

FII Priority compass

powered by FII Institute



Full Report

October 2025
4TH EDITION

FII INSTITUTE
Future Investment Initiative Institute

Impact
on Humanity

In partnership with



FII INSTITUTE
RDC Complex, Building CS01, 4th Floor,
Unit 9, 4044
Al Imam Saud Ibn Abdul Aziz Branch
Road, Al Nakhil,
Riyadh 12382, Saudi Arabia

TERMS OF USE AND DISCLAIMER

This document contains proprietary research of the Future Investment Initiative (FII) Institute. The findings, interpretations and conclusions expressed herein are a result of a collaborative process facilitated and endorsed by the FII Institute but whose results do not necessarily represent the views of the FII Institute, nor the entirety of its Members, Partners or other stakeholders.

All rights reserved. No part of this publication may be reproduced, stored in a retrieval system, or transmitted, in any form or by any means, electronic, mechanical, photocopying, or otherwise without the prior permission of the FII Institute.

CONTENTS

Foreword	5
About Future Investment Initiative Institute (FII Institute)	6
Methodology	7
Executive Summary	9
Key findings	13
National and personal priorities : socio-economic issues remain central	17
Are we on the right track?	27
Conclusion:	34
Looking ahead: Global citizens’ views on the future	
Addendum	
1. Embracing AI and digital transformation thoughtfully	40
2. Living longer and healthier lives	45
3. Achieving cleaner energy for a greener planet	49
4. Restoring prosperity through digital innovation – and hard work	54
5. Bringing together fragmented societies	59

Messages from FII Institute Leadership

This year's FII PRIORITY Compass presents a powerful snapshot of the world's emotional and economic pulse.

Across 32 countries, half of all respondents now cite the cost of living as their number one concern, revealing a global confidence crisis. People everywhere are feeling the impact of inflation, job insecurity, and the pressure of everyday expenses.

The data reveals that citizens are crying out for economic, digital, and human security.

Alongside economic worries, a massive 77% of citizens want their countries to build their own AI systems, underscoring a global demand for technological sovereignty.

Health and longevity also rank high, with 73% prioritizing longer, healthier lives.

The findings expose a divide between an optimistic Global South and a pessimistic Global North.

Citizens want their leaders to address cost-of-living pressures, invest in longevity, and ensure that AI serves humanity, not the other way around.

And yet, despite these divides, the majority of people - 76% - believe their personal lives are heading in the right direction, suggesting a fragile but growing sense of optimism if global leaders respond to the issues that matter most.

This data will inform and focus the conversations at FII9, where ideas meet capital, where ideas inspire action, and where investment turns vision into impact.

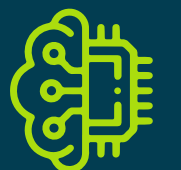


Richard Attias,
Chairman of the Executive Committee and
Acting CEO of the FII Institute

ABOUT

Future Investment Initiative Institute (FII Institute)

The Future Investment Initiative (FII) Institute is a global nonprofit foundation with a single pressing agenda: Impact on Humanity. Global, inclusive and driven by data, we foster great minds from around the world and turn ideas into real-world solutions and actions in four critical areas:



Artificial Intelligence (AI) and Robotics



Education



Healthcare



Sustainability

METHODOLOGY

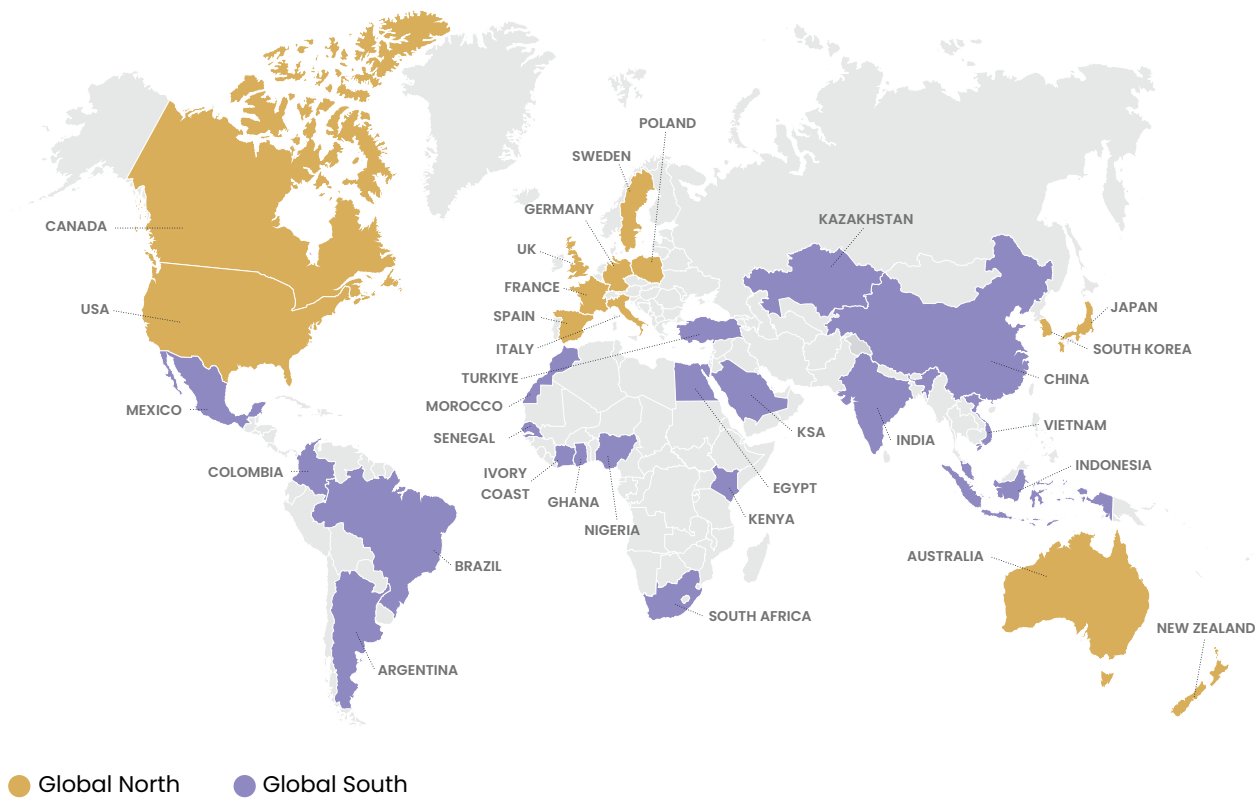
→ We conducted the FII PRIORITY Global Survey in partnership with Ipsos between 1 August – 5 September 2025, covering 61,316 respondents from 32 countries. These countries were chosen to represent both the geographic and socio-economic diversity of the world.

32
Countries

60,000+
Respondents

representative of
66%
of the Global Population

Geographical Coverage



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

Countries surveyed

AFRICA	ASIA	EUROPE	OCEANIA	MENA
GHANA	CHINA	FRANCE	AUSTRALIA	EGYPT
IVORY COAST	INDIA	GERMANY	NEW ZEALAND	MOROCCO
KENYA	INDONESIA	ITALY		SAUDI ARABIA
NIGERIA	JAPAN	POLAND	NORTH AMERICA	SOUTH AMERICA
SENEGAL	KAZAKHSTAN	SPAIN	CANADA	ARGENTINA
SOUTH AFRICA	SOUTH KOREA	SWEDEN	MEXICO	BRAZIL
	TÜRKIYE	UK	UNITED STATES	COLOMBIA
	VIETNAM			

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 also presents the results for two groups of countries:

THE GLOBAL NORTH (28,300 interviews in 13 countries)

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

THE GLOBAL SOUTH (33,016 interviews in 19 countries)

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

THESE 32 COUNTRIES ACCOUNT FOR 66% OF THE WORLD’S POPULATION. THE SURVEY THEREFORE PROVIDES A GOOD APPROXIMATION OF PUBLIC OPINION AT THE GLOBAL LEVEL. HOWEVER, THERE ARE TWO IMPORTANT CAVEATS TO BE MADE:

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

→ Brazil, China, Colombia, Ghana, India, Kazakhstan, Kenya, Mexico, Morocco, Saudi Arabia, Senegal, South Africa and Vietnam have lower internet penetration and so these samples are not nationally representative.

The samples represent the more urban, more educated, and/or more affluent population. These are vital social groups to understand in these countries, representing an important and emerging middle class.

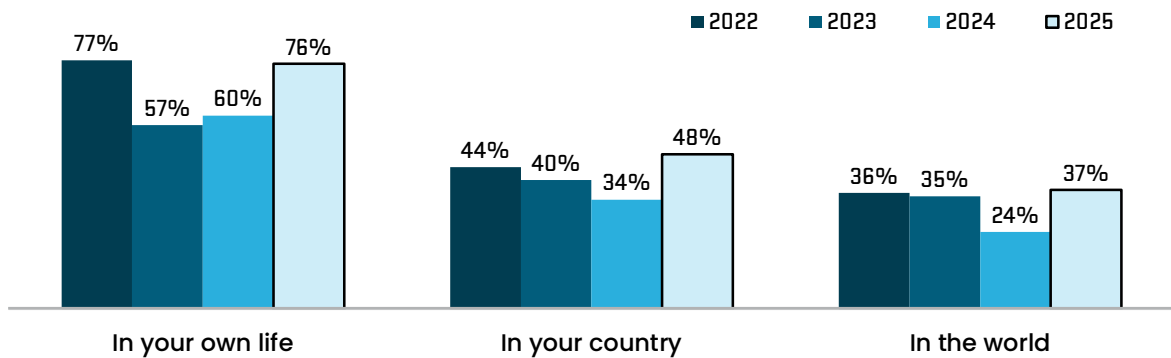
EXECUTIVE SUMMARY

Growing Optimism

Survey results indicate that global citizens’ optimism is on the rise this year. 76% believe things are going in the right direction for their own lives, up 16 points from last year. While optimism for their own lives is now high, confidence in national and global progress has also improved: 48% now feel their country is moving in the right direction (up 14 points), and 37% feel the same about the world (up 13 points).

Over the past four years, global citizens believe they are individually heading in the right direction, while their countries and the world are on the wrong track... Yet they believe that things are looking up in 2025!

Are things headed in the right direction?



Personal Optimism vs. Global Pessimism

This improvement in key indicators should not obscure an important observation: while global citizens are generally optimistic about their personal situation (76%), they remain considerably less hopeful about their country (48%) and even more so about the world (37%).

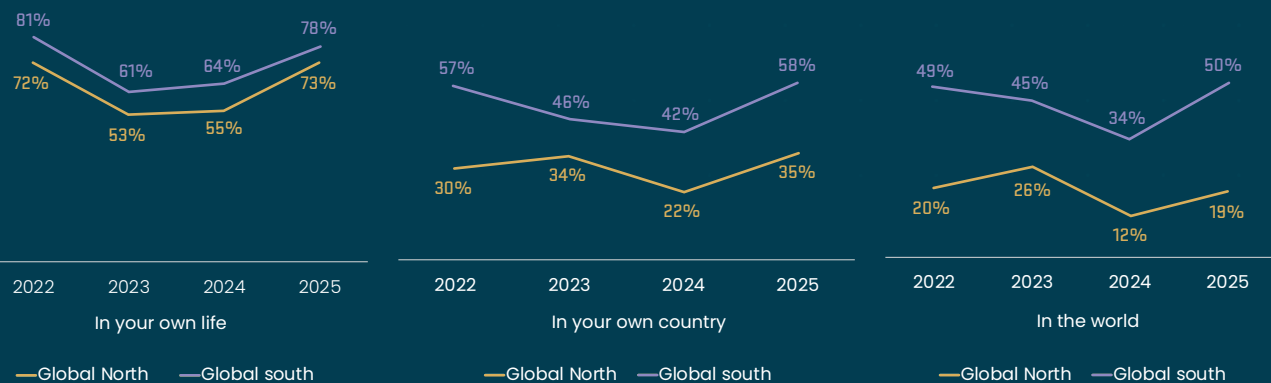
Global South Citizens More Optimistic than Global North

A striking finding is the significant divide between Global North and Global South perspectives. Citizens in the Global South consistently report higher levels of optimism across all measures compared with their counterparts in the Global North.

Specifically, 78% of Global South respondents are optimistic about their personal situation, compared with 73% in the North. The gap becomes even wider when looking at national and global outlooks: 58% of citizens in the South feel positive about their country’s future, versus 35% in the North, while 50% are optimistic about the future of the world, compared with just 19% in the North.

We remain deeply divided in our outlook... With people in the Global North much more pessimistic than the Global South

Are things headed in the right direction?



Nostalgia rules in 2025 among **Global North citizens**, with **65%** saying life in their country was better before, compared to only **41%** of citizens in the **Global South**.

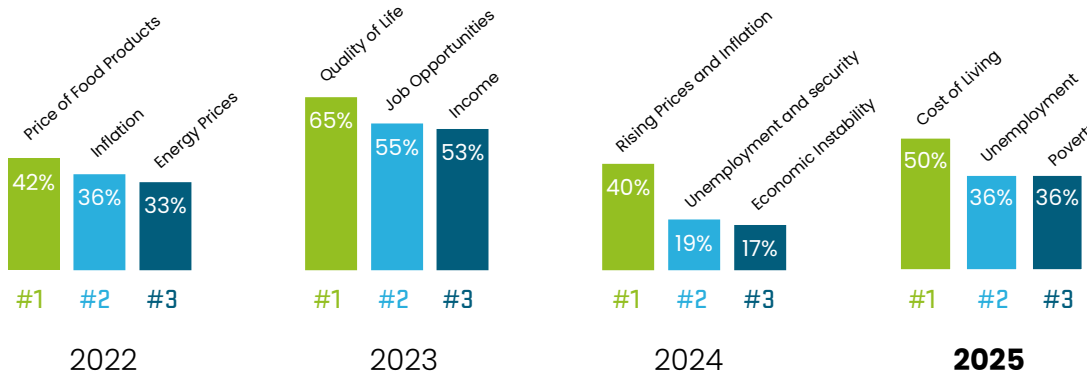
65% of citizens in the **Global South** are **optimistic about innovation and technology improving people’s living conditions**

Moreover, the year-on-year improvements are often stronger in Global South countries than in the North, highlighting a particularly notable shift in optimism in these regions.

Cost of Living Remains the Top Global Concern

As in previous years, inflation and the cost of living remain the leading concerns for global citizens: 50% cite these issues this year, far ahead of their second and third worries—unemployment and poverty (36% each). In our first survey conducted in 2022, rising prices were already a key concern.

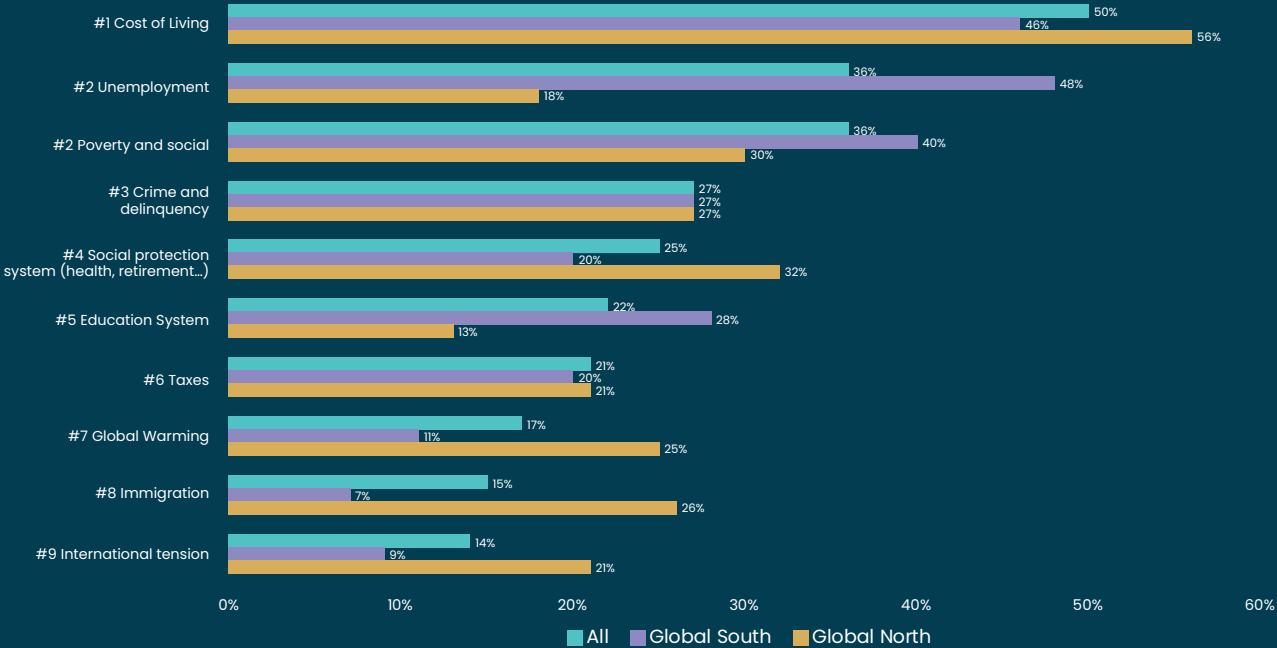
Globally, the number #1 priority has remained the same over the past 4 years: Cost of Living
Top 3 Global Priorities from 2022–2025



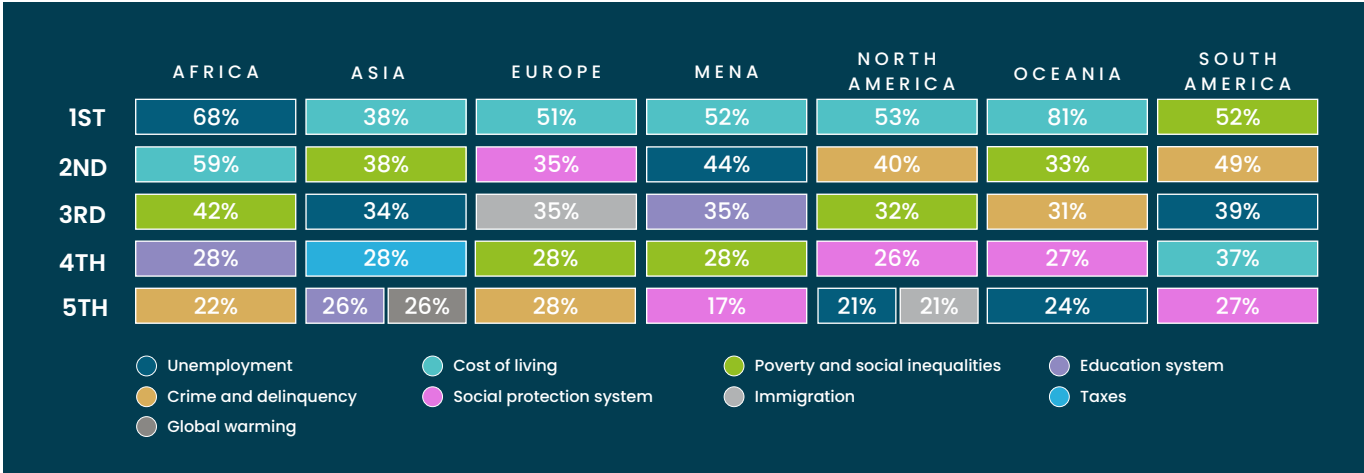
Different Priorities Across the Global North and South

Priorities vary across regions. In the Global North, the cost of living is overwhelmingly the top concern (56% vs. 46% in the South) even though in the Global South, citizens are more concerned about unemployment (48% vs. 18% in the North) and poverty (40% vs. 30% in the North).

The top 10 Global Priorities for 2025 are:



Looking at specific regions, Africa’s top concern is unemployment (68%), while Oceania, Europe MENA, North America, and Asia all rank cost of living as their primary concern. South America prioritizes poverty and social inequalities (52%).



Personal Concerns Highlight Financial and Health Priorities

The survey also identified six key personal concerns, with economic and financial issues dominating. Respondents frequently mention the importance of having a secure job or income (36%), being able to cover everyday expenses (27%) and saving for the future (2%). At the same time, health remains a major concern: the ability to stay healthy and access medical care if needed is the second most frequently cited personal worry (35%).



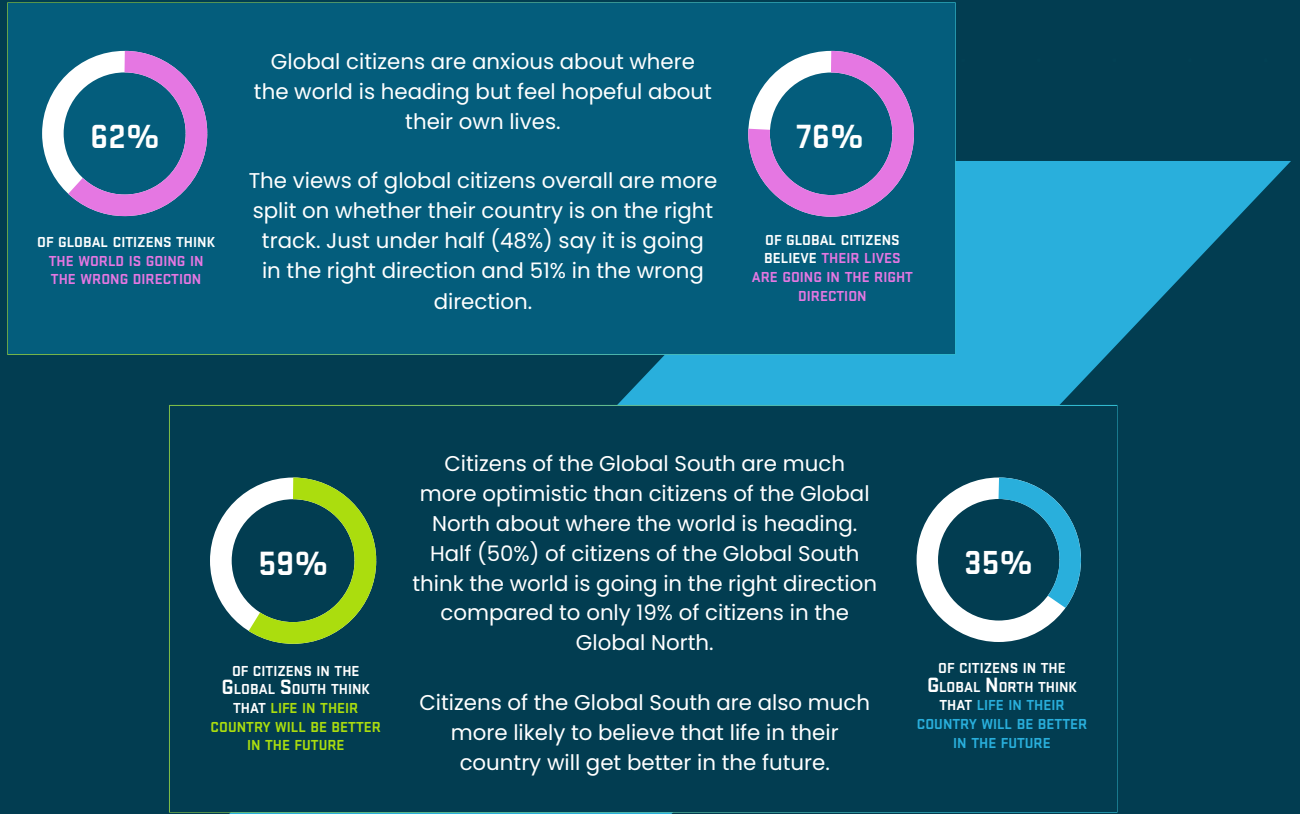
KEY FINDINGS

Across the world, global citizens express a sense of optimism and hope for prosperity and progress. Yet, this sentiment is far from universal — for instance, only 9% in France think that their country is on the right track compared to 91% in China. At the same time, the major challenges of our era — from economic insecurity and social division to crime, immigration, and environmental degradation — continue to cast a shadow over public sentiment.

