

Executive Summary

5th January 2004

Results are released from a new Gallup International **Voice of the People** Survey exclusively for the **World Economic Forum**, in advance of their Annual Meeting in Davos, Switzerland. Based on almost 43,000 interviews from 51 countries, the survey included interviews with a reliable national sample of 2000 from Afghanistan and represents the views of more than 1.1 billion global citizens. Interviewing was conducted in late November and December 2003 - mostly prior to the capture of Saddam Hussein and before Colonel Gadafy's decision to give up WMD was announced. The questions concern different aspects of prosperity and security.

Summary of Main Findings and Conclusions

- * Results from surveys consistently show that individuals feel they have little or no personal effect on the economic, political and social factors which affect daily life, expecting national and international actors to deliver the background stability required to look after and provide for their families.
- * Uncertainty, lack of confidence and instability in one of these areas has an effect on all the other factors. For example, if people feel international and their national security is poor, they will also probably feel gloomy about their economic circumstances too, even if these are not objectively or directly linked.
- * Recent poor economic performance in some regions, such as South America or the emergent economies of Eastern and Central Europe, and more specifically in certain countries such as Japan, has a disproportionately negative effect on most ratings whether they are allied to economic factors or not.
- * The converse is also true, so countries where positive changes are perceived to have taken place recently on one front may have a beneficial effect on assessments of other variables. Consequently Afghanistan is optimistic about most of the survey topics –those concerning both aspects of security but also economic assessments – a finding also borne out in Kosovo and Bosnia Herzegovina. Similarly, Kenya which last year changed both president and government after 24 years and Georgia where Shevadnaze has recently been replaced after a disappointing presidency, both have a generally positive outlook concerning most elements of economic performance but also security.
- * Elsewhere, gloom shrouds many countries on all continents. Twice as many people globally rate international security as “poor” (41%) than the proportion who consider this “good” (20%).
- * National security is also rated “poor” on all continents and few countries expect this situation to improve in the foreseeable future.
- * Half of those interviewed (48%) across the world think the next generation will live in a less safe world. In Western Europe this figure rises to almost two-thirds (64%). But in Afghanistan, India and Pakistan – 3 countries with turbulent backgrounds, people are more optimistic about the next generation and here, half those questioned feel the world will be a safer place for them.

- * People feel that their country's economic position is worse now than it was 10 years ago, although some think they personally have fared slightly better. Many countries, particularly those in the industrialised world have ageing populations and there are genuine anxieties on all continents about people's security in old age and retirement, particularly in South America, Japan and South Korea.
- * In questions about the key factors of prosperity and security in the United States, people are more upbeat in their ratings for both the current situation and the future than is the "average" global citizen. Almost half of those interviewed in the States (45%) say they and their family are more prosperous now than they were ten years ago. Turning to security issues, four out of ten Americans (40%) rated their national security as "good" though the same rating was only given to international security by one in four (24%).
- * In Germany, re-unification seems to have led to a lack of confidence in the economy with gloomy ratings of current economic status, considered less prosperous than ten years ago by three quarters (77%) and a lack of confidence about any positive improvement in the future – almost seven out of ten (69%) think the next generation will be less prosperous. In Switzerland, once seen as an economic haven, two thirds (65%) think they are less prosperous now than they were ten years ago and only slightly fewer (61%) think it will be even worse for the next generation.
- * Elsewhere in Europe, many countries are also pessimistic about the economic conditions but generally those in non-Euro countries such as Denmark, Norway, Great Britain and Iceland are more positive in their assessments of the current situation and in their predictions for the future.
- * Other regions have more positive moods – Africa is generally more upbeat than average although security in old age and retirement in a continent ravaged by Aids is a difficult concept for many.
- * Although Japan may be depressed about both economic and security factors, other countries in the region are less so – Australia, New Zealand, Malaysia, Indonesia and Vietnam all give higher than average ratings to some of the factors examined in the survey.
- * Many in all countries rate environmental security as poor and this is particularly true in Ukraine, the site of the Chernobyl accident, where seven out of ten (72%) rate environmental security as poor. This finding is echoed by more than six out of ten of their Russian neighbours (61%). In both these countries more than half also expect that the situation will be worse in 10 years time.

Outline of the questionnaire

Now compared to 10 years ago:

- Q1 Is this country safer or less safe than 10 years ago?
Q2 Is this country more or less economically prosperous than 10 years ago?
Q3 Are you and your family more or less economically prosperous than 10 years ago?

The future:

- Q4 Will the next generation live in a safer or less safe world?
Q5 Will the next generation be more or less economically prosperous?

Now:

Q6 Good/poor assessment of specific factors

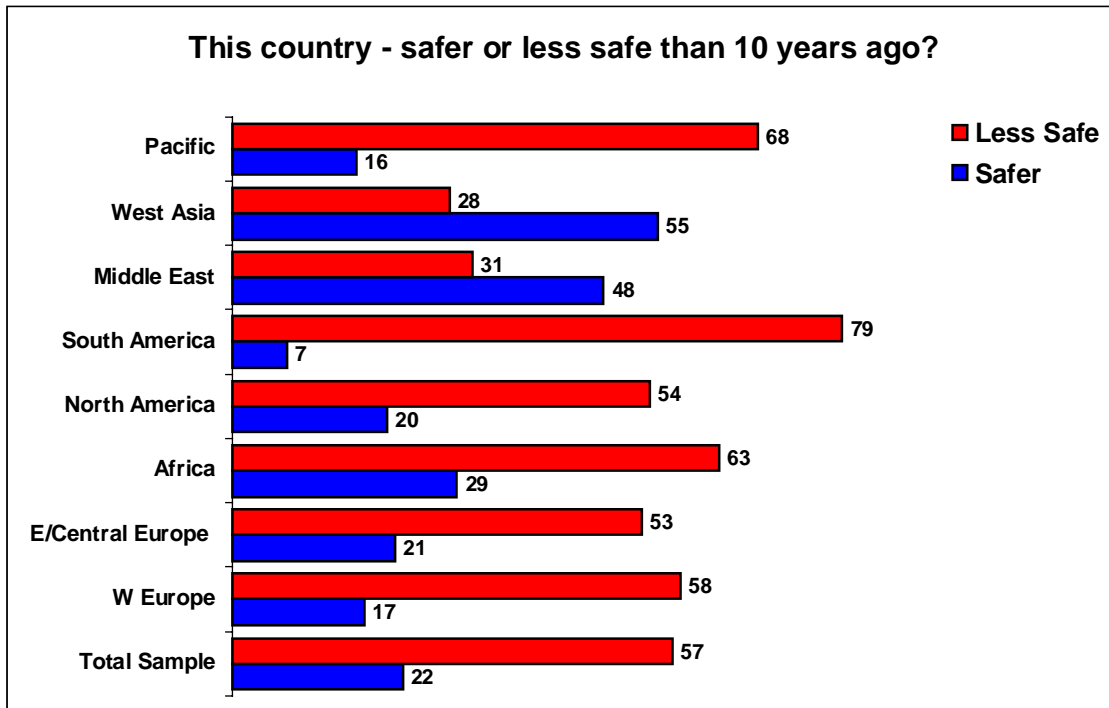
- International security
- Environmental security
- National security
- Peoples current economic position in the country
- Security in old age and retirement

The future:

Q7 And how will it be in 10 years time? Good/poor assessment of specific factors:

- International security
- Environmental security
- National security
- Peoples current economic position in the country
- Security in old age and retirement

Q1 Generally speaking, do you think that in comparison with 10 years ago, this country is safer or less safe than it was 10 years ago or is it the same?



The concept of **safety** includes many different elements – international security, reliable economic conditions and political stability together with a reasonable expectation about an individual's quality of life for himself and his family. An individual feels he can do little to affect these external factors, which are under the control and responsibility of the international community - politicians, NGOs and multi-national corporations, for example. In an increasingly globalised world, people in many countries may feel the effects of events in a distant part of the world, as we have seen in recent years.

The shadow of terrorism and poor economic performance has produced anxiety across the whole world. The results from across all continents show that, overall, only one in 5 people interviewed (22%) think their country is a safer place now than it was 10 years ago, whilst more than twice this proportion (57%) think it is less safe. The results from Afghanistan (88% think their country is safer now) and from Kosovo (81% safer) and Bosnia Herzegovina (35% safer) in former Yugoslavia suggest that people feel safer after international forces intervene – an argument that indirectly supports the Coalition Forces case for intervention in Iraq.

W Europe: More than half the continent (58%) says their country is less safe now than 10 years ago and only 17% safer. But perceptions do not always follow reality. For example, the Dutch (85%) and Portuguese (77%) feel their countries are particularly less safe now than they were 10 years ago although it is hard to justify such negativity. The British – allied closely with the United States and so now identified as a target for international terror - feel less safe (65%) than do the French (55%) and the Germans (52%) who disagreed with the Coalition Forces concerning the war in Iraq.

E/Central Europe: The region shows a different picture, depending on the specific country. Overall in the region a majority (53%) feel their country is less safe than 10 years ago. But 8 out of 10 people in Kosovo (81%), now administered by the United Nations, feel that their

country is safer, as do a third (35%) of those in Bosnia Herzegovina. Even 41% of Serbians feel safer than 10 years ago. But another former part of Yugoslavia, Macedonia doesn't feel very safe with 67% saying it is less safe now than 10 years ago. A majority of Georgians (55%) also feel safer – but this is merely a reflection of the country's generally upbeat mood at having just replaced Shevardnadze who was President 10 years ago.

Africa: Overall in the region, almost two thirds (63%) feel their country is less safe now than 10 years ago and under a third (29%) feel it is safer. But looking at individual countries yields a different picture. In South Africa, an overwhelming majority (75%) say their country is less safe now than it was 10 years ago. This view is echoed by 69% of Nigerians interviewed. But in Cameroon, the proportion is 45% feeling less safe compared with 37% who feel safer. 44% in Kenya feel less safe but 41% feel safer which is interesting given that this country has also experienced recent terrorist attacks. In Uganda three quarters (73%) feel the country is safer than 10 years ago and only 15% feel it is less safe.

North Americans: Geographically, this region includes three countries – the United States, Canada and Mexico. Given the horrific attacks on the Twin Towers, it is not surprising that over half of all Americans (53%) feel their country is now less safe than 10 years ago – but it is noteworthy that this finding is endorsed overwhelmingly by almost three quarters of all Mexicans interviewed (71%) and by 42% of Canadians.

