FII Priority compass

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Full Report

October 2026

5TH EDITION

FII INSTITUTE
Future Investment Initiative Institute
Impact on Humanity

In partnership with

Ipsos bva

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Future Investment Initiative Institute
Impact on Humanity

ABOUT FUTURE INVESTMENT INITIATIVE (FII) INSTITUTE

The Future Investment Initiative (FII) Institute is a global nonprofit 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



SUSTAINABILITY AND ENERGY



HEALTHCARE AND BIOTECHNOLOGY



EDUCATION

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FOREWORD
MESSAGE FROM FII INSTITUTE LEADERSHIP

THIS YEAR'S FII PRIORITY COMPASS – THE 5TH EDITION – PRESENTS AN INSIGHT INTO THE WORLD'S OUTLOOK ON SHIFTING ECONOMICS, EMERGING TECHNOLOGIES, AND DAILY LIFE.



In interviews with over 60,000 citizens across 32 countries, half of all respondents continue to cite the cost of living as their number one concern, underlining a global confidence crisis unrepresented in headlines. People everywhere are feeling the impact of inflation, job insecurity, and the pressure of everyday expenses.

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

Alongside economic worries, a significant 72% of citizens believe in developing a global framework to regulate AI, underscoring a global demand for human control on emerging technologies.

Health and increasing 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 in the Global South are excited about AI, Robotics, and FinTech. Those in the Global North are worried about these same technologies at remarkable rates.

Citizens want their leaders to address cost-of-living pressures, invest in longevity, and ensure that AI serves humanity, not the other way around. Most do not believe their country is heading in the right direction.

And yet, despite these divides, the majority of people - 75% - 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 FII10, where ideas meet capital, where ideas inspire action, and where investment turns vision into impact.

HRH DR. MAHA BINT MISHARI BIN ABDULAZIZ AL SAUD
Chief Executive Officer, FII Institute

32
Countries

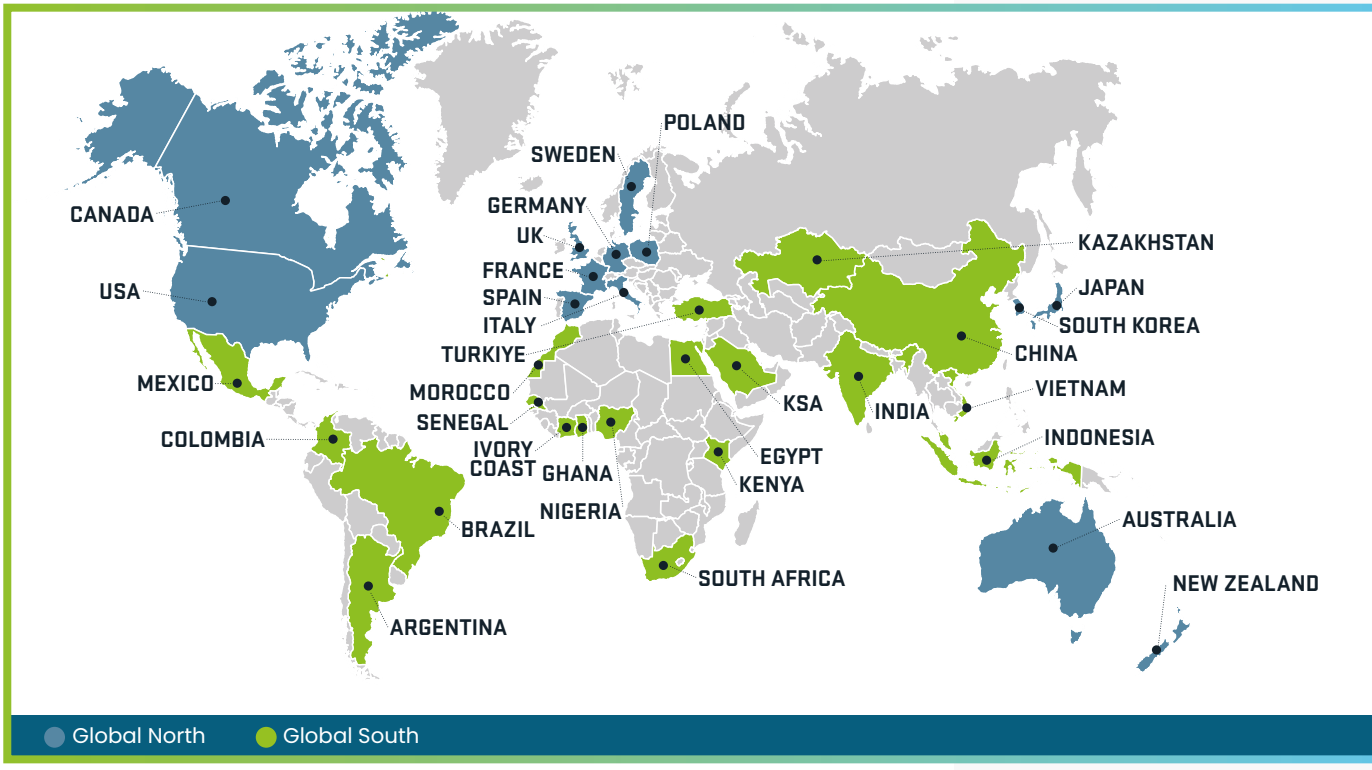
60,000+
Respondents

66%
of the Global Population

METHODOLOGY

We conducted the FII PRIORITY Global Survey in partnership with Ipsos between 24 April – 5 June 2026, covering 61,200 respondents from 32 countries. These countries were chosen to represent both the geographic and socio-economic diversity of the world.

GEOGRAPHICAL COVERAGE



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

COUNTRIES SURVEYED

AFRICA
- GHANA
- KENYA
- IVORY COAST
- NIGERIA
- SENEGAL
- SOUTH AFRICA

ASIA
- CHINA
- INDIA
- INDONESIA
- JAPAN
- KAZAKHSTAN
- SOUTH KOREA
- TÜRKIYE
- VIETNAM

EUROPE
- FRANCE
- GERMANY
- ITALY
- POLAND
- SPAIN
- SWEDEN
- UNITED KINGDOM

MENA
- EGYPT
- MOROCCO
- SAUDI ARABIA

NORTH AMERICA
- CANADA
- MEXICO
- UNITED STATES

OCEANIA
- AUSTRALIA
- NEW ZEALAND

SOUTH AMERICA
- ARGENTINA
- BRAZIL
- COLOMBIA

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, the United Kingdom, and the United States. These countries are characterized by a higher level of economic and industrial development.

THE GLOBAL SOUTH
(32,900 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.

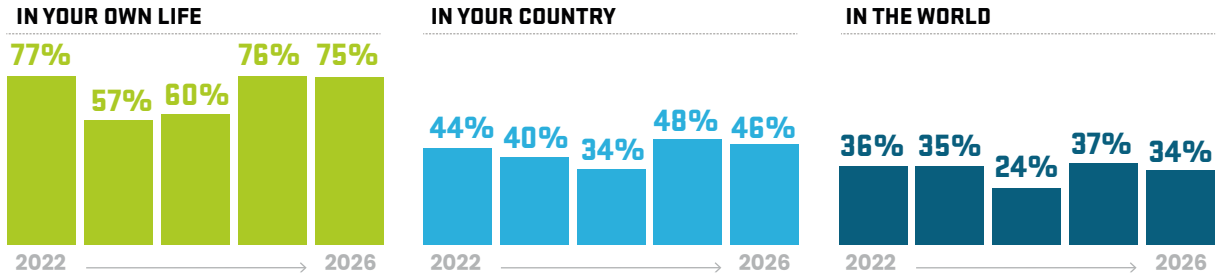
KEY FINDINGS

OPTIMISM STALLS

There has been a **fall in the global citizen's optimism about their country and the world**, following rises last year. Only a third think the world is going in the right direction, down three points from 2025 but still higher than 2024. Just under half (46%) believe their country is on the right track, down two points.

However, **personal optimism remains high**, with three-quarters (75%) believing that their own lives are on track.

Q. Are things headed in the right direction?



As we have found in previous years, **citizens of the Global South are much more optimistic than citizens of the Global North** about the direction of the world (47% vs. 15% say it is going in the right direction) and their country (56% vs. 32%).

COST OF LIVING REMAINS THE TOP GLOBAL PRIORITY

Cost of living is once again the number one priority, but even more global citizens mention it compared to last year (56%, up six points). Energy costs are a likely factor – this is now the second most common concern about cost of living, up nine points to 34%. Rising prices of everyday essentials such as food and housing remain the top concern at 68%. Citizens of the Global North are more concerned about both cost of living and energy costs.

The second and third priorities – poverty/social inequalities and unemployment – also relate to financial security. Both are higher priorities for citizens of the Global South.

TOP 3 GLOBAL PRIORITIES FROM 2022-2026

2022	2023	2024	2025	2026
42% PRICE OF FOOD PRODUCTS	65% QUALITY OF LIFE	40% RISING PRICE AND INFLATION	50% COST OF LIVING	56% COST OF LIVING
36% INFLATION	55% JOB OPPORTUNITIES	19% UNEMPLOYMENT AND SECURITY	36% UNEMPLOYMENT	38% POVERTY AND SOCIAL INEQUALITIES
33% ENERGY PRICES	53% INCOME	17% ECONOMIC INSTABILITY	36% POVERTY AND SOCIAL INEQUALITIES	36% UNEMPLOYEMENT

GLOBAL CITIZENS WANT HEALTHY LIVES AND FINANCIAL STABILITY

The top two priorities for well-being for global citizens and their families are staying physically healthy and getting healthcare when needed (44%), closely followed by having a secure job or income (43%).

TOP PRIORITIES FOR WELL-BEING TODAY



Priorities differ markedly between the Global North and Global South. In the Global South, the top three priorities are 1) having a secure job (46%), 2) staying physically healthy (38%), and 3) getting a good education for your children (34%).

In contrast in the Global North, staying physically healthy comes first (52%), followed by 2) covering everyday living costs (40%) and 3) having a secure job (38%).

INCREASED FAITH IN SOCIAL MOBILITY

More than two-thirds (69%) think that **if someone in their country works hard, they are likely to move up in society**, an increase of 6 points since 2025. This belief is more prevalent in the Global South than the Global North (75% vs.60%) but has increased in both regions.

THERE IS DEMAND FOR AI SERVICES BUT CONCERN ABOUT AI'S IMPACT

Demand is strong for AI education, with more than half of global citizens (57%) willing to pay for classes to advance their AI skills and knowledge, rising to 71% in the Global South. There is **lower willingness to pay for an AI assistant that takes care of scheduling** (39%, rising to 52% in the Global South) **or personal finances** (36%, rising to 47% in the Global South).

