HOSPITALS (E.G. CONSULTATIONS, SURGERY)	56%	44%	57%	43%	55%	45%
INNOVATIVE DIGITAL HEALTH SERVICES (E.G., TELEMEDICINE, HEALTH ID)	53%	47%	51%	49%	54%	46%
AFFORDABLE HEALTHCARE	51%	49%	51%	49%	50%	50%
ADEQUATE NUMBERS OF SPECIALISTS (PEDIATRICIAN, CARDIOLOGIST, GYNECOLOGIST, ETC.)	49%	51%	40%	60%	55%	45%
MENTAL HEALTH SERVICES ADAPTED TO THE NEEDS OF THE POPULATION	46%	54%	40%	60%	50%	50%
ADEQUATE NUMBER OF DOCTORS (I.E., SHORT WAIT TIMES, PRESENCE IN RURAL OR DEPRIVED AREAS)	43%	57%	35%	65%	50%	50%

## SPOTLIGHT ON MENTAL HEALTH

→ **MENTAL HEALTH SERVICES ADAPTED TO THE NEEDS OF THE POPULATION HAS ONE OF THE HIGHEST LEVELS OF DISSATISFACTION.** Half (54%) of global citizens are dissatisfied with this element of healthcare in their local country. Dissatisfaction levels are higher in the Global North (60%) than the Global South (50%).

Q. To what extent are you satisfied with each of the following in your country?

### MENTAL HEALTH SERVICES ADAPTED TO THE NEEDS OF THE POPULATION



→ **THIS IS CONCERNING BECAUSE,** as we have seen in Section 1, mental health is regarded as important to a good quality of life by most global citizens (53%). There are some marked differences geographically, with only 33% in MENA citing this as an important factor, compared to three in five in South America (62%), Europe (59%), Africa (58%) and North America (57%). Asia sits in between on 50%.

**WHEN WE DRILL DOWN INTO SATISFACTION LEVELS** by country, we see that it is citizens from countries in MENA and Asia who are most likely to say they are satisfied with mental health services. Satisfaction is highest in Saudi Arabia (82%), followed by India (75%), Egypt (71%), China (63%) and Indonesia (62%).

**THE COUNTRIES WHERE SATISFACTION IS THE LOWEST** are all European, with the exception of Argentina (27%) which scores poorly on all elements of healthcare. Only three in ten of citizens in Poland (31%), Sweden (also 31%), Italy (32%) and Spain (also 32%) are satisfied. Around seven in ten are dissatisfied, with Poland and Sweden on 69%, and Italy and Spain on 68%.

**THESE DIFFERENT LEVELS OF SATISFACTION** are likely shaped by cultural attitudes. It may be the case that mental health is more of a taboo issue in MENA and Asia so understanding of and expectations for services are lower. The fact that mental health is less likely to be associated with good quality of life in these regions is some evidence of that.



## OVERCOMING BARRIERS TO HEALTHCARE

➔ **WAITING TIMES ARE THE KEY REASON** why public healthcare is believed not to be accessible enough in their country, cited by 45% of global citizens. This is a particular concern in the Global North (56%, rising to 69% in Europe) compared to the Global South (36%, with Africa even lower on 28%).

**FOR CITIZENS IN THE GLOBAL SOUTH**, while waiting times comes top, this is selected less often and the cost of healthcare (34%) attracts a similar number of mentions. Cost is particularly likely to be chosen by citizens in Africa (43%), especially in comparison to citizens in Europe (12%).

Q. In your opinion, what is the main reason why public healthcare is not accessible enough in your country?

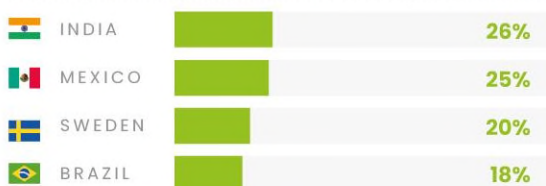
	GLOBAL	GLOBAL NORTH	GLOBAL SOUTH	AFRICA	NORTH AMERICA	SOUTH AMERICA	ASIA	EUROPE	MENA
WAITING TIMES FOR ACCESS TO HEALTHCARE (DOCTORS AND SPECIALISTS, SURGICAL OPERATIONS)	45%	58%	36%	28%	33%	49%	38%	69%	33%
THE COST OF ACCESS TO HEALTHCARE	28%	21%	34%	43%	42%	19%	34%	12%	32%
LOW QUALITY OF CARE	16%	10%	20%	19%	17%	26%	14%	9%	21%
EXTENSIVE TRAVEL (DOCTORS AND SPECIALISTS, SURGICAL OPERATIONS)	11%	11%	10%	10%	8%	6%	14%	10%	14%

# ENVIRONMENTAL PRIORITIES AND EXPECTATIONS

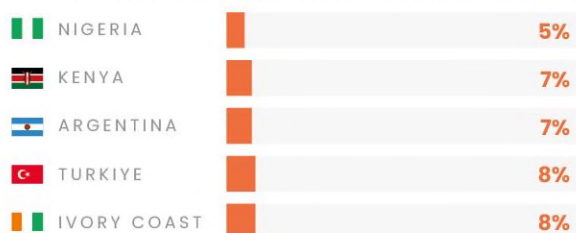
→ **ENVIRONMENT IS CONSIDERED BY SURVEYED CITIZENS AS A LESS PRESSING CONCERN** compared to other matters such as economy, ranking fourth out of the six Macro Priorities evaluated. It is more likely to be raised by citizens in the Global North than the Global South (15% vs 12%) and is less of a concern in Africa (7%) and MENA (11%) compared to North America (17%) and Asia (16%).

**CITIZENS IN INDIA (26%) ARE MOST LIKELY TO SELECT THE ENVIRONMENT AS THE MOST IMPORTANT ISSUE**, followed by Mexico (25%). It ranks lowest in Nigeria (5%), Kenya and Argentina (both 7%). There are no demographic differences in the likelihood to choose the environment.

## HIGHEST RANKING COUNTRIES



## LOWEST RANKING COUNTRIES



## FII Priority compass

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**WHEN EXPLAINING WHAT IT IS ABOUT THE ENVIRONMENT THAT CONCERNS THEM**, global citizens are most likely to mention climate change, pollution, deforestation, waste and unsustainable resource use and water scarcity. There are also broader comments about the need to protect the environment.

Q. And when you think about this subject (environment), what specifically is concerning you?

THEMES RANKED IN ORDER OF MENTIONS

**#01**

**CLIMATE CHANGE AND GLOBAL WARMING**



"Climate change is upon us. Global warming."

INDIA

**#02**

**POLLUTION**



"Air, water and soil pollution with microplastics and other harmful substances."

POLAND

**#03**

**DEFORESTATION AND HABITAT LOSS**



"Deforestation, loss of species, climate change."

SWEDEN

**#04**

**WASTE AND UNSUSTAINABLE RESOURCE USE**



"Plastic waste that cannot be recycled. I throw a lot of plastic into my normal waste bin. Time to make non-recyclable plastic illegal."

UNITED KINGDOM

**#05**

**NEED FOR ENVIRONMENTAL PROTECTION AND CONSERVATION**



"Protection of the planet and sustainability of nature."

SPAIN

**#06**

**WATER SCARCITY AND DROUGHT**



"Water and water scarcity."

MOROCCO

## FII Priority compass

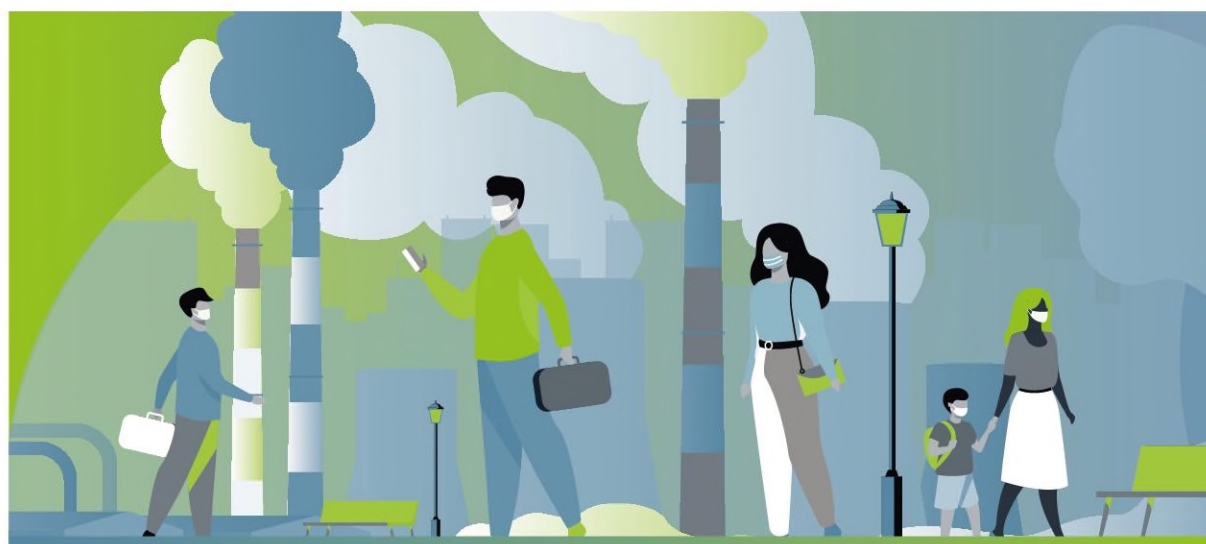
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### KEY ENVIRONMENTAL PRIORITIES

→ **POLLUTION** is the environmental issue that global citizens are most likely to be worried about. More than half (54%) say this is one of the most important environmental issues. Just under half feel that extreme climate events (48%) and climate change (47%) are the most important.