South America: A depressed region overall with eight in every ten (79%) saying their country is less safe than 10 years ago and only 7% saying it is safer. Argentina, the largest country in the region included in the survey, dominates the results. In both Argentina and its neighbour Uruguay, the picture is more extreme – in both these countries 84% think it is less safe. 10 years ago, Argentina and Uruguay were enjoying an economic boom in their dollar-tied economies. The bubble burst and economic life has been much tougher in Argentina and Uruguay in the last few years. There have also been terrorist attacks in Buenos Aires within the last 10 years. Only in Peru which was under corrupt Government of Fujimori 10 years ago, do a significant proportion (25%) say their country is safer now, although even here a majority (52%) feel it is less safe.

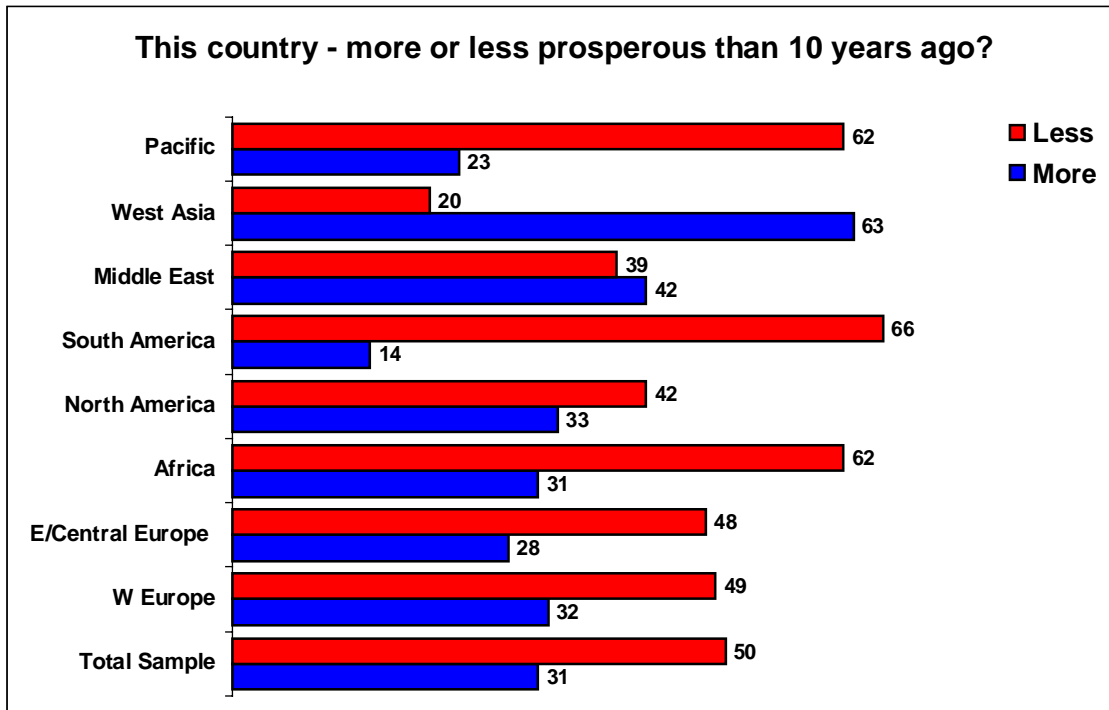
Middle East: Only Turkey and Israel are included in this region and results from the two countries often differ considerably, as on this question where 51% of Turks feel their country is safer now whilst this is true for only 15% of Israelis, whilst 62% of Israelis feel their country is less safe than it was 10 years ago.

West Asia: This region includes the 2 countries from the Indian sub-continent (India and Pakistan) but also includes the results of over 2100 interviews from Afghanistan. Almost 9 out of 10 (88%) of those interviewed in Afghanistan feel that their country is now safer than it was 10 years ago (when the Taliban were in power). In Pakistan too, more than half of those interviewed (54%) feel their country is safer now than it was 10 years ago but by contrast only a third in India (36%) feel safer and over half (51%) feel their country is less safe than it was 10 years ago.

Pacific: Overall in this region 68% feel their country is less safe than 10 years ago, whilst 16% feel safer but there is a different view in different countries. 10 years ago, Japan did not envisage the enduring nature of its economic depression, nor had they experienced the Sarin attack on the Metro, which may be why almost 9 out of 10 (86%) of the Japanese feel the country is now less safe than it was. Terrorist bombs have also been experienced in Indonesia and three quarters (73%) here feel their country is less safe than it was 10 years

ago. Australians (75%) and New Zealanders (70%) also think their countries are less safe but this view is not shared by Malaysians (54% think it is now safer) or Vietnamese (89%). Significant proportions in Hong Kong (23%) and the Philippines (27%) also feel their country is safer than 10 years ago.

Q2 And overall, do you think this country is more economically prosperous, less economically prosperous today than 10 years ago or is it the same?



The last 10 years have seen first a growth in the global economy, followed by economic recession, experienced to different degrees in different parts of the world. Overall, half (50%) think their country is less prosperous now than 10 years ago and only a third (31%) think it is more prosperous. We shall see later that some people think they may have fared somewhat better in terms of personal economic prosperity than has their country.

W Europe: Overall in the region, half of those interviewed (49%) think their country is less prosperous than before, whilst 32% think it is more prosperous than 10 years ago. A contentious finding is that Western European countries which have not changed currency to the Euro, with the exception of Switzerland are more positive – 59% of Danes, 59% of Icelanders, 50% of Norwegians and 44% of the British think their countries are more economically prosperous than they were 10 years ago.

In all other Western European countries, the balance is that more people feel their country is less economically prosperous than 10 years ago. This is particularly true in the previously model economy of Germany, where over three quarters of the sample (77%) think their country is now less prosperous than 10 years ago. This view is also expressed in Portugal and Switzerland (65%) and in Italy and Luxembourg where 55% feel their country is now less prosperous than 10 years ago.

E/Central Europe: A less clear-cut scene, where some economies are perceived to have fared better than others since the collapse of the planned economies and Soviet political system of the region. Overall in this region, 28% think their country is more prosperous, 48% less so. Those who feel their country's is less prosperous now than it was 10 years ago include 69% of Bosnians, 64% of Bulgarians, 62% of Macedonians and 59% of Ukrainians. But countries where a large proportion of the population holds the opposite view are the

Czech Republic (42% more prosperous), Georgia (41%), Kosovo (51%), Poland (63%) and Serbia (35%).

Africa: With the exceptions of Nigeria and Uganda, in all countries opinion is divided on this question. Overall in the region two-thirds (62%) feel their country is less economically prosperous than 10 years ago, but one third (31%) think the opposite. In Cameroon 46% think more prosperous and 40% think less so. In Kenya the figures are split equally with 42% each believing better and worse. The same is true in South Africa where 40% think the country is more prosperous than 10 years ago (just before the first full elections) and 41% think it is less prosperous. Only in two countries is opinion much clearer. Firstly in Uganda where 69% here agree their country is more prosperous than 10 years ago and only 20% feel it is less prosperous and secondly in Nigeria where the reverse is true with 70% thinking their country is less prosperous and only a quarter (25%) feel it is more prosperous than 10 years ago.

North America: The balance of opinion in the three countries from this region is slightly different and the region overall reflects this with 42% saying their country is worse off now than it was 10 years ago and 33% thinking it is now economically more prosperous than before. In the USA, 43% support the “less prosperous” position, compared with 48% in Mexico and only 27% in Canada. Turning to those who believe their country is now more economically prosperous than 10 years ago shows 30%, 41% and 46% respectively.

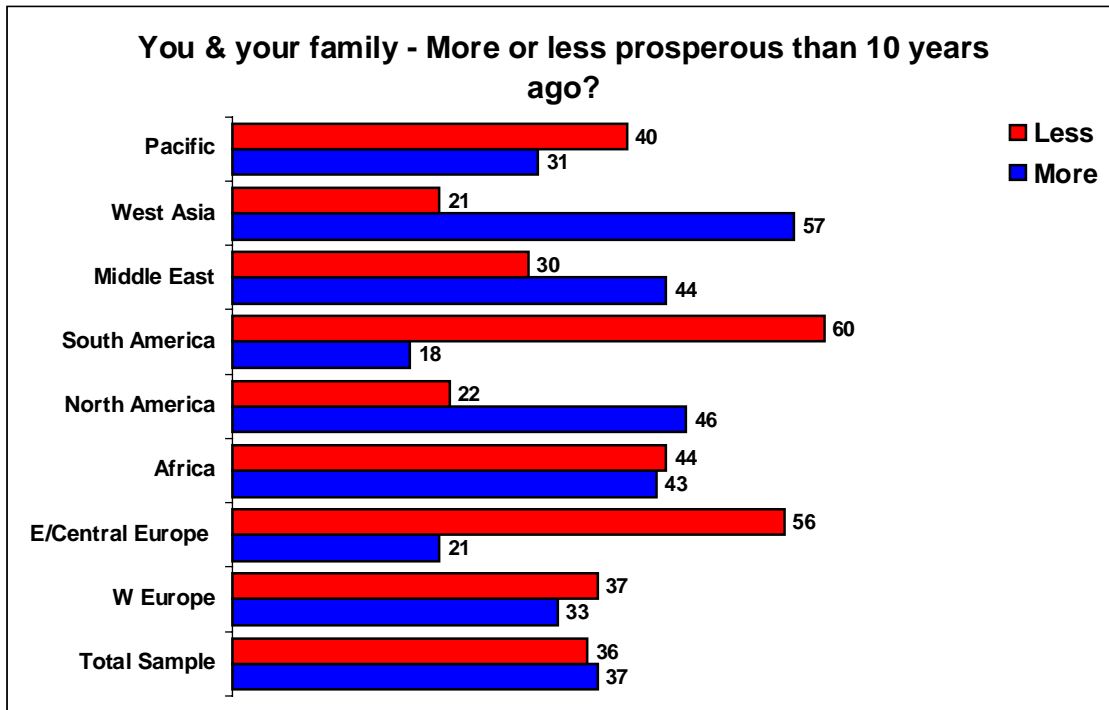
South America: People in all countries in the region are convinced that their country is less economically prosperous (66% overall) than 10 years ago. In Argentina, two thirds (66%) hold this view, in Ecuador the proportion climbs to three quarters (74%), in Peru over half (57%) and almost nine out of ten in Uruguay (89%) feel their country is less prosperous than 10 years ago.

Middle East: The two countries feel very differently. In Turkey, the picture is mixed with 45% thinking the country is more economically prosperous and 35% thinking it is less so. However, in Israel it seems there are no divisions in public opinion on this issue – eight out of 10 Israelis feel their country is worse off economically now than it was 10 years ago and less than one in ten (8%) feel the converse to be true.