Advances in technology promise longer, more connected and sustainable lives. But innovations are more eagerly embraced in some parts of the world than others. For instance, only 23% in France think that AI tools are important compared to 92% in Ghana and Nigeria. Fears play out differently too. Crime is a bigger issue in Sweden (58%) than in many Global South countries. Unemployment is a concern for 81% in Ghana but only 3% in Japan.

We undertook research in 32 countries to explore how global citizens are navigating the challenges and opportunities ahead.

Are we on the right track?



National and personal priorities :
socio-economic issues remain central

Having a
secure job
or income

IS THE TOP PERSONAL
PRIORITY OF CITIZENS
IN THE GLOBAL SOUTH
[39%]

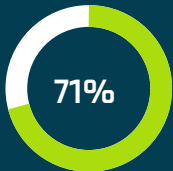
On national priorities, economic issues dominate in both the Global North and Global South. Cost of living is the top issue for global citizens overall (50%) and in the Global North (56%). In the Global South, unemployment tops the list (48%), but it is a much lower priority for the Global North (18%).

Staying
physically
healthy

IS THE TOP PERSONAL
PRIORITY OF CITIZENS
IN THE GLOBAL NORTH
[43%]

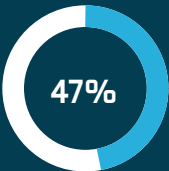
When it comes to personal priorities though, citizens of the Global North are more likely to choose health over wealth. Citizens of the Global South, on the other hand, prioritize economic security.

Embracing AI and digital transformation thoughtfully



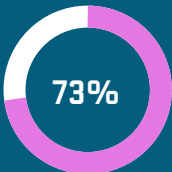
OF CITIZENS IN THE
GLOBAL SOUTH SAY AI
HAS HAD A POSITIVE
IMPACT ON THEIR
EVERYDAY LIFE

Citizens in the Global South are much more positive about the role of AI in their lives. They are more optimistic that AI will create more jobs than it destroys (58% vs 35% in the Global North). However, they share the concerns of citizens of the Global North that the use of AI in education will increase the digital divide (76% of global citizens overall are concerned about this) and are as likely to think that AI tools are a threat to society (54% of global citizens agree). Given these concerns, it is understandable that citizens across the world want to see a global framework to regulate AI (87%).



OF CITIZENS IN THE
GLOBAL NORTH SAY
AI HAS HAD A POSITIVE
IMPACT ON THEIR
EVERYDAY LIFE

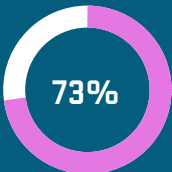
Longer and healthier lives



OF GLOBAL CITIZENS
SAY ADVANCEMENTS IN
LONGEVITY ARE A PRIORITY
FOR THEM

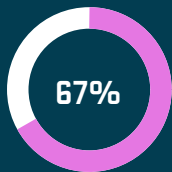
Global citizens want to live longer and healthier lives, but not at any cost. As well as being concerned about the potential burdens on future generations, global citizens are worried about the gap between rich and poor being unfairly widened because longevity will not be affordable to everyone (74% agree).

Citizens of the Global South are much more open to innovations such as trusting AI to medically diagnose them (47% agree vs 34% in the Global North) and emerging biotechnologies (66% think these greatly outweigh any risks compared to 55% of citizens in the Global North). Support for biotechnologies is highest in Vietnam (76%) and India (74%) and lowest in France (37%).



OF GLOBAL CITIZENS
THINK THAT LONGEVITY
IS NOT A GOOD THING IF
IT RESULTS IN YOUNGER
GENERATIONS BEARING
DISPROPORTIONATE
RESPONSIBILITY FOR LARGE
ELDERLY POPULATIONS

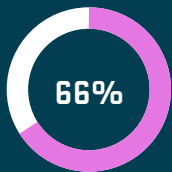
Achieving cleaner energy for a greener planet



OF GLOBAL CITIZENS ARE
WILLING TO PAY A LITTLE
MORE FOR CLEAN ENERGY

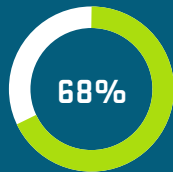
Many global citizens, in particular in the Global North, are frustrated with the pace of change on the energy transition. More than half of citizens in the Global North feel their country (55%) and oil and gas companies (57%) aren't moving fast enough towards renewable energy sources. The proportions are lower among citizens in the Global South (40% and 32% respectively).

However, energy affordability looms even larger – access to affordable energy is a huge concern, particularly in the Global South (80% compared to 68% in the Global North).



OF GLOBAL CITIZENS
SAY THAT ENERGY
AFFORDABILITY IS
MORE IMPORTANT THAN
ENVIRONMENTAL IMPACTS

Restoring prosperity through digital innovation – and hard work

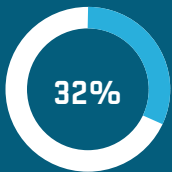


OF CITIZENS IN THE
GLOBAL SOUTH SAY
CRYPTOCURRENCIES ARE A
POSITIVE INNOVATION FOR
THE GLOBAL FINANCIAL
SYSTEM

Citizens of the Global South are much more open to technology-driven finance. As well as being more positive about cryptocurrencies, they are also more likely to trust AI to advise on savings (60% vs 33% in the Global North).

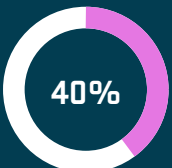
While inflation is more of a concern for citizens of the Global North (72% vs 65% in the Global South), more citizens in the Global South are living beyond their means compared to 2022 (21%, up from 17%). In contrast, the figure has fallen in the Global North, down to 12% from 15%.

Despite facing greater economic insecurity, citizens of the Global South are more likely to believe that if someone works very hard they can move up in society (69% vs 55% in the Global North).



OF CITIZENS IN THE
GLOBAL NORTH SAY
CRYPTOCURRENCIES ARE A
POSITIVE INNOVATION FOR
THE GLOBAL FINANCIAL
SYSTEM

Bringing together fragmented societies



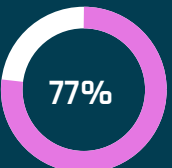
OF GLOBAL CITIZENS BELIEVE THAT IMMIGRATION INCREASES CRIME OR SECURITY RISKS

Global citizens, particularly in the Global North, are more likely to select negatives when asked about the impact of immigration on their country.

This is not the only sign that global citizens are focusing inward. Two-thirds (65%) support national self-sufficiency, even if it makes products more expensive. It is interesting that even though global citizens want to see national solutions, there are low levels of satisfaction with political aspects in their country. For instance, 65% are dissatisfied with the transparency and accountability of political leaders.

Global citizens are concerned about inequality, with 82% believing that it is increasing at an unsustainable pace.

Despite all these societal concerns, most global citizens believe that social cohesion is good in their country (70%) as well as their local area (77%). Citizens of the Global South are considerably more positive about national social cohesion, with 79% saying it is good, compared to only 57% in the Global North. Saudi Arabia (94%) and Ghana (93%) are the countries most likely to report good social cohesion nationally, compared to only 36% in Türkiye and France.



OF GLOBAL CITIZENS SAY THAT SOCIAL COHESION IS GOOD IN THEIR LOCAL AREA

NATIONAL AND PERSONAL PRIORITIES:
SOCIO-ECONOMIC ISSUES REMAIN CENTRAL

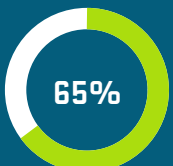
It's still the economy for national priorities, but on a personal level, health concerns are also key issues.

What are global citizens' top national priorities?

Global citizens select economic issues as the top priorities facing their country. Cost of living comes first among global citizens overall (50%), followed by unemployment and poverty/social inequalities (both 36%).

Q. And in this list, what do you think are the top three priorities facing your country today?

Looking ahead: Global citizens' views on the future

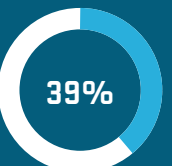


OF CITIZENS IN THE GLOBAL SOUTH ARE OPTIMISTIC ABOUT INNOVATION AND TECHNOLOGY IMPROVING PEOPLE'S LIVING CONDITIONS

Citizens of the Global South are much more optimistic than citizens in the Global North about all the elements of the future we asked about, including the ability of technology to make life better for people.

However, optimism about this has increased across both the Global North and the Global South since last year, up from 49% overall to 55%.

Younger citizens are much more positive about the future than older generations – 68% of under 35s are optimistic about their future compared to only 46% of over 65s.



OF CITIZENS IN THE GLOBAL NORTH ARE OPTIMISTIC ABOUT INNOVATION AND TECHNOLOGY IMPROVING PEOPLE'S LIVING CONDITIONS

Humanity faces immense challenges, from inflation and the cost of living to migration, social division, climate change, and the disruptive force of AI. Yet optimism endures, especially in the Global South, where citizens are more confident about technology, progress, and their own futures. The Global North, grappling with aging populations and slower growth, tends to look ahead with greater caution.

Nowadays, anxiety and hope coexist. But it is hope, driven by younger generations, that should inspire us.

	2025			2022		
TOP THREE PRIORITIES FACING COUNTRY	ALL	GLOBAL NORTH	GLOBAL SOUTH	ALL	GLOBAL NORTH	GLOBAL SOUTH
COST OF LIVING #1	50%	56%	46%	42%	54%	33%
UNEMPLOYMENT #2	36%	18%	48%	33%	15%	48%
POVERTY AND SOCIAL INEQUALITIES #3	36%	30%	40%	36%	33%	39%
CRIME AND DELINQUENCY #4	27%	27%	27%	24%	18%	28%
SOCIAL PROTECTION SYSTEM (HEALTH, RETIREMENT...) #5	25%	32%	20%	25%	27%	23%
EDUCATION SYSTEM #6	22%	13%	28%	24%	14%	33%
TAXES #7	21%	21%	20%	17%	21%	14%
GLOBAL WARMING #8	17%	25%	11%	23%	34%	14%
IMMIGRATION #9	15%	26%	7%	11%	17%	5%
INTERNATIONAL TENSIONS #10	14%	21%	9%	12%	16%	8%
TERRORISM #11	8%	6%	9%	7%	7%	7%
TECHNOLOGY #12	8%	4%	10%	4%	6%	2%
SEXIST, RACIST AND HOMOPHOBIC DISCRIMINATION #13	7%	9%	5%	7%	6%	7%
COVID-19 EPIDEMIC #14	-	-	-	21%	20%	22%

Priorities differ across the world. **Unemployment** is the leading issue in the Global South (48%) but is much less of a concern in the Global North (18%). Unemployment is an especially pressing issue in Africa, with 68% of citizens raising it as a priority. It particularly dominates in Ghana (81%) and South Africa (79%).

In contrast, unemployment barely registers in Japan (3%) and is not much of a concern in Germany (8%) or France (9%) either. As we shall see, Japan and France are the most pessimistic countries about the future, but fear of unemployment is not a reason for this.

In the Global North, **cost of living** is the top issue. This is a particularly important priority in New Zealand (83%), Australia (80%) and Canada (72%), as well as being a top concern in Kenya (71%). Concern is lowest in India (24%), South Korea and Mexico (both 28%).

“

One of the main concerns for both my family and me is the excessive rise we are seeing in all goods and products; it's brutal how hard it is to keep up as the prices of everything increase significantly, while salaries remain the same as they were 15 years ago.

Male, aged 59, Spain

”

While inflationary pressures have been felt across the globe, these differences highlight the breadth of experiences in different countries. Populations which rely on pensions or fixed incomes are more sensitive to increases in cost of living. Countries with weak or no welfare systems are more vulnerable to unemployment.

Concern about **poverty and social inequalities** is higher in the Global South (40% vs 30% in the Global North). It is the top issue in several countries, some of which have recently experienced economic upheavals: Indonesia (67%), Argentina (61%), Türkiye (50%), Brazil (48%), South Korea (44%) and Kazakhstan (42%). Poland and Saudi Arabia (both 18%) have the lowest levels of concern.

Education is also a higher priority in the Global South (28% vs 13% in the Global North). It is a Top 3 concern in several countries in Africa, MENA and Asia: Morocco (44%), Ivory Coast (43%), Senegal (43%), Egypt (37%), Vietnam, Türkiye, China (all 34%) and India (31%). But only 7% select this as a national priority in Japan.

Structural and societal challenges are increasing pressures for citizens of the Global North which helps explain why **immigration** is more of a concern in the Global North than the Global South (26% vs 7%). This is a particularly acute issue in some countries. It is a Top 3 concern in the UK (47%), Germany (43%), Spain (39%) and France (33%).

“

The security of the country, the massive uncontrolled invasion of immigration, the incompetence of the government, the cost of living, the violence.

Female, aged 34, France

”

However, it is barely on the radar in other countries. Only 1% of citizens in South Korea, Indonesia, Brazil, Nigeria and Kenya say that immigration is a top priority. We consider the impact of immigration in more detail later in this report

Citizens in the Global North are also more concerned about **social protection systems** (32% vs 20% in the Global South). This is the top answer in Germany (along with immigration on 43%) and a Top 3 answer in Spain (31%). Concern is also high in Poland (43%). However, some countries in the Global South also see this as an important priority, notably China, where it is the top priority (52%). But it is in the Global South where we see some very low levels of concern. Only 6% in Nigeria and South Africa select this as a priority.

International tensions are also more of a concern in the Global North (21% vs 9% in the Global South). This is a Top 3 answer in Poland (41%) and Canada (28%).

Global warming is another priority more prevalent in the Global North than the Global South (25% vs 11%). The two countries with the highest levels of concern are in the Global South.

Global warming is only mentioned by 2% of citizens in Argentina and 5% in Ghana, Kenya and Nigeria. Even though the Global South is already experiencing some of the most severe climate impacts, concerns are lower. Indeed, financial insecurity is more of an acute and tangible threat compared to wealthier countries.

“

Financial instability, today you are fine, tomorrow you may not have the money to be able to make at least 2 meals.

Male, aged 27, Brazil

”

Although **crime and delinquency** is not a Top 3 concern globally, it dominates priorities in Mexico (74%), Colombia (65%) and Sweden (58%) where it is the top answer. Mexico and Colombia have among the highest homicide rates in the world, whereas the rate in Sweden is low. Saudi Arabia (9%) and Poland (10%) have the lowest levels of concern.

We last asked this question about national priorities in 2022, when the Covid-19 pandemic was a significant concern. Despite this, most of the priorities are at similar levels to three years ago.

The increase in the cost of utility bills such as electricity and water and the increase in the price of gas and gasoline are very stressful on the family and are difficult to pay off easily.

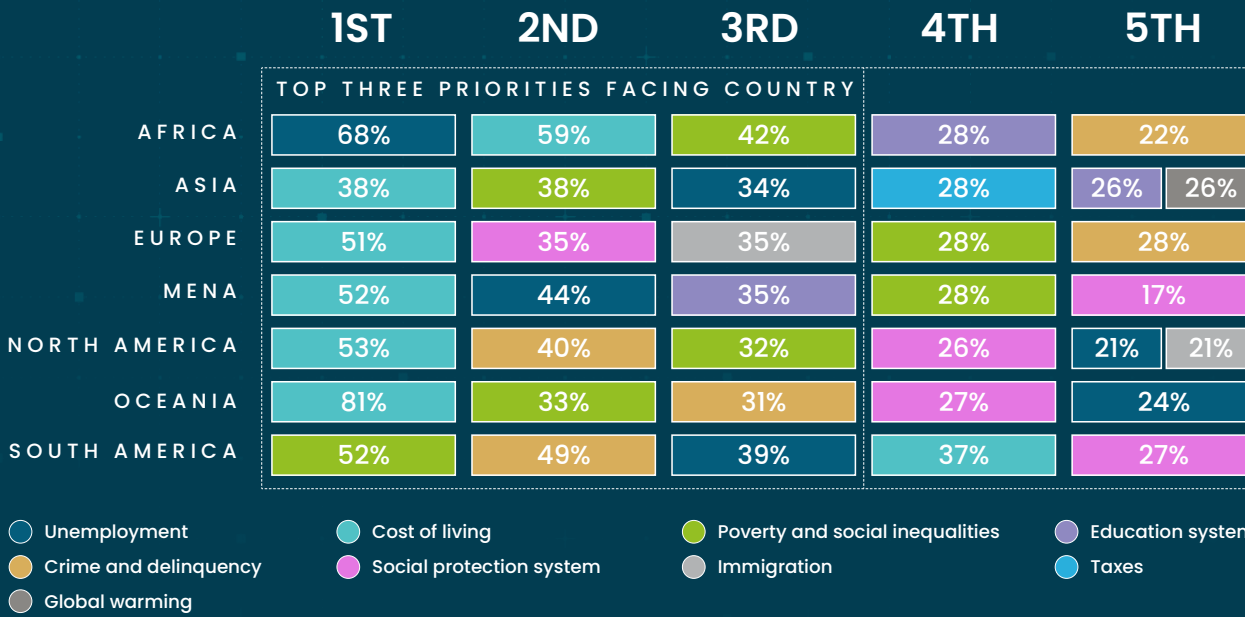
Male, aged 59, Saudi Arabia

There are two notable exceptions to this. Citizens of the Global North are more likely to mention immigration (26% vs 17% in 2022), crime (27% vs 18%) and international tensions (21% vs 16%). Increase in concern over these issues appears to have come at the expense of global warming, mentioned by 34% of citizens of the Global North in 2022 but only 25% in 2025.

The only noteworthy change among citizens of the Global South is that cost of living has jumped from 33% in 2022 to 46% today.



If we explore how priorities differ by region, we can see that cost of living is the top concern in most regions of the world. This is particularly striking in Oceania, where it is a priority for 81% of citizens.



However, in Africa unemployment (68%) comes first, while poverty and social inequalities (52%) is the top concern in South America. In Europe, where aging populations are putting welfare systems under pressure, social protection systems come second (35%).

Crime is a particular concern in both North America (40%) and South America (49%), a reflection of high crime rates in both regions.

Education systems are a particularly high priority for citizens in MENA (35%). Asia is the only region where taxes feature in the Top 5, selected by 28%.

These priorities cut across humanity regardless of gender. But concerns vary across different age groups, reflecting how needs evolve at different life stages.

Under 35s are more concerned about unemployment (45% vs 23% of over 55s) and education systems (27% vs 16%).

The fact that the cost of living is becoming more and more expensive is worrying, salaries are not seeing an increase, it is already difficult enough to have a stable job.

Female, aged 32, Senegal

“

I am most concerned about the health of my family members and the education of my child. My child is at a critical stage of learning, and I hope he can receive quality education, develop good learning habits and character, and have a bright future ahead.

Female, aged 35, China

”

Older generations place more emphasis on social protection systems (34% of over 55s select this as a priority compared to 18% of under 35s). Older global citizens are also more concerned about global and local tensions. For instance, 26% of over 65s see international tensions as a priority compared to only 9% of 18- to 24-year-olds. Crime and delinquency (33% vs 24%) and immigration (23% vs 12%) are also greater concerns for over 65s compared to 18- to 24-year-olds.

“

To see a reduction in unnecessary immigration to NZ. Far too many immigrants arriving in NZ from 3rd world countries affecting the social fabric of NZ.

Male, aged 71, New Zealand

”

“

Remove crime from the streets. People are afraid to go out in the evenings.

Female, aged 67, Sweden

”

Although concern about climate change is often associated with young people, we found that only 11% of 18-24-year-olds mentioned global warming as a top priority compared to 20% of over 65s.

“

The world is experiencing extreme weather conditions that cannot be ignored.

Male, aged 52, Japan

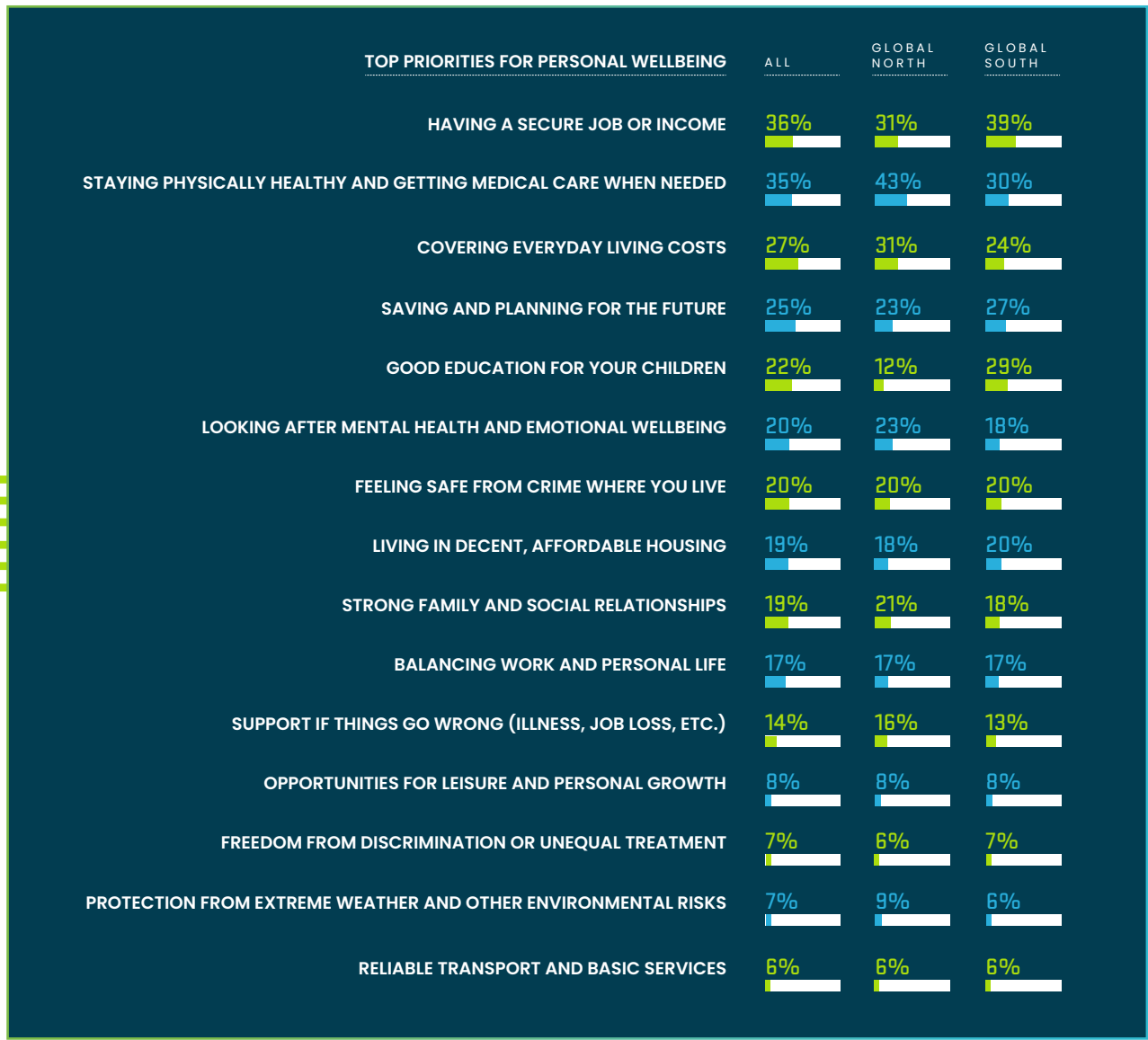
”

What are global citizens' top national priorities?

As well as differing national priorities, citizens of the Global North and Global South also vary on their top priorities for their well-being.