**POLLUTION IS MORE OF A CONCERN** in the Global South (58%) than the Global North (48%). In the Global North, pollution comes third, just behind extreme climate events (51%) and climate change (49%). Citizens in the Global North are more likely than citizens in the Global South to mention waste production (39% vs 33%) and loss

of biodiversity (25% vs 20%), while those in the Global South are more likely to say that excessive use of natural resources (34% vs 29%) and deforestation (31% vs 22%) are important.



**THERE ARE ALSO SOME SIGNIFICANT VARIATIONS** across individual countries:

- Citizens in Japan (72%) and South Korea (63%) are most likely to be concerned by extreme climate events such as floods and heatwaves. Both countries have experienced devastating heatwaves and flooding in recent years. However, Saudi Arabia, which has also faced extreme weather events in the past few years, has lower than average levels of concern (41%).
- Citizens in Kenya (65%), Japan (62%) and South Korea (60%) are most likely to mention climate change. It is worth noting that Kenya was one of the first countries in Africa to enact laws on climate action, with the passing of the Climate Change Act in 2016.
- Excessive use of natural resources is more of a concern in MENA (38%) and North America (38%) than other regions. Citizens in Morocco (47%) are particularly likely to regard this as an important environmental issue. Mining plays a significant role in Morocco's economy; it possesses an estimated 70% of the world's reserves of phosphates, a valuable mineral used in a range of sectors. Concern is also higher than average in Mexico (44%), whose economy also relies heavily on mining.
- Deforestation is a particular concern in Brazil (50%) and the Ivory Coast (48%). Both countries have lost vast areas of forest to agricultural expansion, mining, logging and urbanization.
- Biodiversity is particularly an issue in Europe, especially in Germany (37%) and Sweden (36%).

Q. In your opinion, which of the following environmental issues are the most important?

	GLOBAL	GLOBAL NORTH	GLOBAL SOUTH	AFRICA	NORTH AMERICA	SOUTH AMERICA	ASIA	EUROPE	MENA
POLLUTION (E.G., AIR, WATER, SOIL)	54%	48%	58%	61%	57%	58%	52%	50%	56%
EXTREME CLIMATE EVENTS (FLOODS, HEATWAVES, DROUGHTS, CYCLONES, FOREST FIRES)	48%	51%	46%	49%	47%	43%	54%	47%	43%
CLIMATE CHANGE	47%	49%	46%	53%	43%	40%	50%	47%	45%
WASTE PRODUCTION (E.G., PLASTIC POLLUTION)	36%	39%	33%	37%	35%	31%	36%	40%	29%
EXCESSIVE USE OF NATURAL RESOURCES (E.G., WATER, FOSSIL FUELS)	32%	29%	34%	25%	38%	33%	31%	30%	38%
DEFORESTATION	27%	22%	31%	32%	26%	45%	24%	24%	24%
LOSS OF BIODIVERSITY (DECLINE OF ANIMAL AND PLANT SPECIES)	22%	25%	20%	19%	26%	24%	18%	28%	16%
OVERFISHING AND OVER-CULTIVATION	10%	10%	10%	8%	9%	7%	9%	11%	16%

## SPOTLIGHT ON POLLUTION

**→ CONCERN ABOUT POLLUTION VARIES** a great deal among global citizens. As we have seen, it is the top issue of concern in the Global South, with 58% saying it is the most important environmental issue compared to 48% in the Global North.

**CONCERN IS HIGHEST IN AFRICA (61%).** Nigeria tops the list of countries – 66% of its citizens believe pollution is one of the most important environmental issues. Poland is the only Northern country with above average levels of concern.

**THE OVERALL PATTERN OF FINDINGS** reflects the fact that air pollution is higher in the Global South than the Global North. The 25 most polluted countries in the world according to IQAir’s 2023 World Air Quality Report are all located in the Global South.

**HOWEVER, LEVELS OF AIR POLLUTION** do not neatly align to levels of concern. India is the third most polluted country in the world, exceeding World Health Organization (WHO) guidelines by over 10 times. But just over half (57%) see pollution as the most important environmental issue, lower than Argentina on 64%, which is ranked 101st in terms of air pollution, exceeding WHO guidelines by one to two times.

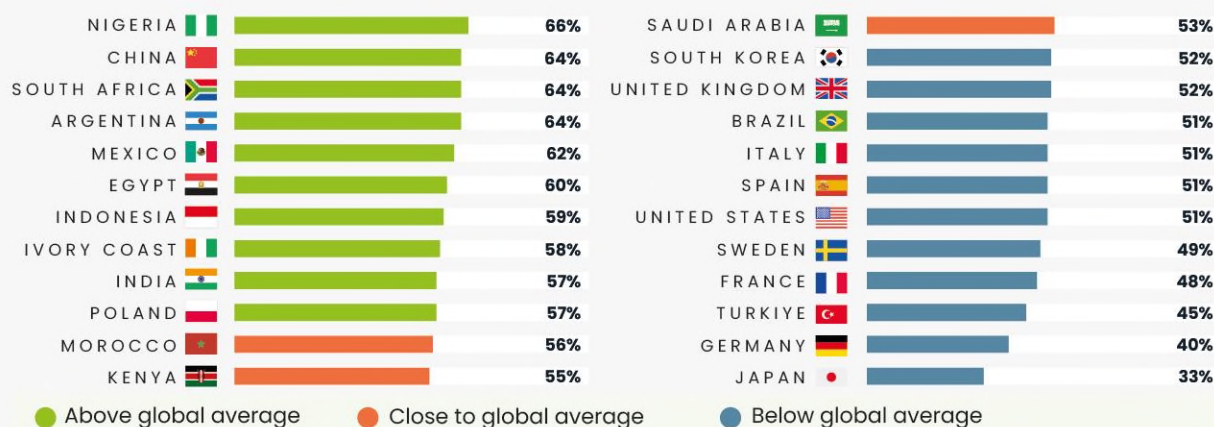
**INDIA’S AIR QUALITY IS ALSO CONSIDERABLY WORSE** than Mexico and South Africa, ranked 46th and 47th respectively on air pollution, but concern in both countries is higher on 62% and 64%. Nigeria has the highest levels of concern about pollution among global citizens but comes 35th in the air pollution rankings, behind Egypt, Indonesia, China and Saudi Arabia.

## FII Priority compass

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Q. In your opinion, which of the following environmental issues are the most important?

% ANSWERING 'POLLUTION (E.G., AIR, WATER, SOIL)'



## EXPECTATIONS OF COMPANIES

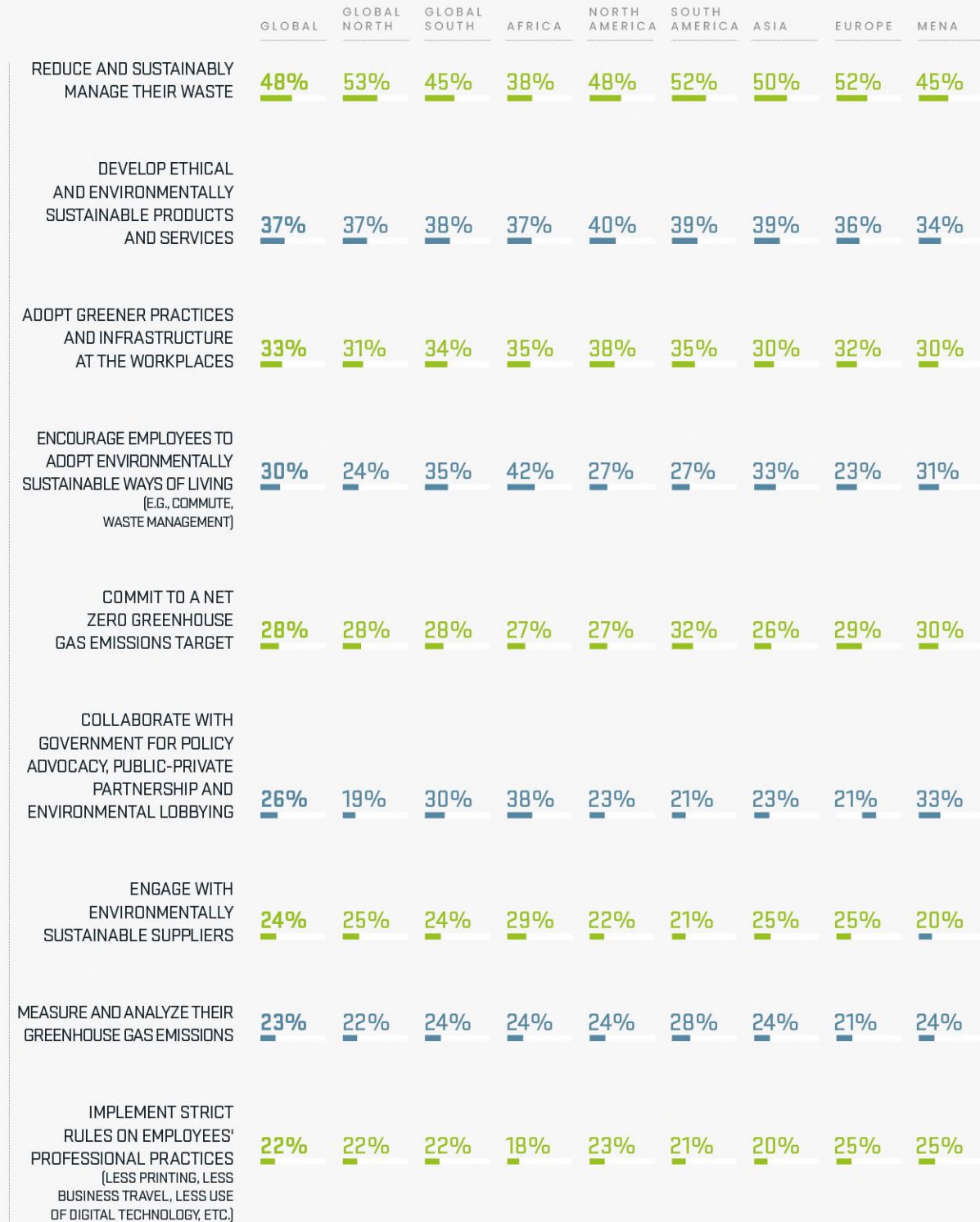
**GLOBAL CITIZENS ARE MOST LIKELY TO THINK** companies should help tackle climate change in a very tangible way – reducing/sustainably managing their waste. Around half (48%) think companies should prioritize this. This is the top answer for citizens in every region, with the exception of Africa, where encouraging employees to adopt environmentally sustainable ways of living comes top on 42%.