West Asia: In objective terms this is a poor region, yet perceptions by majorities in all three countries are that the country is economically more prosperous than 10 years ago. Overall in the region, 63% say their country is more prosperous, and only 20% think it is less economically prosperous than 10 years ago. In Afghanistan, more than 8 out of 10 feel this is the case (82%). In Pakistan, the proportion is 6 out of 10 (62%) and in India it is 52%.

Pacific: A region of extremes, although overall a quarter (23%) think their country is more prosperous and just under two thirds (62%) think it is less so. Those who think their country is more prosperous include Australia (66%) and New Zealand (62%) but also in the newer economies of Malaysia (71%) and Vietnam where almost everyone (99%) believe the country is more prosperous than it was 10 years ago. In this last country, a mood of optimism prevails over everything as Vietnam has just hosted a very successful South East Asian Games and won the majority of gold medals. The opposite view prevails in the longer established economies of Japan (85%), which has experienced a lengthy economic depression in recent times, Hong Kong (79%) Korea (55%), and Taiwan (68%).

Q3 Thinking now about you and your family, do you think you are more economically prosperous, less economically prosperous than 10 years ago or about the same?



Global opinions are divided equally with just over a third (37%) of all those interviewed who think that they and their family are more economically prosperous than they were 10 years ago, and the same proportion (36%) who think that they and their family are less prosperous than 10 years ago. It is interesting that in Africa, West Asia, North America and Asia Pacific, people feel that they themselves and their families have fared marginally better economically than their ratings for their country by comparison.

W Europe: A mixed view again where taking the region as a whole, a third believe they and their family are more prosperous (33%) and a similar proportion (37%) think they are less economically prosperous than 10 years ago. However, those with a more positive view of their personal economic prosperity prevail in Norway (64%), Denmark (63%), Iceland (50%), Luxembourg (49%), Great Britain (46%) and the Netherlands (44%). Those who feel they and their families have fared less well than 10 years ago are found in larger proportions at the heart of the European Union in France and Germany where just under half (47%) believe this is the case as well as in Italy (47%), Greece (42%), Austria (38%) and somewhat surprisingly, in non-EU Switzerland (38%).

E/Central Europe: People's assessment of their personal economic prosperity now in comparison to 10 years ago is quite negative in many countries in East and Central Europe. Only in Kosovo (50%) and the Czech Republic (43%) does the proportion of those who think they and their family are better off than 10 years go exceed the proportion of those who think they are less prosperous (31% and 27% respectively). Most of the region thinks they are personally less well off than 10 years ago, notably 70% in Ukraine and in Bulgaria, 66% in Bosnia Herzegovina, 59% in Macedonia, and 53% in Poland. Even in Russia, one third (37%) think they are less prosperous personally than 10 years ago, whilst only a quarter (25%) believe they are better off.

Africa: In Uganda, overwhelmingly (69%) people think they are now more prosperous personally than they and their families were 10 years ago, as do 45% of Kenyans and 42% of Nigerians. However, half (50%) of Cameroonians and 41% of South Africans feel the opposite – that they and their family are less prosperous now than they were 10 years ago.

North Americans: On balance, Mexicans (57%), Canadians (41%) and Americans (45%) feel more prosperous now than they were 10 years ago, yet in each country more than a fifth think they and their families are less well off (25%, 27% and 21% respectively).

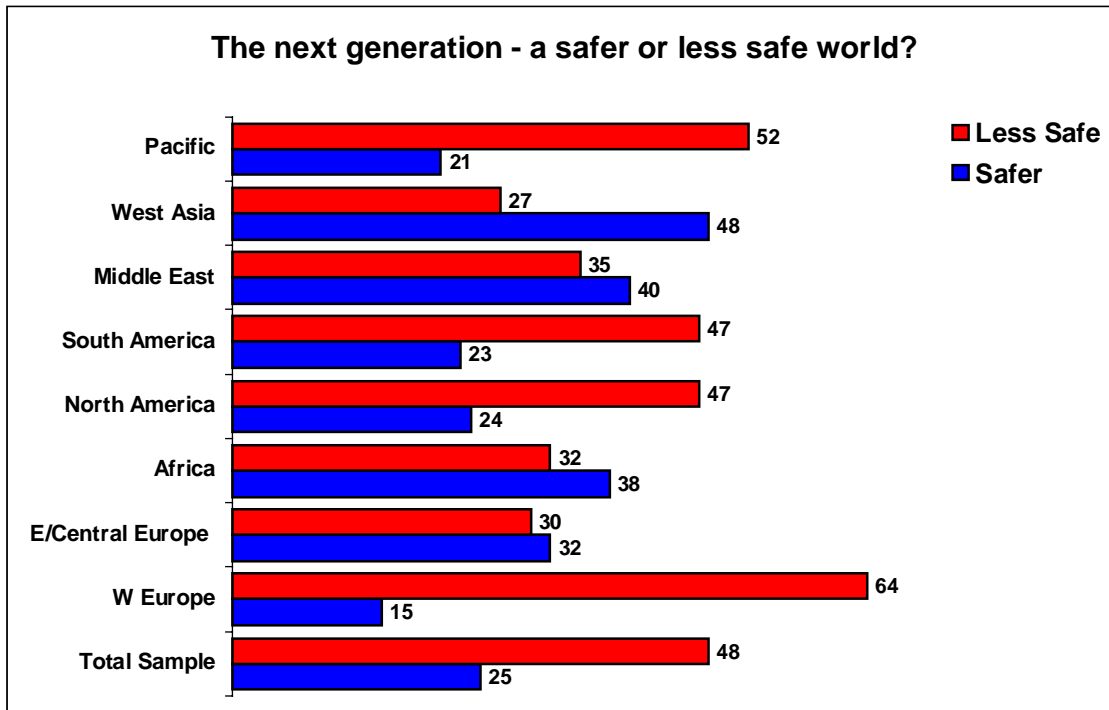
South America: Again a depressing view of economic prosperity in this region, with large majorities in Uruguay (73%), Argentina (61%), Ecuador (59%) and Peru (53%) bearing testimony to recent economic turbulence and feeling less prosperous personally than they did 10 years ago.

Middle East: Almost half (46%) in Turkey say they feel personally more economically prosperous than they did 10 years ago, but the opposite is true in Israel, where 44% feel less economically prosperous now than they did 10 years ago.

West Asia: Economically speaking, this region is upbeat. In Afghanistan, 72% think they and their family are now more prosperous than 10 years ago and this view is also endorsed by majorities in both Pakistan (52%) and India (54%).

Pacific: The regional average where 40% say they are less prosperous and only 31% say they are more economically prosperous than 10 years ago covers extreme views in different countries. In Japan (55%), Hong Kong (44%), Taiwan (42%) and Indonesia (39%) a negative view of personal economic prosperity today compared with the past prevails. But elsewhere, particularly in Vietnam (87%), Malaysia (69%), New Zealand (61%) and Australia (56%) people feel they are better off now personally than they were 10 years ago.

Q4: Do you think that the next generation will live in a safer or less safe world or will it be the same as now?



It seems from the results that people have recognised that winning the war against terror will take a long time, as several world leaders have already prophesised. Half of all those interviewed across the world (48%) think that the next generation will live in a less safe world than now, and only a quarter (25%) think the world will be safer for the next generation.

W Europe: An even more pessimistic prediction from this region, where as a whole two thirds (64%) think the next generation will live in a less safe world and only 15% think the world will be safer. In Coalition ally Great Britain, six out of ten (59%) think the next generation will live in a less safe world, and an identical proportion is found in non-Coalition France. Germans are even more pessimistic and here three quarters (74%) think this will be the case.

E/Central Europe: Again, the results seems to support the case for intervention with 84% of Kosovans saying the next generation will live in a safer world – a view supported also by 47% of Bosnians and even 41% of Serbians, also supported by 74% of Georgians who are optimistic about everything since the fall of their last Government. In Russia, however, 44% feel the next generation will live in a less safe world, as do 46% of Poles.

Africa: Opinion divides equally overall in this region with just over a third (38%) feeling the next generation will live in a safer world and just under a third (32%) feeling the world will be a less safe place for the next generation. 57% of Ugandans and 49% of Kenyans think the world will be a safer place for the next generation but half of all South Africans interviewed (50%) think the next generation will live in a less safe world.

North America: 57% of Canadians think the next generation will live in a less safe world, compared with only 16% who feel it will be safer. In the States, 44% think the future will be less safe for the next generation but a quarter (25%) think the world will be safer for the next

generation. However, the most optimistic country in the region turns out to be Mexico, where two thirds (66%) believe the next generation will live in a safer world.

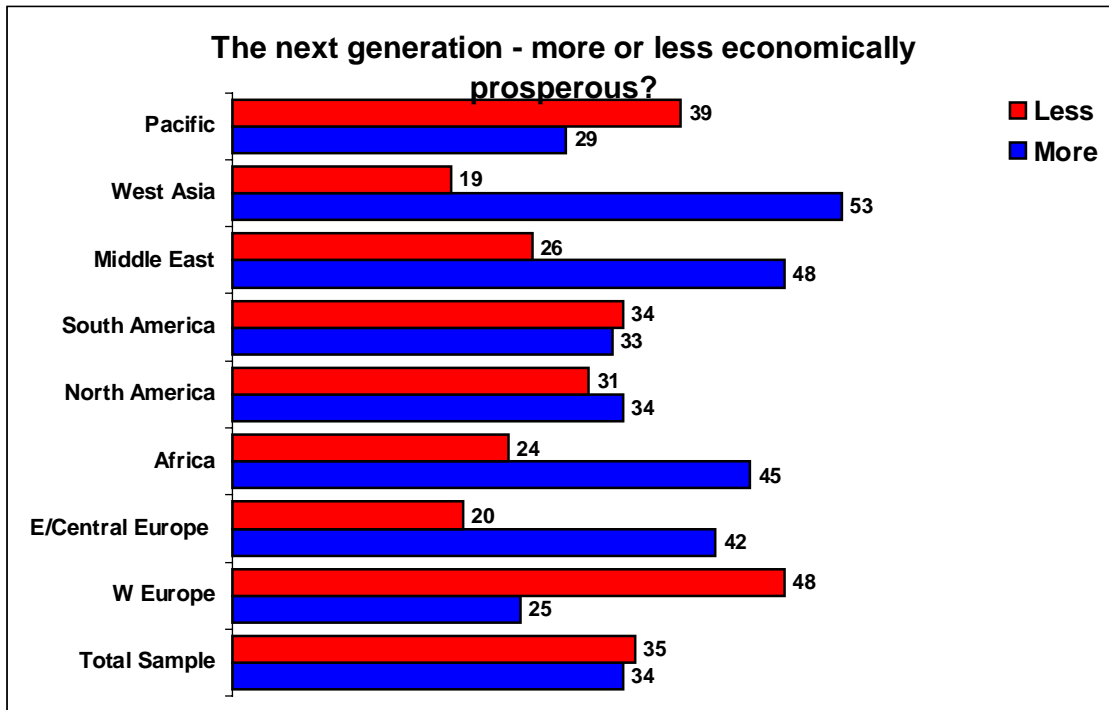
South America: Mostly a pessimistic prediction – in the region as a whole, just under half (47%) think the next generation will not live in a safer world, compared with 23% who think it will be a safer world for the next generation. Uruguay (63%) and Ecuador (61%) are particularly negative about the next generation and how safe the world will be.