In the Global North, **physical health** comes top (43% vs 30% in the Global South). Two European countries, France (53%) and Germany (52%), are most likely to select physical health, while Kazakhstan (16%) is the least likely.

Q. And thinking about yourself and your family, which of the following areas do you consider to be the top priorities for your well-being today?



However, in the Global South a **secure job or income** is most important (39% vs 31% in the Global North). Job security is most likely to be mentioned by Argentina (54%) and the Ivory Coast (53%). Concern is lowest in Germany (19%). Spain is something of an outlier in the Global North, with 42% seeing a secure job as a priority. This likely reflects Spain's high unemployment rates since the 2008 financial crisis.

Citizens of the Global South prioritize wealth over health, while citizens of the Global North choose health over wealth because of the different circumstances citizens face – the pressures of ageing populations in the Global North, greater economic insecurity and weaker safety nets in the Global South.

“

My top priority concern for myself and family is the ability to provide for our basic needs and live comfortably.

Female, aged 24, Nigeria

”

“

Health is the top priority. I want to do everything to ensure my family becomes or stays healthy and to find as much support as possible in doing so.

Female, aged 55, Germany

”

There are other differences. Citizens of the Global South are more likely to prioritize a **good education for their children** (the third most important priority selected by 29% vs 12% in the Global North). This is a particularly high priority in the Ivory Coast (40%) and Ghana (39%) but is only selected by 8% in Japan and 10% in both South Korea and Canada.

Citizens of the Global North are more likely to mention **covering everyday living costs** (31% vs 24% in the Global South), particularly in Australia (42%). Concern is lowest in Colombia (13%) and India (14%).

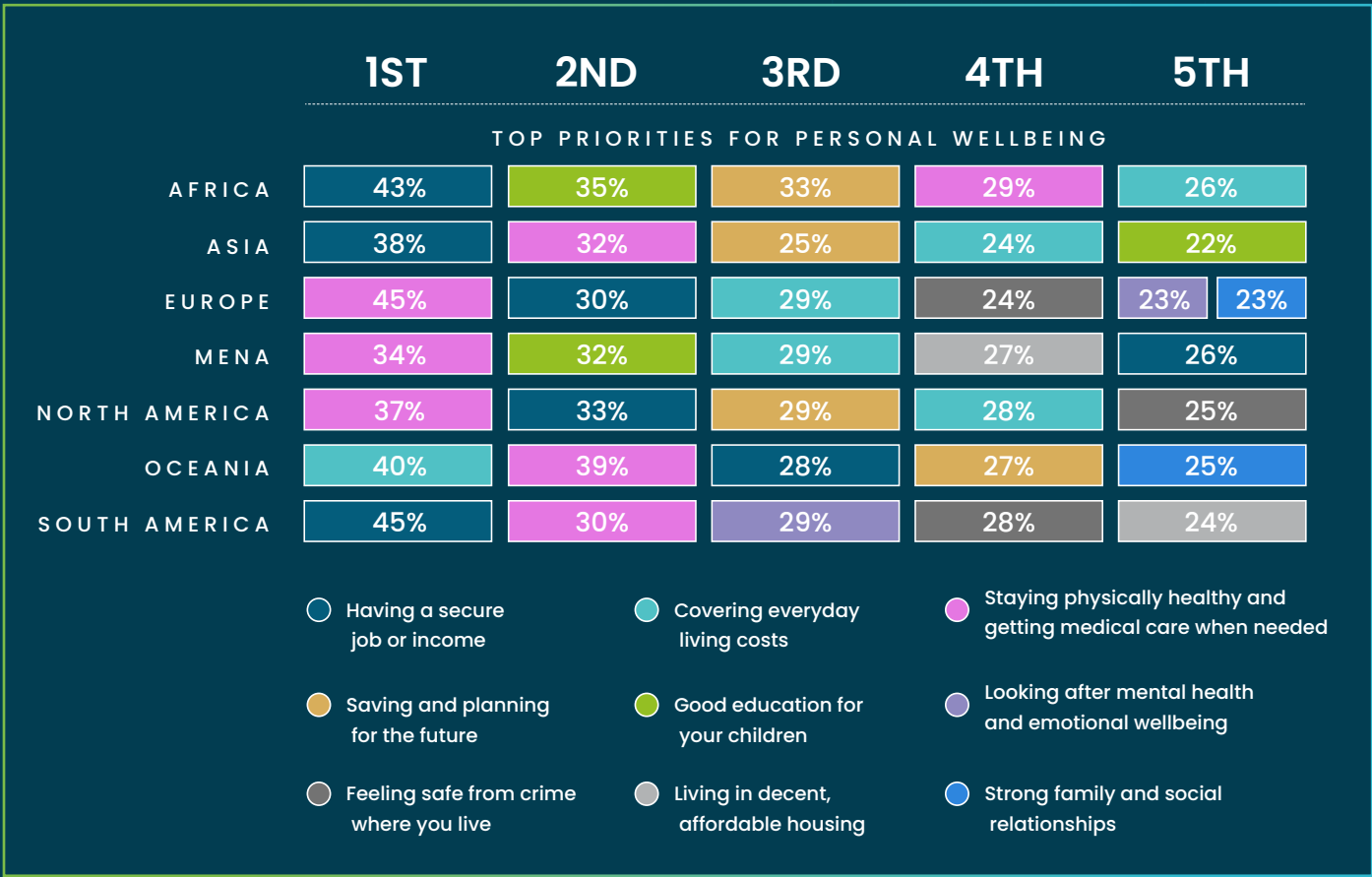
Although **mental health** is mentioned more often in the Global North (23% vs 18% in the Global South), it is Brazil (34%) that is the most likely to select this as a priority. Ghana is the least likely (8%).

Safety from crime is as likely to be mentioned by citizens of the Global North as the Global South. Concerns are highest in countries which see crime as a top national priority, Mexico (38%), South Africa (35%), Sweden and Colombia (both 32%). Vietnam and South Korea (both 9%) are the countries least likely to select safety from crime.

These differences across the Global North and Global South generally play out when we look at personal priorities on a regional level.

Job/income security comes top in Africa, Asia and South America, while staying physically healthy is mentioned most often in Europe and North America. However, this also comes first in MENA.

Education features among the top priorities in MENA (32%) and Africa (26%). Crime, a national priority for citizens in North and South America, also appears on their list of personal priorities (25% and 28% respectively want to feel safe from crime). This is a top personal concern for Europe as well (24%). South America is the only region where mental health makes the Top 3 (29%) and only in MENA is affordable housing listed as a key personal priority (27%).



As well as these regional differences, there are also clear differences in priorities by age. Older people are most likely to prioritize physical health (54% compared to 26% of under 35s), everyday living costs (32% vs 24% of under 35s) and feeling safe from crime (26% vs 18% of under 35s).

Health is a top priority because without good health you cannot do anything of the other things you would like to do and especially when you are older, health becomes more important.

Male, aged 68, Australia

As I get older, access to health care is my major concern. It is far harder to get specialist health care.

Male, aged 71, New Zealand

The top priority for both under 35s (40%) and 35–54-year-olds (39%) is having a secure job (vs 26% of over 55s). For 35–54-year-olds the second most popular priorities are saying physically healthy (32%) followed by a good education for their children (28%) and covering everyday living costs (also 28%). Under 35s select saving and planning for the future (28%) and staying physically healthy (26%) as their second and third priorities.

I need to straighten out my finances. With the way things are, we're drowning just trying to cover the basics.

Female, aged 41, United States

For this year, the priority is to start long-term investments in mutual funds and similar to improve the standard of living in the future.

Male, aged 22, Indonesia

ARE WE ON THE RIGHT TRACK?

There is concern about where the world is heading but global citizens have hope about their own lives.

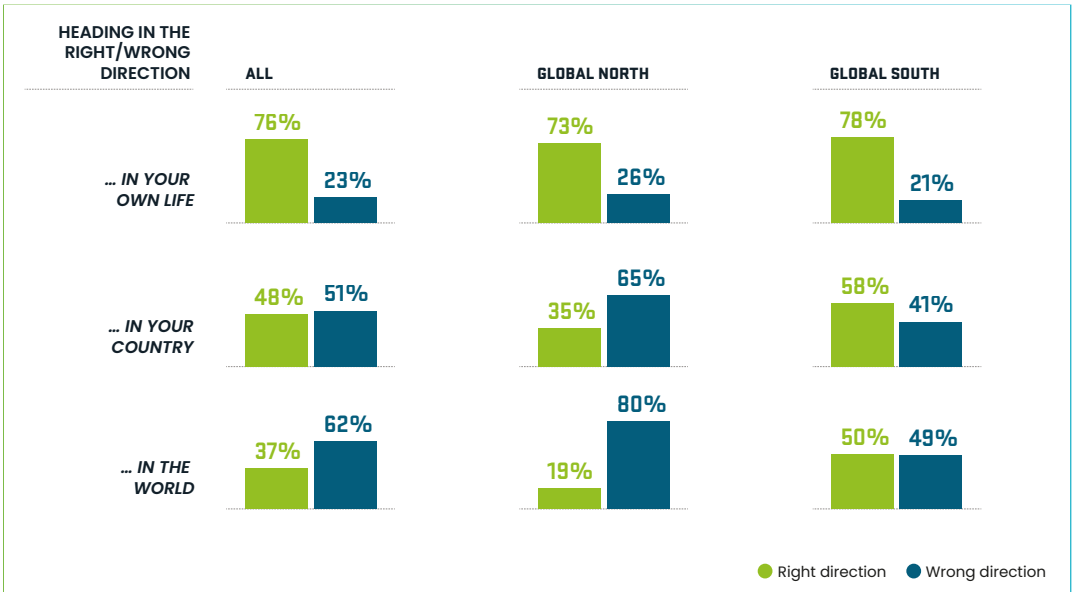
Most global citizens feel that the world is on the wrong course – 62% think this is the case, while only 37% say it is going in the right direction.

Furthermore, global citizens are optimistic that their own lives are on track. Only 23% say their life is going in the wrong direction, while 76% feel it is on the right course. Views of where their country is heading sit somewhere in between. There is an almost even split between feeling it is going in the right (48%) or the wrong (51%) direction.

Citizens of the Global South are much more positive than citizens of the Global North about the direction the world is going in. Half (50%) of citizens of the Global South say it is on the right track, compared to only 19% of citizens in the Global North.

Citizens of the Global South are also more optimistic that their country is going in the right direction (58% vs 35% in the Global North). We see a much smaller gap in positivity between citizens of the Global South and Global North when it comes to their own lives (78% vs 73% say it is on the right track).

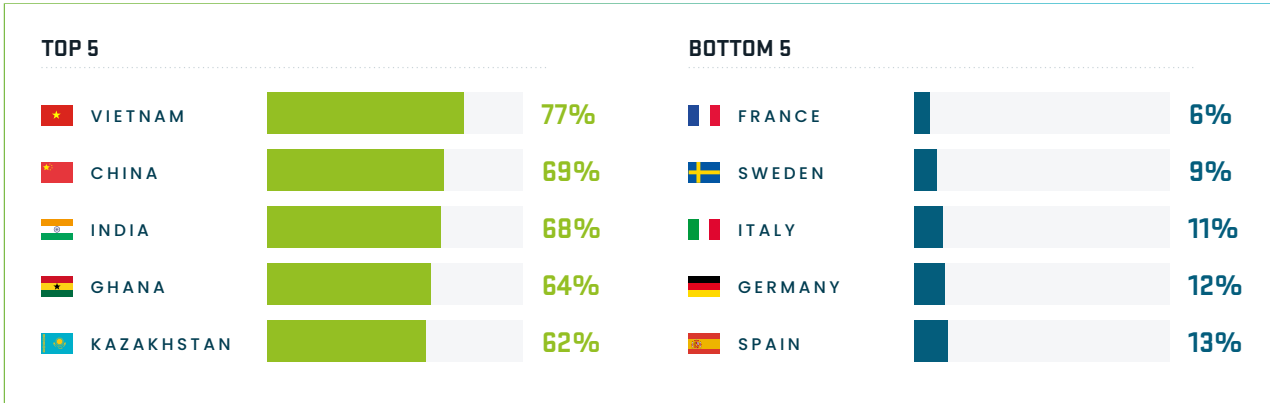
Q. Generally speaking, would you say things are generally headed in the right direction, or do you feel things are off on the wrong track....?



Why should there be such a big gap in optimism between the Global South and the Global North? As we have seen, citizens of the Global South feel much more positive about both the present and the future on a range of issues. It is a caricature to draw a contrast between “old, tired democracies” and “nations on the move.” However, our research certainly suggests more positivity and less unease among citizens of the Global South compared to their counterparts in the Global North.

At an individual country level, there are some very wide disparities in views on whether the world is heading in the right direction. Vietnam is the most optimistic country (77%), followed by China (69%). France has the lowest proportion of citizens who believe that the world is on the right track, with only 6% believing this to be the case. A staggering 94% of French citizens think the world is going in the wrong direction. All the countries in the bottom five are European.

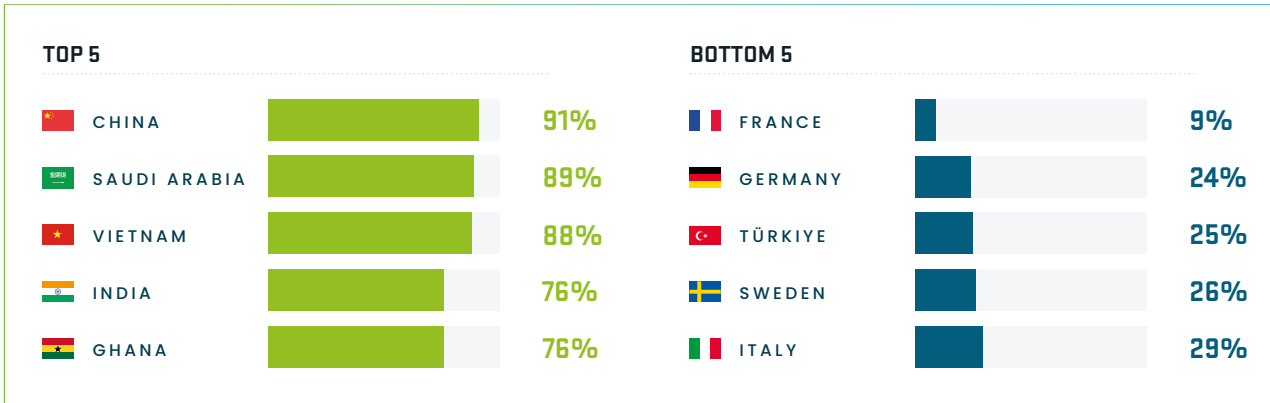
WORLD: RIGHT DIRECTION



We also see some stark differences of opinion on whether global citizens think their country is on the right track. At one extreme we have citizens of France who are, by some way, the least likely to think their country is going in the right direction (9%). Nine in ten (90%) believe that France is going in the wrong direction. Ongoing political instability in France has clearly impacted national optimism about the future. Citizens of Germany (24%), Türkiye (25%) and Sweden (26%) are also unlikely to believe their country is going in the right direction.

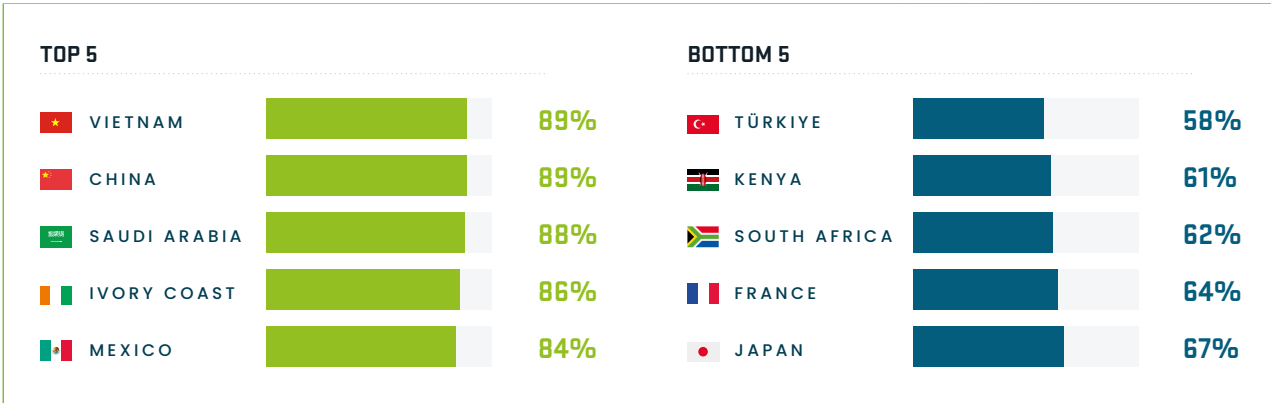
At the other end of the spectrum, we have China, whose citizens are ten times as likely as French citizens to believe their country is on the right track (91%). Optimism is almost as high in Saudi Arabia (89%) and Vietnam (88%).

COUNTRY: RIGHT DIRECTION



Vietnam, China and Saudi Arabia also top the list for the most positive about the direction their own lives are taking, with around nine in ten thinking things are on the right track. Citizens of Türkiye are the least positive (58%).

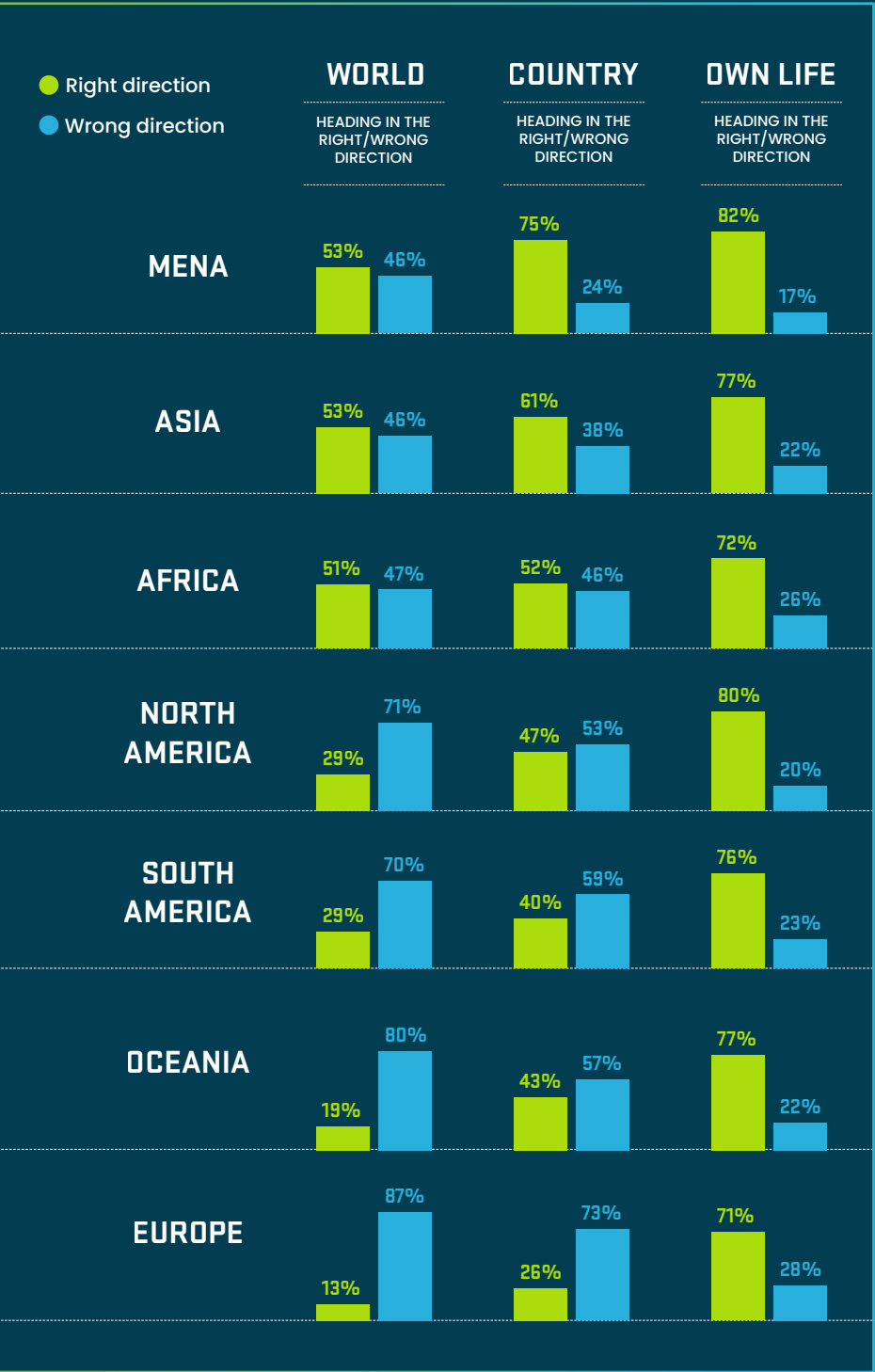
OWN LIFE: RIGHT DIRECTION



There is much less of a gap in optimism between different countries when it comes to citizens' own lives. It is also notable that the list of the bottom five countries has more of a geographical spread, rather than being dominated by European countries, although France still makes an appearance.



When we look at the findings by region, we see that MENA, Asia and Africa are the most positive about the direction the world is heading in. Around half think it is on the right track and less than half on the wrong track. Citizens in Oceania and Europe are much less positive – 87% in Europe and 80% in Oceania believe the world is on the wrong track. North America and South America sit somewhere in between the optimistic and pessimistic regions.



The regional pattern is similar when it comes to country. However, MENA is the clear leader, with 75% believing their country is going in the right direction. Africa and North America have more similar views about their country than they do about the world. Oceania is much more positive than Europe, whereas the attitudes of these two regions on the world outlook are quite similar. In Europe, 73% believe their country is on the wrong track (the figure is only 24% in MENA), while in Oceania the figure is 57%.

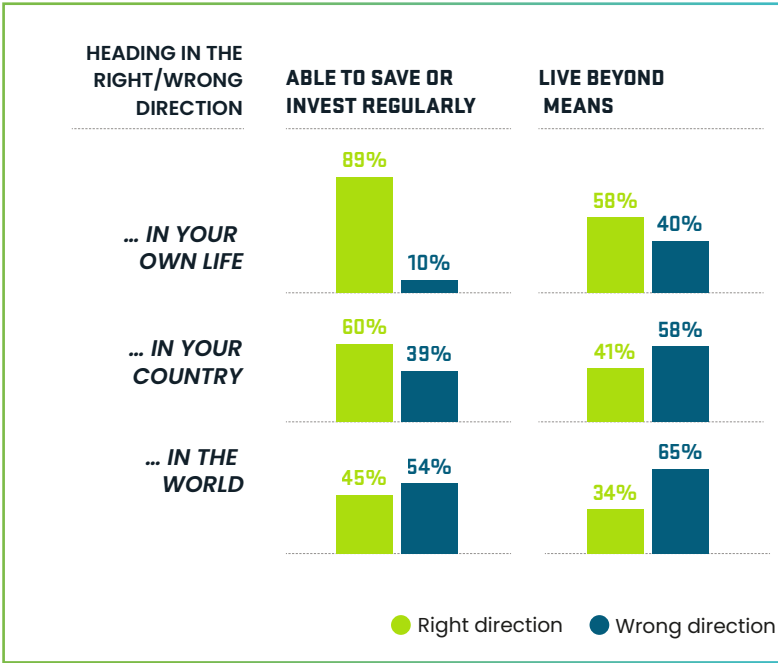
The regional differences on whether global citizens' own lives are on the right track are much less marked. Citizens in North America are almost as optimistic (80%) as MENA (82%), again the leader.