**OTHER POPULAR PRIORITIES CENTER ON CUSTOMERS AND EMPLOYEES.** Just over a third (37%) of global citizens believe companies should focus on developing ethical and environmentally sustainable products/services. Levels of support for this priority are the same

in the Global North as the Global South. Around three in ten believe companies should adopt greener practices in the workplace (33%) and encourage employees to adopt environmentally sustainable ways of living (30%). Citizens in the Global South are more likely to think both should be prioritized.

**ACTIONS FOCUSING ON EMISSIONS** or working with government or supply chains attract less support. Citizens in the Global South are more likely than those in the Global North to think collaboration with government should be prioritized by companies (30% vs 19%).

Q Which of the following do you think companies should prioritize to help lessen climate crisis?



## PERSONAL ACTIONS

**TAKING A MORE PERSONAL PERSPECTIVE**, almost all global citizens have done something during their lifetimes to protect the environment. Sorting your waste more is the most common action in the Global North (55%), while buying more reusable products is the most frequent measure in the Global South (48%). Reducing energy consumption is equally common in both (47% overall). These elements were already at the top of the list in 2023, which shows that these behaviors

are now well entrenched in people's habits.

**BUYING MORE REUSABLE PRODUCTS**, using alternative modes of transport to the car, purchasing items because of their environmental credentials and limiting use of air conditioning are more common in the Global South than the Global North. Buying more reusable products is particularly likely in Africa and South Africa (both 57%).

**CITIZENS IN THE GLOBAL NORTH** are more likely to cite buying second-hand products, eating less meat, insulating their homes and reducing air travel.

**OVERALL, THESE FINDINGS DEMONSTRATE** that global citizens are prepared to undertake a range of actions in order to safeguard the environment.

Q Which of the following measures to protect the environment have you adopted the most in your life?

	GLOBAL	GLOBAL NORTH	GLOBAL SOUTH	AFRICA	NORTH AMERICA	SOUTH AMERICA	ASIA	EUROPE	MENA
REDUCE ENERGY CONSUMPTION IN YOUR HOUSEHOLD	47%	48%	47%	47%	96%	96%	97%	49%	96%
SORT YOUR WASTE MORE	47%	55%	41%	41%	47%	52%	44%	57%	48%
BUY MORE REUSABLE PRODUCTS (BAGS, WATER BOTTLES, ETC.)	44%	38%	48%	57%	48%	57%	43%	36%	30%
MAKE MORE USE ALTERNATIVE MEANS OF TRANSPORT TO THE CAR (E.G. PUBLIC TRANSPORT, CYCLING, WALKING, CARPOOLING)	34%	28%	39%	39%	51%	50%	43%	28%	38%
PURCHASED ITEMS MORE BECAUSE OF SUPERIOR ENVIRONMENTAL CREDENTIALS	20%	14%	25%	29%	30%	29%	42%	13%	35%
LIMIT USE OF AIR CONDITIONING (E.G. AT WORK, IN THE HOME, IN THE CAR)	19%	15%	22%	20%	19%	16%	24%	12%	19%
BUY MORE SECOND-HAND PRODUCTS	16%	19%	13%	13%	18%	18%	23%	21%	27%
EAT LESS MEAT	15%	18%	13%	13%	19%	15%	12%	22%	13%
INSULATE YOUR HOME BETTER	13%	14%	12%	11%	13%	13%	8%	15%	19%
REDUCE YOUR AIR TRAVEL	10%	12%	8%	6%	12%	8%	14%	14%	14%
NONE	4%	5%	3%	2%	9%	5%	8%	4%	11%

# SOCIAL INCLUSION

➔ **SOCIAL INCLUSION IS THE PRACTICE OF CREATING ENVIRONMENTS WHERE ALL PEOPLE CAN ENGAGE FULLY** in social, economic, and cultural activities, promoting equity and participation for marginalized groups. This topic is ranked fifth of the six issues we asked global citizens about. It is more likely to be selected in Europe (9%) compared to Asia (5%) and Africa (also 5%). France is the country most like to choose this (13%), followed by Sweden (11%), while Japan (2%) and Korean (3%) are the least likely. There are no demographic differences of note.

**CITIZENS WHO SELECTED THIS AS A CONCERN** talk about a lack of respect and tolerance between citizens. More specifically, there are fears of violence, polarization and discrimination, as well as a lack of unity. There is

an economic dimension to this too, with some global citizens highlighting economic inequality and tensions between different social classes.

**#01**  
LACK OF RESPECT, TOLERANCE AND UNDERSTANDING BETWEEN CITIZENS



"There is no more respect between people, no more mutual aid."  
FRANCE

**#02**  
INCREASING VIOLENCE, CRIME AND INSECURITY



"The amount of fighting that is happening."  
UNITED KINGDOM

**#03**  
POLITICAL AND IDEOLOGICAL POLARIZATION DIVIDING CITIZENS



"Society in Poland is deeply conflicted, political opponents are subject to slander, hostility and are denied the right to be Poles."  
POLAND

**#04**  
DISCRIMINATION AND PREJUDICE DUE TO RACE, RELIGION OR GENDER



"Ethnicity and hatred among tribes."  
NIGERIA

**#05**  
LACK OF UNITY, COHESION AND SENSE OF COMMUNITY AND CONSERVATION



"People in our country have become too quick to turn on each other or dislike one another because of their differences."  
UNITED STATES

**#06**  
ECONOMIC INEQUALITY AND TENSIONS BETWEEN DIFFERENT SOCIAL CLASSES



"Social tensions due to those who have too much and those who have too little."  
ITALY

## FII Priority compass

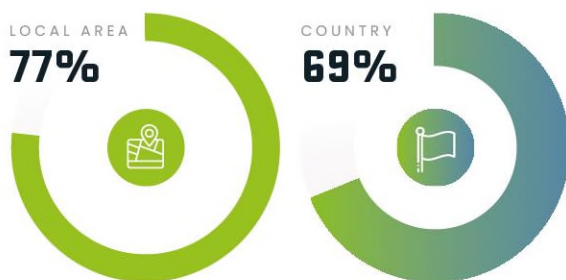
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### SOCIAL COHESION

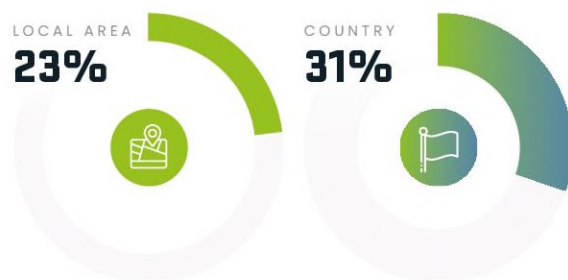
(E.G. MEETING AND TALKING REGULARLY WITH OTHERS, DOING ACTIVITIES TOGETHER)

→ **GLOBAL CITIZENS ARE MORE LIKELY TO FEEL POSITIVE ABOUT SOCIAL COHESION** in their local area than in their country as a whole (77% vs 69%). This mirrors the pattern we see with satisfaction, which is higher on more proximate elements – personal satisfaction is higher than satisfaction with country, which in turn is higher than satisfaction with the world.

#### GOOD SOCIAL COHESION



#### BAD SOCIAL COHESION



→ **CITIZENS IN THE GLOBAL SOUTH** are much more likely to feel positively about social cohesion in both their local area (83%) and country (79%) compared to citizens in the Global North (55% and 69% respectively).