But AI also brings concerns, with **80% rejecting AI tools being used in final decisions in sensitive areas like hiring, justice or healthcare.** Three-fifths (61%) think humans will lose control over advanced AI in the next 20 years and 54% disagree that AI will create more quality jobs than it destroys. There are **very high levels of agreement** in both the Global North and Global South that **there needs to be a global framework/rules to regulate AI** (85% in total agree).

BIG TECH NEEDS TO DO MORE TO PROTECT YOUNG USERS

Most citizens in the Global North think that **tech companies don't do enough to protect young users** (74%, versus 45% in the Global South). Two-fifths (40%) of global citizens think that **people under 16 shouldn't be allowed to have social media accounts**, rising to 50% in the Global North.

ROBOTS ARE THE FUTURE - BUT NOT FOR EVERYTHING

Most (65%) agree robots will become a normal part of daily life in 10 years, particularly in the Global South (70% vs. 58% in the Global North). But fewer (54%) agree robots will improve the quality of life for everyday people.

Three-fifths (61%) would be **comfortable with robots assisting with home tasks such as laundry, cleaning and dishes** but fewer (53%) would feel comfortable about **robots undertaking elderly care – 47% would not be comfortable.** We see the highest levels of comfort with using robots for home tasks, public service delivery and elderly care among citizens in the Global South, men, under 35s, global citizens with high levels of education and those living in urban areas.

GLOBAL CITIZENS ARE DISSATISFIED WITH HEALTHCARE AND ARE WILLING TO PAY MORE FOR BETTER CARE

Less than half of global citizens are satisfied with quality of care in hospitals, affordable healthcare and innovative digital health services. Satisfaction is lowest with having an adequate amount of doctors (37%, rising to 41% in the Global North).

Given these low levels of satisfaction, it is not surprising to find that **a clear majority (63%) agree that making healthcare affordable for everyone is worth higher taxes.** A similar proportion (64%) would be **happy to pay higher costs for top-quality doctors and treatment** than have free care of lower quality. This is particularly the case in the Global South (73% vs 51% in the Global North).

GLOBAL CITIZENS WANT STRONGER SOCIAL PROTECTION SYSTEMS TO IMPROVE SOLIDARITY

Three-quarters (75%) **want social protection and health care systems in their country to be strengthened** because there is not enough solidarity with the people who need it. Only 25% say that social protections should be reduced because it is too expensive and encourages assistance.

TRADITIONAL MEDIA ARE TRUSTED FOR BEING ACCURATE BUT ARE REGARDED AS BIASED, WHILE ONLINE SOURCES ARE RELEVANT BUT POLARIZING

A majority still trust traditional media to provide accurate and reliable information. Around three-fifths trust national radio broadcasters (65%), national TV broadcasters (62%) and newspapers (61%).

→ But there are also **high levels of agreement that traditional media are politically biased** (75%). Most global citizens (60%) believe that **online content creators reflect the concerns of ordinary people better than journalists,** particularly in the Global South compared to the Global North (70% vs. 47%). However, a large majority (81%) of global citizens believe that **social media has made society more polarized.**

EDUCATION CAN BE AN ENGINE OF SOCIAL MOBILITY BUT THERE ARE CONCERNS ABOUT COST AND VALUE

Three in five (60%) believe the **education system in their country gives young people from low-income backgrounds the chance to rise in society.** However, most global citizens believe **university is no longer worth the cost** (65%) and that **access to higher education in their country is too expensive** for the average citizen (72%).

→ **Most (55%) feel the education system in their country is not preparing young people for employment.** More than two-thirds (69%) believe that **governments should prioritize vocational training over academic degrees** because of AI, especially in the Global South (75% vs.62% in the Global North).

WORK NEEDS TO BE MEANINGFUL BUT PAY MATTERS TOO

Most global citizens who work would continue to do so even if they didn't need the money (64%), **80% feel their work makes a meaningful contribution to society** and 79% believe that a good work life balance is more important than having a high salary.

→ However, **low pay is the most likely reason to find a new job**, mentioned by 48%, way ahead of the second most important reason (difficult working conditions at 28%). Workers in the Global South are more likely to want to leave their job because of low pay (52% vs. 43% in the Global North).

COST OF LIVING AND HOUSING ARE REGARDED AS THE MAIN BARRIERS TO HAVING CHILDREN

Despite falling birth rates, only 32% want people in their country to have more children and a similar number (28%) would like to see fewer. The most common view is that the current number of children is about right (40%).

Global citizens think that **cost of living pressures (57%) is the factor most likely to limit people's ability to have children**, followed by housing costs/shortages (35%).

OPTIMISM ABOUT THE FUTURE

Most global citizens feel optimistic about their own future (60%) but only 35% have faith in political leaders to address geopolitical challenges and maintain global stability (down from 37% in 2025). **Global citizens are also pessimistic about the future of the global economy.** Only 37% feel optimistic, down from 40% in 2025.

As we have found in previous years, **citizens in the Global South are much more optimistic than citizens in the Global North.** For instance, 49% feel optimistic about the global economy compared to only 19% in the Global North, and 69% feel optimistic about their own future compared to 44% in the Global North.

Other groups with higher levels of optimism about the future are under 35s compared to over 55s, men compared to women, white collar workers compared to blue collar workers, and global citizens with high levels of education.

There is also **a clear relationship between optimism about the future and having children in the household.** Global citizens with large families (more than four children) are the most optimistic of all. The link between optimism and having children highlights the wider societal value of creating the conditions in which the next generation can thrive.

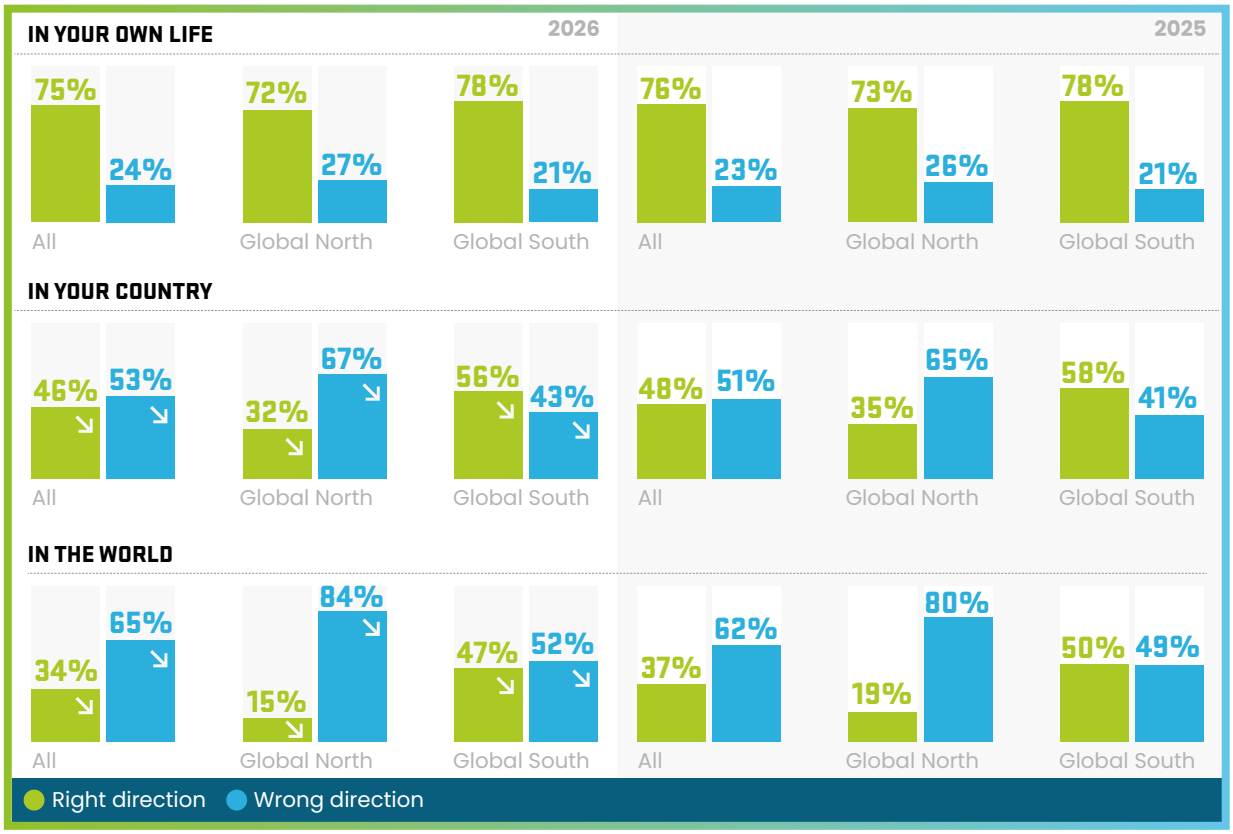
LOOKING AHEAD TO THE FUTURE: ARE WE ON THE RIGHT TRACK?

ARE WE ON THE RIGHT TRACK?

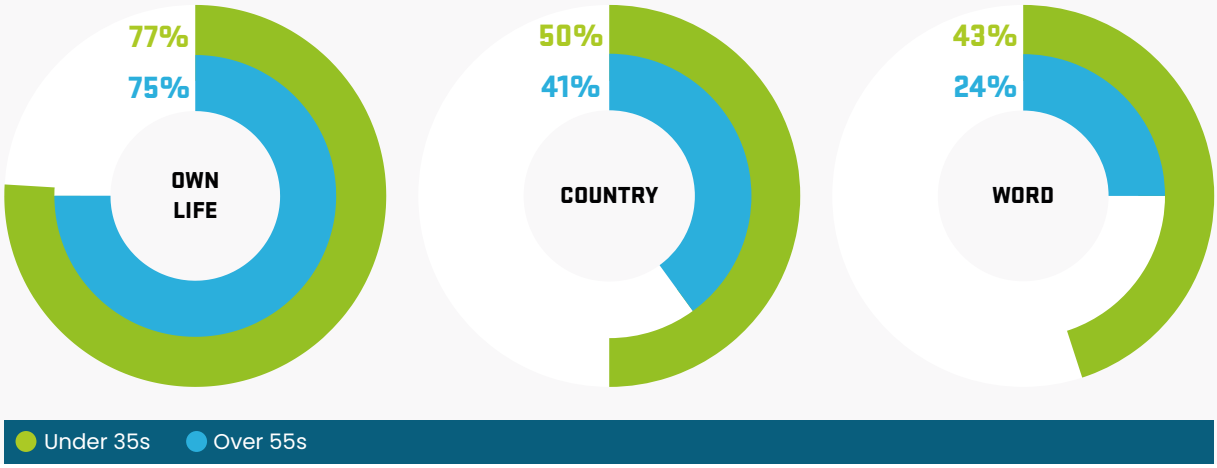
MOST GLOBAL CITIZENS FEEL THEIR OWN LIVES ARE ON THE RIGHT TRACK BUT THE WORLD IS GOING IN THE WRONG DIRECTION.