In contrast to attitudes on the world and their own country, citizens in Africa are almost as pessimistic as citizens in Europe – 26% feel their life is going in the wrong direction compared to 28% in Europe. This could be linked to the economic position of citizens in Africa. As we shall see later in this chapter, there is a clear relationship between feeling your life is on the right track and not living beyond your means.

While there is some correlation between personal and national or global optimism, the relationship is not clear cut. This is because financial security influences whether global citizens believe their lives are on track. We found that 89% of global citizens who are able to save regularly believe that their life is heading in the right direction, compared to only 58% of those who live beyond their means.

Greater financial security tempers the tendency of citizens of the Global North to be more pessimistic. As we shall see in a next section, citizens in the Global North are more able to save than citizens in the Global South.

Young people are more positive that the world and their country are on the right track. Almost half (46%) of under 35s think the world is on the right track compared to only 25% of over 55s. More than half (54%) think their country is going in the right direction compared to only 41% of over 55s. Optimism regarding one's own life shows little variation between age groups.



I am overly concerned economically because our income does not cover our expenses, we are always in debt.

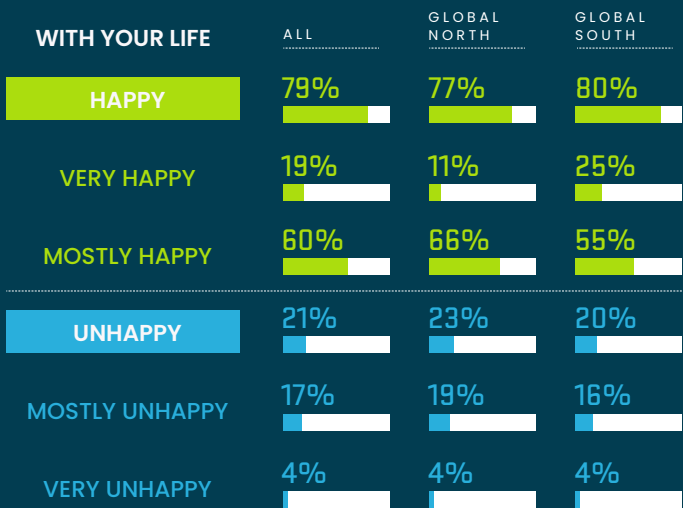
Female, aged 29, Türkiye

How happy are global citizens?

Most global citizens are happy with their lives (79%). Citizens in the Global South are more likely to be very happy (25% vs 11% in the Global North) but overall levels of happiness are not that much higher.

But there are significant variations by country, with citizens in Mexico (90%), Vietnam (also 90%) and Colombia (89%) the most likely to be happy. Citizens of Türkiye are the least happy, with 49%, just short of a majority, saying they are happy.

Q. Overall, how happy or unhappy are you with your life today?



There is a strong relationship between feeling happy and believing that your life is going in the right direction. We found that 92% of those who are 'very happy' say their life is on the right track, compared to only 25% of those who are 'very unhappy.'

Nevertheless, it is interesting that there is a significant proportion of global citizens who feel very unhappy but think their life is going in the right direction. We can speculate as to why this is the case, but one factor may well be that these global citizens are making sacrifices today in the hope of a better future which impact their current happiness.

In the times we are living in, the future is very uncertain so it's important we save ahead of time and use money only when needed.

Female, aged 23, Kenya

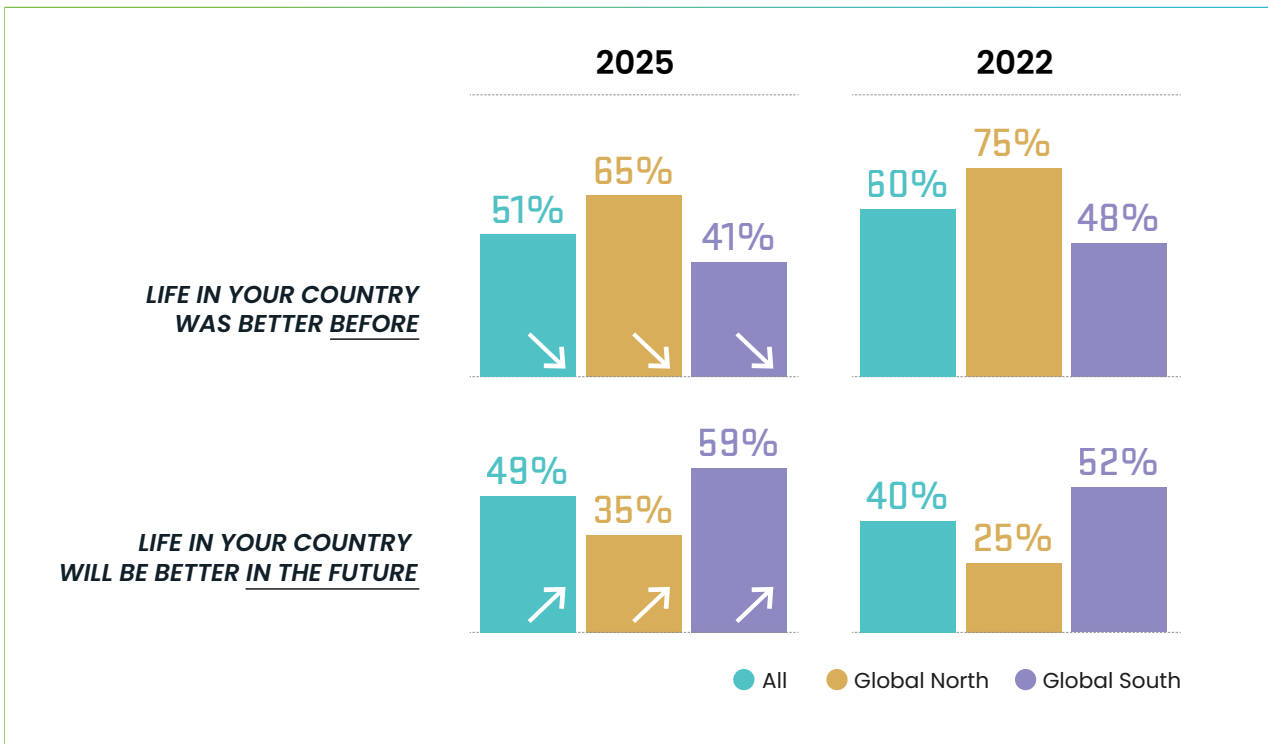
Is life going to get better?

Although global citizens are generally happy, they are split on whether to be nostalgic or optimistic about life in their country. Nostalgia rules among Global North citizens, with 65% saying life in their country was better before, compared to only 41% of citizens in the Global South. Citizens in the Global South are much more likely to think life in their country will be better in the future (59% vs 35% in the Global North).

→ Nostalgia is particularly prevalent in France (87%), Japan (80%) and Türkiye (79%), who all have large majorities who believe their country is on the wrong track. Nostalgia is lowest in the two places where citizens are most likely to believe their country is on the right track, Vietnam (18%) and China (19%).

→ Global citizens are more likely to think that better times are to come compared to 2022 when we last asked this question. The proportion believing that life will be better in the future has increased from 40% in 2022 to 49% today. We see a rise among citizens in the Global South and, in particular, the Global North.

Q. With which of the following two sentences do you most agree?



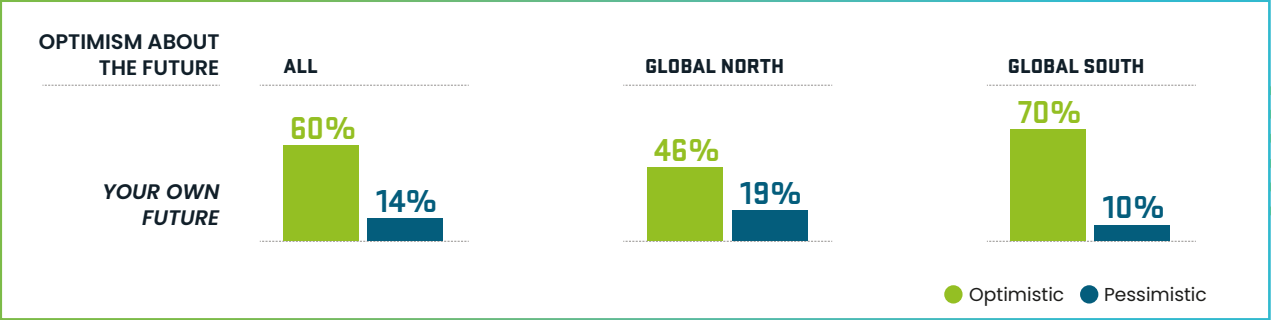
As well as being more common among citizens of the Global North, nostalgia is also more widespread among older global citizens. Among over 55s, 61% believe that life in their country was better before, compared to only 44% of under 35s.

CONCLUSION

Looking ahead: Global citizens' views on the future

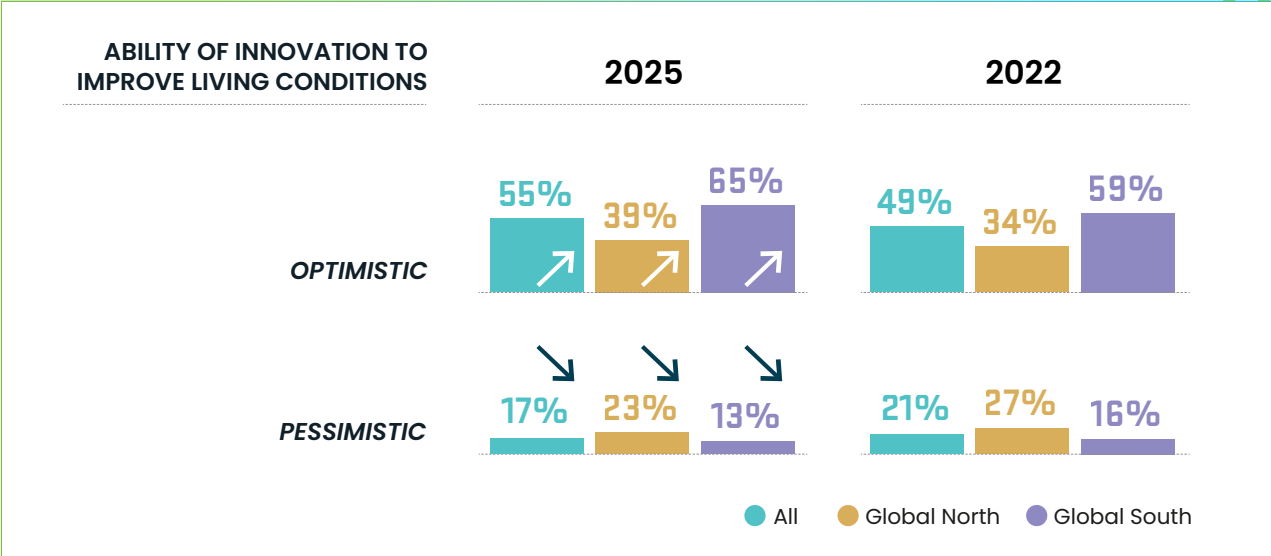
Citizens in the Global South are much more optimistic about the future than those in the Global North.

High proportions of citizens in the Global South feel optimistic about their future (70%) compared to less than half of citizens in the Global North (46%). Pessimism about global citizens' personal futures is twice as high in the Global North as the Global South (19% vs 10%). Nigeria (90%) and Ghana (89%) are the most positive countries. Japan (20%), Türkiye (24%), Italy (30%) and France (31%) are the least.



We see the same pattern in relation to improving living conditions through innovation and technology. Most (65%) citizens in the Global South feel optimistic about this, compared to only 39% in the Global North. However, optimism in both the Global North and Global South has increased since last year. A clear majority (55%) are now optimistic, up from 49%.

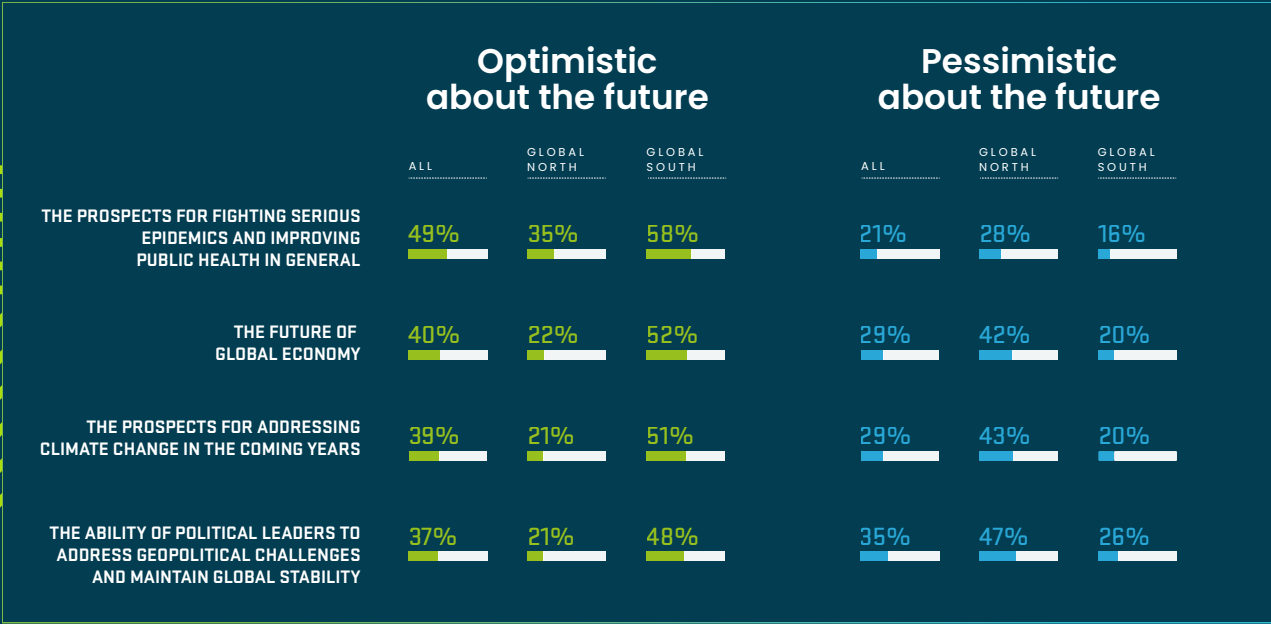
THE PROSPECTS OF IMPROVING PEOPLE'S LIVING CONDITIONS THROUGH INNOVATION AND TECHNOLOGY



On the other dimensions of the future we asked about, we see lower levels of optimism. However, citizens of the Global South are much more likely to be optimistic than citizens of the Global North. The only area where less than half of citizens of the Global South are positive is the ability of political leaders to address geopolitical challenges (48%).

In contrast, only one in five of citizens of the Global North are optimistic about the future of the global economy (22% vs 52% in the Global South) or addressing climate change (21% vs 51%). Less than half of citizens of the Global North feel optimistic about the future of all the dimensions we asked about – even their own lives.

At a country level, France and Japan are consistently the most pessimistic. For instance, only 7% in Japan and 12% in France are optimistic about addressing climate change. This compares to 69% in Saudi Arabia, which is consistently optimistic about the future.



If we explore optimism about the future at a regional level, we see a consistent pattern. Global citizens in Africa and MENA are the most optimistic and citizens in Europe and Oceania are the least.

Citizens in North American and South America (whose optimism levels tend to be similar) are less positive than global citizens overall, while global citizens in Asia are generally more positive than average. These different patterns of optimism and pessimism broadly map onto what we see in the Global North and Global South.

OPTIMISM OR PESSIMISM ABOUT THE FUTURE	TOTAL	AFRICA	ASIA	EUROPE	MENA	OCEANIA	NORTH AMERICA	SOUTH AMERICA
YOUR OWN FUTURE	60%	82%	54%	43%	73%	58%	60%	59%
	14%	6%	18%	20%	8%	14%	13%	13%
THE PROSPECTS OF IMPROVING PEOPLE'S LIVING CONDITIONS THROUGH INNOVATION AND TECHNOLOGY	55%	73%	56%	36%	70%	44%	48%	50%
	17%	10%	15%	26%	10%	21%	19%	19%
THE PROSPECTS FOR FIGHTING SERIOUS EPIDEMICS AND IMPROVING PUBLIC HEALTH IN GENERAL	49%	68%	49%	33%	66%	40%	43%	38%
	21%	11%	19%	30%	11%	28%	27%	27%
THE FUTURE OF GLOBAL ECONOMY	40%	64%	41%	20%	59%	27%	33%	32%
	29%	13%	27%	45%	15%	38%	33%	32%
THE PROSPECTS FOR ADDRESSING CLIMATE CHANGE IN THE COMING YEARS	39%	59%	40%	20%	59%	25%	33%	32%
	29%	14%	29%	44%	14%	38%	33%	32%
THE ABILITY OF POLITICAL LEADERS TO ADDRESS GEOPOLITICAL CHALLENGES AND MAINTAIN GLOBAL STABILITY	37%	52%	44%	18%	61%	25%	32%	25%
	35%	22%	28%	52%	16%	42%	38%	42%

● Optimistic ● Pessimistic

Younger global citizens are more positive on every single measure we asked about. For instance, 68% of under 35s are optimistic about their own future compared to only 46% of over 65s.

“
Frankly we are going through a quite difficult period but it's not for that reason that we are going to let ourselves be discouraged so I think that I will do my best to provide for my family's needs.
”

Male, aged 19, Ivory Coast

“
I'm very worried about stable work but I feel that things are getting sorted out. I fight for a better tomorrow.
”

Female, aged 25, Argentina

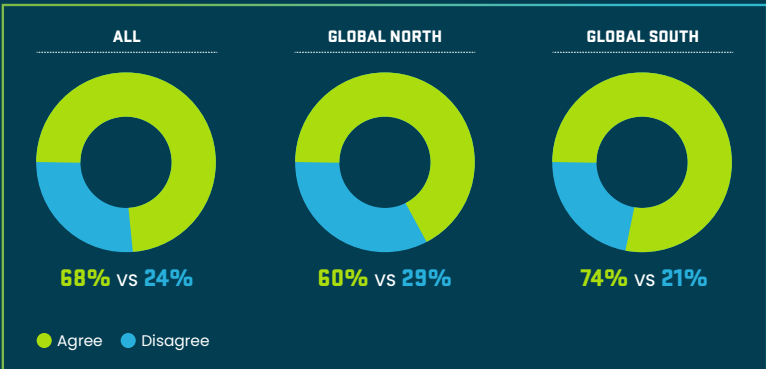
The gap in optimism is especially wide regarding the ability of innovation and technology to improve living conditions, with 63% of under 35s optimistic compared to only 39% of over 65s. We also see stark differences on the future of the global economy, with 51% of under 35s olds optimistic, compared to 21% of over 65s, and addressing climate change (48% vs 21%).

How can we shape a better future?

It is encouraging to see such a high degree of optimism about the future among younger generations. However, optimism is not enough. We need to take urgent action to tackle the challenges which exist across the globe relating to economic security, health and energy.

Who is going to make the world a better place? Governments obviously have a part to play. Most global citizens would like their governments to spend more addressing long-term challenges such as climate change and education even if it means increasing public debt (68% agree, 24% disagree).

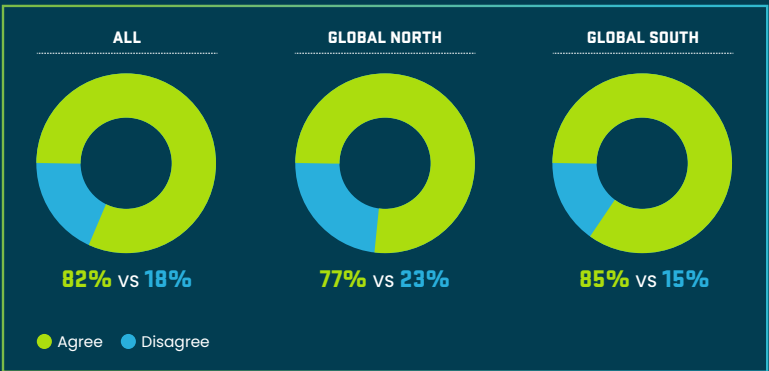
EVEN IF IT MEANS INCREASING PUBLIC DEBT, THE GOVERNMENT SHOULD SPEND MORE TO ADDRESS MAJOR LONG-TERM CHALLENGES SUCH AS CLIMATE CHANGE AND EDUCATION



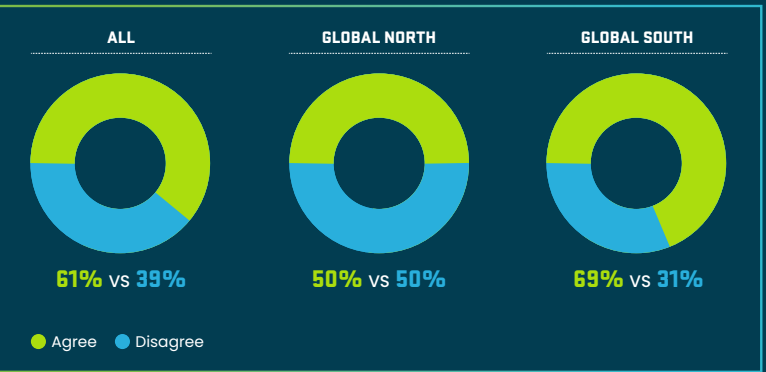
Citizens in the Global South are more likely to want government spending on long-term challenges (74% agree vs 60% in the Global North). This may be because issues such as education feel particularly pressing to citizens in the Global South.

ENVIRONMENTAL AND SOCIAL IMPACTS SHOULD INFLUENCE HOW COMPANIES INVEST

Business must play an important role too. There are high levels of agreement among global citizens that companies should factor environmental and social impacts into their investments (82%). Agreement is higher in the Global South (85%) than the Global North (77%).



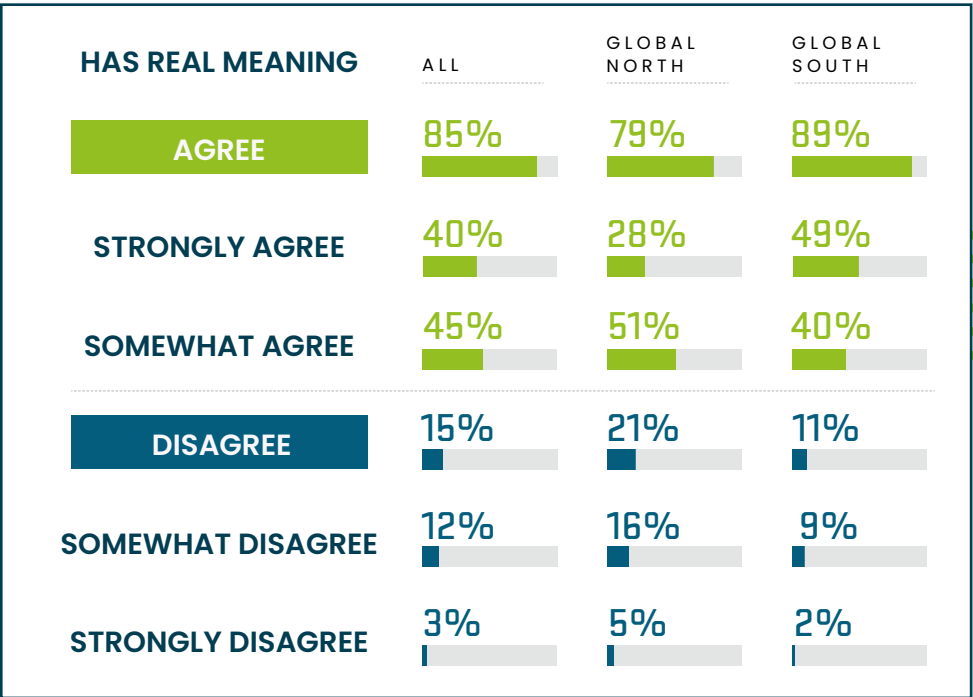
PRIVATE INVESTORS SHOULD TAKE MORE RISK TO FUND BIG INFRASTRUCTURE, EVEN IF RETURNS ARE UNCERTAIN



There is less consensus on whether private investors should run risks to fund infrastructure. Citizens in the Global South are most likely to believe that they should, even if returns are uncertain (69%). Citizens in the Global North are evenly split, with 50% agreeing and 50% disagreeing. Egypt is the most positive on 84%, South Korea (37%) and Japan (38%) the least.