Middle East: Given the continuing problems between Israel and its occupied territories, these results are less depressing than might have been expected. Less than half (47%) of Israelis interviewed feel the next generation will live in a less safe world and a full quarter (25%) feel the world will be a safer place.

West Asia: Predictably, a majority of those interviewed in Afghanistan (68%) feel that the next generation will live in a safer world. Just under half of the Pakistani sample (46%) are similarly optimistic but this is not the case in India where 47% feel the next generation will live in a less safe world.

Pacific: Overall the region is pessimistic about the next generation and whether the world will be a more or less safe place with over half (52%) saying it will be less safe and less than a quarter (21%) thinking it will be safer. In Japan (68%), New Zealand (72%), Australians (68%), Hong Kong (53%) and Taiwan (62%) think the next generation will live in a less safe world but 48% of Malaysians, 34% of South Koreans and 84% of Vietnamese disagree and feel the world will be a safer place for the next generation.

Q5: And do you think the next generation will be more economically prosperous, less economically prosperous or the same as now?



While views are equally divided as a third (35%) think the future generation will be less prosperous but equally, a third (34%) think it will be more prosperous. Views in some regions are more polarised and there is a good deal of uncertainty generally about future economic prospects.

W Europe: Negative perceptions overall in this region regarding future economic prospects for the next generation – 48% think there is a less economically prosperous future for the next generation compared with only 25% who feel it will be more economically prosperous. The most pessimistic country of all in the region is Germany where 7 out of 10 (69%) think the next generation will be less economically prosperous. 61% of the Swiss, 59% of those in Luxembourg, 58% of Greeks, 56% of Austrians and 54% of Italians share such a pessimistic economic projection. But there are more optimistic views in Great Britain where only 32% think the next generation will be less economically prosperous and a slightly higher proportion (35%) think the next generation will be better off.

E/Central Europe: Overall, 4 out of 10 (42%) think the future will be more prosperous compared with only 20% who think it will be less economically prosperous for the next generation although high levels of don't know throughout the region indicate a considerable degree of uncertainty. Only Russia (36%) and Poland (35%) have significant proportions that think the future will be less prosperous. Elsewhere more people think the future will be brighter economically, particularly in Georgia (77%), Kosovo (84%), Czech Republic (54%) and Bosnia (57%).

Africa: A positive economic outlook in the African region with almost half (45%) thinking the next generation will be more economically prosperous. In Nigeria 42% and in Cameroon 47% think this is so, 63% in Kenya and 64% in Uganda. However, in South Africa, there is equal

support for both views with a third maintaining things will be better economically and a similar proportion saying the next generation will have less economic prosperity.

North Americans: Opinions are almost equally divided in all three countries.

South America: Argentina has more who think the future will be prosperous (38%) than those who think the opposite (29%) but there is a fairly large proportion that cannot give an opinion. Particularly negative views of the economic future from Ecuador, where 50% think the next generation will be less economically prosperous, and Uruguay (40%).

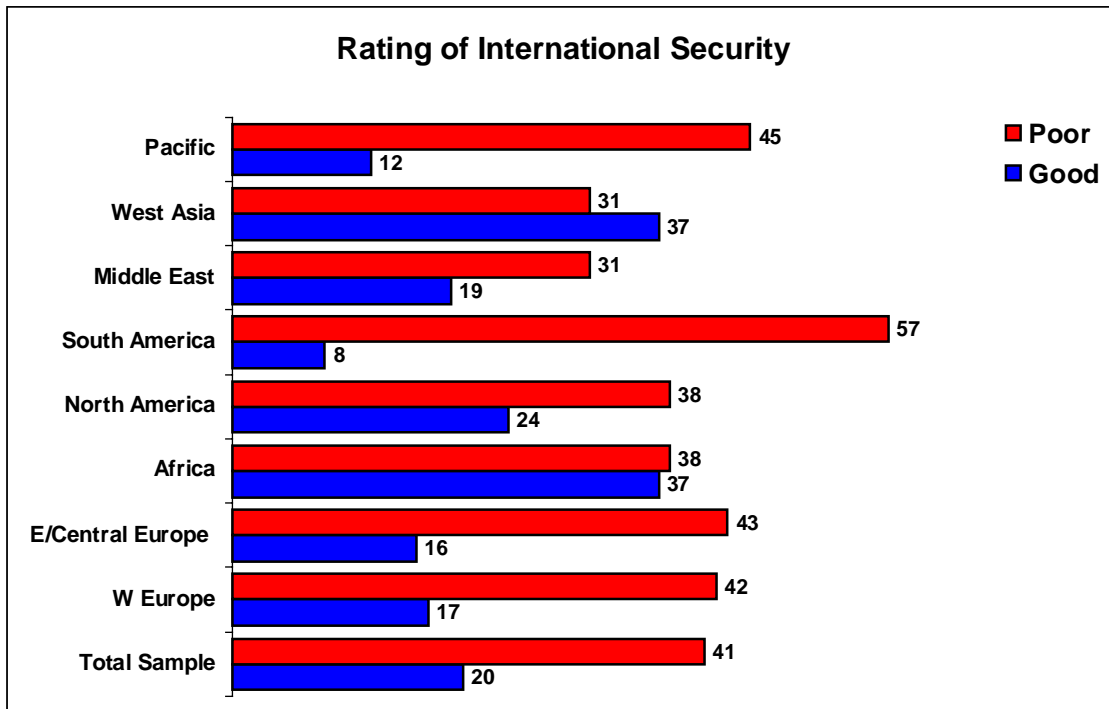
Middle East: Although the gap is much closer in Israel, in both countries the balance of opinion is that the next generation will be more economically prosperous.

West Asia: This is the only truly optimistic region in terms of the future economic prosperity. Taking the three countries together, over half (53%) think the next generation will be more prosperous and less than one in five (19%) feel the opposite will be true. Optimism is very high in Afghanistan and almost two thirds of people there (64%) think the next generation will live in more prosperity. The same is true but to a lesser extent in India (56%) and in Pakistan (46%).

Pacific: Mixed views according to the country but in the region overall 29% think the next generation will be more prosperous, 39% think it will be less so. However, most of the negative economic outlook comes from Japan where 54% think the next generation will be less economically prosperous, Taiwan (52%) and Hong Kong (42%). By contrast, in Malaysia 62%, 50% in South Korea, 40% in Australia, 44% in New Zealand think the next generation will be more economically prosperous.

I'd now like to ask you how you feel about different elements of safety and security that affect us all and the world we live in. Using a scale where 1 means very poor and 5 means very good how would you rate...

Q6a: International security?



It is perhaps not surprising that in the wake of the September 11th attacks and the subsequent “war on terrorism”, most people interviewed across the world think the current state of international security is either very poor or poor (41%) and only half as many (20%) think it is good or very good.

W Europe: Several countries have a more positive assessment of international security than the global average, notably 22% of Germans who think international security is either good or very good, as do 21% in Iceland, 18% in Switzerland and 19% in Great Britain. However, 62% of Italians think international security is poor or very poor, as do 55% of the Dutch, 54% of Danes and 49% of the French.

E/Central Europe: Opinions differ quite widely according to the country. Most extreme, 71% of Russians feel international security is poor – a feeling shared by 54% of Serbians and 49% of Bulgarians. There is a slightly more positive perspective in Kosovo (where 30% rate international security as good), Bosnia Herzegovina and Czech Republic (24% each).

Africa: The most positive region – more than a third of all those interviewed (37%) rate international security as good, although a similar proportion (38%) think it is poor. Nigerians are particularly positive, with four out of ten (40%) rating international security as good or very good, as do 20% in Cameroon, 29% in Kenya, 29% in South Africa and 26% in Uganda.

North Americans: 1 in 4 Americans (24%) rate international security as good, although 38% rate it as poor. Mexicans are slightly more positive about international security with 29%

rating this good compared with 34% who rate it as poor, but they are less positive in Canada (18% good, 43% poor).

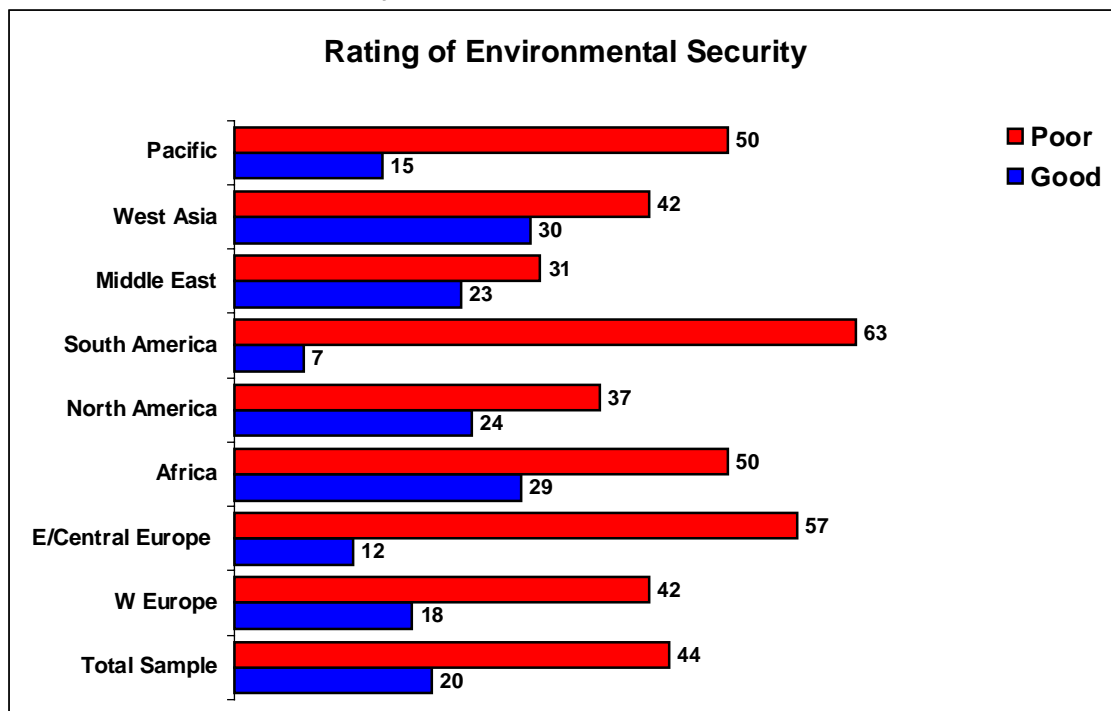
South America: International security is not highly rated in the region, with majorities in all countries rating this as poor (Argentina 59%, Ecuador 56%, Uruguay 51% and Peru 50%).