Two-thirds believe that the world is on the wrong track (65% vs. 34% on the right track). While global citizens are more positive about the direction their country is heading, a majority still feel their country is going the wrong way (53% vs. 46% in the right direction). There has been an increase since last year in how many global citizens feel the world (up 3 points) and their country (up 2 points) is on the wrong 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....?

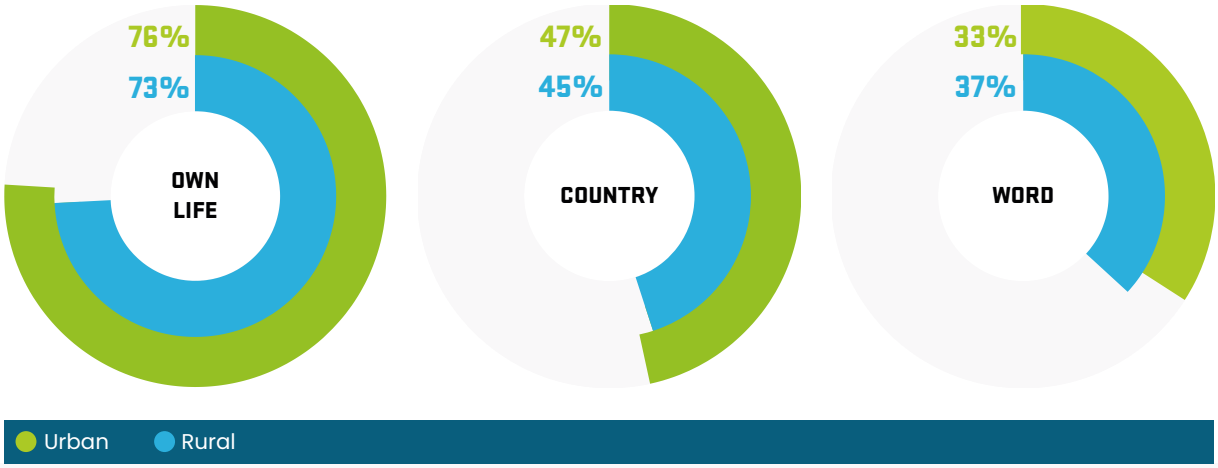


WHICH GROUPS ARE MORE OPTIMISTIC THAT THINGS ARE HEADING IN THE RIGHT DIRECTION?



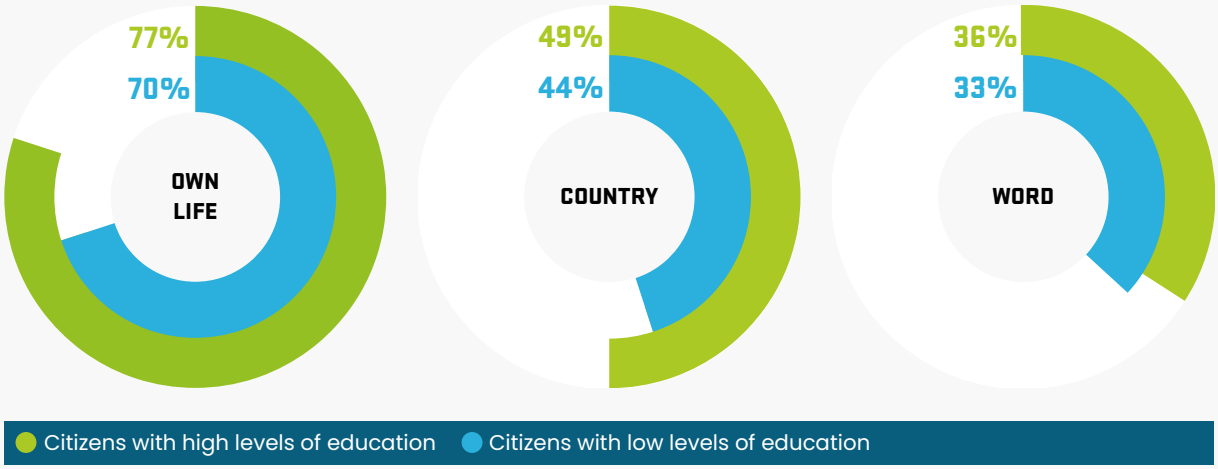
AGE

Under 35s are particularly optimistic that the world is heading in the right direction compared to older global citizens.



URBAN VS. RURAL

Global citizens living in urban areas are more optimistic than those in rural areas about their own lives and country but are less optimistic about the world.



EDUCATION

Global citizens with high levels of education are more optimistic than those with low levels of education.

REGION

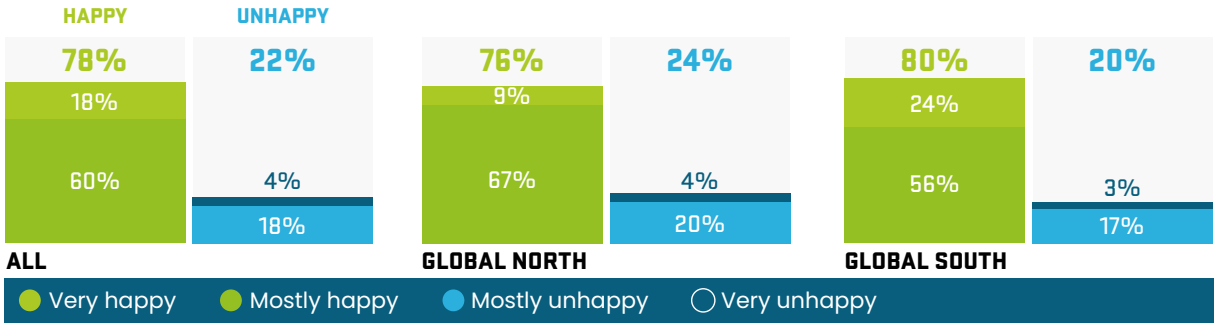
Global citizens in MENA and Asia are most likely to feel their country and the world are headed in the right direction compared to Europe and Oceania. There is much less variation when it comes to their own lives but Europe again scores lowest and MENA the highest.

HEADING IN THE RIGHT DIRECTION...

	Africa	Asia	Europe	MENA	Oceania	North America	South America
...IN YOUR OWN LIFE	71%	79%	70%	83%	74%	78%	76%
...IN YOUR COUNTRY	46%	63%	24%	76%	32%	39%	40%
...IN THE WORLD	45%	50%	9%	58%	15%	23%	29%

Most global citizens are happy with their lives but some groups are happier than others. Overall, 78% are happy. Happiness levels are higher in the Global South (80%) than the Global North (76%).

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



GROUP WITH THE HIGHEST LEVELS OF HAPPINESS

GLOBAL CITIZENS IN A COUPLE
83%
vs. 73% who are single

GLOBAL CITIZENS WHO HAVE CHILDREN IN THE HOUSEHOLD
81%
vs. 77% who do not have children

GLOBAL CITIZENS WHO ARE WORKING OR RETIRED
81%
83%
vs. 63% particularly in comparison to global citizens who are unemployed and looking for work

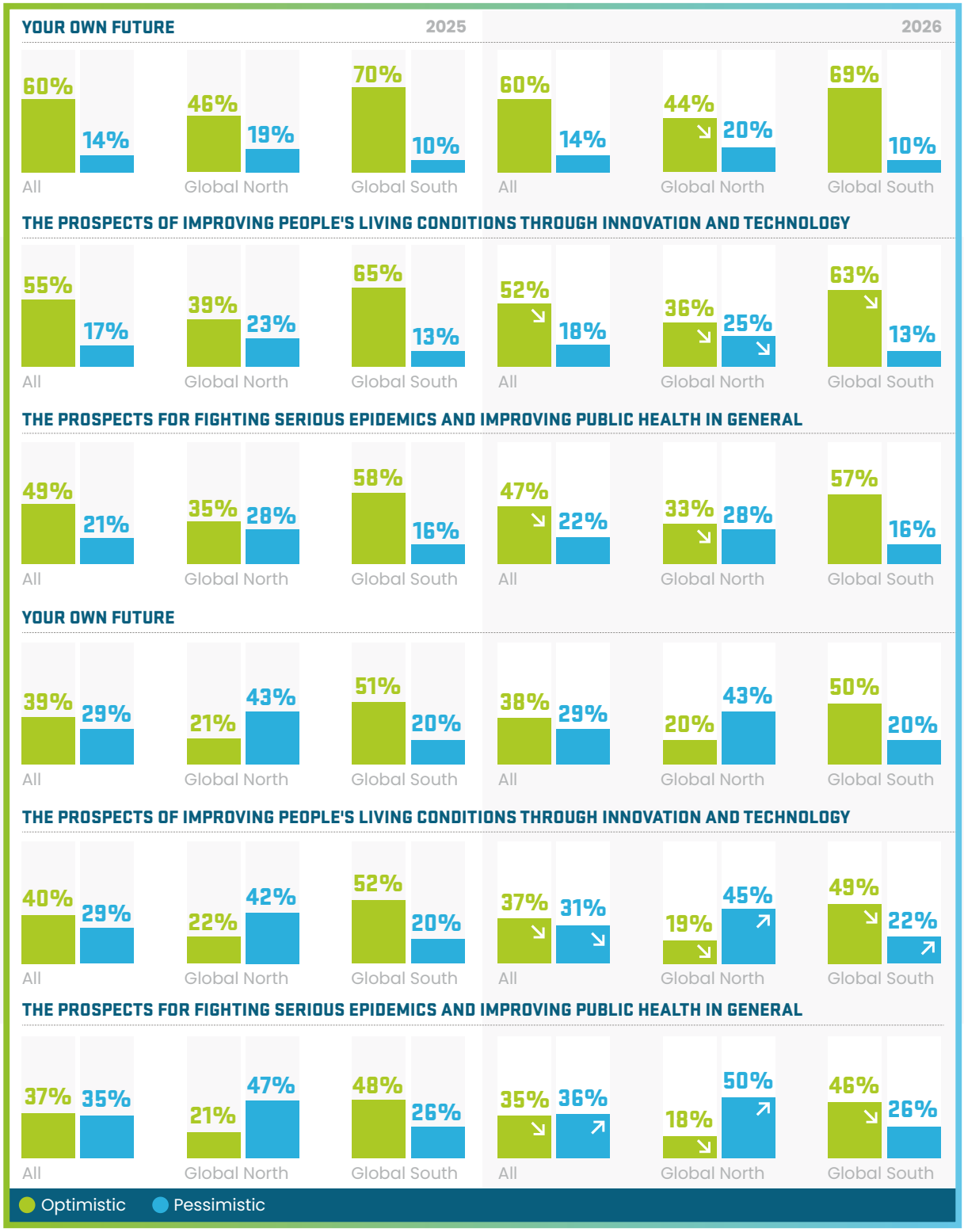
GLOBAL CITIZENS IN WHITE COLLAR ROLES
83%
vs. 74% in blue collar roles

OVER 65S
83%
vs. 78% overall

LOOKING AHEAD TO THE FUTURE

GLOBAL CITIZENS ARE MOST OPTIMISTIC ABOUT THEIR OWN FUTURE AND LEAST OPTIMISTIC ABOUT THE ABILITY OF POLITICAL LEADERS TO ADDRESS GEOPOLITICAL CHALLENGES.