Finally, there are the actions and energies of global citizens themselves. Perhaps the most encouraging finding in our research is that most global citizens believe that life has meaning (85%). Agreement is particularly strong in the Global South, with half (49%) strongly agreeing that life has meaning (89% agree) compared to 28% in the Global North (79% agree).

Q. Would you say that you feel that your life has real meaning ...?



Governments, the private sector, thought leaders, civil society and global citizens themselves all have a role to play in making sure that each of our lives continues to have meaning. Together, we can shape a better, healthier and more sustainable future.

ADDENDUM

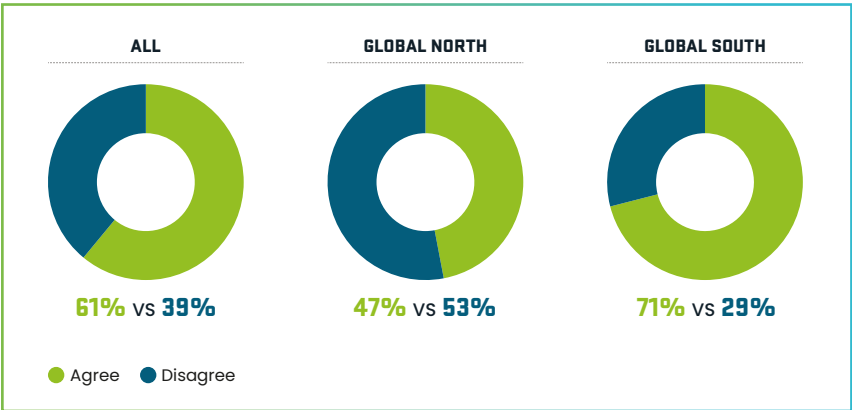
1. Embracing AI and digital transformation thoughtfully

AI has had a positive impact on lives in the Global South – citizens in the Global North are less enthusiastic.

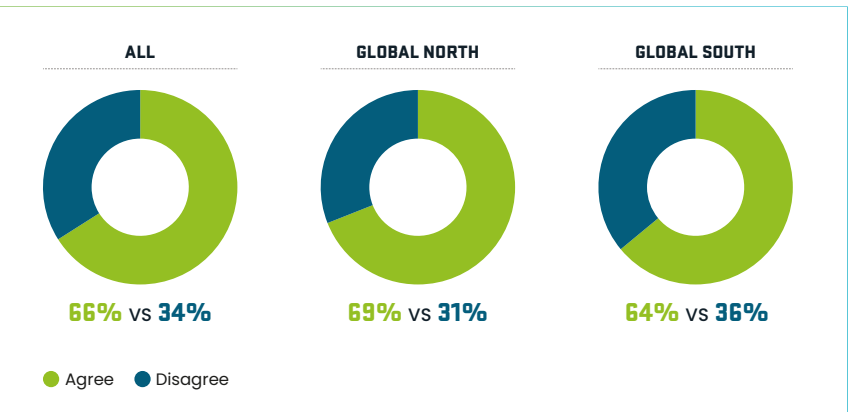
Most citizens in the Global South believe that AI has had a positive impact on their everyday lives (71%). In contrast, most citizens in the Global North disagree that this is the case (53% compared to only 29% disagreeing in the Global South). There are even greater variations by country. China, Nigeria and Kenya (all 86%) are the most positive about the personal impact of AI, France is the least (31%).

There is also a clear age divide, with 70% of under 35s saying that AI has been positive in their lives, compared to only 42% of over 65s (58% of this age group disagree).

I BELIEVE AI HAS HAD A POSITIVE IMPACT ON MY EVERYDAY LIFE



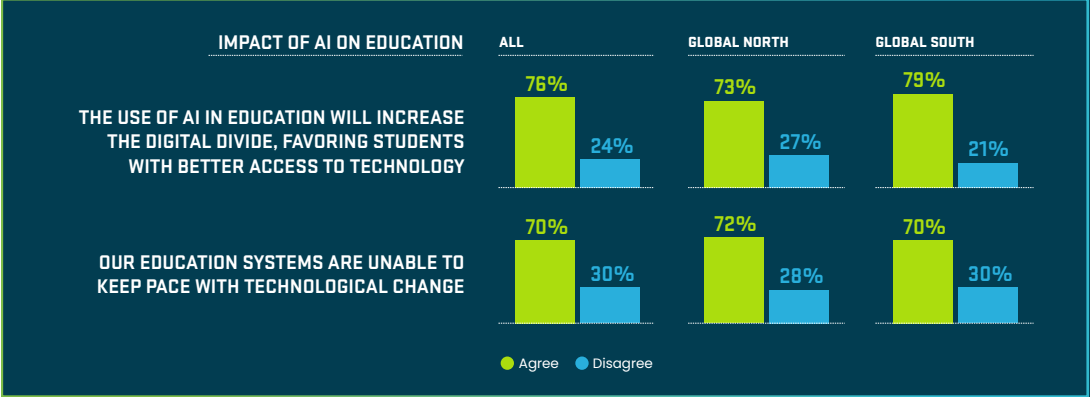
AI-POWERED DISINFORMATION OR “DEEPFAKES” HAVE THE POTENTIAL TO TOPPLE GOVERNMENTS



How much do global citizens believe AI is going to change the world? The political implications are potentially huge. Most global citizens believe that AI-powered disinformation or “deepfakes” could topple governments (66%).

Citizens in the Global North are most likely slightly more inclined to hold this view (69% vs 64% in the Global South). Agreement that AI could bring governments down is particularly high in the UK (77%), the US (75%) and New Zealand (75%). China (54%), Vietnam and Saudi Arabia (both 55%) are the least likely to think this.

Global citizens are also concerned that the use of AI in education will increase the digital divide (76%). This concern is greater in the Global South (79% vs 73% in the Global North). As we saw previously, the education system is a particular priority for citizens in the Global South. Global citizens across the world share a broader worry that education systems can’t keep up with technological change (70%).

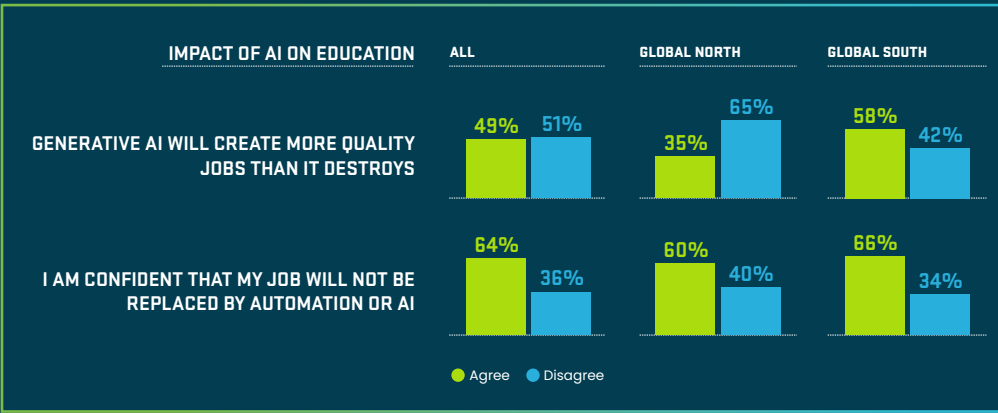


When it comes to the impact of AI on jobs, global citizens have mixed views, with 49% believing it will create more quality jobs than it destroys and 51% disagreeing.

Citizens in the Global North are particularly skeptical; 65% disagree compared to only 42% in the Global South. There is a clear age difference too. Half (55%) of under 35s believe that AI will create more good jobs than it destroys, compared to only 36% of over 65s.

Because younger and Global South citizens have more positive experiences of AI in their own lives, this likely makes it easier for them to envisage how AI could generate good quality jobs.

Global citizens have a higher degree of confidence that their own jobs won’t be replaced by automation or AI (64% agree vs 36% disagree). Views do not differ a great deal between the Global South and Global North (66% vs 60%). Concern is highest in South Korea (58%), lowest in Indonesia (20%).

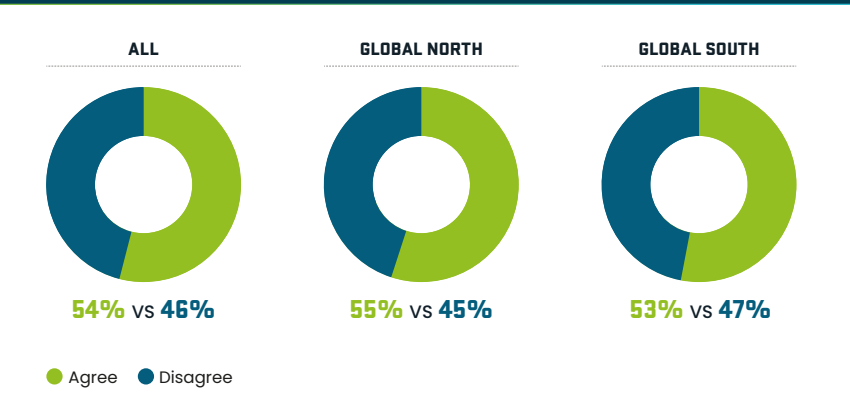


I am doing everything in my power to upskill but without relevant experience it is very difficult in this new AI enabled world.

Female, aged 59, South Africa

Given the mix of views on the impact of AI, it's understandable that global citizens are split on whether AI tools are a threat to society – 54% agree while 46% disagree. Although citizens of the Global South are much more positive about the impact of AI in their own lives, they are as likely as citizens in the Global North to believe that AI is a threat to society.

AI TOOLS ARE A THREAT TO SOCIETY



This may be linked to a lack of trust in big tech, a sentiment found across the world. There are high levels of agreement that big tech companies will prioritize profit over safety when investing in AI (80%). Almost three-quarters (73%) agree big tech companies have too much power compared with governments. These concerns are shared across the Global North and the Global South. But there are some differences by country, with the UK and South Africa (82%) most likely to regard AI tools as a threat and Japan (51%) and China (55%) the least likely.

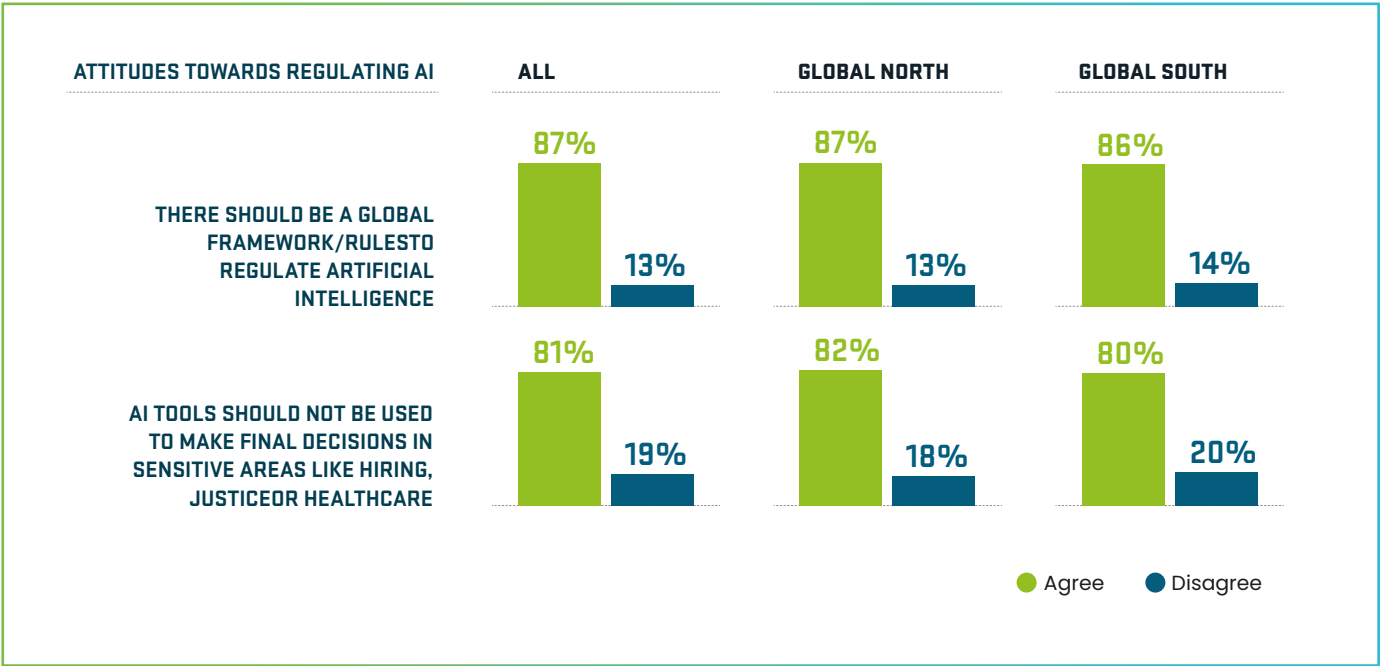
These fears help explain why most global citizens believe that their country should develop its own AI technologies instead of relying on global tech companies (77%). However, this also links into a wider desire for national self-sufficiency.

ATTITUDES TOWARDS BIG TECH	Agree			Disagree		
	ALL	GLOBAL NORTH	GLOBAL SOUTH	ALL	GLOBAL NORTH	GLOBAL SOUTH
BIG TECHNOLOGY COMPANIES TODAY HAVE TOO MUCH POWER COMPARED WITH GOVERNMENTS	73%	73%	73%	27%	27%	27%
BIG TECHNOLOGY COMPANIES WILL PRIORITIZE PROFIT OVER SAFETY WHEN INVESTING IN AI	80%	81%	78%	20%	19%	22%
MY COUNTRY SHOULD DEVELOP ITS OWN AI TECHNOLOGIES INSTEAD OF RELYING ON GLOBAL TECH COMPANIES	77%	73%	79%	23%	27%	21%

Responsible AI?

In light of these concerns around AI and big tech, it is not surprising that global citizens want to see some parameters put in place around AI.

Almost nine in ten (87%) would like to see a global framework to regulate AI and 81% believe that AI tools should not be the final decider in sensitive areas like hiring, justice or healthcare. Citizens of the Global South may be more positive about AI than their counterparts in the Global North, but they are no less likely to want protections to be in place.



As AI integrates more deeply into home scenarios, future transaction assistants, elder care, etc., can all be achieved through AI, and it is necessary to guard against the overuse of AI to replace labor.

Male, aged 45, China

How important are digital services?

Technology is an essential part of life for global citizens, who regard all the digital services we asked about as important. Access to high-speed internet scores highest (89% important vs 10% unimportant) followed by financial services (86% vs 12% unimportant). White-collar workers are more enthusiastic about all the digital tools we asked about, but the gap is most marked on remote work tools (75% say these are important compared to 63% of blue-collar workers).

Younger global citizens are particularly likely to see AI tools as important, with 74% of 18–34-year-olds saying this, compared to only 32% of over 65s. The proportion saying that AI tools are important has risen since 2024 (up from 53% to 59%). This figure is likely to rise in the years ahead, particularly if AI increasingly delivers positive benefits to humanity.

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

DIGITAL SERVICES	ALL		GLOBAL NORTH		GLOBAL SOUTH	
	Important	Unimportant	Important	Unimportant	Important	Unimportant
ACCESS TO HIGH-SPEED INTERNET	89%	10%	83%	15%	91%	7%
FINANCIAL SERVICES (E.G., ONLINE BANKING, INVESTING)	86%	12%	82%	15%	88%	10%
E-COMMERCE AND ONLINE PAYMENTS	83%	15%	76%	20%	87%	11%
DIGITAL TOOLS FOR E-GOVERNMENT SERVICES	73%	21%	60%	29%	83%	14%
DIGITAL PLATFORMS FOR SOCIAL INTERACTION	71%	26%	57%	38%	80%	18%
ONLINE LEARNING OR SKILL DEVELOPMENT COURSES	70%	23%	50%	36%	84%	13%
DIGITAL TOOLS OR APPS TO MANAGE YOUR HEALTH OR WELLNESS	69%	25%	53%	37%	79%	16%
REMOTE WORK TOOLS	68%	22%	48%	33%	80%	15%
GENERATIVE AI TOOLS (E.G., CHATGPT, MIDJOURNEY)	59%	33%	38%	47%	73%	22%

Finally, citizens of the Global South have a greater appetite for all the digital services we asked about. This is seen most clearly on online learning (84% of citizens in the Global South say this is important vs 50% in the Global North), remote work tools (80% vs 48%) and generative AI tools (73% vs 38%). Citizens in Ghana and Nigeria (both 92%) are the most likely to regard AI tools as important. By contrast only 23% in France and 32% in Sweden think the same.

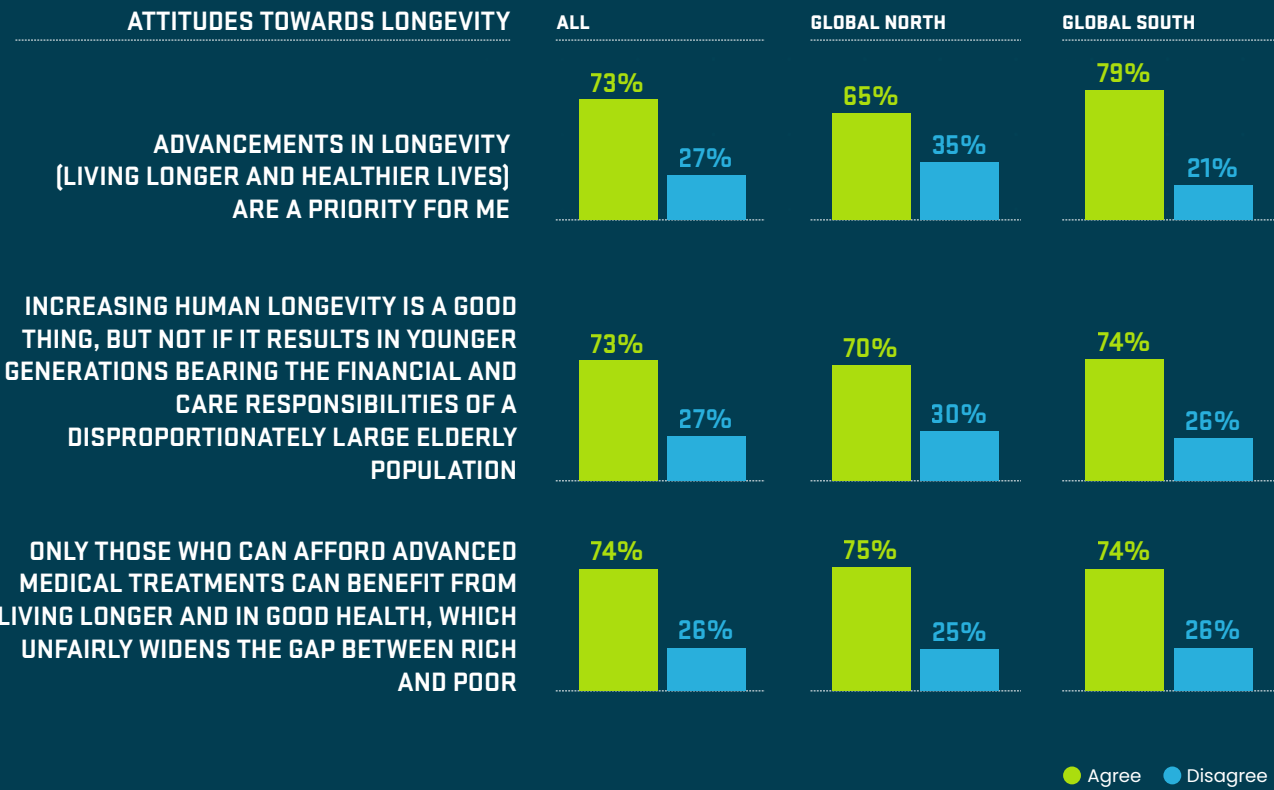
As we shall see in the next two chapters, this digital positivity translates into greater enthusiasm in the Global South for innovation in health and financial services.

2. Living longer and healthier lives

Global citizens want to live longer but not at the expense of future generations.

Living longer and healthier lives is important to global citizens. Around three-quarters (73%) say that advancements in longevity are a priority for them, rising to 79% in the Global South (vs 65% in the Global North). Ghana is the most positive country (90%). Japan is the only country where a majority (54%) disagree.

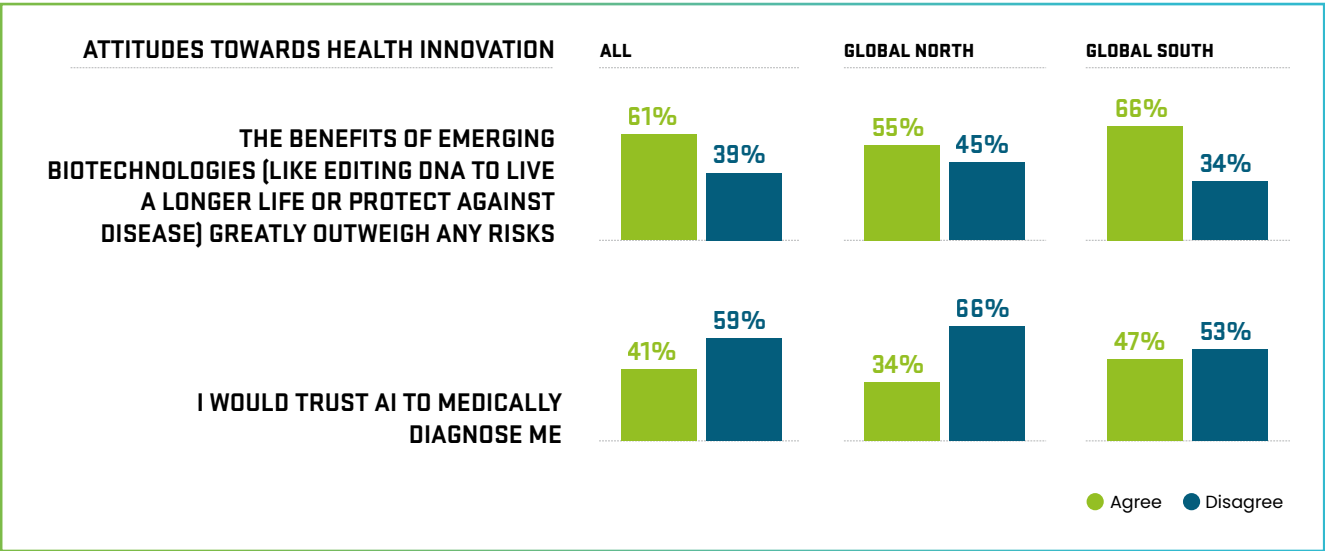
However, global citizens do not want longevity at all costs. Most believe that increasing human longevity is not a good thing if younger generations end up bearing disproportionate responsibilities for elder generations (73% agree). And most (74%) are concerned that the gap between rich and poor will increase because only those who can afford advanced medical treatments will live longer and healthier lives. These worries are equally shared by citizens of the Global North and Global South.



How far do global citizens embrace innovation in health?