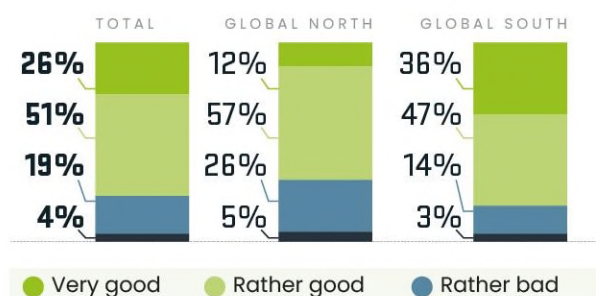
**CITIZENS OF THE GLOBAL NORTH** are also more likely to view social cohesion in their country more negatively than in their local area. Overall, 18% in the Global North say social cohesion is good in their local area but bad in their country, versus only 8% in the Global South. In the Global South, 75% regard social cohesion in both their local area and country as good, compared to only 51% in the Global North.

**THE PROPORTION OF CITIZENS** saying that social cohesion in their country is good is particularly high in Saudi Arabia (93%), India (90%) and Indonesia (also 90%). These are also the countries with the highest levels saying social cohesion in their local areas is good.

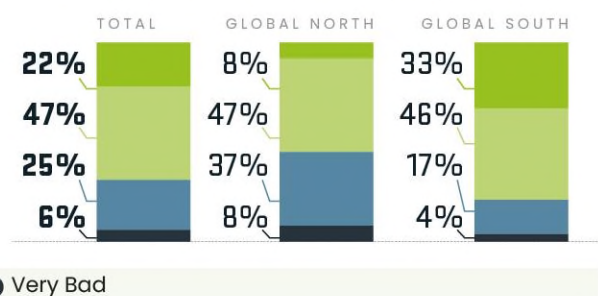
**CONVERSELY, CITIZENS** in France (56%), Germany (54%) and Turkiye (53%) are most likely to believe social cohesion is bad in their countries. Turkiye (44%) and France (37%) are also most likely to say it is bad in their local area but are joined by Poland (38%).

Q. In your opinion, what is the state of social cohesion (e.g. meeting and talking regularly with others, doing activities together) today...?

#### IN YOUR LOCAL AREA



#### IN YOUR COUNTRY



## FACTORS OF HEALTHY PERSONAL RELATIONSHIPS

→ **MUTUAL RESPECT** is most likely to be cited by global citizens when asked what contributes to healthy personal relationships. More than half (56%) think this is the most important factor. It is most likely to be mentioned by citizens in South America (64%) and Europe (62%) and least likely to be chosen in Africa (48%).

**QUALITY TIME WITH FAMILY** and friends comes second on 41%. This is particularly the case for citizens in the Americas (46%, 47% in South America and 45% in North America) compared to other regions. These two aspects were already important in 2023, and are even more so in the eyes of citizens in this survey.

**FINANCIAL SECURITY** (33%) and communication skills (32%) are the most important factors for a third. Both are particularly likely to be cited in Africa (40% and 44% respectively). Financial security is also important in Asia (38%).

Q. Which do you think are the most important factors contributing to healthy personal relationships?

	GLOBAL	GLOBAL NORTH	GLOBAL SOUTH	AFRICA	NORTH AMERICA	SOUTH AMERICA	ASIA	EUROPE	MENA
MUTUAL RESPECT	56%	60%	54%	48%	57%	64%	53%	62%	55%
QUALITY TIME WITH FAMILY AND FRIENDS	41%	41%	42%	38%	45%	47%	41%	41%	39%
FINANCIAL SECURITY	33%	32%	34%	40%	27%	30%	38%	28%	33%
COMMUNICATION SKILLS	32%	30%	34%	44%	31%	24%	32%	27%	38%
SHARED VALUES AND GOALS	28%	27%	28%	25%	32%	25%	27%	29%	29%
SHARED INTERESTS AND VALUES	27%	30%	25%	28%	31%	25%	25%	30%	20%
SUPPORTIVE NETWORK OF FRIENDS AND FAMILY	26%	25%	26%	29%	24%	24%	23%	27%	26%
EMOTIONAL INTELLIGENCE	24%	21%	27%	27%	29%	30%	21%	24%	22%
ACCESS TO RELATIONSHIP COUNSELLING OR THERAPY	12%	7%	15%	16%	12%	12%	13%	6%	17%

## DISAGREEMENTS IN RELATIONSHIPS

**MOST GLOBAL CITIZENS HAVE PEOPLE IN THEIR CLOSE CIRCLE** that they disagree with. More than four in five (82%) disagree with someone in their close circle on at least one of the issues we asked about. This is particularly likely to be the case for citizens in the Global South (91%) compared to citizens in the Global North (71%).

**WHEN WE LOOK AT THE FIVE DIFFERENT TOPIC AREAS** asked about in the survey, there is not a huge amount of difference in how likely global citizens are to socialize with people they disagree with on each area. It is most likely on political issues (63%) and least likely on child-rearing issues (53%).

**CITIZENS IN AFRICA** are particularly likely to have people in their close circle that they disagree with on political issues (78%), while citizens in Asia (55%) are markedly less likely. Kenya (84%) and Japan (26%) sit at opposite ends of the spectrum on this. However, not all Asian countries fit this pattern, as 74% of citizens in India and 68% in Indonesia disagree with people in their social circle on politics.

**MORE GENERALLY, CITIZENS IN ASIA AND EUROPE** are less likely to regularly socialize with people they disagree with on all five areas. Japan stands out as the lowest scoring country on all measures. For instance, only 17% of citizens in Japan socialize with people they disagree with on environmental measures (the

highest score is India on 80%). South Korea, which tends to score the second lowest, is next on 23%. There is then quite a big gap until we reach the next lowest countries, which are Poland and France (both 43%) and the United Kingdom (46%).

**THE REGIONAL DIFFERENCES ARE MOST STRIKING** on religious matters, with only 43% of citizens in Europe and 44% of citizens in Asia saying they have people in their close circle that they disagree with on religion. Japan (17%), South Korea (20%) China (28%) and Germany (33%) score lowest of all on this. The figure for Africa is 73%, with both Nigeria and Kenya on 76%.

**CITIZENS WHO BELIEVE THAT SOCIAL TIES** in their country or their local area are strong are more likely to say that they maintain relationships with people with whom they disagree. For instance, 71% who say social cohesion in their country is very good regularly socialize with people they disagree with on health-related subjects and 70% on environmental issues. This suggests a link between perceptions of strong social ties and the ability to foster an environment where people feel comfortable disagreeing. This relationship is likely to be mutually reinforcing. Social cohesion enables people to engage in discussions and maintain relationships despite disagreements, which in turn sustains that social cohesion.

Q. Are there people in your close circle (family, friends, colleagues, etc.) with whom you regularly socialize and with whom you disagree on...?

% ANSWERING YES

	GLOBAL	GLOBAL NORTH	GLOBAL SOUTH	AFRICA	NORTH AMERICA	SOUTH AMERICA	ASIA	EUROPE	MENA
POLITICAL ISSUES	63%	56%	69%	78%	64%	75%	55%	62%	57%
HEALTH-RELATED SUBJECTS (E.G. VACCINES, HOMEOPATHY)	58%	45%	66%	68%	58%	65%	53%	50%	68%
RELIGIOUS MATTERS	54%	38%	64%	73%	54%	62%	44%	43%	65%
ENVIRONMENTAL ISSUES	54%	41%	64%	69%	52%	56%	50%	45%	64%
CHILD-REARING ISSUES	53%	35%	65%	66%	50%	65%	48%	39%	69%
AT LEAST ONE ISSUE (NET)	82%	71%	91%	94%	58%	65%	53%	77%	68%

## PARTICIPATION IN COMMUNITY ACTIVITIES

**ON AVERAGE, SLIGHTLY LESS THAN HALF OF CITIZENS** (46%) report participating in community/voluntary activities at least once a month, with 18% doing so at least once a week. In general, young people are more involved in these types of activities (56% of those under 35 compared to 36% of those 55 and over).