Middle East: Given the region's particular security problems, it is perhaps surprising that fewer Israelis and Turks than elsewhere in the world rate this as poor (36% and 30% respectively).

West Asia: Again, these three countries give a higher than average rating for international security with almost half of Afghans (47%) rating this as good, compared with 36% of Pakistanis and 32% of Indians.

Pacific: Almost half (45%) overall in the region think international security is poor and only just over one in ten (12%) rate it as good. Japan is the most negative in region with 59% rating international security as poor. But, some more positive assessments – more than 1 in 5 respondents in Australia (20%), Malaysia (29%), New Zealand (20%), Philippines (20%) and 36% in Vietnam think international security is good.

Q6b: Environmental security?



Just under half of all those interviewed (44%) feel that environmental security is poor and only one in five (20%) feel it is good, but patterns vary considerably according to region and even according to country.

W Europe: More Southern Europeans tend to rate their environmental security as poor as evinced by Greece (66%), Italy (57%) and Portugal (57%) compared to their Northern European counterparts. The most positive assessments of environmental security in Western Europe come from Icelanders (41% rate this as good), 28% of the Dutch and 25% of the Swiss.

E/Central Europe: The long shadow of Chernobyl hangs over the region where overall six out of ten (57%) think environmental security is poor. In Ukraine, where the nuclear accident happened, 72% rate environmental security as poor, which 61% of their Russian neighbours agree with. 51% of Georgians and 44% of Bulgarians also hold this view.

Africa: Some people in the region as a whole are more positive about environmental security with almost one in three (29%) rating this as good, although half the region (50%) rate environmental security as poor. West Africa particularly seems to have a problem in Cameroon – 50% rate environmental security as poor and in Nigeria the comparable figure is 53%. Comparing this with other countries, this view is held by 46% in South Africa, 39% in Uganda and 38% in Kenya.

North Americans: 25% of Americans, 20% of Mexicans and 19% of Canadians rating environmental security as good, although in all three countries a larger proportion rate this factor as poor.

South America: There is a very negative assessment from the entire region about environmental security (63% poor rating in region as a whole), which is disappointing given

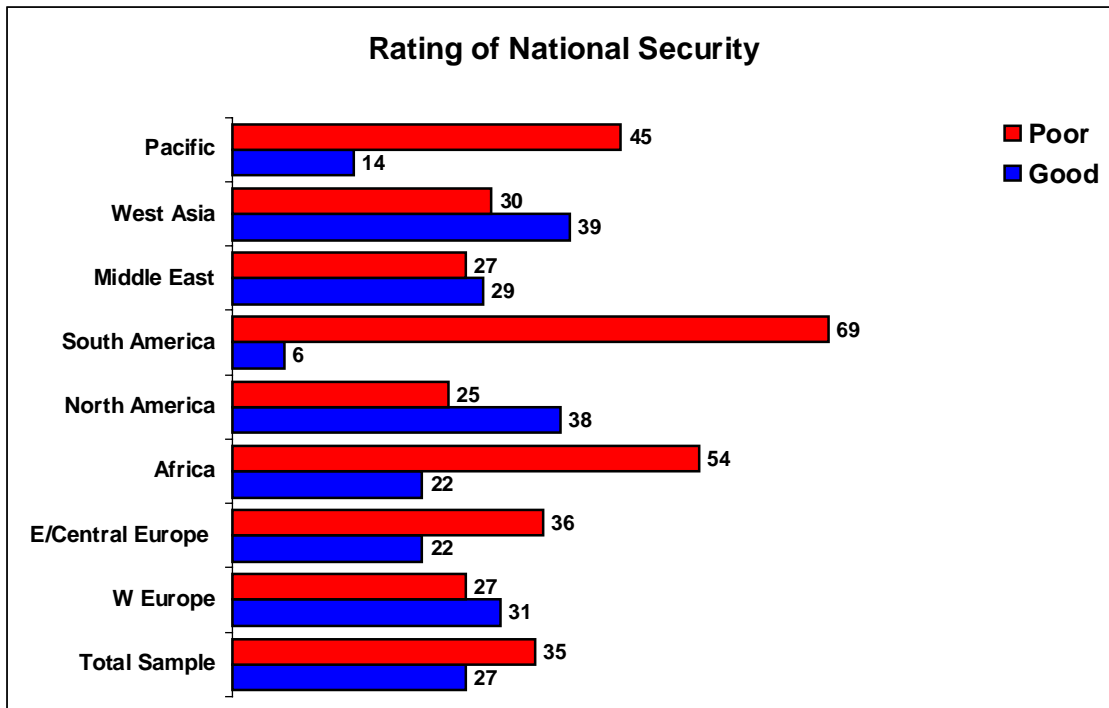
the continents many important global heritage sites. The details for each country are 63% in Argentina, 66% Ecuador, 63% Peru and 60% Uruguay.

Middle East: On balance in both countries people think that environmental security is rather poor – according to 30% of Turks and 45% of Israelis.

West Asia: Afghanistan's general positive ratings of everything also prevail here where more than four out of ten (44%) rate environmental security as good and only 31% rate this as poor. Indians and Pakistanis are less generous – in India only 28% rate environmental security as good and in Pakistan, the figure is 24% but these are still higher than the average elsewhere.

Pacific: Views on environmental security are quite polarised in this region. Majorities in the heavily industrialised nations of Japan (65%) and Korea (57%) rate environmental security as poor but there are more positive assessments from Australia (20% good), Hong Kong (25%), Malaysia (36%), New Zealand (19%) and Vietnam (30%). In Indonesia – a land enriched by tropical rain forests, a massive six out of ten respondents (60%) rate environmental security as good.

Q6c Your national security?



Opinion is generally quite divided on the issue of national security and on this question as in several others, in many countries the majority of opinion falls neither one side nor the other when rating such factors. Nonetheless, overall in the world, only 27% of those interviewed feel national security is good, whilst 35% feel it is poor.

W Europe: A slightly more positive assessment in Western Europe when this region is taken as a whole (27% rate national security as poor, 31% as good). Rated even more highly in some countries – in Germany, national security is rated as good by 39%, in Austria by 40%, Iceland (63%), Luxembourg (49%), Norway (53%) and Switzerland (56%). It is interesting that in Great Britain, more than a third (35%) say national security is good although 24% still rate this as poor. In France, the corresponding figures are 23% good and 27% poor, and national security in Germany is rated good by 39% and only by 15% as poor.

E/Central Europe: Taking the region as a whole, 36% rate their national security as poor and 22% rate it as good. However, in Russia 61% rate national security as poor – recalling recent terrorist events in the country perhaps. Good news however is that 48% of Kosovans rate national security as good – a positive endorsement of the UN administration of the country. The same proportion of Bosnia Herzegovina agrees that national security is good.

Africa: A less positive assessment of national security from Africa as a whole with only one in five (22%) rating this factor as good and a majority (54%) think national security is poor. This is particularly true in Nigeria where one in six (59%) rate national security poor. Strongest support for national security comes from Kenya where 38% rate this as good.

North America: More positive assessment of national security in two of the countries with 40% of Americans and 35% of Canadians rating this as good. In Mexico they disagree with this and almost half (48%) think national security is poor.

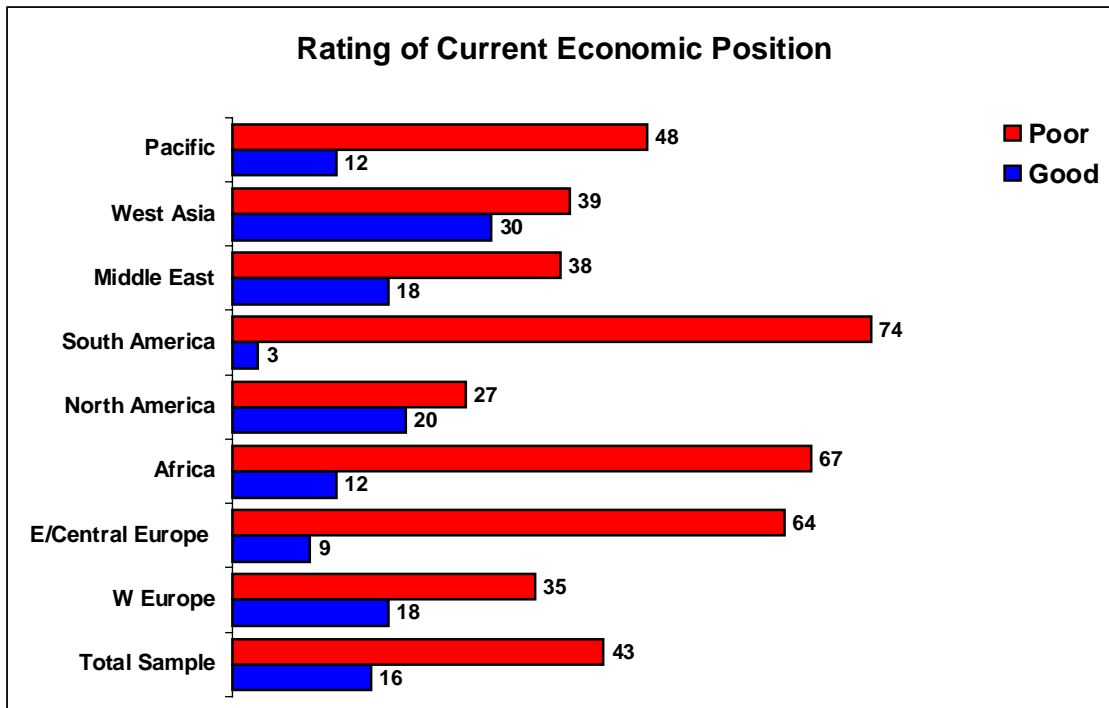
South America: The region does not feel very safe with almost seven out of ten (69%) overall rating their national security as poor. This is particularly true in Ecuador (74%), Argentina (70%) and Peru (63%).