Technology increasingly has a role to play in improving health and longevity. The potential risks of emerging biotechnologies such as editing DNA are worth it as far as global citizens are concerned. Most agree that benefits such as living a longer life or protecting against disease greatly outweigh any risks (61%). Enthusiasm is greater in the Global South compared to the Global North (66% vs 55%). Vietnam (76%) and India (74%) are the most likely to support biotechnologies, France (37%) is the least likely.

But how willing are global citizens to use AI for their medical diagnoses? We found that most global citizens – 59% in total – would not trust AI to medically diagnose them. However, a significant number (41%) would. We see a gender difference here, with 47% of men saying they would trust AI to medically diagnose them compared to only 36% of women.



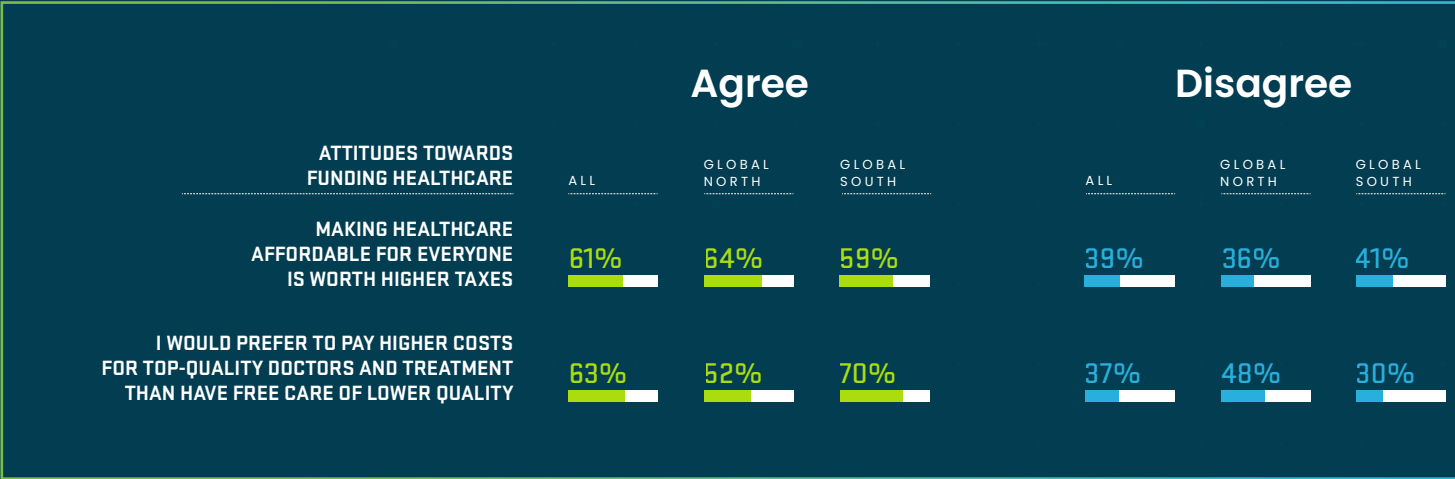
Almost half (47%) of citizens in the Global South would trust AI for medical diagnoses, compared to only a third (34%) in the Global North. Trust is highest in China (73%) and lowest in France (27%).

This reflects the greater enthusiasm we see in general in the Global South for innovative digital solutions. There are parallels here with the fintech revolution in the Global South. Lack of access to traditional financial channels led to a rapid and widespread adoption of innovative solutions such as mobile money services. Similarly, longstanding challenges to delivering healthcare are driving uptake of digital health services.

How should healthcare be funded and delivered?

Healthcare is worth the cost to citizens across the globe. Where there is a trade-off between cost and quality, most prefer to pay more for top-quality doctors and treatment than to have lower quality care which is free (63% agree). However, opinion is more split in the Global North (52% agree, 48% disagree), while in the Global South there are high levels of agreement (70%).

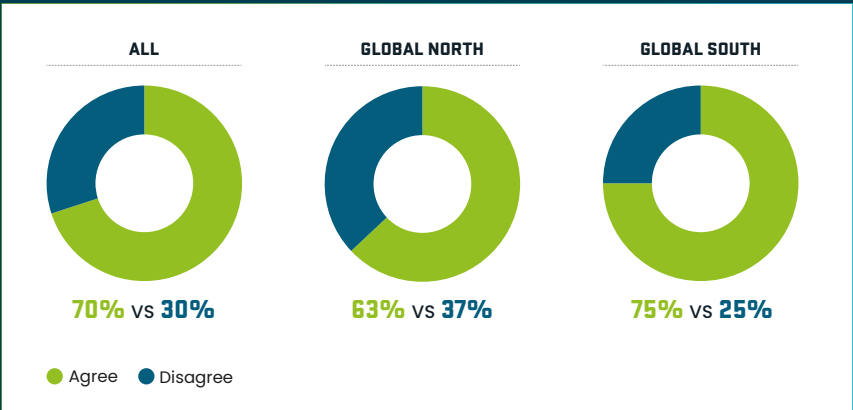
How should healthcare be funded? Most believe that making healthcare affordable for everyone is worth higher taxes (61% agree, while 39% disagree). Agreement is higher in the Global North, where citizens place a higher priority on staying physically healthy, but not substantially so (64% vs 59% in the Global South). There are some stark differences of opinion within Europe, with 75% in Sweden and 74% in the UK being willing to pay higher taxes compared to only 39% in France. There is also some divergence in Africa, with 84% in Nigeria believing affordable healthcare for all is worth higher taxes compared to only 52% in the Ivory Coast.



Another geographical difference in attitudes is a greater appetite for compulsory vaccinations in the Global South. Three-quarters (75%) of citizens in the Global South believe governments should require citizens to be vaccinated against major diseases, compared to only 63% in the Global North.

GOVERNMENTS SHOULD REQUIRE VACCINATIONS FOR ALL CITIZENS AGAINST MAJOR DISEASES

This may well reflect lower vaccination coverage in the Global South. Japan is the only country where less than half (49%) support compulsory vaccinations. Agreement is highest in Nigeria (87%).



How satisfied are global citizens with healthcare?

Global citizens are not particularly happy with their healthcare. Less than half are satisfied with the four dimensions we asked about. Satisfaction is lowest on having adequate doctors, with only 38% satisfied and almost the same number dissatisfied (37%). Satisfaction is higher in the Global South (42%) compared to the Global North (32%). This may reflect different expectations around healthcare, with citizens of the Global North preferring to see doctors, while citizens of the Global South are more open to other forms of healthcare, both in person or virtually.

SATISFACTION WITH HEALTHCARE	ALL		GLOBAL NORTH		GLOBAL SOUTH	
	Satisfied	Dissatisfied	Satisfied	Dissatisfied	Satisfied	Dissatisfied
QUALITY OF CARE IN HOSPITALS (E.G. CONSULTATIONS, SURGERY)	48%	28%	47%	27%	47%	29%
AFFORDABLE HEALTHCARE	46%	29%	44%	30%	48%	28%
INNOVATIVE DIGITAL HEALTH SERVICES (E.G., TELEMEDICINE, HEALTH ID)	42%	22%	38%	19%	45%	25%
ADEQUATE NUMBER OF DOCTORS (I.E., SHORT WAIT TIMES, PRESENCE IN RURAL OR DEPRIVED AREAS)	38%	37%	32%	43%	42%	34%

Less than half of global citizens are satisfied with affordable healthcare or the quality of care in hospitals. Around three in ten are dissatisfied with both. We do not see marked differences between citizens of the Global North and the Global South on either of these aspects of healthcare. However, there are some noticeable differences by country, with Saudi Arabia (67%) and India (65%) the most satisfied with affordable healthcare and Poland (18%) and Italy (21%) the least satisfied.

Where we do see a difference regionally is in attitudes towards innovative digital health services, such as telemedicine and health ID. Here, satisfaction levels are noticeably lower among citizens of the Global North compared to the Global South (38% vs 45%). Satisfaction is particularly high in Saudi Arabia (78%) and is lowest in Japan and Italy (both 24%).

As we have seen, citizens of the Global South are particularly receptive to digital solutions which can make their lives better. And with good reason – innovation is key to helping humanity live longer and healthier lives.



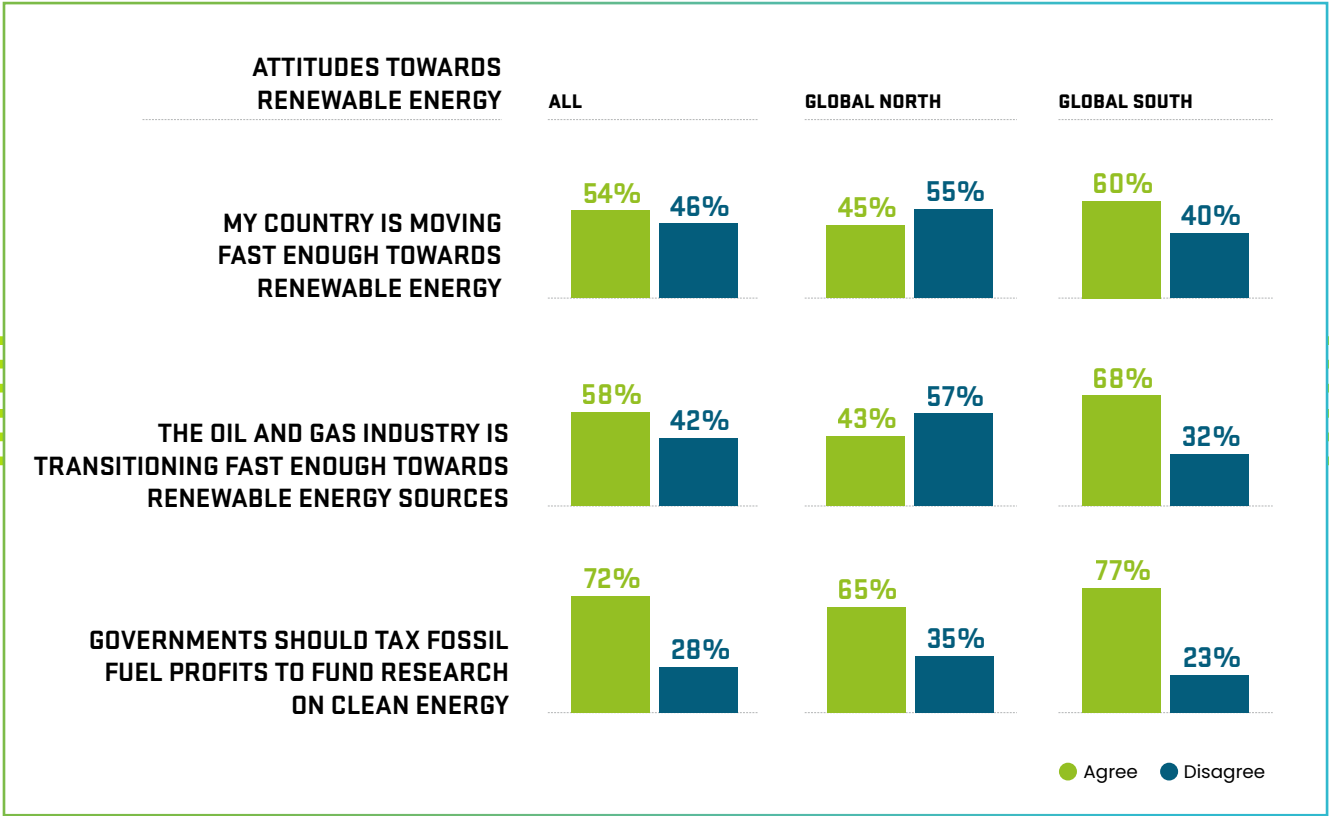
3. Advancing cleaner energy for a greener planet

Global citizens, particularly in the Global North, want quicker progress on the energy transition.

Most citizens in the Global North disagree that their country is moving fast enough towards renewable energy (55% compared to 40% in the Global South). As we have seen previously, global warming is more of a concern in the Global North. Agreement is lowest in Japan (30%), the country with the highest levels of concern about global warming, and highest in China (90%).

Citizens in the Global North are also more likely to disagree that the oil and gas industry is transitioning fast enough to renewable energy sources (57% disagree compared to 32% of the Global South). Despite being less impatient with the pace of change, citizens in the Global South are keener to see governments taxing fossil fuel profits to fund research on clean energy (77% vs 65% of citizens in the Global North).

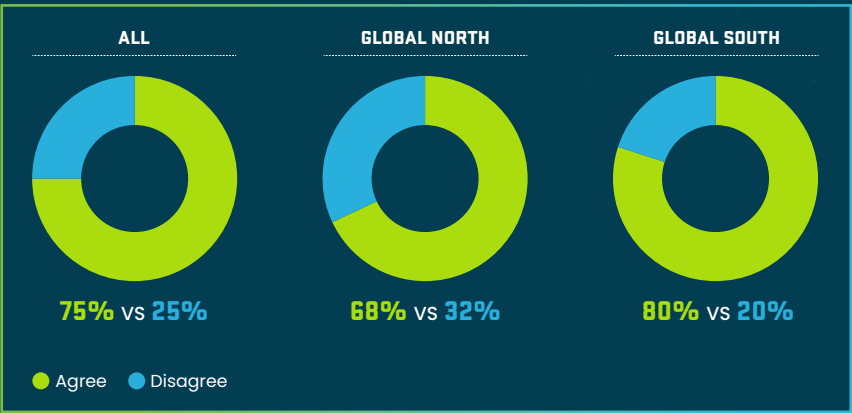
As we have seen, older global citizens are more concerned about global warming, and this translates into greater frustration with the pace of change. Only 44% of over 65s feel their country is moving fast enough compared to 58% of under 35s. Only 43% say the oil and gas industry is transitioning fast enough compared to 65% of under 35s.



How much is clean energy worth paying for?

While many global citizens want faster action on the energy transition, this needs to be balanced against energy affordability. The cost of energy is a major worry – having access to affordable and reliable energy is a huge concern for 75%. This is particularly the case in the Global South (80%) compared to the Global North (68%). This is likely because households in the Global South generally spend a higher proportion of their household income on energy. However, citizens in all countries are concerned. Sweden is the only country where less than the majority (only 46%) are worried.

MY ACCESS TO AFFORDABLE AND RELIABLE ENERGY IS A HUGE CONCERN

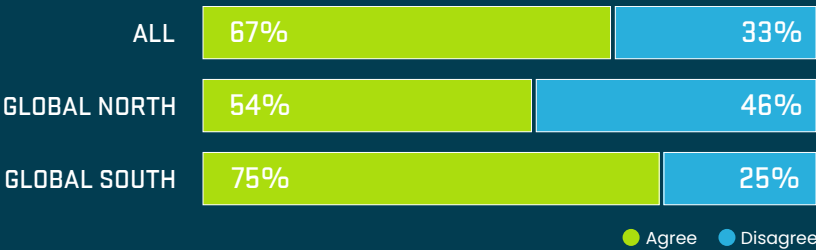


Most global citizens would be willing to pay a little more for clean energy if it helps fight climate change (67%). Even though citizens in the Global South are more concerned about energy costs, they are more open to paying a bit more for clean energy, with 75% being prepared to do so compared to only 54% in the Global North.

However, this willingness to pay more for clean energy only goes so far. For most global citizens, energy affordability is a greater concern than the environmental impact of energy consumption (66% agree, 34% disagree). Agreement is higher in the Global South than in the Global North (69% vs 61%).

PAYING FOR CLEAN ENERGY

I AM PERSONALLY WILLING TO PAY A LITTLE MORE FOR CLEAN ENERGY IF IT HELPS FIGHT CLIMATE CHANGE



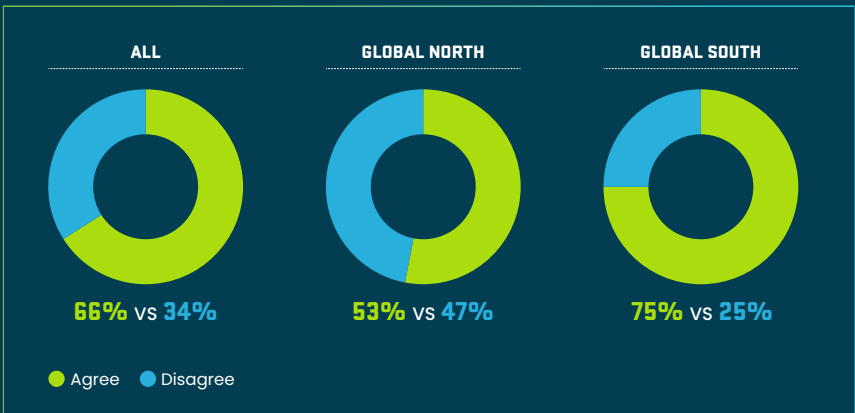
ENERGY AFFORDABILITY IS A GREATER CONCERN FOR ME THAN THE ENVIRONMENTAL IMPACT OF MY ENERGY CONSUMPTION



How should the energy transition work in practice?

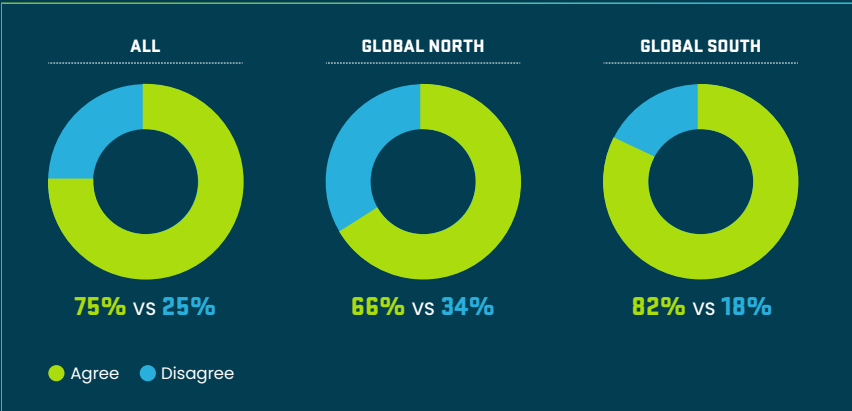
Affordability is one element of the energy transition. The impact on jobs is another. There is some optimism among global citizens that the energy transition will not impact jobs negatively. This is particularly the case in the Global South, where 75% are confident that green jobs will replace lost fossil fuel jobs, compared to 53% of citizens in the Global North. Young people are also more optimistic (71% of under 35s agree compared to 56% of over 65s). This is another sign of the greater sense of optimism that both the Global South and younger generations have about the future.

I AM CONFIDENT THAT GREEN JOBS WILL REPLACE THOSE LOST IN FOSSIL FUELS (COAL, OIL, GAS...)



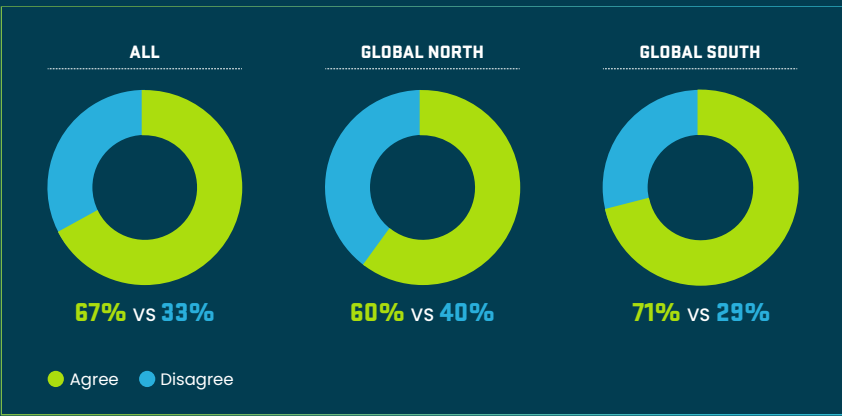
There is a need to mine metals such as lithium and cobalt which are essential for green technologies like electric vehicles and renewable energy storage. Global citizens are positive that this mining can be done responsibly for the clean energy transition (75%). Optimism is greater in the Global South (82% vs 66% in the Global North). This is despite the fact that, as will be discussed later in this chapter, citizens in the Global South express greater concern about the overuse of natural resources.

MINING FOR METALS LIKE LITHIUM AND COBALT CAN BE DONE RESPONSIBLY FOR THE CLEAN ENERGY TRANSITION



Another debate is how much of a part nuclear power, which provides low carbon energy, should play in the energy transition. Most global citizens come down on the side of those in favor of nuclear energy.

NUCLEAR ENERGY SHOULD PLAY A BIGGER ROLE IN MY COUNTRY'S ENERGY PRODUCTION IN THE FUTURE



Two-thirds (67%) believe nuclear energy should play a bigger role in their country's energy mix. Agreement is higher among citizens of the Global South (71% compared to 60% in the Global North). Agreement is highest in China (89%) and lowest in New Zealand (39%). Men are more likely than women to want nuclear energy to play a bigger role (72% vs 61%).

What are global citizens thinking and doing about the environment?

Global citizens' support for clean energy is likely linked to worries about pollution. This is the environmental issue global citizens are most concerned about (49%), closely followed by too much waste and plastic (44%).

But environmental concerns differ across the Global South and the Global North. Extreme weather is the top concern in the Global North (48% vs 37% in the Global South), followed by too much waste and plastic (46%) and pollution (42%).

In contrast, pollution is the top issue in the Global South, selected by 55%, followed by too much waste and plastic (43%). Citizens in the Global South are more likely to be concerned by overuse of natural resources (34% vs 27% in the Global North) and deforestation (32% vs 25%). This is likely a reflection of economies in the Global South being more dependent on resource extraction.

Q. In your opinion, which of the following environmental issues are the most important? (Max 3 answers)

MOST IMPORTANT ENVIRONMENTAL ISSUES	ALL	GLOBAL NORTH	GLOBAL SOUTH
POLLUTION OF AIR, WATER OR SOIL	49%	42%	55%
TOO MUCH WASTE AND PLASTIC	44%	46%	43%
EXTREME WEATHER (E.G., FLOODS, HEATWAVES, WILDFIRES, STORMS)	41%	48%	37%
LONG-TERM CLIMATE CHANGE	33%	38%	29%
OVERUSE OF NATURAL RESOURCES (E.G., WATER, FOSSIL FUELS)	31%	27%	34%
CLEARING FORESTS (DEFORESTATION)	29%	25%	32%
LOSS OF WILDLIFE AND PLANT SPECIES (BIODIVERSITY)	26%	28%	25%
OVERFISHING OR FACTORY FARMING	12%	12%	12%
SHORTAGE OF CRITICAL MINERALS (E.G., LITHIUM, COBALT)	8%	7%	9%

Finally, almost all global citizens are taking action on the environment – only 5% haven't adopted any of the measures we asked about. For citizens of the Global North, the top action is separating and recycling household waste (63%), followed by using reusable items (40%) and using less energy at home (also 40%).