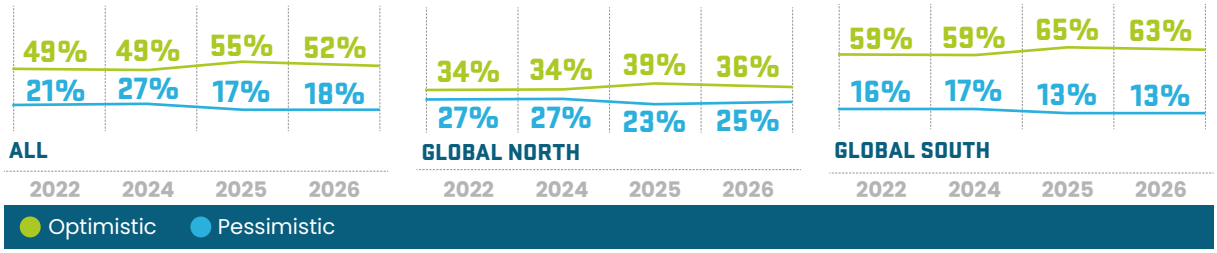
Most global citizens feel optimistic about their own future (60%) but only 35% have faith in political leaders (35%, down from 37% in 2025). Global citizens are also gloomy about the future of the global economy (37%, down from 40% in 2025) and the prospects for addressing climate change (38%). Optimism is higher about the prospects for fighting epidemics and improving public health but is felt by less than half (47%, down from 49% in 2025).



Global citizens are optimistic about the prospects of improving people's living conditions through innovation and technology but less so than last year. Just over half (52%) of global citizens feel optimistic, rising to 63% in the Global South (compared to 36% in the Global North).

Fewer are pessimistic, even in the Global North (25% compared to 13% in the Global South). However, last year optimism was higher (55% compared to 52% this year). Despite the fall, optimism is still higher than the 49% seen in 2022 and 2024.

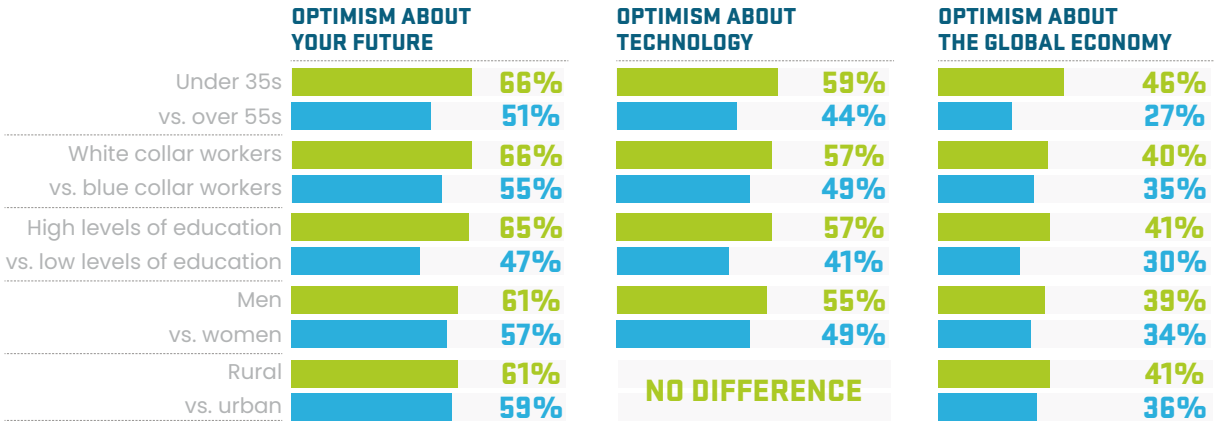
THE PROSPECTS OF IMPROVING PEOPLE'S LIVING CONDITIONS THROUGH INNOVATION AND TECHNOLOGY



WHO IS THE MOST OPTIMISTIC?

Levels of optimism are much higher in the Global South on every dimension. For instance, 49% feel optimistic about the global economy compared to only 19% in the Global North and 69% feel optimistic about their own future compared to 44% in the Global North.

THE MOST OPTIMISTIC GROUPS



As we go on to discuss in the final chapter of this report, there are also higher levels of optimism among global citizens with children in the household, particularly those with large families.

CONCERNS ABOUT THE FUTURE

Confidence in the outlook for political leadership and the global economy may be tempered by fears about the future. When asked about biggest concerns about their country's future, global citizens were most likely to mention economic recession or financial crisis (50%), followed by deterioration of public services (40%).

Q. Among the following developments or risks, which three concern you most when you think about the future of your country over the next 10 years?

	All	Global North	Global South	Africa	Asia	Europe	MENA	Oceania	North America	South America
ECONOMIC RECESSION OR FINANCIAL CRISIS	50%	51%	49%	48%	52%	44%	44%	55%	61%	51%
DETERIORATION OF PUBLIC SERVICES (HEALTHCARE, EDUCATION, ETC.)	40%	45%	36%	36%	30%	51%	40%	41%	47%	40%
POLITICAL INSTABILITY AND RISING POLARIZATION	36%	37%	35%	47%	33%	38%	20%	37%	29%	39%
MASS UNEMPLOYMENT DUE TO TECHNOLOGICAL CHANGE	33%	21%	41%	50%	34%	18%	41%	27%	26%	35%
EXTREME WEATHER EVENTS OR CLIMATE-RELATED DISASTERS	22%	25%	20%	13%	32%	19%	18%	19%	33%	17%
SOCIAL TENSIONS	21%	22%	20%	20%	22%	23%	21%	17%	17%	18%
FOOD OR WATER SHORTAGES	18%	13%	22%	23%	18%	10%	20%	23%	14%	24%
IMMIGRATION	17%	25%	12%	16%	9%	29%	18%	16%	23%	3%
ARMED CONFLICT	17%	21%	14%	13%	14%	27%	9%	16%	10%	22%
LARGE-SCALE DISINFORMATION	16%	18%	15%	11%	17%	18%	12%	19%	15%	19%
A MAJOR PANDEMIC OR HEALTH EMERGENCY	16%	13%	17%	9%	18%	12%	24%	19%	13%	20%

Citizens in the Global South are more likely to be concerned about mass unemployment due to technological change (41% vs. 21% in the Global North), while citizens in the Global North are more concerned about deterioration of public services (45% vs. 36%).

Concerns play out differently across different regions. Citizens in Asia are more likely to be concerned about extreme weather events (32%), citizens in South America are more likely to mention political instability (39%), citizens in Africa are more likely to worry about mass unemployment due to technological change (50%, the top answer), as are citizens in MENA (41%). Citizens from Oceania are more likely to mention economic recession (61%). As we shall see in the next section, there are also distinct macro and personal priorities in different regions of the world.

WHAT ARE GLOBAL CITIZENS' PRIORITIES IN 2026?

MACRO PRIORITIES

Cost of living is more important than ever. It is once again the number one priority for global citizens (56%) but the proportion mentioning it has gone up (it was 50% last year). Cost of living is particularly a priority for citizens of the Global North (61%) compared to the Global South (52%, although still the number one priority). As we discuss in the next chapter, concern about energy costs has shot up since last year.

Poverty and social inequalities remain a key priority. This is the second priority overall (38%) but features much more strongly for citizens in the Global South (44% compared to 29% in the Global North). The second highest ranking priority for citizens in the Global North is social protection systems (34% but only chosen by 21% of the Global South).

> *My top priority concern for 2026 is the cost of living, especially housing, groceries, energy bills and healthcare. I'm most worried about being able to make sure my family has a stable home and a good quality of life.*
>
> **MALE, AGED 30, AUSTRALIA**

> *The most pressing issue is the economic situation. We are in such a bad state that no one can help anyone, the country is getting poorer; some are very rich, some are very poor, and there are great gaps in between.*
>
> **FEMALE, AGED 65, TÜRKIYE**

Unemployment is the third most important priority and is particularly important for citizens in the Global South (49% vs. 18% in the Global North). As we have seen in the previous chapter, citizens of the Global South are especially concerned about mass unemployment due to technological change.