Middle East: Both countries in this region have experienced terrorism recently but with different effects on public opinion. In Turkey, hit by recent bombs one in three (30%) think national security is good compared with one in four (25%) who rate this as poor. By contrast, almost half of Israelis (48%) rate their national security as poor despite Sharon's tough approach to the issue.

West Asia: Again, this region reveals a higher than average level of confidence in national security, despite the fact that all three countries have experienced high states of tension over the last few years. Just under half (44%) in Afghanistan and a slightly lower proportion in India (39%) and Pakistan (35%) rate national security as good.

Pacific: Perhaps the memory of the Sarin attack in Japan had an effect on perceptions of national security, which may explain why a majority of the Japanese (54%) rate national security as poor. But Indonesia has also had terrorist attacks but here only one in three (37%) rate national security as poor. Elsewhere there are more positive assessments of national security – this factor is rated good by 51% of Malaysians, 44% in Hong Kong and 41% in Australia.

Q6d: Peoples current economic position in this country?



Global recession inevitably followed global growth and the resulting economic crash in some parts of the world has tainted people's ratings concerning their current economic status in their country. Taking all the survey countries together, 16% think people's current economic status is good and 43% think it is bad but these assessments vary considerably by region and within region by country.

W Europe: Slightly more optimistic in some countries but as a region overall just under one in five (18%) rating their current economic position as good and 35% rating this as bad. There are more positive assessments of economic status in Norway (52% good), Netherlands (38%), Denmark (36%), Switzerland (29%) and Great Britain (25%). Negative perceptions of people's current economic position are found in Portugal (61% rate it poor), Italy and Greece 44% rate current economic status as poor in both countries. Both the major economic drivers of France and Germany are negative about people's current economic position, with four out of ten in each country rating this as poor.

E/Central Europe: Russia is the only country where a significant proportion rate their current economic position as good (36%). Elsewhere, in all countries large majorities rate people's current economic position as poor - 76% in Macedonia, 73% in Bosnia and Bulgaria, 71% in Ukraine, 70% in Serbia, 68% in Georgia and Poland and 51% in Czech Republic.

Africa: A very economically depressed region both in reality and in people's assessment of their current economic position. Overall, two thirds (67%) of those interviewed across all 5 African countries rate this as poor and the figure is even higher at 73% amongst Nigerians.

North America: An upbeat assessment with 21% of Americans and 23% of Canadians saying people's current economic position in their country is good. This view is not shared by Mexicans where almost half those interviewed (47%) rate their current economic position as poor.

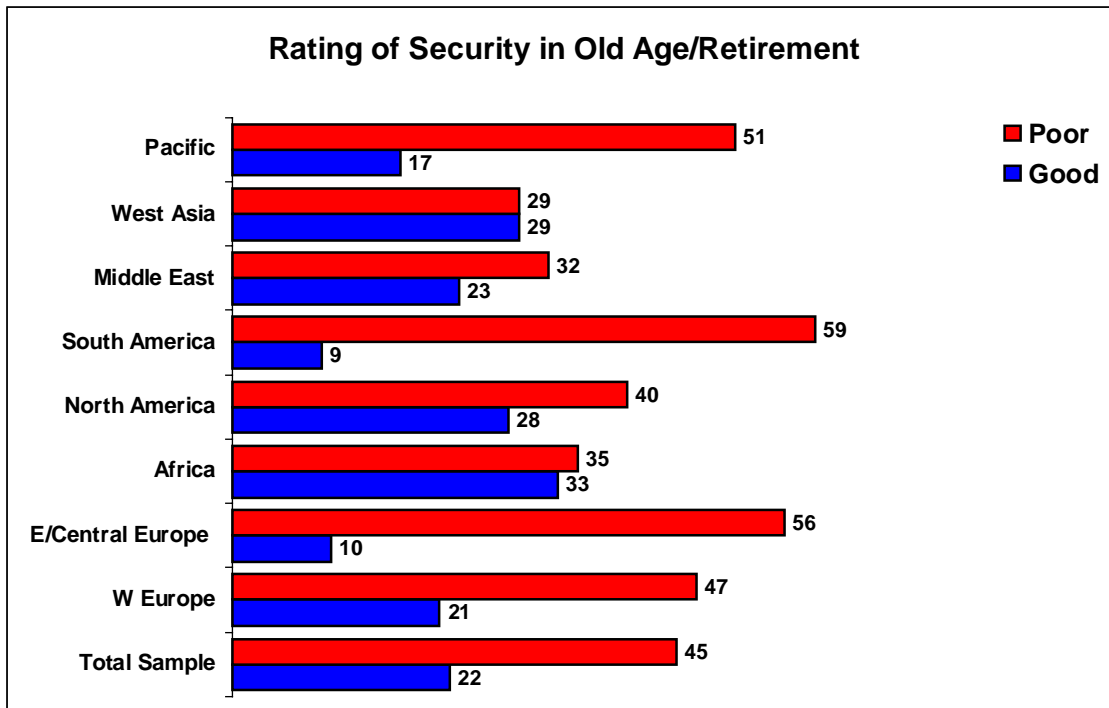
South America: Unsurprising that the region overall is extremely pessimistic with three quarters (74%) rating people's current economic position in their country as poor. The individual country figures are 82% in Ecuador, 78% in Peru, 76% in Uruguay and 71% in Argentina rate people's current economic position in their country as poor.

Middle East: Israelis are very negative about their current economic position within their country and more than six out of ten (62%) rate this as poor, compared to only 8% who rate it good. In Turkey the ratings are more positive and one in five (19%) rate their current economic position as good.

West Asia: Frequently the results show this region is more optimistic than many others and this is also the case regarding people's current economic status. In Afghanistan, around one in three (36%) rate this as good, as do 30% in India and 27% in Pakistan.

Pacific: Overall view is more negative in this region – almost half (48%) assess people's current economic position in their country as poor. The most negative ratings come from Japan (63% rate poor), Philippines (53%), Korea and Indonesia (43% each) and Hong Kong (41%). However, there are more upbeat assessments in Australia (24% good), Malaysia (48% good) and Vietnam (54% good).

Q6e: Your security in old age or retirement?



The global problem of increasing elderly populations and the funding crisis for pensions is affecting many people and 45% overall think their security in old age or retirement is poor.

W Europe: Gloomy prospects about security in old age prevail in most Western European countries but ratings are particularly negative in Portugal (61% rate poor) and in Italy (59%). Germany is also seized by this problem and more than half (52%) rate their security in old age and retirement as poor. There are more positive assessments of security in old age and retirement from Iceland (48% rate this good), Luxembourg (42%), Denmark (39%) and Norway (38%). In Britain, one in four (24%) and a similar proportion in Switzerland (26%) feel that their security in old age and retirement is good.

E/Central Europe: Negative perceptions of people's security in old age and retirement prevail in the region, particularly in Bosnia (68% rate this as poor), Czech Republic (60%), Ukraine (59%), Poland and Bulgaria (58%), and Serbia (52%). Only in Russia is opinion less sure with 20% assessing their security in old age and retirement as good and 38% rating this as poor.

Africa: 34% of Kenyans are optimistic about their security in old age and retirement but elsewhere perceptions are more negative with 45% of South Africans and 36% of Ugandans rating this as poor. With Africa in the grip of the AIDS crisis, many people will not reach old age and perhaps this explains why the region has a high "don't know" level in response to this question.

North America: More upbeat assessment with 28% of Americans, 27% of Canadians and Mexicans rating their security in old age and retirement as good.

South America: Very negative assessment of security in old age and retirement from Ecuador (76% poor), Uruguay (72%), Peru (60%) and Argentina (55%).

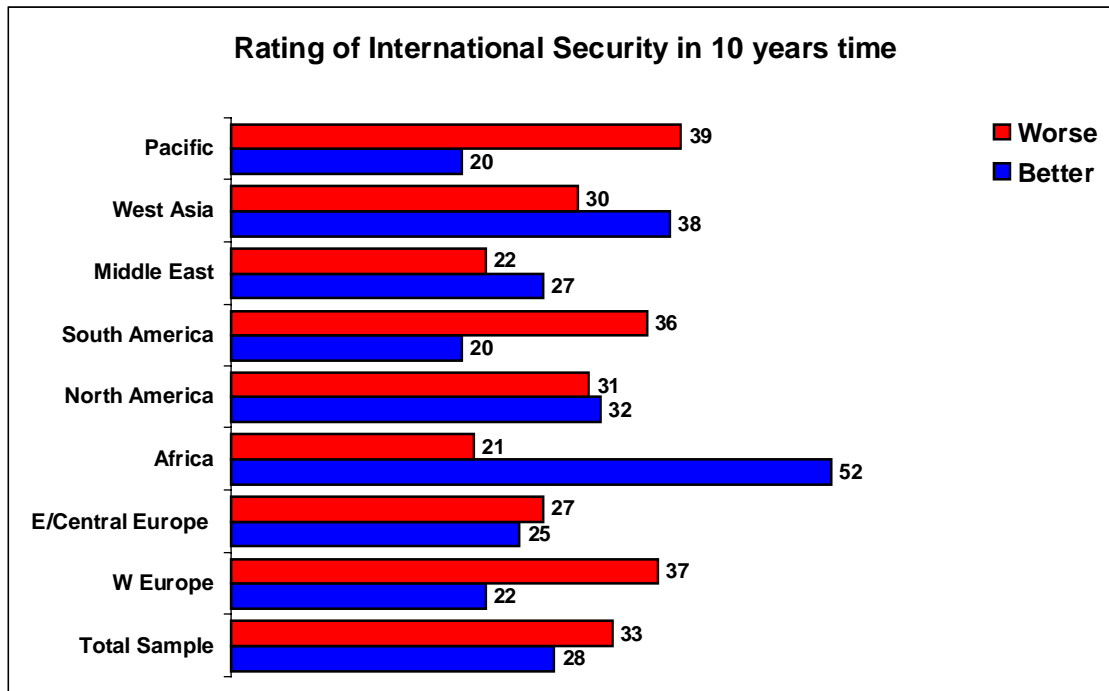
Middle East: In Israel, more than a quarter (26%) feel that their security in old age and retirement is good, whilst in Turkey this figure is similar at 23%

West Asia: A continent where old people are often looked after financially by their extended family which may explain why there are more people rating their security in old age and retirement as good in these three countries - 33% in Afghanistan, 29% India and 28% in Pakistan.