Q. Which of the following measures to protect the environment have you adopted the most in your life? (Max 3 answers)

ENVIRONMENTAL ACTIONS TAKEN	ALL	GLOBAL NORTH	GLOBAL SOUTH
SEPARATE AND RECYCLE HOUSEHOLD WASTE	54%	63%	47%
USE REUSABLE ITEMS INSTEAD OF SINGLE-USE	45%	40%	48%
USE LESS ENERGY AT HOME	41%	40%	41%
BUY PRODUCTS THAT ARE ECO-LABELLED OR SUSTAINABLY MADE	26%	15%	33%
CHOOSE TRANSPORT OTHER THAN A PRIVATE CAR	20%	18%	21%
BUY MORE SECOND-HAND GOODS	17%	21%	13%
LIMIT USE OF AIR CONDITIONING	16%	13%	18%
EAT LESS MEAT	15%	17%	13%
IMPROVE HOME INSULATION	14%	15%	14%
REDUCE AIR TRAVEL	10%	11%	9%
NONE OF THESE	5%	5%	4%

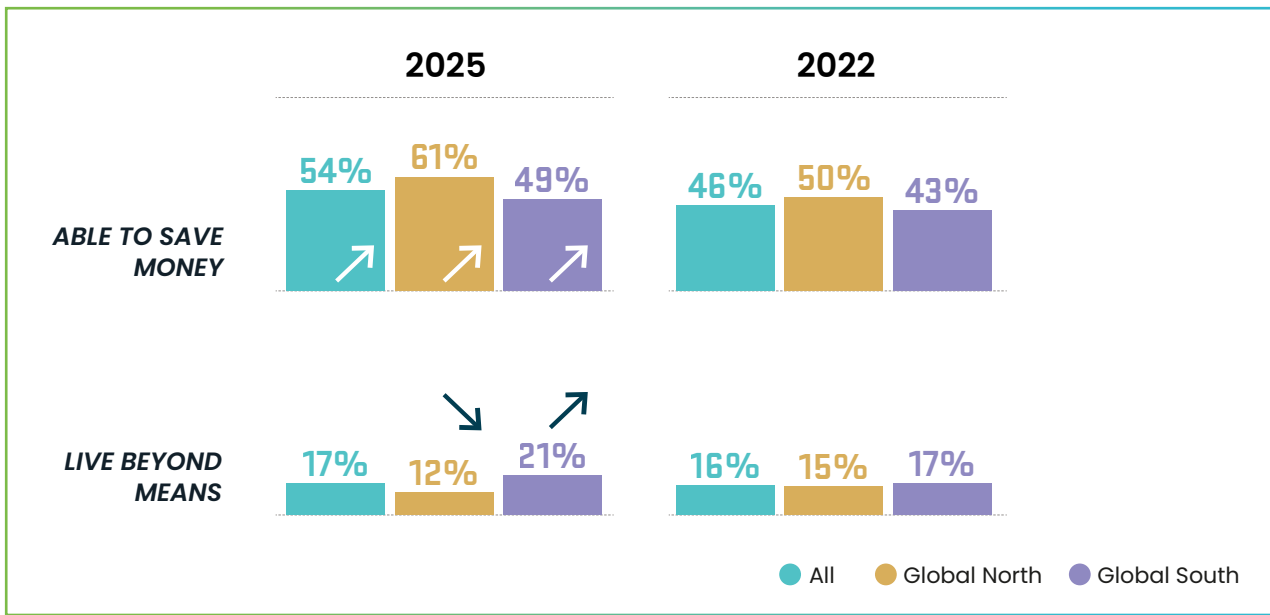
Using reusable items is the top measure for citizens of the Global South (48%), closely followed by separating and recycling household waste (47%). Many environmental actions, such as using less energy at home or buying reusable items, can also help with cost-of-living pressures, the subject of our next chapter.

4. Restoring prosperity through digital innovation — and hard work

More global citizens are saving but inflation continues to cause concern.

Most global citizens (54%) can save money, but 32% are only saving occasionally. However, this is an improvement compared to 2022 when we last asked this question, when less than half (46%) of global citizens were able to save. The easing of inflationary pressures since 2022 is enabling more citizens to save money.

Q. Which of these situations is closest to yours in terms of cost of living?

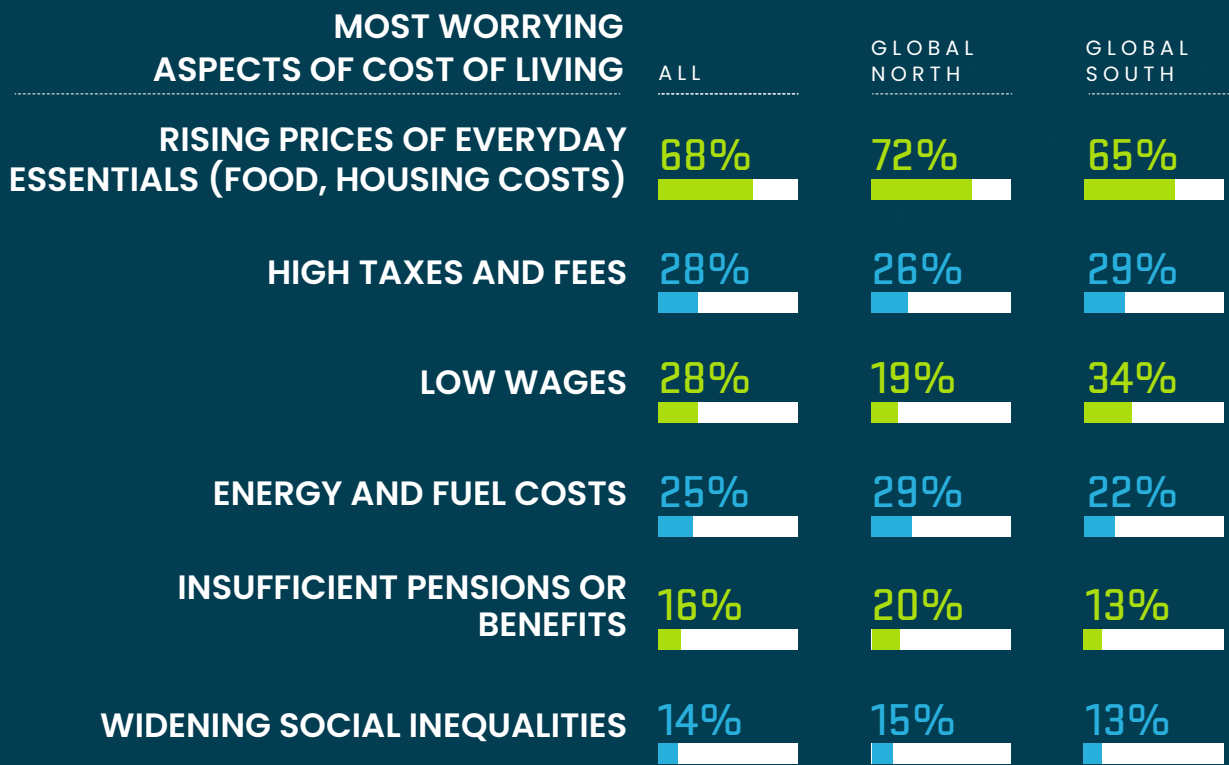


→ We see the biggest increase among citizens of the Global North (up from 50% to 61%). As citizens in the Global North already had a greater capacity than citizens in the Global South to be able to save, this means the gap between the two regions has widened (61% of citizens of the Global North can save vs 49% in the Global South). In Africa, the figure who can save is only 34%, with Senegal the lowest country of all on 28%.

→ Citizens in the Global South are now almost twice as likely to be living beyond their means compared to citizens in the Global North (21% vs 12% in 2025 compared to only 17% vs 15% in 2022). It is striking that despite being more likely to be struggling with day-to-day costs, citizens of the Global South are, as we have seen before, much more optimistic about the future.

Although inflation may have slowed down, it continues to concern global citizens. Rising prices of everyday essentials is the top anxiety about the cost of living (68%), particularly in the Global North (72% vs 65% in the Global South). In New Zealand the figure is 84%, whereas in India it is only 48%.

Q. There has been a lot of talk over the past several months about the difficulties associated with the rising cost of living. Among the following aspects related to this subject, which ones worry you the most? (Two answers allowed)



We see some geographical differences in what global citizens pick as their second highest concern. Low wages come second in the Global South (34% compared to 19% in the Global North). This reflects wage levels being significantly lower in the Global South than in the Global North.

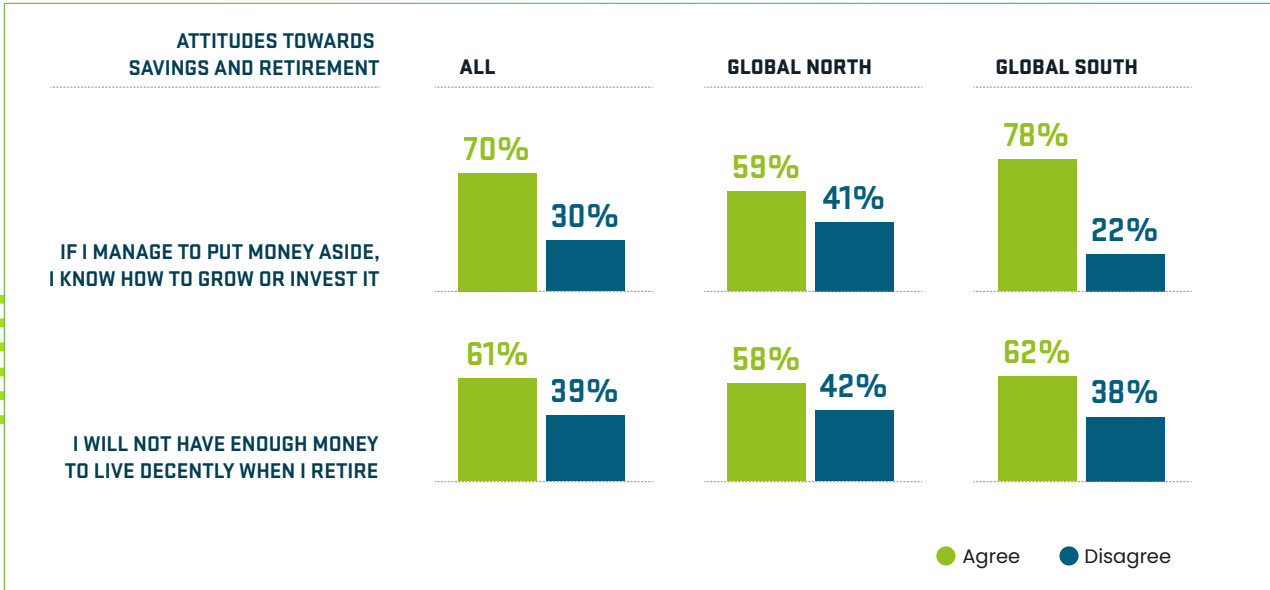
In the Global North, energy and fuel costs are second (29% vs 22% in the Global South). High taxes are the third most important concern in both the Global South (29%) and the Global North (26%).

What do global citizens think about technology-driven finance?

There is a clear global divide on whether cryptocurrencies are a good thing. Citizens of the Global South are more than twice as likely as citizens from the Global North to believe cryptocurrencies are a positive innovation for the global financial system (68% vs 32%). The two most positive countries are found in Africa – Nigeria (89%) and Ghana (82%) – and the most negative in Europe – France 25% and Germany 28%. Younger global citizens are also favorable, with 65% of under 35s regarding cryptocurrencies as a positive innovation compared to only 27% of over 65s.

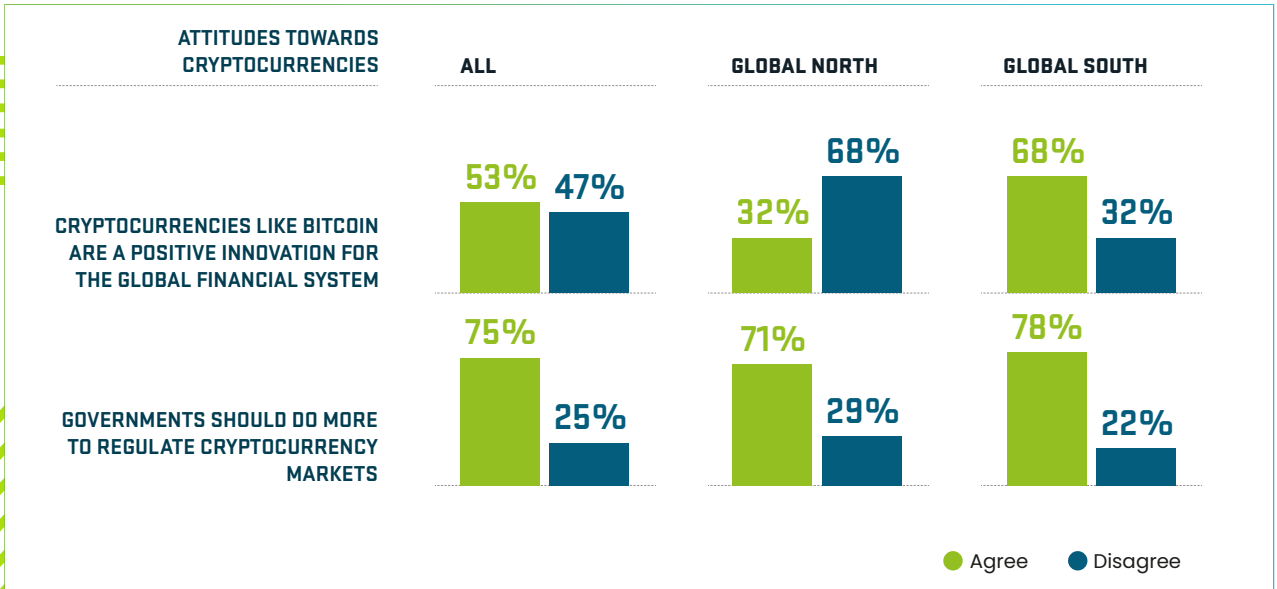
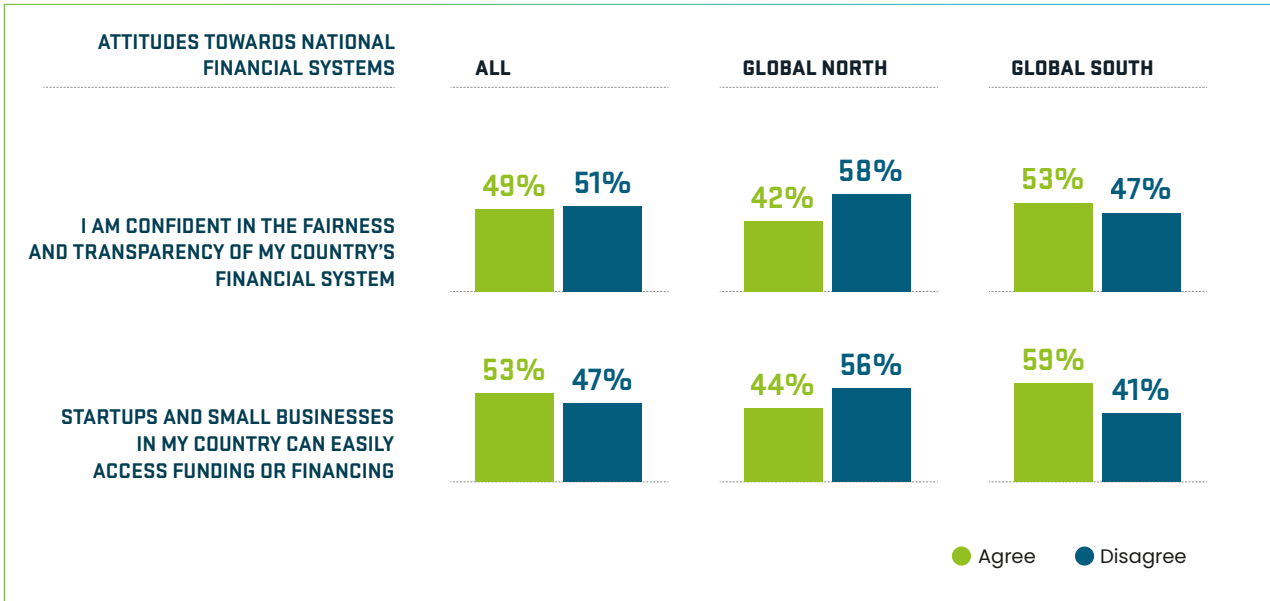
Despite their optimism, most citizens in the Global South want governments to do more to regulate cryptocurrency markets (78%, higher than the Global North on 71%). As we also saw in relation to AI, citizens of the Global South are enthusiastic about innovation but want to see guardrails in place as well.

Although citizens in the Global South are less able to save, they are more confident that if they can put money aside, they know how to grow or invest it (78% vs 59% in the Global North). Even though there is widespread confidence in being able to grow savings, most global citizens believe they will not have enough money to live decently when they retire (61%). Concern is somewhat higher among citizens of the Global South (62% vs 58% in the Global North).



Turning to national financial systems, global citizens are split on whether they have confidence in the fairness and transparency of these, with 49% agreeing and 51% disagreeing. Citizens in the Global South have more faith in their country's financial system than citizens in the Global North (53% vs 42%).

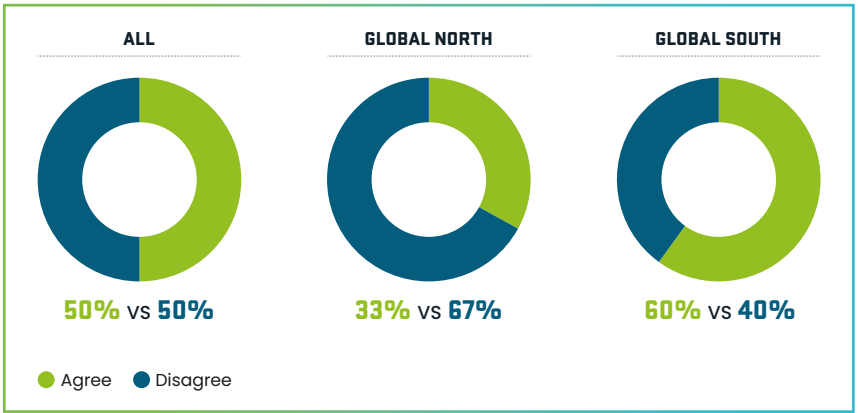
There are also mixed views on whether startups and small businesses in their countries can easily access funding (53% agree and 47% disagree). Again, citizens of the Global South are more positive (59% agree vs 44% of the Global North).



We see a similar geographical divide on using AI in personal finances. Most citizens in the Global South would trust AI to advise them how to manage their savings (60%), whereas only a third (33%) of citizens of the Global North would. The trend of citizens of the Global South being the most enthusiastic adopters of innovations in financial services looks set to continue.

Younger people are also much more open to using AI to manage their savings, with 59% saying they would trust AI to do so compared to only 30% of over 65s.

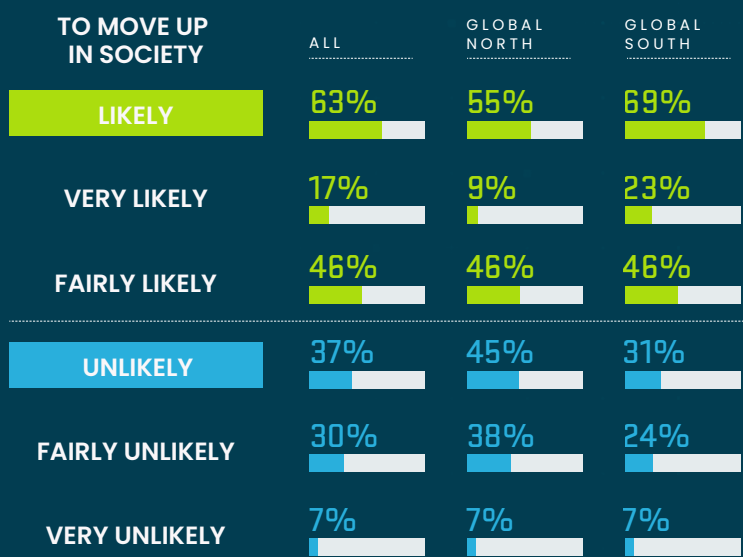
I WOULD TRUST AI TO ADVISE ON HOW TO MANAGE MY SAVINGS



Future prosperity?

Despite all their financial concerns, most global citizens believe that hard work will pay off. Almost two-thirds (63%) believe that if someone works very hard, it is likely that they will move up in society.

Q. Thinking about opportunities in your country today: if someone works very hard, how likely is it that they can move up in society?



There is more optimism about social mobility in the Global South than the Global North (69% vs 55%). Citizens of Saudi Arabia (88%) and India (86%) are the most positive of all. Citizens of Turkey (32%) and Japan (38%) have the least confidence that hard work will result in social mobility. While Europe is generally less positive than average (53%), Sweden is an exception with 74% believing that hard work pays off.

Young global citizens are also more hopeful that hard work will pay off, with 68% of under 35s thinking this will result in social mobility, compared to 61% of 35–54-year-olds and 59% of over 55s.

We also see greater optimism among citizens of the Global South and younger generations when it comes to social unity, a topic we explore in our next chapter.



5. Bringing together fragmented societies

Increasing global migration flows coincide with citizen concerns about immigration impacts.

When we asked global citizens what impact immigration has on their country's development, they were most likely to cite negative effects. Around two in five feel immigration increases crime (40%), puts pressure on welfare systems and public services (36%) and creates social tensions (35%).

Citizens in the Global North are more likely to feel that immigration increase social tensions (40% vs 32% in the Global South).

Q. In your opinion, what effects does immigration (from abroad into your country) have on your country's development?

IMPACT OF IMMIGRATION ON COUNTRY	ALL	GLOBAL NORTH	GLOBAL SOUTH
INCREASES CRIME OR SECURITY RISKS	40%	42%	39%
ADDS PRESSURE ON SOCIAL WELFARE SYSTEM AND PUBLIC SERVICES	36%	40%	34%
CREATES SOCIAL TENSIONS	35%	40%	32%
BRINGS CULTURAL DIVERSITY	35%	34%	35%
BOOST PRODUCTIVITY AND ECONOMIC GROWTH	28%	24%	31%
FILLS JOB VACANCIES	26%	30%	23%
DRIVES NEW IDEAS AND INNOVATION	22%	14%	27%
HELPS OFFSET AN AGING POPULATION	15%	22%	10%
NO SIGNIFICANT EFFECT	7%	5%	8%

Views on the positives of immigration differ across the Global North and Global South, reflecting how experiences of migration can vary across the world. Citizens of the Global North are more likely to think immigration fills job vacancies (30% vs 23% in the Global South) and helps offset an aging population (22% vs 10%). In contrast, citizens in the Global South are more positive about immigration boosting productivity and growth (27% vs 14% in the Global North) and driving new ideas (27% vs 14%). However, for citizens in both the Global North and Global South, the most positive impact of immigration is it brings cultural diversity (35%).

As we have seen previously, older global citizens are more concerned about immigration. They are also more likely than younger global citizens to mention negative impacts. For instance, 47% of over 55s believe that immigration increases crime compared to only 34% of under 35s. Over 55s are also more likely to think that immigration adds pressures to social welfare systems (45% vs 30% of under 35s) and creates social tensions (42% vs 30%).

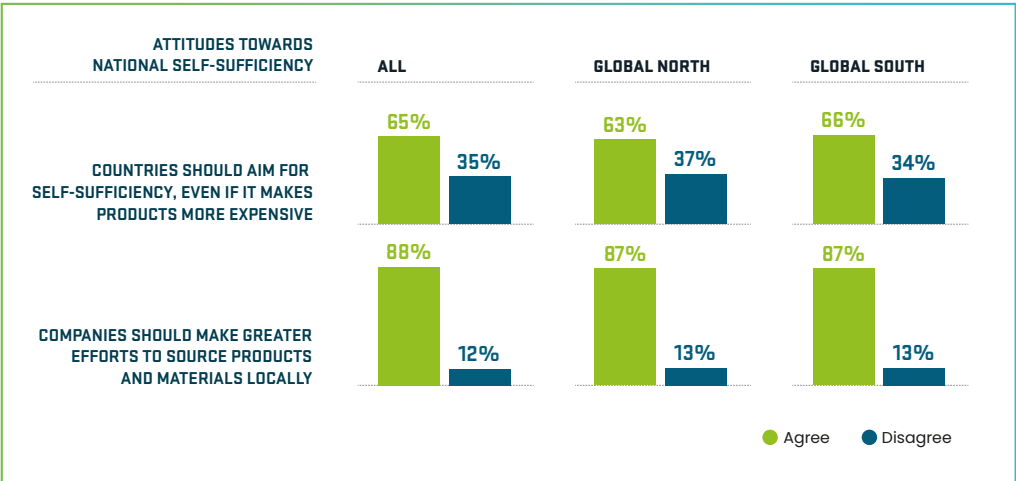
In contrast, younger global citizens are more likely to have positive views on the impact of immigration, with 32% saying it boosts productivity and economic growth (32% vs 23% of over 55s) and that it drives new ideas and innovation (28% vs 15%).