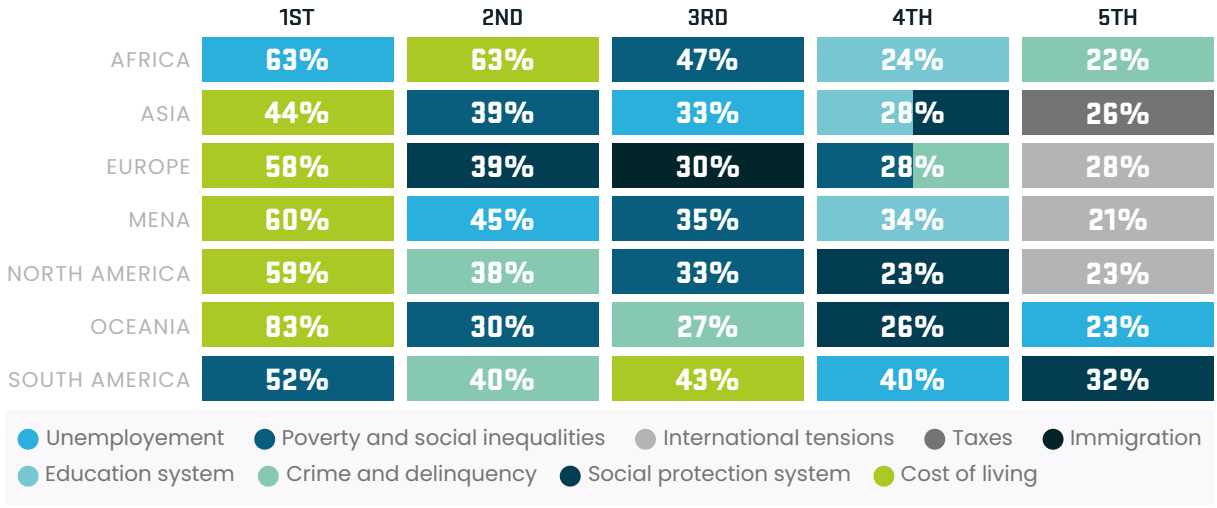
> *The top priority concern is to have secure employment for myself and my future children. The job market is deteriorating at a rapid pace and the future of employment is not looking too great.*
>
> **MALE, AGED 21, INDIA**

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

	2022			2025			2026		
	All	Global North	Global South	All	Global North	Global South	All	Global North	Global South
COST OF LIVING	52%	54%	33%	50%	56%	46%	56%	61%	52%
POVERTY AND SOCIAL INEQUALITIES	36%	33%	39%	36%	30%	40%	38%	29%	44%
UNEMPLOYMENT	33%	15%	48%	36%	18%	48%	36%	18%	49%
CRIME AND DELINQUENCY	24%	18%	28%	27%	27%	27%	27%	25%	28%
SOCIAL PROTECTION SYSTEM (HEALTH, RETIREMENT...)	25%	27%	23%	25%	32%	20%	27%	34%	21%
EDUCATION SYSTEM	24%	14%	33%	22%	13%	28%	22%	12%	28%
TAXES	17%	21%	14%	21%	21%	20%	20%	21%	19%
INTERNATIONAL TENSIONS	12%	16%	8%	14%	21%	9%	18%	28%	11%
GLOBAL WARMING	23%	34%	14%	17%	25%	11%	14%	18%	11%
IMMIGRATION	11%	17%	5%	15%	26%	7%	14%	24%	8%
IMPACT OF NEW TECHNOLOGIES (AI, JOBS, PRIVACY...)'	4%	6%	2%	8%	4%	10%	11%	11%	11%
TERRORISM	7%	7%	7%	8%	6%	9%	8%	6%	10%
SEXIST, RACIST AND HOMOPHOBIC DISCRIMINATION	7%	6%	7%	7%	9%	5%	7%	8%	6%
COVID-19 EPIDEMIC	21%	20%	22%	/	/	/	/	/	/

One other notable difference is that citizens of the Global South are more likely to cite education as a priority compared to citizens of the Global North (28% vs. 12%). We explore attitudes towards education more fully in a later chapter in this report – citizens of the Global South are particularly likely to feel concerned about the cost of education and the educational pressures young people face but also have more faith in the ability of education to increase social mobility.

Macro priorities differ regionally. In Africa, the number one macro priority is unemployment (69%), whereas in South America it is poverty and social inequalities (52%). In South America, crime comes second (50%), while in Europe it is social protection systems (39%). In MENA, unemployment (46%) is the second most important priority.



There are fewer differences across different demographic groups. Cost of living dominates for all demographic groups. Under 35s are more concerned than average about unemployment (48%), as are global citizens with a high level of education (38%) compared to those with a low level (29%).

PERSONAL PRIORITIES FOR WELL-BEING

Health and financial security are the most important priorities for wellbeing. Staying physically healthy and getting healthcare when needed is the number one priority, chosen by 44%. This is more of a priority in the Global North than the Global South (52% vs.38%).

Having a secure job or income is just behind in second place on 43%. This is the number one priority in the Global South (46%, compared to 38% in the Global North where it is in third place).

> *Main concern for me and my family: finding a doctor or dentist or ophthalmologist or dermatologist or any other specialist when we NEED it without being rejected or having to wait 4 to 6 months to be seen.*
>
> **MALE, AGED 66, FRANCE**

> *My main concern is the lack of work, the economy is getting worse and worse, we cannot make ends meet, we are getting more in debt to eat.*
>
> **FEMALE, AGED 40, ARGENTINA**

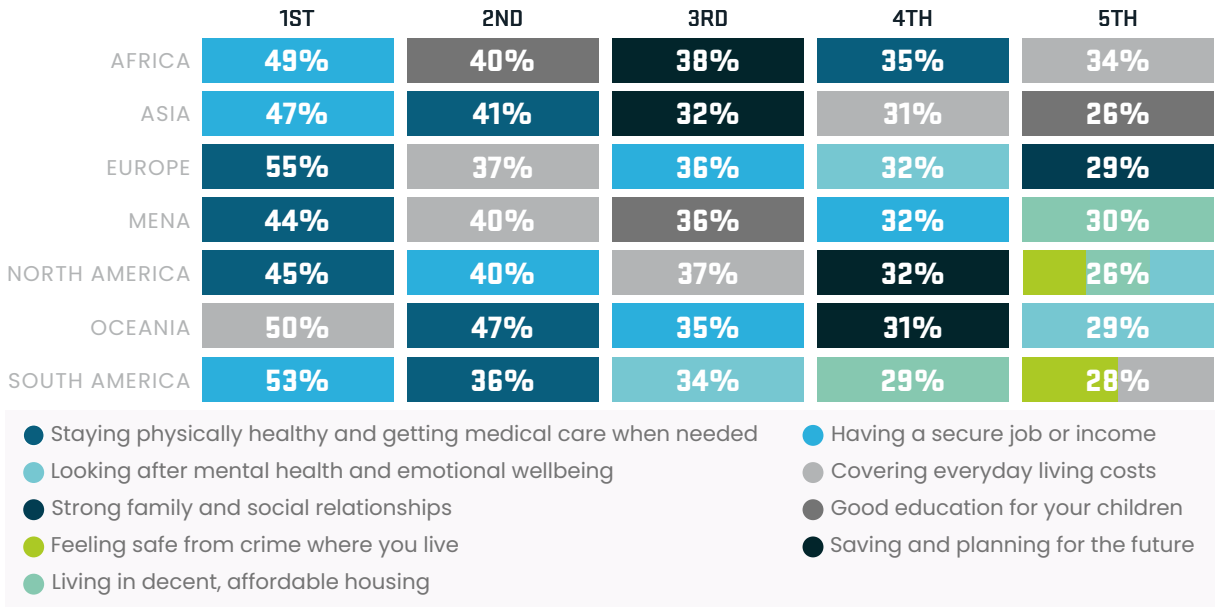
Covering everyday living costs is in third place overall at 35%. It more of a priority in the Global North where it comes second (40% vs. 32% in the Global South).

> *I'm concerned about being able to afford to live. Everything is so expensive and I can hardly afford to cover my bills (rent, power, water, energy). My phone bill is too high, and groceries are far too expensive. I have been struggling to eat.*
>
> **FEMALE, AGED 20, CANADA**

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?

	All	Global North	Global South
STAYING PHYSICALLY HEALTHY AND GETTING MEDICAL CARE WHEN NEEDED	44%	52%	38%
HAVING A SECURE JOB OR INCOME	43%	38%	46%
COVERING EVERYDAY LIVING COSTS	35%	40%	32%
SAVING AND PLANNING FOR THE FUTURE	30%	27%	32%
LOOKING AFTER MENTAL HEALTH AND EMOTIONAL WELLBEING	26%	31%	23%
GOOD EDUCATION FOR YOUR CHILDREN	25%	12%	34%
STRONG FAMILY AND SOCIAL RELATIONSHIPS	24%	27%	21%
FEELING SAFE FROM CRIME WHERE YOU LIVE	23%	22%	23%
LIVING IN DECENT, AFFORDABLE HOUSING'	23%	21%	23%
BALANCING WORK AND PERSONAL LIFE	21%	21%	21%
PROTECTION FROM EXTREME WEATHER AND OTHER ENVIRONMENTAL RISKS	7%	8%	7%

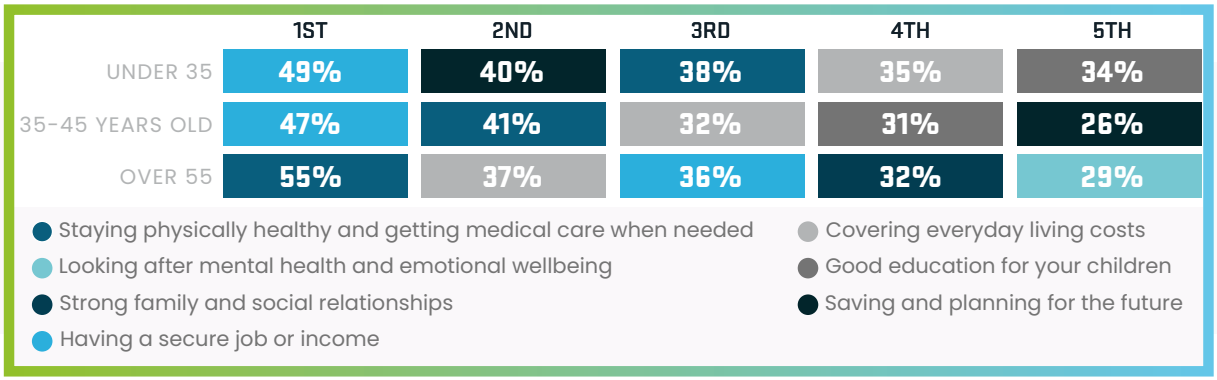
Staying physically healthy is a top three priority for every region other than Africa, where getting a good education for your children (40%) is the second highest priority and saving and planning for the future (38%) comes third. Education is also a top three priority in MENA (36%) and saving for the future (32%) features in the top three in Asia.



Turning to demographic differences, education is the second most important priority for global citizens with children in the household (40%).

Personal priorities differ by age. For under 35s and 35 to 54 year olds, having a secure job is the top priority (49% and 46%), whereas for over 55s it is staying physically healthy (64%). Retired global citizens are particularly likely to see staying physically healthy as a personal priority (71% compared to 40% of global citizens who are working).

> *"My concern is the lack of financial means necessary for my children's education."*
>
> **FEMALE, AGED 34, IVORY COAST**



Younger global citizens are also more likely to see saving for the future as a priority (34% compared to 23% of over 55s). This may be linked to their greater willingness to pay for better healthcare and education compared to over 55s, themes we will explore later in this report.