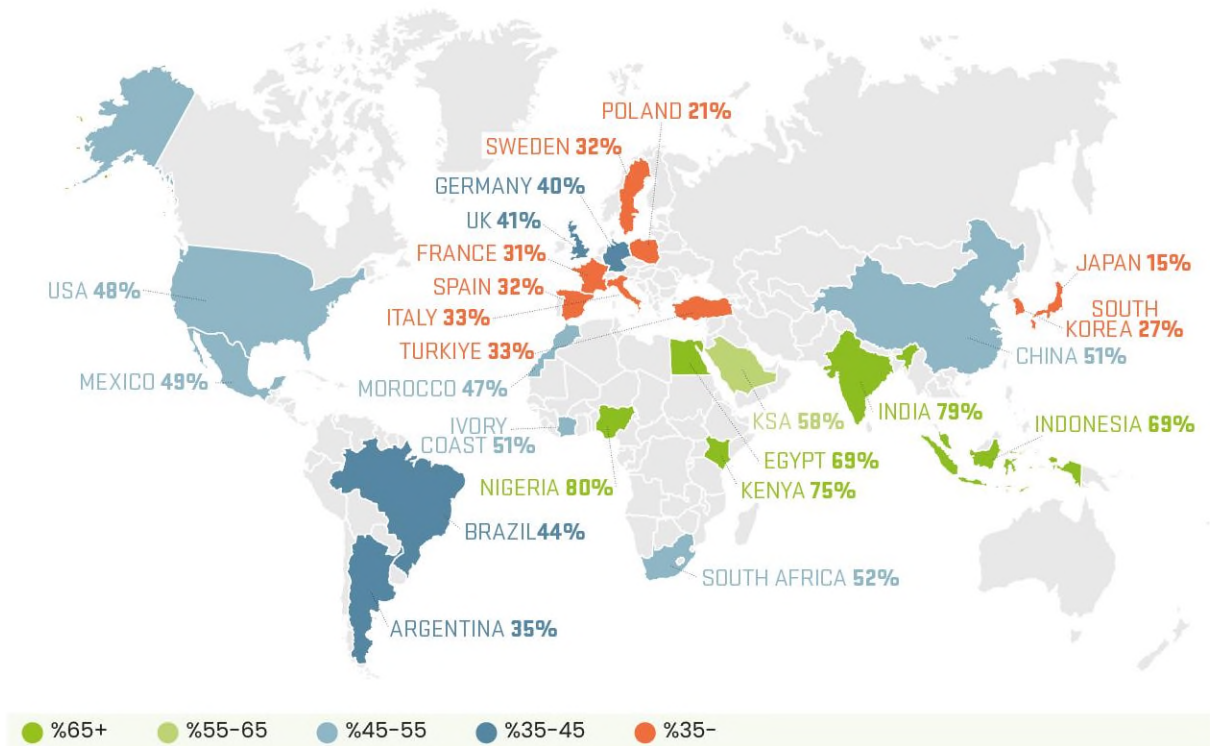
**CITIZENS IN THE GLOBAL SOUTH** are considerably more likely than those in the Global North to undertake community activities at least monthly (56% vs 32%). On a regional basis, participation is higher in Africa (65%) and MENA (58%) than in Europe (33%) and South America (39%).

**THE LOWEST RANKING COUNTRIES** in terms of participation are generally in Europe and most of the highest are in Africa, with Nigeria top on 80%. In Asia, the picture is much more mixed with India recording the second highest levels of participation (79%), while Japan (15%) is the lowest.

**WE HAVE SEEN THAT THERE IS A LINK** between perceptions of social cohesion and likelihood to regularly socialize with people you disagree with. There is also a clear relationship between social cohesion and levels of participation. People who believe that social cohesion in their country or local area is very good are considerably more likely to participate in voluntary and community activities at least monthly.

**AROUND SEVEN IN TEN WHO BELIEVE SOCIAL COHESION** is very good in their country (73%) and in their local area (71%) undertake community and voluntary activities at least monthly, compared to an overall average of 46%. It is difficult to disentangle cause and effect – does social cohesion encourage more community activity or does community participation improve social cohesion? However, it is likely that social cohesion and participation work in tandem and strengthen each other.

Q. How often do you participate in community and associative activities or volunteer work?



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**WE ASKED GLOBAL CITIZENS TO NAME** the top three initiatives which would most increase participation in their community. Cultural events came top, chosen by 50%, followed by volunteer programs (46%) and locally organized sports activities (41%).

**CITIZENS IN THE GLOBAL SOUTH** are more likely than citizens in the Global North to choose locally organized sports activities (45% vs 34%) and community entrepreneurship development (41% vs 21%). Both initiatives are particularly popular in Africa (55% and 52% respectively).

Q. Select the top three initiatives you think would most increase citizens' participation and engagement in your community

	GLOBAL	GLOBAL NORTH	GLOBAL SOUTH	AFRICA	NORTH AMERICA	SOUTH AMERICA	ASIA	EUROPE	MENA
CULTURAL EVENTS LINKED TO HERITAGE, LOCAL TRADITIONS, LOCAL HISTORY, ETC.	50%	51%	48%	53%	47%	43%	49%	53%	45%
VOLUNTEER PROGRAMS (E.G. NEIGHBORHOOD CLEANING, MENTORING)	46%	43%	49%	53%	54%	40%	49%	39%	50%
LOCALLY ORGANIZED SPORTS ACTIVITIES	41%	34%	45%	55%	38%	46%	34%	37%	46%
MOMENTS DEDICATED TO DISCUSSION AND DIALOGUE (E.G., COMMUNITY/ NEIGHBORHOOD COUNCILS)	34%	33%	35%	35%	30%	33%	36%	31%	36%
COMMUNITY ENTREPRENEURSHIP DEVELOPMENT	33%	21%	41%	52%	27%	36%	32%	22%	32%
COMMUNITY AND SHARED GARDENS	30%	33%	29%	19%	32%	35%	33%	31%	35%
NEIGHBORHOOD WATCH PROGRAMS	24%	21%	26%	24%	39%	30%	19%	23%	22%

# TECHNOLOGY

Technology is ranked sixth of the six issues we asked global citizens about. Nevertheless, it is clear that technology is part of the fabric of people's lives.

→ **THERE IS NOT A GREAT DEAL OF DIFFERENCE** in terms of which regions and countries are most likely to select technology. Citizens in the Global South are more likely to do so than citizens in the Global North (6% vs 2%). India (12%) is the country most likely to pick technology, followed by Saudi Arabia (10%). Argentina, France, Italy and Poland are the least likely (all 1%). In demographic terms, under 35s are more likely than over 55s to choose technology as their main concern (7% vs 2%).

**WHEN WE ASKED GLOBAL CITIZENS** why they had chosen technology as an issue of concern, AI was the most common theme in their answers. Innovation more broadly is also raised. Other key issues relate to data security, the digital divide, and an overreliance on technology. Finally, some respondents highlight the importance of incorporating technology into education and skills development.

## #01

**ARTIFICIAL INTELLIGENCE (AI) DEVELOPMENT AND IMPLICATIONS**



"AI taking jobs away from people with creative careers."

UNITED STATES

## #02

**TECHNOLOGICAL ADVANCEMENT AND INNOVATION**



"When technology improves, human life also improves."

INDIA

## #03

**CYBERSECURITY AND DATA PRIVACY**



"The cybersecurity issue is becoming a big issue in the country."

NIGERIA

## #04

**ACCESS TO TECHNOLOGY AND THE DIGITAL DIVIDE**



"We are not that technically advanced and far behind other countries."

SOUTH AFRICA

## #05

**DEPENDENCE ON TECHNOLOGY**



"Technology is increasingly replacing people in professions."

TURKIYE

## #06

**TECHNOLOGY IN EDUCATION AND SKILL DEVELOPMENT**



"Technology education should be given a higher priority because the world is really shifting to technology so that each person can access it well and knowledgeably."

KENYA

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### DIGITAL PREPAREDNESS

Most global citizens feel personally prepared for the digital age (63%) but only around half think the same about their country (48%).



are personally prepared for the digital age



say their country is prepared for the digital age

**THERE IS A CLEAR DIFFERENCE** in personal preparedness between the Global South and Global North, with 73% of citizens in the Global South feeling prepared, compared to only 48% in the Global North.

On a regional basis, feelings of preparedness are higher in Africa (84%) and MENA (75%) and lowest in Europe (49%). The Americas (63% in South America and 59% in North America) and Asia (60%) are in line

with the global average.

**YOUNGER GLOBAL CITIZENS** are notably more likely to feel personally prepared for the digital age – 72% of under 35s do so compared to only 50% of over 55s.

### THE DAY-TO-DAY ROLE OF DIGITAL SERVICES

**ALL THE DIGITAL SERVICES WE ASKED ABOUT** are an important part of daily life for a majority of respondents. High speed internet (86%), financial services (84%) and e-commerce (81%) are the most likely to be regarded as important.

**ALTHOUGH GENERATIVE AI TOOLS SUCH AS CHATGPT** have only been available to the public for a couple of years, already half (53%) of global citizens feel these services are an important part of their daily lives. This rises to two-thirds (67%) of citizens in the Global South, who are twice as likely as citizens in the Global North (33%) to say these tools are important.

**THIS IS PART OF A GENERAL PATTERN** where citizens in the Global South are more likely to say that specific digital services are important in their daily lives. As well as generative AI, there are substantial gaps in perceptions of importance for online learning/skills (84% in the Global South vs 50% in the Global North), health/wellness tools (81% vs 52%), government services (83% vs 57%) and platforms for social interactions (80% vs 53%).

**YOUNGER CITIZENS** are generally more likely to say that all the services asked about are an important part of their daily lives. For instance, 78% of under 35s say that platforms for social interactions are important to them, versus 57% of over 55s. The exceptions are financial services and government services, which are just as likely to be important to older citizens as younger citizens.