Pacific: The Japanese are very negative about their sense of security in old age and retirement with 71% rating this as poor. In South Korea, 69% feel the same. But other countries are more positive – 50% of Malaysians assess their security in old age and retirement as good, as do 38% in Vietnam, 32% in the Philippines and 35% of Australians and Indonesians.

And now, using a scale as before but this time where 1 means much worse and 5 means much better. I'd like to ask you to rate each of the types of security for how you think they will be in 10 years time.

Q7a: International security?



Across the world, the gap between those who think the future will be better regarding international security and those who think the opposite is much narrower. One in three (33%) feel this will be better in the future and only slightly less (28%) think international security will be worse. It is up to world leaders to deliver the reality to match these expectations.

W Europe: The least optimistic projections for the future regarding international security come from Netherlands – where 60% think international security will be worse in 10 years time, as do 50% of Austrians, and 49% of Italians. British opinion divided with 33% thinking international security will be worse in 10 years time and 27% thinking it will be better. In Germany, the figures are similar at 28% and 25% respectively but France is much more negative in its projection for future international security with four out of ten (40%) thinking this will be worse in the future.

E/Central Europe: There are contrasting views in the region but also high don't know levels which indicate general uncertainty about the future and predictions. Countries where a majority think international security will be better in 10 years time include Kosovo (64%), Georgia (58%) and Bosnia Herzegovina (54%) but in Russia, 54% think it will be worse.

Africa: Optimism is high in the region regarding international security and across the five countries, over half (52%) think this will be better in the future. The rating is even higher in Nigeria where 57% think international security will be better in the future, as do with 52% in Kenya and 40% in South Africa.

North America: Although overall opinion is divided in the region, there are more positive than average assessments for the future from the North American region with 33% of Americans, 31% of Mexicans and 25% of Canadians thinking international security will be better in 10 years time.

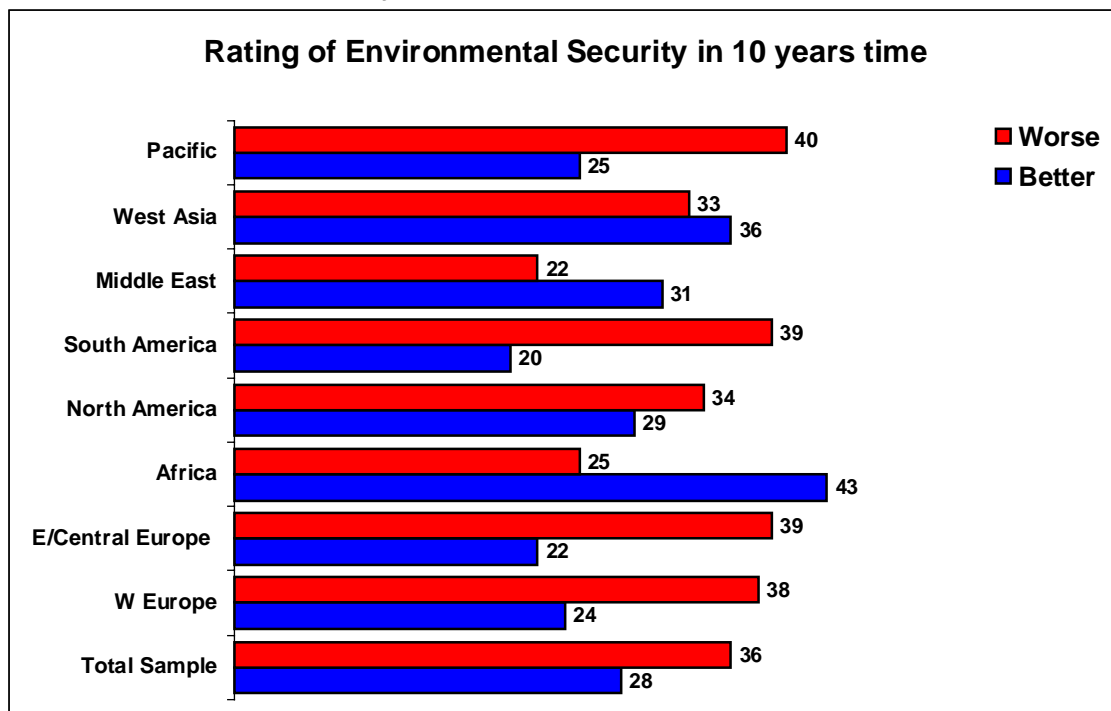
South America: High levels of don't know from Argentina and Uruguay indicate general anxiety about the future and a majority in the region think international security will only change a little in the next 10 years. Overall, however, more than one in three (36%) expect international security to be worse in 10 years time.

Middle East: A feeling that things must get better comes across from the Israeli results as more than one in three (36%) feel international security will be better in the future, in comparison with just over one in five (22%) who feel it will be worse. In Turkey, people are less sure things will change at all and so one in four (25%) fail to make a prediction on this issue.

West Asia: With its recent history of conflict, perhaps it is not surprising that these three countries are considerably more optimistic about future international security. In Afghanistan and India, just under half (44%) think this will be better in the future and in Pakistan, the figure is 30%.

Pacific: A gloomy outlook from Japan (58% think international security will be worse in 10 years time), and also in Hong Kong (41%) but most of the region see little change or slight improvement. Indonesians are more positive and here four out of ten (43%) think international security will be better in the future.

Q7b: Environmental security?



On balance, more people across the globe think environmental security will be worse in 10 years time (36%) than think it will be better (28%) but a large proportion (30%) think it will be neither one nor the other, perhaps reflecting the lack of accord over the issue generally amongst world leaders.

W Europe: The only extreme views in the region are from Greece, where 60% think environmental security will be worse in 10 years time, and from Italy where 53% think the same thing.

E/Central Europe: There are negative projections for environmental security from Russia (51%) and the Ukraine (54%) but more optimistic ratings in other countries, particularly Kosovo (69% think environmental security will be better in future), as do 54% in Bosnia Herzegovina and 45% of the Czech Republic.

Africa: Half of all Kenyans (50%) are hopeful that environmental security will be better in 10 years time as are Nigerians (45%) and to a lesser extent South Africans (35%).

North America: Opinion is divided in the States where 30% think environmental security will be better in 10 years time and 33% think it will be worse. Balance slightly less positive in Canada where 28% think it will be better and 36% think it will be worse. In Mexico, people are more pessimistic regarding environmental security in the future and almost half (47%) think this will be worse.

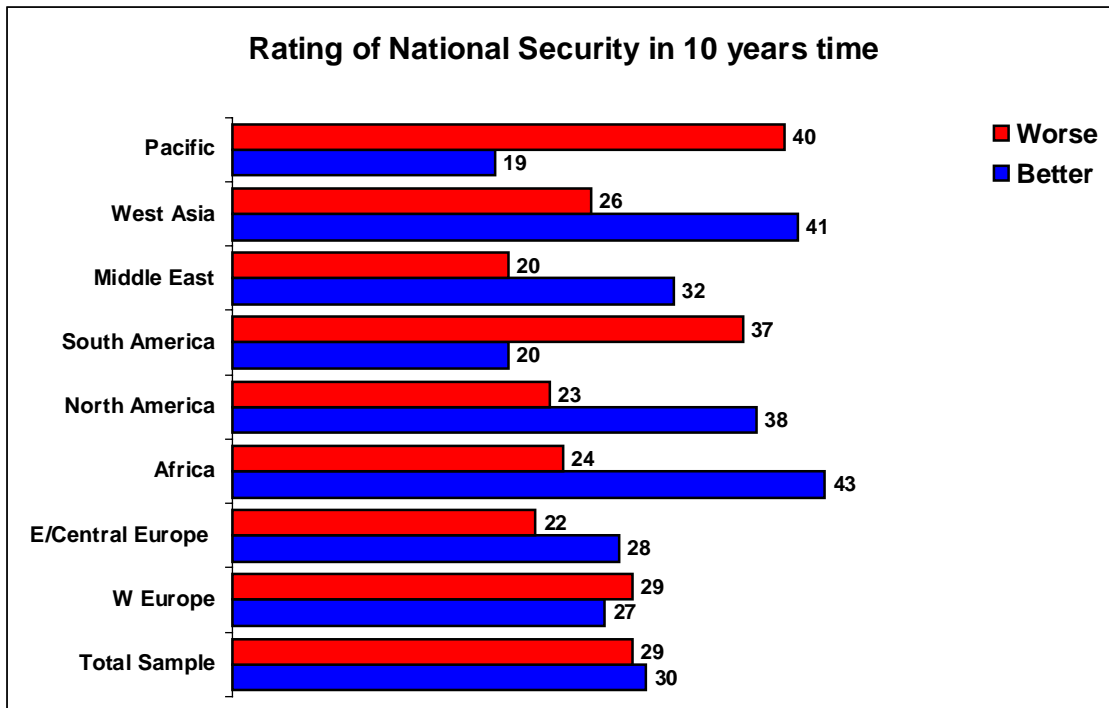
South America: There are particularly negative projections for future environmental security from Ecuador (53%) and Peru (53%) – two countries with important environmental heritage sites for the entire world.

Middle East: In Israel opinion divides into thirds – one third think environmental security will be better, one-third thinks it will be worse and one third thinks it will not change in the future. In Turkey, one in three (31%) thinks that environmental security will be better in the future.

West Asia: Improvements in future environmental security are expected by four out of ten citizens in Afghanistan and India (43%) but they are slightly less positive in Pakistan where environmental security is expected to be worse in the future by 36%.

Pacific: A deterioration in environmental security is predicted for the future by 53% of the Japanese and 42% of South Koreans. Other countries feel there will be little change and taking the region as a whole, four out of ten (40%) expect that environmental security will be worse in future.

Q7c Your national security?



Taking all countries in the survey together, views split equally into a third who think their national security will be better in the future (30%), a similar number (34%) who predict there will be no change in this factor and only marginally fewer (29%) who feel that their national security will be worse. The results must be studied at the regional and country level to see how this situation varies both by and within each continent.

W Europe: Particularly negative assessment of future national security in Netherlands (61% think it will get worse), but also in Italy (40%). Elsewhere, little change from the current situation is seen regarding national security in 10 years time.

E/Central Europe: Very positive expectations for national security in the future from Kosovo (78%), Georgia (64%), and Bosnia Herzegovina (60%) but 40% of Russians are negative which again may be reflective of recent terrorism in the country. High don't know levels in the region generally seem to indicate a lack of certainty about the future.

Africa: Improvements in the future for national security foreseen by 58% of Kenyans and 44% of Ugandans and by more than four out of ten in the region as a whole (43%), although in Cameroon and South Africa this figure is slightly less positive at 36%.