COST OF LIVING AND PROSPERITY

CONCERNS ABOUT THE COST OF LIVING

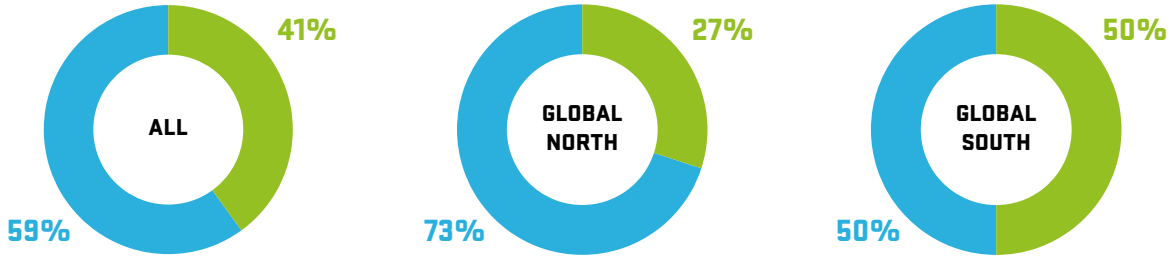
Inflation (68%) remains the top concern around the cost of living but energy and fuel costs have jumped into second place (34%, up from 25% in 2025). The impact of successive crises in the Middle East on fuel prices has been felt more in the Global North. Concern about fuel costs has risen to 42%, up from 29% last year. In contrast, low wages still come second in the Global South (32% vs. 17% in the Global North). However, energy costs have also become more of a worry in the Global South, rising from 22% last year to 29% in 2026.

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)

	2025			2026		
	All	Global North	Global South	All	Global North	Global South
RISING PRICES OF EVERYDAY ESSENTIALS (FOOD, HOUSING COSTS)	68%	72%	65%	68%	↘ 70%	↗ 67%
ENERGY AND FUEL COSTS	25%	29%	22%	↗ 34%	↗ 42%	↗ 29%
LOW WAGES	28%	19%	34%	↘ 26%	↘ 17%	↘ 32%
HIGH TAXES AND FEES	28%	26%	29%	↘ 24%	↘ 22%	↘ 25%
INSUFFICIENT PENSIONS OR BENEFITS	16%	20%	13%	15%	↘ 18%	13%
WIDENING SOCIAL INEQUALITIES	14%	15%	13%	13%	↘ 13%	12%

As well as being more concerned about energy costs, citizens of the Global North are also more likely to see global tariffs in negative terms. Only 27% agree their impact has been more positive than negative for their country, compared to 50% in the Global South.

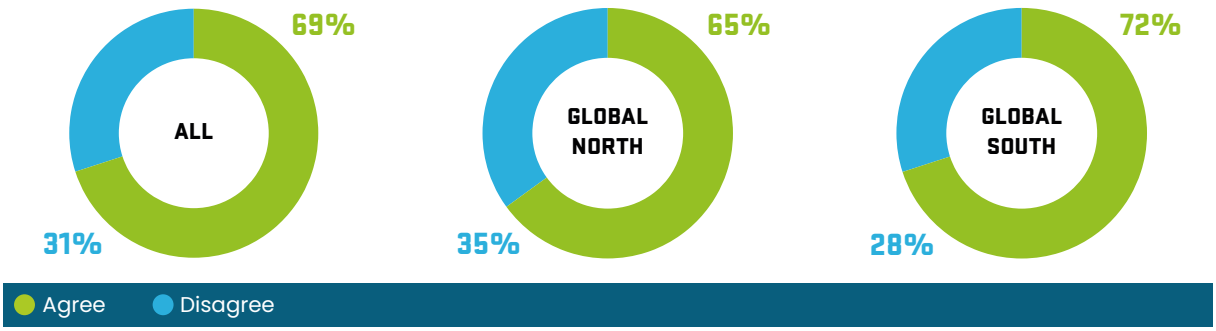
THE IMPACT OF INCREASING GLOBAL TARIFFS IS MORE POSITIVE THAN NEGATIVE IN MY COUNTRY



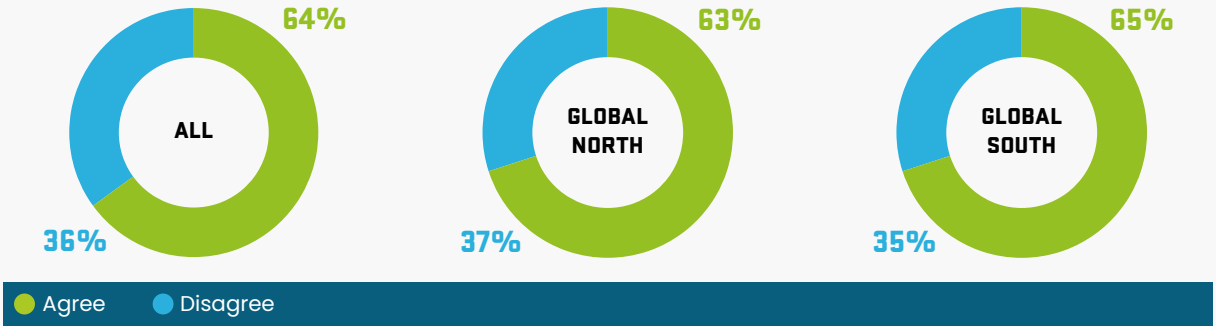
Despite concerns about the cost of living, global citizens would not sacrifice national security for lower prices. More than two-thirds (69%) believe that national security should trump low consumer prices. Agreement is higher in the Global South than the Global North (72% vs. 65%).

A similar proportion believe countries should aim for self-sufficiency, even if it makes products more expensive (64%). There is no significant gap between the Global North (63%) and Global South (65%). Agreement is lower in South America (50%).

IN A FRAGMENTED WORLD ECONOMY, NATIONAL SECURITY SHOULD TRUMP LOW CONSUMER PRICES



COUNTRIES SHOULD AIM FOR SELF SUFFICIENCY, EVEN IF IT MAKES PRODUCTS MORE EXPENSIVE



Global citizens who are financially secure are more likely to agree with both sentiments. Among those able to save money, 72% believe that national security should trump low consumer prices compared to 66% who live beyond their means, while 67% say countries should try for self-sufficiency even if it makes products more expensive compared to 59% of those living beyond their means. However, in both cases a clear majority of global citizens who live beyond their means say they would be willing to sacrifice cheaper products.

HOW TO ACHIEVE PROSPERITY?

Prosperity is about more than money. For global citizens, prosperity means financial security (62%) but also good health/access to care (46%), reflecting the personal priorities explored in the previous chapter.

Freedom and equal opportunity come third in the list (30%). Financial security is particularly associated with prosperity in the Global North (69% compared to 57% in the Global South), while in the Global South quality education and skills is more important (31% vs. 21%).

Q. When you think about the term "prosperity," what does it mean to you?

	All	Global North	Global South
FINANCIAL SECURITY/STABLE INCOMEHAVING A SECURE JOB OR INCOME	62%	69%	57%
GOOD HEALTH AND ACCESS TO CARE	46%	50%	44%
QUALITY EDUCATION AND SKILLS	27%	21%	31%
SAFE, AFFORDABLE HOUSING	26%	26%	26%
TIME FOR FAMILY AND COMMUNITY	22%	24%	20%
MEANINGFUL WORK AND PURPOSE	23%	21%	24%
FREEDOM AND EQUAL OPPORTUNITY	30%	28%	30%
A CLEAN AND SAFE ENVIRONMENT	21%	21%	22%

Global citizens have faith in the power of hard work to achieve prosperity. Most global citizens think that hard work (46%) is what is required to improve financially, followed by having a network (39%).

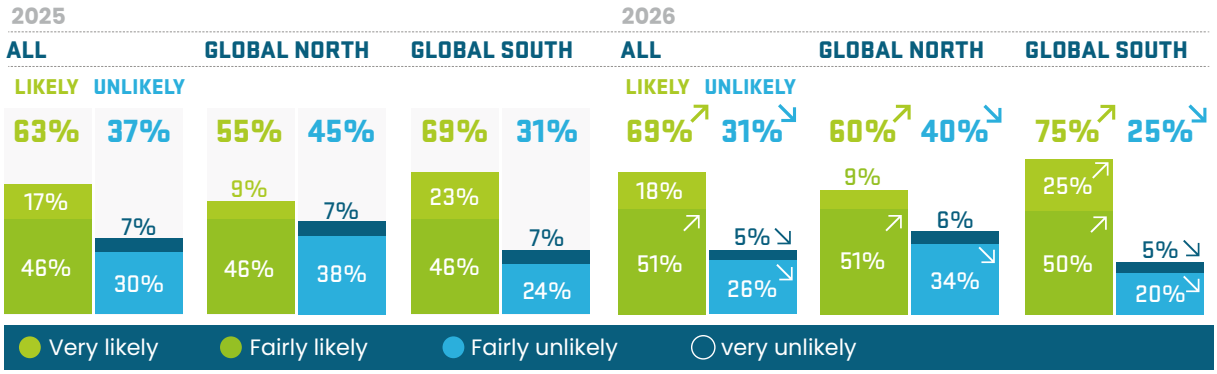
Citizens in the Global North are more likely to mention luck as a factor (24% vs. 14% in the Global South), whereas citizens from the Global South are more likely to cite taking risks (22% vs. 15% in the Global North). Having a network (49%) is the top answer in Africa.

Q. In today's society, would you say that in order to improve financially, you must first of all...

	All	Global North	Global South
WORK HARD	46%	44%	48%
HAVE A NETWORK, KNOWING THE RIGHT PEOPLE	39%	37%	40%
COME FROM A PRIVILEGED BACKGROUND, INHERITING	26%	32%	31%
TAKE RISKS	19%	15%	22%
BE LUCKY	18%	24%	22%
BE TALENTED	18%	17%	14%
KNOW HOW TO PUT YOURSELF AHEAD OF MORE DESERVING PEOPLE	11%	9%	12%

Most global citizens believe that if someone in their country works hard, they are likely to move up in society. More than two-thirds (69%) believe this, an increase from last year (63%). This belief is much more marked in the Global South than the Global North (75% vs. 60%) but it has risen in both regions since last year. Regionally, it more prevalent in MENA (86%) and Africa (79%) and least common in Europe (59%) and South America (62%).