Q. How important are the following digital services in your daily life?

	GLOBAL	GLOBAL NORTH	GLOBAL SOUTH
ACCESS TO HIGH-SPEED INTERNET	86%	78%	90%
FINANCIAL SERVICES (E.G., ONLINE BANKING, INVESTING)	84%	77%	89%
E-COMMERCE AND ONLINE PAYMENTS	81%	72%	87%
DIGITAL TOOLS FOR E-GOVERNMENT SERVICES	72%	57%	83%
ONLINE LEARNING OR SKILL DEVELOPMENT COURSES	70%	50%	84%
DIGITAL PLATFORMS FOR SOCIAL INTERACTION	69%	53%	80%
DIGITAL TOOLS OR APPS TO MANAGE YOUR HEALTH OR WELLNESS	69%	52%	81%
GENERATIVE AI TOOLS (E.G., CHATGPT, MIDJOURNEY)	53%	33%	67%

## FII Priority compass

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### BENEFITS OF TECHNOLOGY

→ **CONVENIENCE IN EVERYDAY TASKS** is the key benefit of technological progress for global citizens, chosen by 52%. Convenience is particularly appreciated in the Global North, where 59% say this is the area which has been the most beneficial to their lives, compared to 46% of citizens in the Global South.

**ACCESS TO NEWS/KNOWLEDGE** is the second most popular benefit of technology, chosen by just under half of the citizens surveyed (46%). This is particularly valued in Africa (55%) compared to Asia (39%) and MENA (40%).

**IN THIRD PLACE IS IMPROVED COMMUNICATIONS** with others (34%), which is more likely to be cited by citizens in the Global South (37%, rising to 45% in Africa) than in the Global North (29%).

**THE OTHER TECHNOLOGICAL BENEFIT** which is clearly more popular in the Global South is access to job/business opportunities, selected by 33% (rising to 40% in Africa) compared to 18% in the Global North.

Q. In which of the following areas of your life has technological progress been most beneficial?

	GLOBAL	GLOBAL NORTH	GLOBAL SOUTH	AFRICA	NORTH AMERICA	SOUTH AMERICA	ASIA	EUROPE	MENA
INCREASED CONVENIENCE IN EVERYDAY TASKS (E.G., ONLINE SHOPPING, BANKING, TRANSPORTATIONS)	52%	59%	46%	49%	56%	51%	51%	59%	35%
IMPROVED YOUR ACCESS TO NEWS AND KNOWLEDGE	46%	46%	46%	55%	44%	53%	39%	49%	40%
IMPROVED YOUR COMMUNICATION AND INTERACTION WITH OTHERS	34%	29%	37%	45%	34%	34%	29%	30%	35%
IMPROVED YOUR RELATIONS WITH PUBLIC SERVICES (E.G., REQUESTS FOR DOCUMENTS, APPOINTMENTS)	28%	28%	27%	22%	27%	32%	28%	29%	29%
IMPROVED YOUR FAMILY LIFE (E.G., COMMUNICATIONS WITH MY FAMILY)	27%	23%	30%	31%	28%	25%	25%	23%	35%
IMPROVED YOUR ACCESS TO JOB AND BUSINESS OPPORTUNITIES	27%	18%	33%	40%	28%	27%	24%	18%	33%
IMPROVED YOUR ACCESS TO HEALTHCARE (E.G., BETTER-ADAPTED SERVICES, LOWER COSTS)	20%	19%	21%	18%	16%	15%	26%	18%	22%
IMPROVED YOUR ACCESS TO LEISURE ACTIVITIES	16%	15%	17%	11%	18%	20%	19%	14%	19%
INCREASED YOUR PERSONAL SAFETY	12%	11%	13%	10%	13%	8%	17%	9%	16%
HELPED YOU ADOPT ECO-FRIENDLY ACTIONS	11%	10%	12%	9%	13%	10%	14%	9%	14%

## SATISFACTION WITH DIGITAL SERVICES

**→ WE SEE A MIXED PICTURE ON SATISFACTION** with different elements of digital services. Satisfaction with digital infrastructure is relatively high on 65%, more than double levels of dissatisfaction (30%). As with all the different dimensions asked about, satisfaction is higher in the Global South than in the Global North (69% vs 61%).

**HOWEVER, MORE THAN TWO-FIFTHS OF GLOBAL CITIZENS** are dissatisfied with data privacy and protection, cybersecurity measures, censorship standards and the prevention of AI-related risks and vulnerabilities (43% in all cases). Around half are satisfied with each.

Q. How satisfied are you with the following elements of technological progress and security in your country?

	GLOBAL		GLOBAL NORTH		GLOBAL SOUTH	
	Satisfied	Not satisfied	Satisfied	Not satisfied	Satisfied	Not satisfied
DIGITAL INFRASTRUCTURE (E.G., BROADBAND INTERNET, DIGITAL SERVICES, ETC.)	65%	30%	61%	31%	69%	29%
DATA PRIVACY AND PROTECTION	52%	43%	42%	50%	60%	37%
CYBERSECURITY MEASURES	49%	43%	38%	50%	58%	37%
CENSORSHIP STANDARDS / RESTRICTED ACCESS TO CERTAIN SENSITIVE OR HARMFUL CONTENT	49%	43%	37%	49%	58%	38%
REGULATIONS AND RESTRICTIONS ON AI TOOLS	45%	40%	29%	48%	57%	32%
PREVENTION OF AI-RELATED RISKS AND VULNERABILITIES	44%	43%	27%	52%	55%	37%
LEVEL OF MISINFORMATION ON THE INTERNET AND SOCIAL NETWORKS	37%	56%	25%	64%	45%	51%

## MISINFORMATION

**→ MORE THAN HALF (56%) OF GLOBAL CITIZENS** are dissatisfied with the level of misinformation on the internet and social networks and only 37% are satisfied. This is the only element we asked about where dissatisfaction outstrips satisfaction. Dissatisfaction is particularly high in the Global North (64%) compared to the Global South (51%).

**GLOBAL CITIZENS BELIEVE THAT RESPONSIBILITY** for tackling online disinformation lies with both social media platforms and public authorities. Three-quarters believe that online disinformation needs to be addressed by social media platforms (77%) and public authorities (76%) through regulation. Citizens in the Global South are more likely to believe this (80% in both cases), but not markedly more than citizens in the Global North (where the figures are 73% and 72% respectively).

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### SECURITY OF PERSONAL DATA

→ **CONCERNS ABOUT THE SECURITY OF PERSONAL DATA** are less stark but are present: 52% are satisfied with the current situation in this area, while 43% are still dissatisfied. The figures are similar for cybersecurity measures (49% satisfied and 43% dissatisfied).

**CITIZENS IN THE GLOBAL NORTH** are more likely to be dissatisfied with both data security (50%) and cybersecurity measures (also 50%) than in the Global North (37% in both cases). There is also an age dimension, as under 35s are more likely to be satisfied with data security (60%) and cybersecurity measures (57%) than over 55s (43% and 38% respectively).

**TRUST IN TECHNOLOGY COMPANIES** to handle personal data responsibly is not particularly high – half (49%) of global citizens trust them compared to 22% who do not. Trust is higher in the Global South than in the Global North (56% vs 39%).

**ONE LIKELY FACTOR AT PLAY HERE** is that a significant proportion of respondents – 35% overall – have been the victim of a digital crime such as a financial scam. This is particularly likely to be the case in the Global South (44%) compared to the Global North (23%), with levels highest of all in Africa (53%).

**HOWEVER, THIS IS NOT NECESSARILY** a straightforward relationship because satisfaction with data security and cybersecurity measures, as well as trust in technology companies handling personal data responsibly, is higher in the regions most likely to be victims of digital crimes, the Global South and Africa.

### CONCERNS ABOUT AI

→ **GLOBAL CITIZENS ARE AS LIKELY TO BE SATISFIED [44%] AS DISSATISFIED [43%]** with the prevention of AI-related risks and vulnerabilities. Satisfaction is twice as high in the Global South than the Global North (55% vs 27%).

**WE ASKED ABOUT THE IMPACT OF AI ON SOCIETY** and found that attitudes are currently neutral. Global citizens are more likely to agree than disagree that 'technologies like ChatGPT and AI are a threat to society' (37% vs 24%), but 39% neither agree nor disagree.

**THERE IS LITTLE DIFFERENCE BETWEEN** the Global South (36%) and the Global North (38%) on this. However, agreement levels are higher than average in India (55%), Egypt (48%), Saudi Arabia (also 48%), the United States (47%), France (46%) and the United Kingdom (45%). Overall, a high proportion (33%) are neutral on this issue, suggesting that the jury is still out.

#### 'TECHNOLOGIES LIKE CHATGPT AND AI ARE A THREAT TO SOCIETY'

 **37%**  
AGREE

 **24%**  
DISAGREE

## IMPACT OF TECHNOLOGY ON JOBS

→ **THERE IS ALSO OPTIMISM** about the impact of digital technologies on employment. Almost half (48%) agree that 'digital technologies create more jobs than they destroy' and only 16% disagree.

**AGREEMENT IS PARTICULARLY HIGH** in the Global South (59%, rising to 66% in Africa) compared to the Global North (32%). In the Global North, one in five disagree (21% vs 13% in the Global South). Disagreement is highest in Europe (23%) and lowest in Africa (11%), North America and South America sit in between, with 17% disagreeing in both regions.

### 'DIGITAL TECHNOLOGIES CREATE MORE JOBS THAN THEY DESTROY'

 **48%**  
AGREE

 **16%**  
DISAGREE



## BARRIERS TO DIGITAL TECHNOLOGIES

→ **AS WE HAVE SEEN, ONLY 48%** believe their country is ready for the digital era. As with personal preparedness, there is a clear gap between the Global South (57%) and the Global North (35%). Agreement is lowest in Europe (32%) and South America (33%). Levels of agreement are high in MENA (67%) and to lesser extent in Africa (59%) and Asia (55%).