What price national sovereignty?

As well as concerns about immigration, there are other signs that global citizens are becoming more inward-focused. Most support national self-sufficiency – even if it makes products more expensive. Two-thirds (65%) agree with this sentiment, while only a third (35%) disagree. This is even though cost of living is, as we have seen previously, the number one concern for global citizens.

Support for self-sufficiency is particularly high in India (76%) and the UK (74%), countries where national sovereignty has been an especially salient issue. It is lowest in South Korea (50%), Colombia (53%), Brazil (54%), New Zealand (55%) and Mexico (56%). These are all countries with economies particularly orientated towards trade.

There are high levels of agreement that companies should make more effort to source locally (88% agree, while only 12% disagree).



Despite anxieties about cost of living, national security trumps prices. When asked about the trade-off between the two, most global citizens opt for national security (70%). The greater emphasis on national security in the Global South may well be because most high-intensity conflicts since World War II have taken place there.

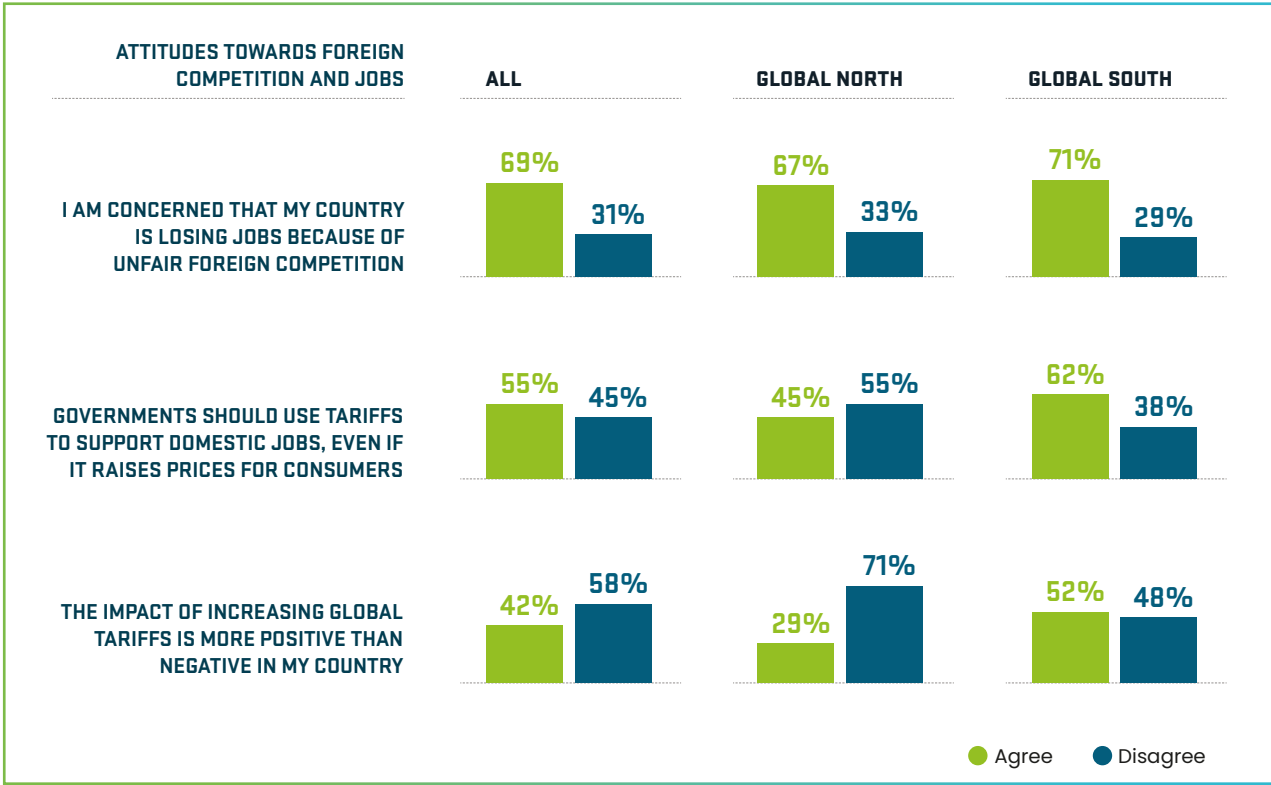


Can tariffs protect national jobs?

Another dimension to this national focus is concern about job losses due to ‘unfair foreign competition.’ More than two-thirds (69%) of global citizens say they are worried about this, with not much difference seen between the Global North and Global South. There is some variation by country though. Agreement is highest in Indonesia (83%) and France (81%). It is lowest in New Zealand (53%) and the US (54%), which is perhaps surprising because the loss of American jobs has been a high-profile issue.

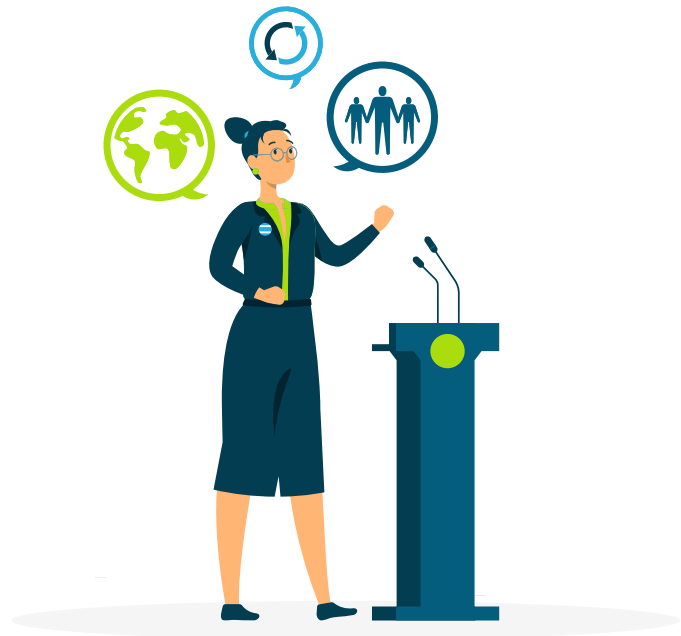
However, compared to prioritizing national security over prices, the case for using tariffs to support domestic jobs – even if it raises prices – is less clear cut. Just over half (55%) agree with this approach, while just under half (45%) disagree. Support is stronger in the Global South (62% agree vs 45% in the Global North). Views vary considerably by country, with Türkiye (76%) and Vietnam (72%) the most positive. Mexico (39%), Colombia (39%) and New Zealand (33%), who are also the least keen on self-sufficiency at the expense of higher prices, are the least likely to agree.

This uncertainty about using tariffs to support domestic jobs may be linked to skepticism about tariffs in general, particularly in the Global North. Most disagree that global tariffs will be beneficial for their country (58%, rising to 71% in the Global North vs 48% in the Global South). Global citizens aged under 35 are twice as likely as the over 65s to be positive about tariffs (52% vs 26%). This may be because older global citizens have longer memories of the impact of tariffs.



How satisfied are global citizens with political systems?

Global citizens are more likely to be dissatisfied than satisfied with most of the political aspects in their country which we asked about. The exceptions are national security and defense, where 53% are satisfied and 41% dissatisfied and international relations (55% satisfied and 41% dissatisfied).



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

POLITICAL ASPECTS	ALL		GLOBAL NORTH		GLOBAL SOUTH	
	Satisfied	Dissatisfied	Satisfied	Dissatisfied	Satisfied	Dissatisfied
RELATIONS WITH OTHER COUNTRIES AND DIPLOMACY	55%	38%	44%	47%	63%	31%
NATIONAL SECURITY AND DEFENSE	53%	41%	45%	47%	59%	37%
POLITICAL STABILITY	39%	56%	32%	62%	44%	51%
ECONOMIC POLICIES	39%	55%	29%	64%	46%	49%
CITIZEN PARTICIPATION AND REPRESENTATION IN THE POLITICAL SYSTEM	39%	54%	32%	58%	44%	50%
IMMIGRATION POLICY	37%	53%	26%	64%	45%	45%
SOCIAL INEQUALITIES	30%	64%	23%	69%	34%	60%
TRANSPARENCY AND ACCOUNTABILITY OF POLITICAL LEADERS	29%	65%	25%	69%	32%	62%
LEVEL OF CORRUPTION	22%	71%	25%	64%	19%	75%

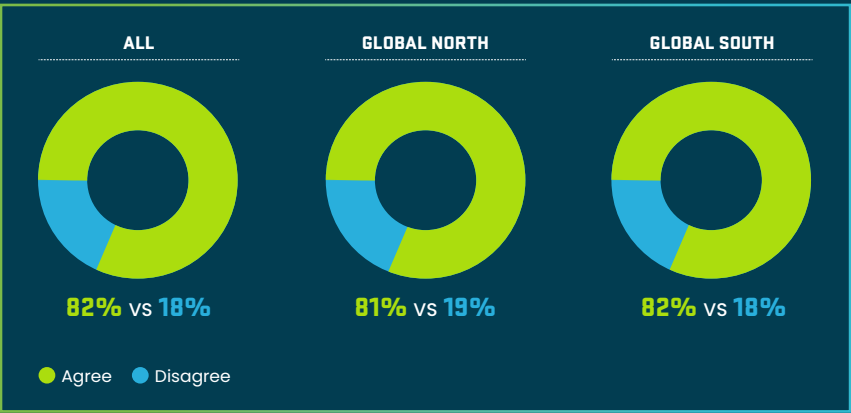
Dissatisfaction is highest with corruption, particularly in the Global South, with 75% of citizens there dissatisfied compared to 64% in the Global North. This is the only political aspect where citizens in the Global South are more dissatisfied than in the Global North. This reflects the fact that corruption is a much more salient issue in the Global South.

The two other political aspects with high levels of dissatisfaction are transparency and accountability of political leaders (65% are dissatisfied) and social inequalities (64% are dissatisfied). However, compared to 2024 we see improvements in satisfaction with transparency of political leaders, as well as political stability and citizen participation. Although satisfaction levels remain worryingly low, these are encouraging signs.

How much of a problem is economic equality?

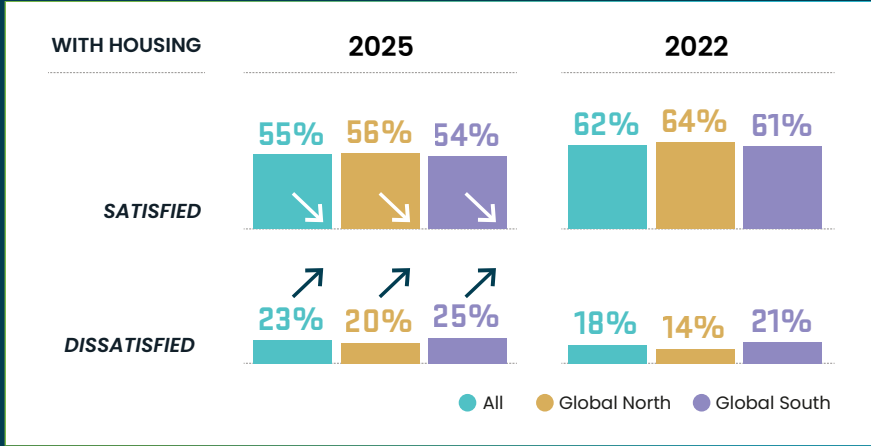
Economic inequality can be a significant factor contributing to feelings of fragmentation and unease. As we have seen, global citizens who are living beyond their means are much gloomier about their and their country's future prospects. Our research shows that global citizens are anxious about the intensification of economic inequality. There are high levels of agreement (82%) that economic inequality is increasing at an unsustainable pace globally. This view is held across both the Global North and Global South.

ECONOMIC INEQUALITY IS INCREASING AT AN UNSUSTAINABLE PACE GLOBALLY



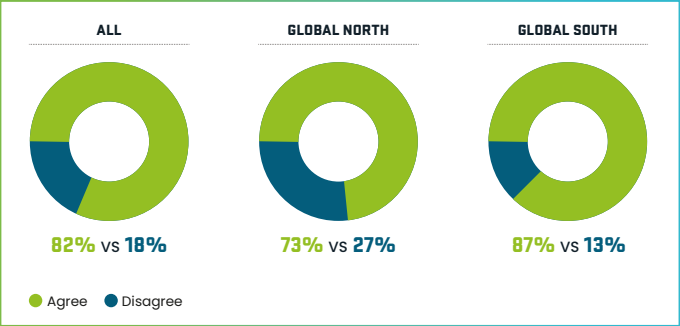
Housing can be a significant factor in economic inequality and one of this year's findings helps explain why global citizens feel inequality is on the increase. Satisfaction with being able to access safe and comfortable housing has fallen compared to 2024, down from 62% to 55%. Satisfaction has dropped in both the Global North and Global South.

YOUR ABILITY TO ACCESS SAFE AND COMFORTABLE HOUSING



These anxieties about inequality may be why such a high proportion of global citizens (82%) believe that governments should introduce guaranteed basic income.

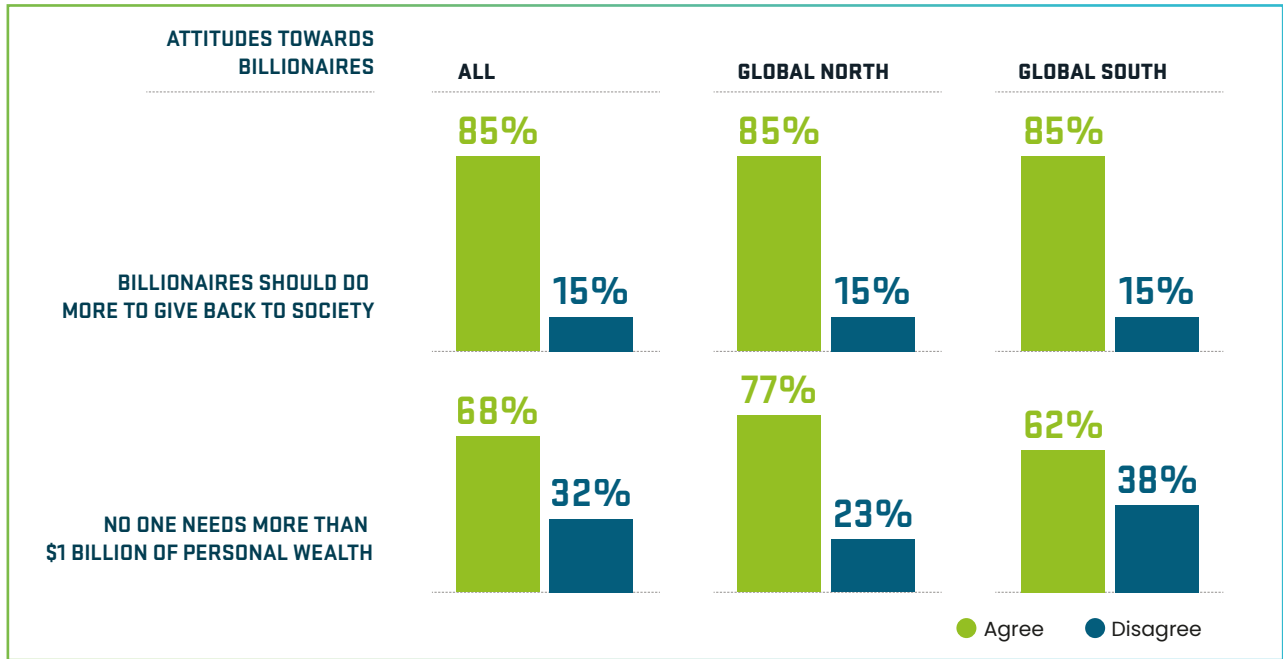
GOVERNMENTS SHOULD INTRODUCE GUARANTEED BASIC INCOME TO ENSURE ECONOMIC SECURITY FOR CITIZENS



Agreement is particularly high in the Global South compared to the Global North (87% vs 73%). This likely reflects welfare systems being more limited in the Global South compared to the Global North. African countries are the most positive (92%), Japan (57%) and Germany (67%) are the least.

Disquiet about inequality helps explain why global citizens do not feel particularly positive towards billionaires. Most (85%) think billionaires should do more to give back to society. A smaller number, but still a clear majority (68%), believe that no one needs more than \$1 billion of personal wealth.

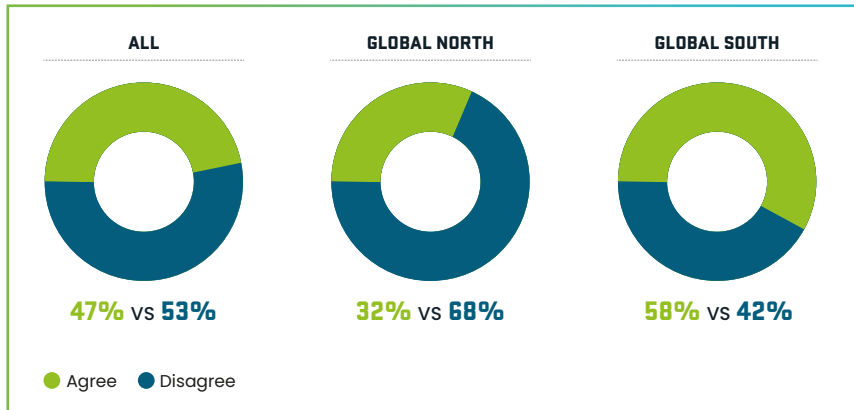
Support for a limit on wealth is more pronounced in the Global North than the Global South (77% vs 62%), despite greater economic inequality in the Global South. New Zealand is the country most likely to be in agreement (84%), South Korea the least likely (48%). This sentiment is also much more widespread among over 65s (84%) compared to 18–24-year-olds (57%).



There is also some mistrust of CEOs of global companies. Most global citizens do not have faith that CEOs of the largest international companies will make the right decisions on balancing profit with negative impacts on humanity. Just over half (53%) disagree that they will, while 47% agree.

Citizens of the Global South have more confidence in CEOs (58% agree vs 32% of citizens in the Global North), as do younger global citizens (57% of under 35s vs 32% of over 65s). New Zealand is the most mistrustful country (80%), Egypt the least (22%).

THE CEOs OF THE LARGEST INTERNATIONAL COMPANIES (FORTUNE 500) CAN BE TRUSTED TO MAKE THE RIGHT DECISIONS WHEN IT COMES TO BALANCING PROFIT WITH NEGATIVE IMPACTS ON HUMANITY



How do global citizens feel about their local area?

Despite the feelings of friction we have explored in this chapter, there are some positive results to report as well. Global citizens generally feel safe in the places they frequent (64% are satisfied with this) and the quality of the environment where they live (62% satisfaction).

In contrast to the pattern we see on other questions, citizens of the Global North are more likely to be satisfied with both these aspects of life compared to citizens in the Global South. Although the future may feel more uncertain in the Global North than the Global South, living standards and quality of life continue to be higher.

THE EXTENT TO WHICH YOU FEEL SAFE IN THE PLACES YOU REGULARLY FREQUENT



THE QUALITY OF THE ENVIRONMENT WHERE YOU LIVE (E.G., AIR QUALITY, WATER QUALITY, ACCESS TO GREEN SPACES)¹

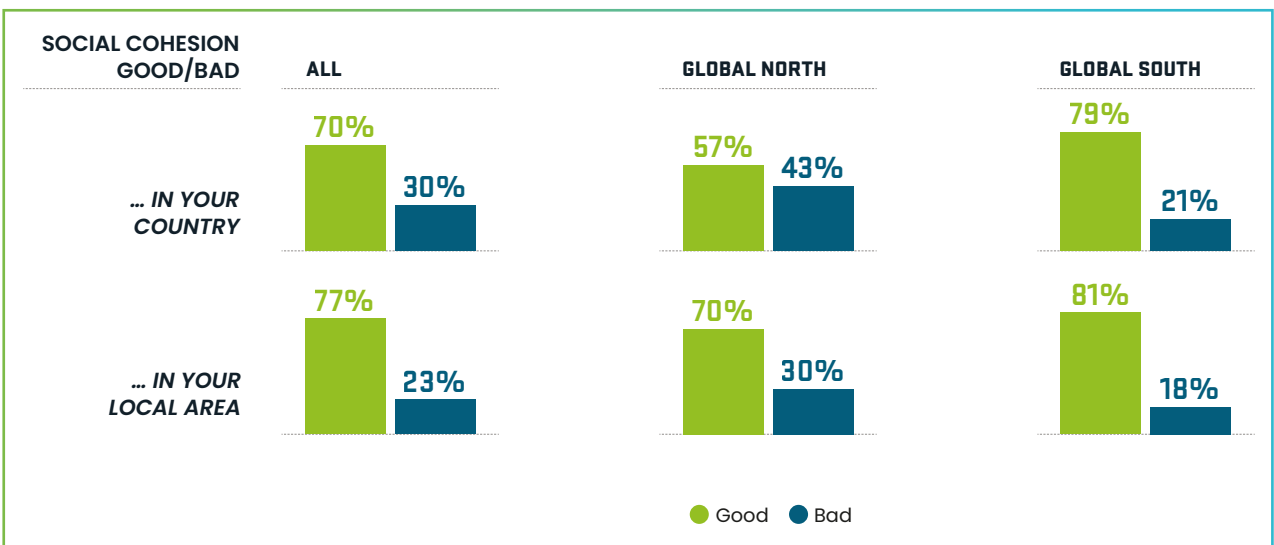


How good is social cohesion?

There is heartening evidence of social unity despite all the anxiety about immigration and inequality. Most global citizens believe social cohesion is good in their country (70%) and the figure is even higher for their local area (77%).

Citizens of the Global South are the most positive about both. The difference is particularly marked on national cohesion, with citizens of the Global North twice as likely to describe social cohesion in their country as bad (43% compared to 21% in the Global South).

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



There is a clear relationship with positive views on social cohesion and believing your country is on the right track. Among global citizens who rate social cohesion in their country as 'very good', 77% believe their country is going in the right direction. In comparison, only 13% of those who say social cohesion in their country is 'very bad' think their country is on the right track.

Another reflection of this relationship is that France and Türkiye, which have high levels of negativity about the direction their country is going in, are most likely to say social cohesion in their country is bad (both 64%). Saudi Arabia (94%) and Ghana (93%), which are hugely positive about their country being on the right track, are the most likely to say that social cohesion is good.

Young people are the most upbeat about social cohesion, particularly at a national level. More than three-quarters of under 35s (77%) say social cohesion is good in their country compared to only 61% of over 55s. For their local area, the figures are 81% among under 35s and 72% among over 55s.

Young people's positivity about social ties helps explain why they are much more optimistic about what the future holds, as we have seen at the beginning of this report.

Acknowledgements

FII Partnered with Ipsos bva to develop FII PRIORITY Compass 2025
About Ipsos



Ipsos is one of the largest market research and polling companies globally, operating in 90 markets and employing nearly 20,000 people. Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data from our surveys, social media monitoring, and qualitative or observational techniques. "Game Changers" – our tagline – summarizes our ambition to help our 5,000 clients navigate with confidence our rapidly changing world. Founded in France in 1975, Ipsos has been listed on the Euronext Paris since July 1, 1999. The company is part of the SBF 120, Mid-60 indices, STOXX Europe 600 and is eligible for the Deferred Settlement Service (SRD).