North America: Optimistic region with 39% of Americans, 32% of Canadians and 30% of Mexicans who think national security will be better in 10 years time.

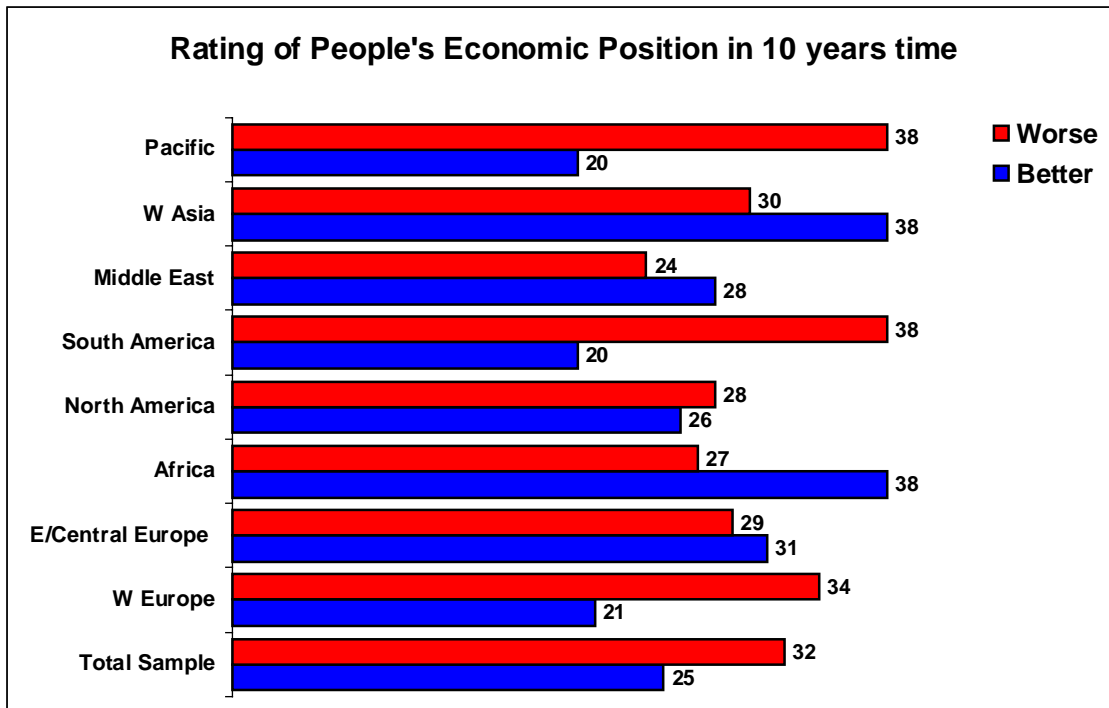
South America: High don't knows in Argentina indicate anxiety generally about the future which are mirrored in its neighbour Uruguay but half those interviewed in Ecuador (56%) and Peru (50%) have negative expectations that national security will be better in 10 years time.

Middle East: Both Israel and Turkey have significant proportions (38% and 32% respectively) who feel national security will be better in the future than think it will be worse (24% and 20%).

West Asia: Almost half of those interviewed in Afghanistan (46%) and in India (45%) think that national security will be better in 10 years time and this figure is only slightly lower at 35% in Pakistan.

Pacific: National security will be worse in 10 years time think 56% of the Japanese but 42% of Australians and Malaysians think it will be better as do 40% in Hong Kong and 32% in New Zealand. Indonesia with its legacy of terrorist attacks is more optimistic and just less than half here (44%) think national security will be better in the future.

Q7d: Peoples economic position in this country?



Taking all countries together, 32% think this will be worse in 10 years time and 25% think it will be better but most people across the world predict only small changes in people's economic position in the country for the future. High don't knows in some regions indicate a lack of certainty about the future, adding to people's economic gloom.

W Europe: Perception that economically things will be slightly worse in the future – overall in the region one in three (34%) think this, compared with 21% who think it will be better in 10 years time, although the majority in almost all countries predict only minor changes. There are particularly pessimistic views from the Dutch – almost half (47%) think people's current economic position will be worse in 10 years times as do 44% of Greeks and 43% of Italians. The British are slightly more optimistic and here just under one in three (27%) think economic status will be better in the future although a similar proportion (26%) think it will be worse. In the two other large economies of the region - France and Germany only 13% and 19% respectively think people's economic position will be better in the future.

E/Central Europe: Different countries in the region have vastly differing views of how people's economic position will be in 10 years time. There are particularly high expectations in Kosovo where 70% expect that people's economic position will be better in the future. This view is also held by 63% of Georgians, 53% of Bosnia Herzegovina and 51% of Russians think their economic position will be improved in 10 years time.

Africa: The region is optimistic about prospects for their economic position in 10 years time – 38% think this will be better and only 27% think it will be worse. Optimism is particularly high in Kenya with 52% expecting economic status to improve in the future and in Uganda where 42% expect the same.

North America: No change expected from 43% of Americans, 48% of Canadians although 47% of Mexicans think their economic position will be worse in 10 years time.

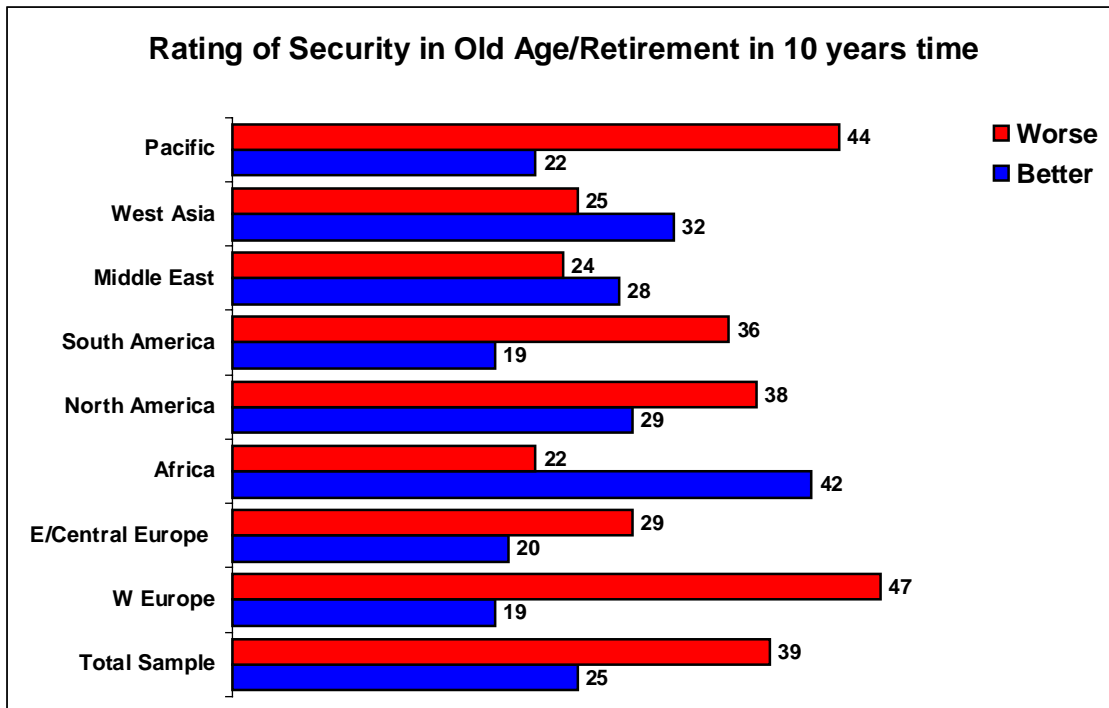
South America: 63% of Ecuadorians and 58% of Peruvians think their economic position will be worse in 10 years time and most of the region feels there will be little change. Extremely high levels of don't know in Argentina and Uruguay are the result of general economic uncertainty.

Middle East: No real changes are expected, although a third of Israelis think people's economic position will improve in the future.

West Asia: Peace brings stability and stability brings improved economic circumstances so expectations in this region are high with 46% of Indians, 39% of Afghans and 31% of Pakistanis expecting future economic position to be better.

Pacific: No change predicted by 49% in Australia and South Korea and 50% in New Zealand but 57% in Hong Kong, 53% in Japan feel their economic position will be worse in 10 years time. 88% of Vietnam and 44% of Malaysians and Indonesians think their position economically in 10 years time will be better.

Q7e: Security in old age or retirement?



Growing elderly populations and lack of retirement provision do not bode well for the future and so overall only one in four (25%) of people interviewed across the world think that security in old age and retirement will be better in 10 years time whilst 39% think it will be worse. Fears are particularly high in several countries such as Japan and Argentina, but Western Europe as a region, is not optimistic either.

W Europe: There is a pessimistic view in Western Europe overall about security in old age—47% think that this be worse in 10 years time. Over half of all Germans (56%) share this gloomy outlook with majorities in the Netherlands (64%), Italy (57%), Austria (55%) and Switzerland (50%).

E/Central Europe: 62% in Russia don't know how security in old age and retirement will be in 10 years time, which indicates the lack of certainty in the country about this issue. Elsewhere in the region only Bosnians (43%), Georgians (56%) and Kosovans (67%) predict that security in old age and retirement will be better.

Africa: Almost half of Nigerians and Kenyans (45%) think that economic security in old age and retirement will be better in 10 years time but this is in contrast with opinion in the rest of the region where little change is predicted by most. There are extremely high don't know levels across the region, again indicating how unsure people are about predictions for their future particularly those regarding old age in a continent ravaged by the AIDS epidemic.

North America: 43% of Canadians expect security in old age and retirement to be worse in 10 years time but Americans and Mexicans are less sure – 30% and 29% respectively think it will be better.

South America: 27% of Argentines don't feel comfortable making any predictions about the future regarding their security in old age and retirement but 57% of Ecuadorians and 48% of Peruvians expect that security in old age and retirement will be worse in 10 years time.

Middle East: Again there are high levels of don't know in Turkey but in Israel most people see little change in their security in old age and retirement when looking into the future.

West Asia: Many in Afghanistan and in India find this a difficult question to answer but still one in three think that their security in old age and retirement will be better in the future.

Pacific: The effects of the recent but enduring economic recession in Japan has deeply affected the population, 69% of whom think their security in old age and retirement in 10 years time will be worse. 45% of South Koreans agree with this gloomy prediction. By contrast, 46% of Malaysians and Indonesians as well as 42% of those in Taiwan disagree and think that security in old age and retirement will be better in 10 years time.

Please see the Methodological Appendix which gives details of how, when and who was interviewed for the survey, together with further contact details for each country.

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