**LIMITED DIGITAL LITERACY (47%) AND DIGITAL COSTS (45%)** are regarded by global citizens as the main barriers that prevent people in their country from adopting digital technologies. Cost is particularly important in the Global South (49% compared to 39% to the Global North) as is poor internet coverage/speed (46% vs 32% in the Global North).

Q. In your opinion, what are the main barriers that prevent certain individuals or groups (in terms of age, gender, social category, religious or ethnic minorities, etc.) in your country from adopting digital technologies?

	GLOBAL	GLOBAL NORTH	GLOBAL SOUTH	AFRICA	NORTH AMERICA	SOUTH AMERICA	ASIA	EUROPE	MENA
LIMITED DIGITAL LITERACY	47%	47%	46%	55%	43%	51%	36%	51%	44%
DIGITAL PRODUCTS OR INTERNET ACCESS COSTS	45%	39%	49%	56%	50%	60%	38%	41%	40%
POOR INTERNET COVERAGE OR POOR INTERNET SPEED	40%	32%	46%	56%	44%	43%	34%	35%	39%
PRIVACY OR SECURITY CONCERNS	37%	39%	35%	28%	36%	30%	49%	35%	35%
LACK OF INTEREST	31%	33%	29%	30%	35%	31%	27%	35%	29%
LANGUAGE BARRIERS	26%	25%	26%	25%	21%	17%	26%	25%	36%
DISCRIMINATION OR BIAS IN TECHNOLOGY/ SOFTWARE DESIGN	20%	19%	20%	17%	22%	18%	24%	18%	17%
LACK OF RELEVANT CONTENT	18%	16%	20%	18%	18%	17%	22%	14%	20%

# FUTURE ASPIRATIONS

→ **IN THE FINAL CHAPTER OF THIS REPORT**, we focus on the future. First of all, we consider the views of global citizens on what will impact on health and well-being in the future and then go onto explore levels of optimism about different elements of the future, such as living conditions and climate change.

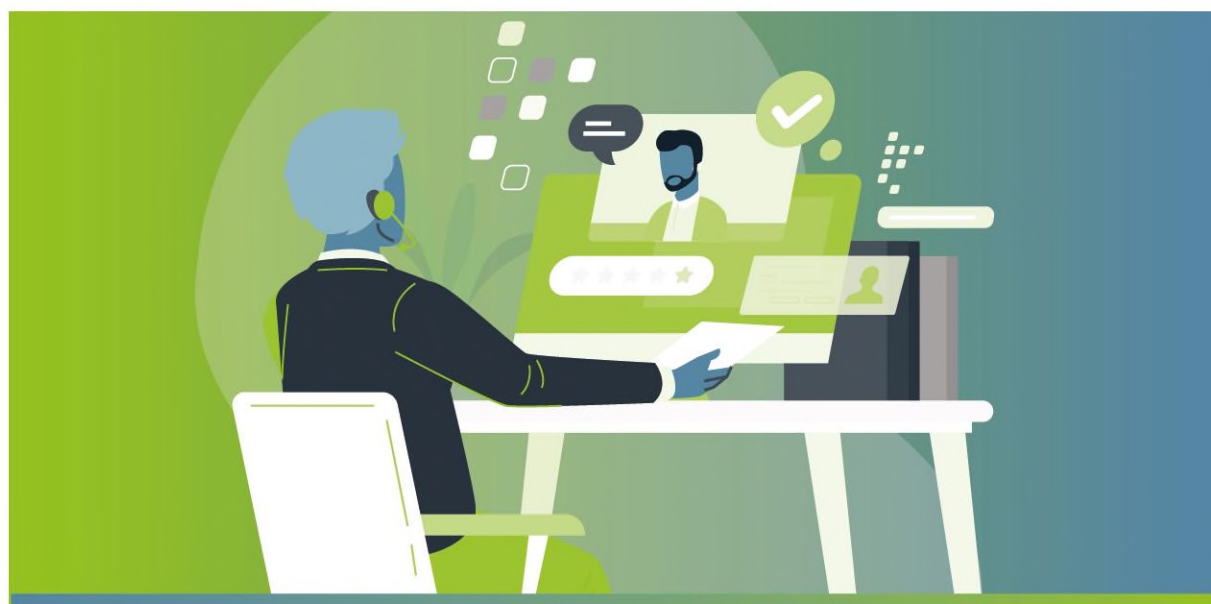
**WE END THE CHAPTER BY REFLECTING UPON THE KEY LESSONS** from our research and, crucially, what must happen next. Our six Calls to Action set out how humanity should tackle its common challenges.

## KEY FACTORS IN A HEALTHY FUTURE

→ **FINANCIAL SITUATION** is the top answer when we asked global citizens what they think will be the most significant factors impacting health and well-being in the future. This is more likely to be mentioned by citizens in the Global South than the Global North (51% vs 44%) and is particularly likely to be cited by citizens in Africa (60%). By contrast, financial situation comes up less often Europe (43%) and Asia (45%).

**WORK STRESS (36%)**, environmental factors (34%) and physical activity levels (also 34%) are the next most popular answers, each mentioned by around a third. Work stress is most likely to be regarded as the most significant factor in future health by citizens in South America (44%). This is particularly true in Mexico (47%) and Argentina (46%). In Africa (28%), citizens are less likely to cite work stress.

**DIET IS THE FACTOR** where we see the greatest variation in responses across different countries. Almost half of citizens in Morocco (47%) and the United Kingdom (45%) say this is the most significant factor impacting future health. In contrast, less than one in ten of citizens in China (9%) and Germany (8%) believe this to be the case.



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Q. Which do you think will be the most significant factors impacting health and well-being in the future ?

	GLOBAL	GLOBAL NORTH	GLOBAL SOUTH	AFRICA	NORTH AMERICA	SOUTH AMERICA	ASIA	EUROPE	MENA
FINANCIAL SITUATION	48%	44%	51%	60%	49%	53%	45%	43%	48%
WORK STRESS	36%	35%	36%	28%	37%	44%	34%	37%	39%
ENVIRONMENTAL FACTORS	34%	32%	36%	39%	31%	31%	39%	33%	29%
PHYSICAL ACTIVITY LEVEL	34%	39%	30%	29%	40%	34%	33%	38%	27%
DEVELOPMENTS IN HEALTHCARE SERVICES AND INNOVATION	31%	28%	34%	47%	33%	28%	30%	29%	20%
DIET	30%	30%	29%	35%	31%	20%	25%	28%	40%
THE IMPORTANCE OF SCREENS (TELEVISION, COMPUTER, SMARTPHONE, ETC) IN EVERYDAY LIFE	20%	18%	21%	19%	19%	24%	20%	19%	20%
PERSONAL RELATIONSHIPS	19%	20%	18%	15%	16%	21%	22%	19%	18%
GENETIC FACTORS	16%	17%	16%	13%	17%	13%	17%	17%	19%

## OPTIMISM ABOUT THE ROAD AHEAD

**WE ASKED GLOBAL CITIZENS WHETHER THEY FEEL** optimistic or pessimistic about five different dimensions relating to the future. Across all five, respondents are more likely to be optimistic than pessimistic.

**GLOBAL CITIZENS ARE MOST OPTIMISTIC** about the prospects of improving living conditions through innovation and technology, with half (49%) feeling positive about this, more than twice the level of pessimism (21%). A similar proportion have faith in the prospects of tackling epidemics and improving public health (45%).



### OPTIMISM IS LOWER ON ADDRESSING CLIMATE CHANGE

(40%) and the future of the global economy (39%). Global citizens feel least optimistic about the ability of political leaders to address geopolitical challenges and maintain global stability (37%). The gap between optimism and pessimism is narrower on these measures. For instance, 31% are pessimistic about addressing climate change compared to 40% who are optimistic. Optimism (37%) only just surpasses pessimism (34%) when it comes to the ability of political leaders to address geopolitical challenges. The proportion who are neither optimistic nor pessimistic is consistent across all measures, at around one in three.