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



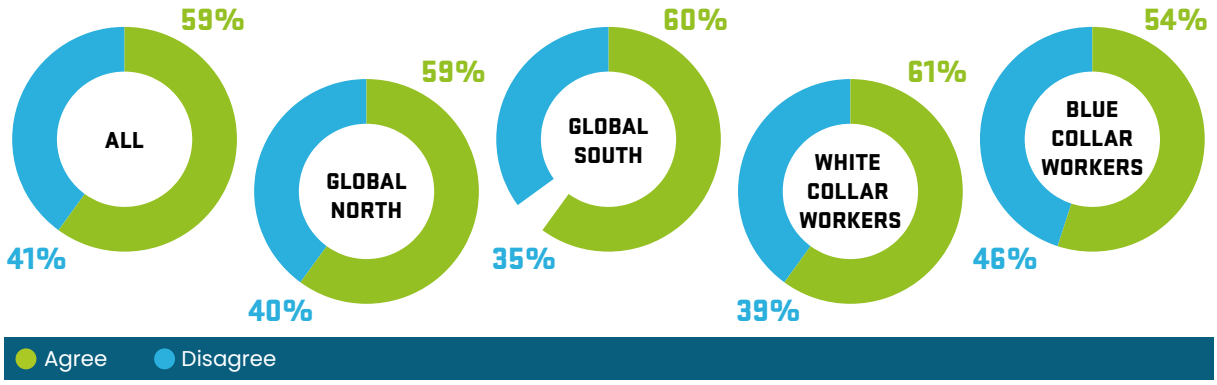
But national political leaders have a role to play too. In terms of who has the biggest role in creating widespread prosperity, national political leaders are the top selection (47%), particularly in the Global North (54% vs. 43% in the Global South). Citizens in the Global South are more likely to cite international organizations (16% compared to 10% in the Global North). Only 13% mention company leaders.

Q. Who should play the biggest role in creating widespread prosperity?

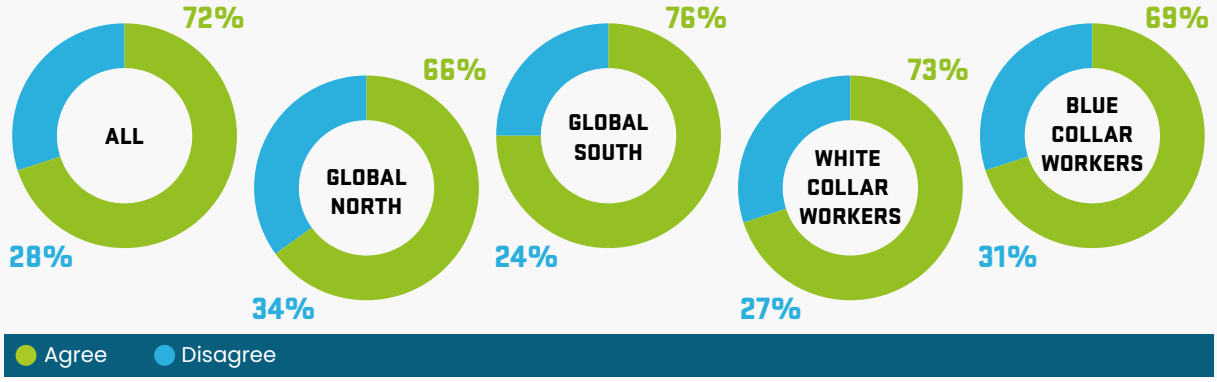
	All	Global North	Global South
NATIONAL POLITICAL LEADERS	47%	54%	43%
INTERNATIONAL ORGANIZATIONS (UNITED NATIONS, WORLD BANK, WORLD HEALTH ORGANIZATION...)	13%	10%	16%
LOCAL POLITICAL LEADERS	12%	11%	13%
CITIZEN ASSOCIATIONS	10%	8%	11%
LEADERS OF LARGE COMPANIES	8%	9%	8%
LEADERS OF SMALL BUSINESSES	4%	5%	4%
LABOR UNIONS	4%	3%	5%
NET: POLITICAL LEADERS	60%	65%	56%
NET: COMPANIES	13%	14%	12%
NET: OTHER ACTORS	27%	21%	32%

Some global citizens lack confidence that they would be able to set up a business if they wanted to. While a majority (59%) believe that starting a business in their country is accessible to people like them, 41% disagree. There is little difference between the Global North and Global South. Agreement is higher among men than women (62% vs. 57%) and white collar workers compared to blue collar workers (61% vs. 54%).

IN MY COUNTRY, STARTING A BUSINESS IS ACCESSIBLE TO PEOPLE LIKE ME



ENTREPRENEURS CONTRIBUTE MORE TO PROSPERITY THAN LARGE CORPORATIONS



There is more faith in the ability of entrepreneurs to stimulate prosperity. Most (72%) believe entrepreneurs contribute more to prosperity than large corporations. This is especially the case in the Global South (76% vs. 66% in the Global North). One factor here may be a greater openness in the Global South to technological transformation, the subject of our next chapter.

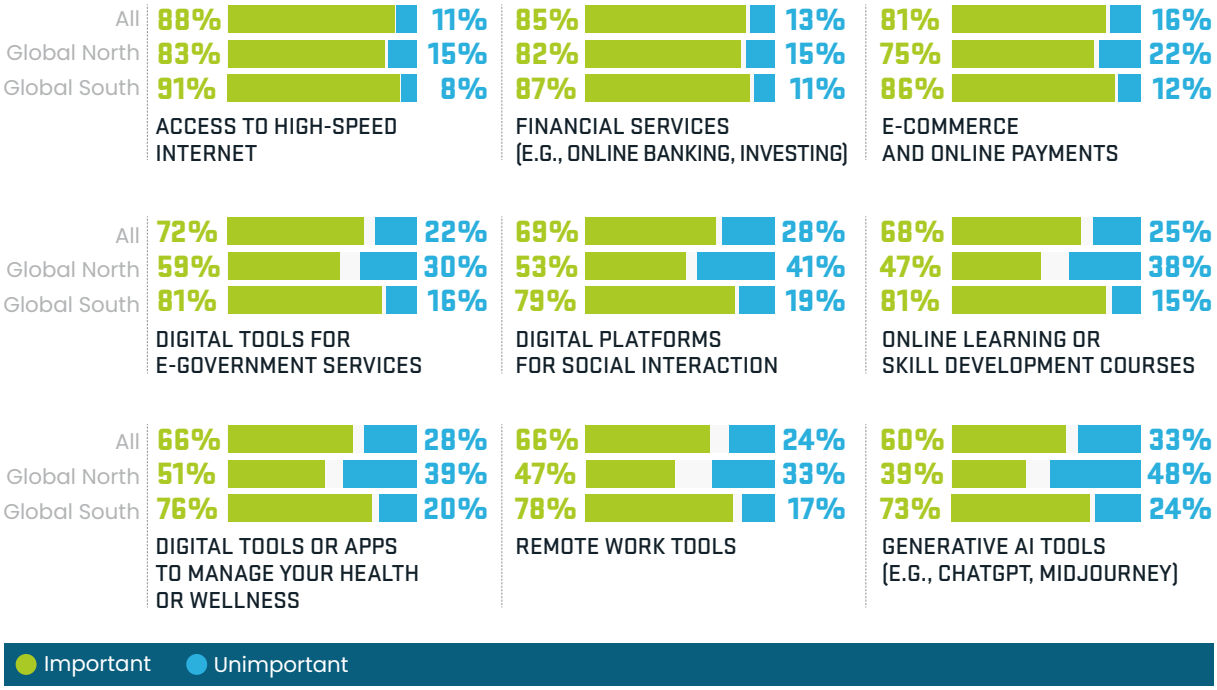
TECHNOLOGICAL TRANSFORMATION AND AI DISRUPTION

DIGITAL SERVICES IN DAILY LIFE

Digital services are important to global citizens' daily lives. Access to high-speed internet (88%), financial services (85%) and e-commerce/online payments (81%) are particularly important. Digital platforms are also regarded as a key tool for social interactions (69% say this is important in their daily life) and for managing health or wellness (66%).

Citizens from the Global South are consistently more likely to regard digital services as important. We see the biggest gap with AI tools (73% of citizens in the Global South regard these as important compared to only 39% in the Global North) and digital learning (76% vs. 51%).

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

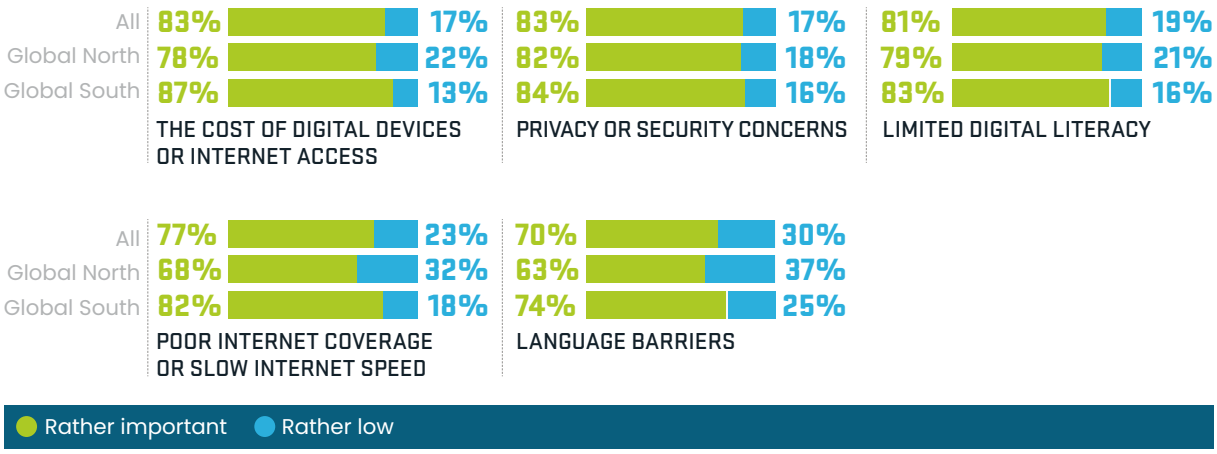


Younger global citizens are generally more likely than older global citizens to see digital services as important. For instance, 69% of under 35s say AI tools are important, compared to 61% of 35 to 54 year olds and 43% of over 55s.

Although citizens of the Global South are more likely to regard digital services as important in their daily life, they are also more likely to cite barriers to adoption. This is particularly the case for internet coverage (82% compared to 68% in the Global North) and language barriers (74% vs. 63%).

Global citizens living in rural areas are more likely to say poor internet coverage is a barrier (80% compared to 75% living in urban areas).