**CITIZENS IN THE GLOBAL SOUTH** are considerably more optimistic than citizens in the Global North about all five dimensions. On addressing climate change (52% vs 23% in the Global North), the future of the global

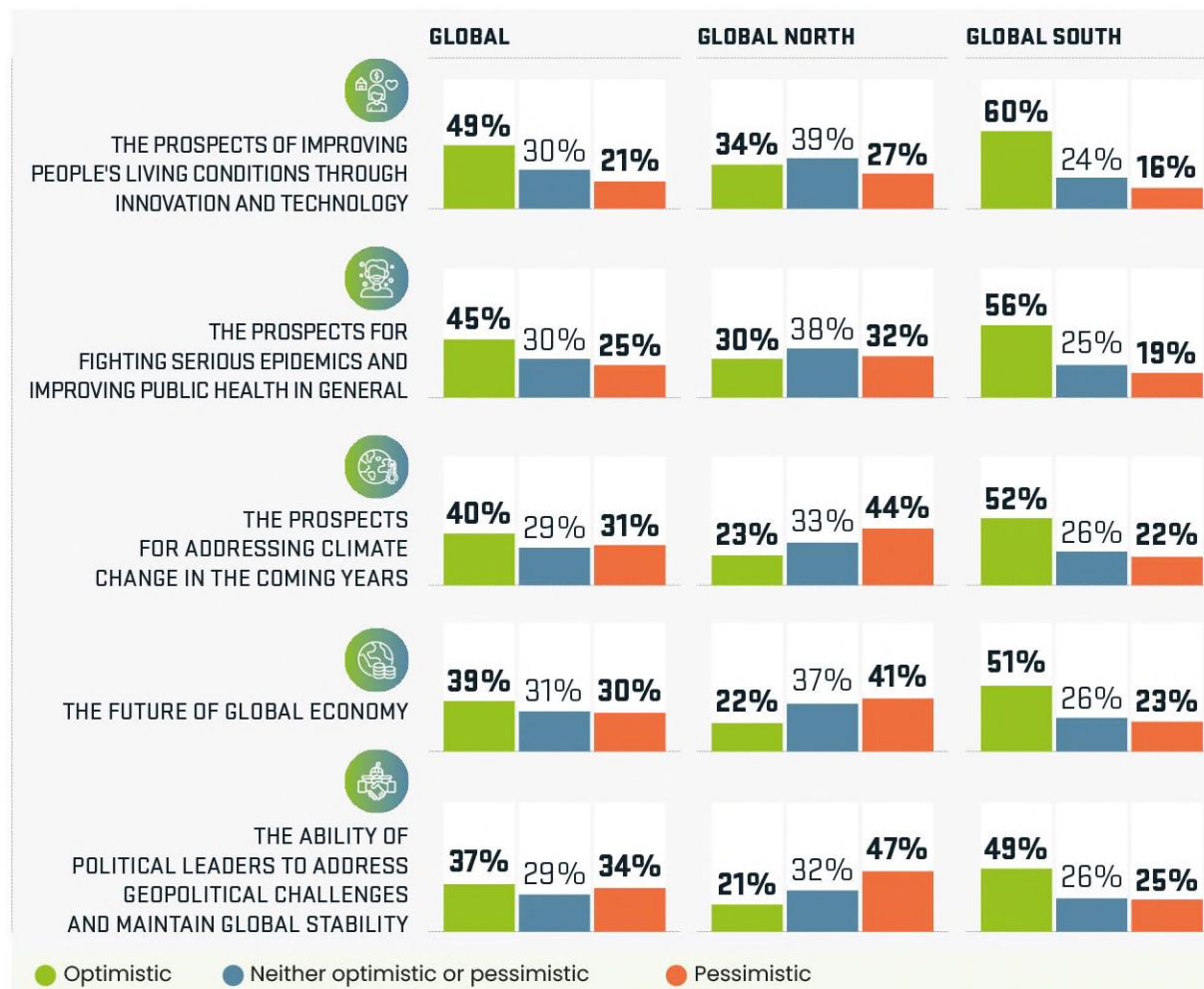
economy (51% vs 22%) and the ability of political leaders to address geopolitical challenges (49% vs 21%), citizens in the Global South are more than twice as likely to be optimistic. The only element where a majority in the Global South are not optimistic is the ability of political leaders, which is just under half (49%).

**ANOTHER CLEAR GEOGRAPHICAL TREND**, which is related to the clear differences in outlook between the Global North and Global South, is that optimism is inversely linked to income levels. Optimism is highest in low-income countries and lowest in high-income countries, with medium-income countries sitting between the two. For example, 62% in low-income countries are optimistic about the future of the global economy, compared to 49% in medium-income countries and only 26% in high-income countries.

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Q. Overall, are you optimistic or pessimistic about the future of global economy?



### WHEN WE LOOK AT INDIVIDUAL COUNTRIES, NIGERIA AND KENYA STAND OUT AS BEING PARTICULARLY OPTIMISTIC.

- More than seven in ten Nigerians are optimistic about improved living standards (75%), fighting epidemics/improving public health (also 75%) and the future of the global economy (71%). In Kenya, the figures are 70%, 70% and 68% respectively.
- Citizens in China and Saudi Arabia are also more likely to be particularly optimistic, most notably on improving living conditions (73% and 74%) and fighting epidemics/improving public health (also 73% and 74%).
- Citizens in China and Saudi Arabia are the most optimistic of all on political leaders (both 68%), closely followed by India on 67%. Nigeria is fourth on 63%.
- India is one of the highest scoring countries on the future of the global economy (64%) and second highest on climate change (69%).

**THE MOST PESSIMIST COUNTRIES ARE FRANCE, TURKIYE, JAPAN AND ITALY.**

- Citizens in France are the most likely of all to be pessimistic about political leaders (59%), the global economy (55%) and improving living conditions (39%).
- Turkiye ties with France on the global economy on 55% and also scores highest of all on fighting epidemics/improving public health (46%). It is second to France on improving living conditions (37%) and political leaders (53%).
- Japan (56%) leads on pessimism on climate change, followed by France (51%) and Turkiye (49%). Germany and Italy are other pessimistic European countries (45%) on this dimension. In Asia, Turkiye and South Korea score highly on pessimism on 49% and 47%.
- Citizens in Japan and Italy are also among the most pessimistic on the future of the global economy (both 45%), fighting epidemics/improving public health (30% and 36%, which is lower than France on 41%), political leaders (both 51%) and improving living standards (31% and 22%).

→ There are certain groups which are consistently more likely to be more in all the areas we asked about:

- ▶ Younger global citizens. Optimism decreases with age. For instance, 57% of under 35s are optimistic about the prospects of improving people's living conditions through innovation and technology, compared to only 38% of over 55s. For 35–54-year-olds, the figure is 48%.
- ▶ Those who are working compared to global citizens who are not working. This is likely linked to age, although the not working group includes those in education. For instance, 44% of respondents who are working are optimistic about the global economy, compared to 33% who are not working.
- ▶ Among global citizens who are working, white-collar workers are more optimistic

than blue-collar workers, with managers and professionals the most optimistic of all. For instance, 50% of white-collar workers (rising to 56% of managers and professionals) are optimistic about fighting epidemics and improving public health, versus 43% of blue-collar workers.

- ▶ Men tend to be more optimistic than women, although the difference is not particularly large. For instance, 38% of men are optimistic about the ability of political leaders to address geopolitical challenges, compared to 35% of women.
- ▶ The global citizens who are most likely to be optimistic on all the dimensions asked about – and by a considerable margin – are people who believe that social cohesion in their country or local area is very strong. For example, around three-quarters who believe that social cohesion in their country (78%) or local area (74%) is very strong are optimistic that living conditions will be improved.

# CALL TO ACTION

The world today faces a daunting array of challenges and crises.

→ Instability and uncertainty in the global economy are straining financial systems and exacerbating inequalities. Inflation continues to cast a long shadow over people's lives.

Climate change is already having a material impact and as global warming increases, extreme events such as heatwaves, droughts, fires, floods, and storms will become more frequent and severe. There is a sense of pessimism about our ability to tackle climate change in the Global North in particular.

Related to this pessimism are high levels of dissatisfaction with governance, in particular in relation to corruption, polarization and a lack of transparency. There is widespread dissatisfaction among global citizens with the current state of affairs both nationally and globally.

Access to and affordability of healthcare is inadequate and the people whose health is most likely to be impacted by financial scarcity and environmental degradation face the greatest health inequalities.

→ **MANY - NOTABLY OLDER PEOPLE AND THOSE IN THE GLOBAL NORTH** – do not feel personally prepared for the digital age and even more feel their country is not ready. There is a great deal of disquiet about misinformation in particular, but also data privacy and security and AI-related risks.

But we also have reasons to be feel positive about the future. There is a great deal of energy and enthusiasm to harness in the Global South in particular, where optimism levels are high.

Technology has already brought enormous benefits to people's lives and many global citizens are optimistic that technology and innovation can improve people's living conditions. Technology has the potential to improve life across a wide range of domains.

For instance, in healthcare AI is already driving advancements in early detection, predictive analytics, and tailored therapies.

Another reason to feel hopeful about the future is that most citizens derive a sense of satisfaction from their own lives. Social ties are resilient and significant sources of strength on both an individual and societal basis. Social cohesion and community participation can work powerfully together, as well as acting as an effective antidote to polarization.

We must come together both individually and collectively to tackle the challenges we face and find innovative solutions to make things better for humanity.

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### THESE ARE OUR SIX CALLS TO ACTION FOR KEY STAKEHOLDERS

such as governments, corporations and non-profit organizations.



Economic growth, adequate social protections and development of skills all have an important part to play in increasing people's sense of financial security.



Improve transparency and accountability and ensure robust mechanisms are in place to counter corruption.



Utilize innovative partnerships, funding and technology to improve the accessibility and affordability of healthcare.



Harness the willingness of global citizens and companies to take tangible steps to improve the environment through providing clear opportunities and incentives to make changes.



Increase opportunities to participate in community and voluntary activities which are grounded in people's culture and local areas.



Improve the accessibility and security of digital services so the benefits of technology are available to everyone, while ensuring adequate protections are in place to curtail misinformation and cybercrimes.

Each of these calls to action should be seen as an imperative, as well as an opportunity. Human effort and ingenuity, together with new technologies, such as quantum computing, have an important role to play in creating a better future for us all. It is time for innovative and collaborative action.



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