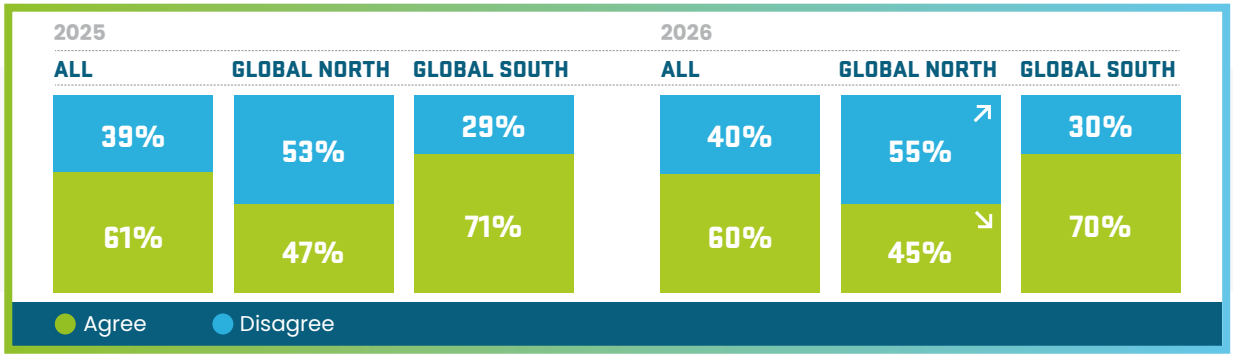
Q. To what extent do you think each of the following acts as a barrier to the adoption of digital technologies for some people in your country?



DEMAND FOR AI SERVICES

AI has become part of people's lives. Most global citizens believe that generative AI has had a positive impact on their everyday lives (60%), but the proportion is much higher in the Global South than the Global North (70% vs. 45%). Despite rapid advancements in artificial intelligence, this figure has not changed since 2025 (60%). If anything, citizens of the Global North are less enthusiastic about the impact of AI on their lives, with the proportion saying it has had a positive impact falling from 49% in 2025 to 47% in 2026.

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



DEMOGRAPHIC DIFFERENCES ON WHETHER AI HAS HAD A POSITIVE IMPACT ON EVERYDAY LIFE:

A CLEAR GENDER DIVIDE WITH 63% OF MEN FEELING POSITIVE

compared to 57% of women

WHITE COLLAR WORKERS
65%

compared to blue collar workers 55%

LESS THAN HALF AGED OVER 55
48%

compared to 66% of under 35s and 61% of 35 to 54 year olds

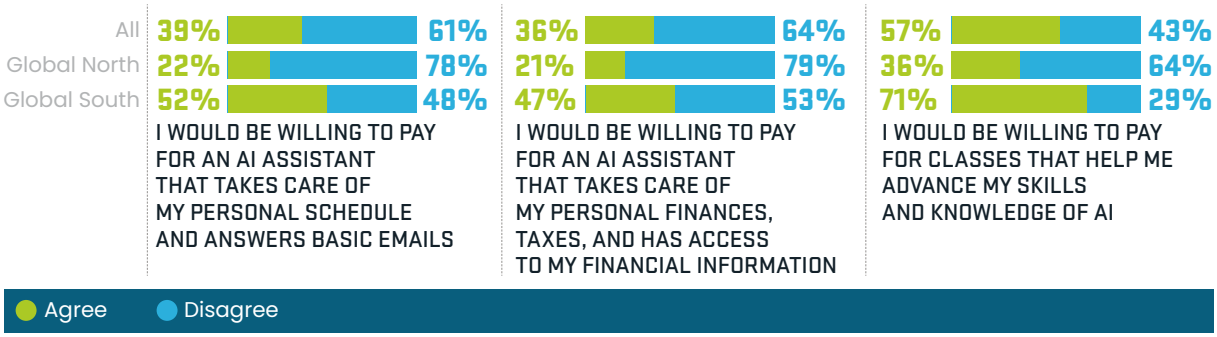
GLOBAL CITIZENS WITH A HIGH LEVEL OF EDUCATION
66%

compared to 47% with a low level of education and 53% with a medium level

GLOBAL CITIZENS LIVING IN URBAN AREAS
61%

compared to 57% living in rural areas

There is currently little demand for paying for AI assistants. Interest is highest for an AI assistant that takes care of personal schedules and answers basic emails (39% would be willing to pay), followed by taking care of personal finances and taxes (36%).



Demand is more than twice as high in the Global South than the Global North. Around half would be prepared to pay for an AI assistant that deals with scheduling (52%) or takes care of personal finances (47%) compared to only one in five in the Global North (22% and 21%, respectively).

WILLINGNESS TO PAY FOR AI ASSISTANCE WITH SCHEDULING AND PERSONAL FINANCES IS ALSO HIGHER AMONG THE GROUPS WHO ALREADY FEEL MORE POSITIVE TOWARDS AI:

- Younger global citizens - Half (50%) of under 35s are willing to pay for an AI assistant that deals with scheduling versus 24% of over 55s, and 45% are willing to pay for an AI assistant that deals with personal finances compared to 24% of over 55s.
- Men compared to women - 43% would be willing to pay for an AI assistant for personal scheduling versus 36% of women and 41% for an AI assistant for personal finances versus 32% of women.
- Global citizens with high levels of education - 45% with a high level of education would be interested in an AI assistant for personal scheduling, compared to 32% with a low level of education and 33% with a medium level.
- White collar workers compared to blue collar workers - 46% versus 39% would be interested in an AI assistant for personal scheduling.

There is much greater interest in paying for classes to advance AI skills : 57% would be willing to do this. Demand is almost twice as great in the Global South than the Global North (71% vs. 36%).

Demand is also greater among men (60% vs. 53% of women) and white collar workers (62% vs. 52% of blue collar workers), under 35s (64% vs. 44% of over 55s) and global citizens with a high level of education (63%, compared to 43% with a low level of education).

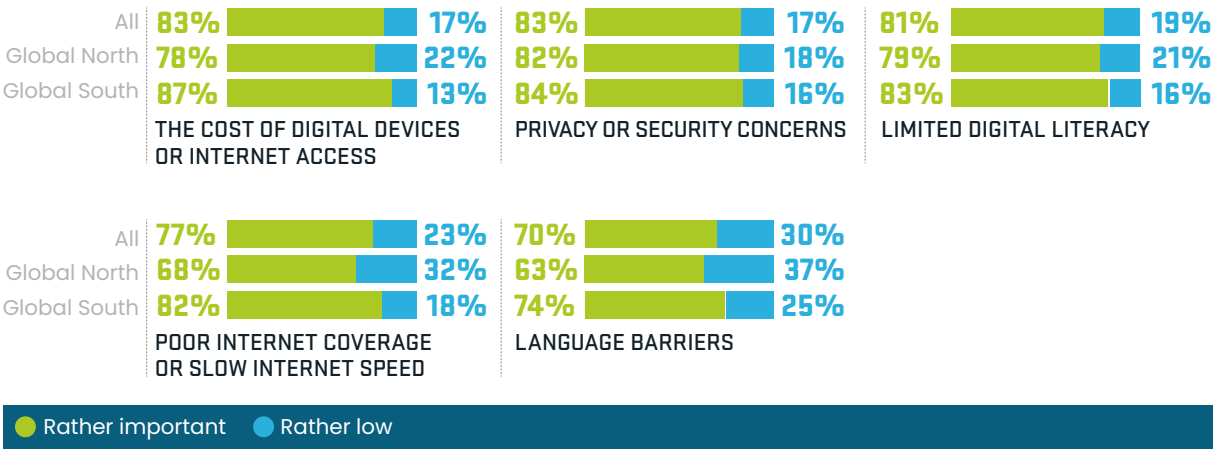
WHAT ARE GLOBAL CITIZENS' CONCERNS ABOUT AI?

AI is transformational and this brings fears as well as hopes. We asked global citizens about some of the most pressing concerns around AI.

The area where we see the greatest degree of consensus is not allowing AI to make final decisions in sensitive areas like hiring, justice or healthcare. This is rejected by 80% of global citizens, with little difference between citizens of the Global North and Global South.

There are also high levels of agreement that big technology companies will prioritize profit over safety when investing in AI (77%). Here citizens of the Global North are more likely to agree (80% vs.75% in the Global South).

A clear majority (61%) believe that humans will lose control over AI within the next 20 years. There is little difference in views between the Global North and the Global South.



Opinion is more split about the impact of generative AI on jobs but has generally become more pessimistic. On balance, global citizens are more likely to disagree than agree that generative AI will create more quality jobs than it destroys (54% vs. 46% agree). However, pessimism has grown since last year when there was a more even split, with 49% agreeing and 51% disagreeing.

Pessimism is once again far stronger in the Global North, with 70% disagreeing compared to only 43% in the Global South. Regionally, agreement that AI will create more quality jobs than it destroys is lowest in Oceania (26%), Europe (27%) and North America (33%), and highest in Asia (57%), Africa (57%) and MENA (66%).

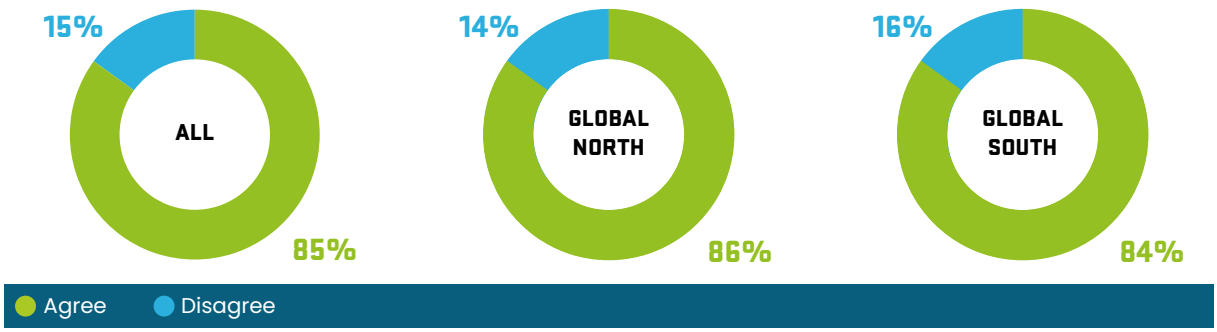
Optimism is higher among men than women (48% vs. 44%), under 35s compared to over 55s (51% vs. 38%), and global citizens with a high level of education (49% compared to 43% with a low level of education and 42% with a medium level).

But global citizens are more optimistic about their own jobs. More than three-fifths (62%) are confident that their job will not be replaced by AI and only 38% disagree. But the outlook is more pessimistic than last year, when 64% agreed and 36% disagreed. Optimism is greater in the Global South (66% compared to 56% in the Global North).

Confidence is greater among white collar workers (68% vs. 62% of blue collar workers), men (64% vs. 60% of women), global citizens with a high level of education (65% compared to 55% with a low education) and global citizens in rural rather than urban areas (64% vs. 61%).

Global citizens want AI to be subject to human oversight. Given these concerns about AI and the lack of confidence in big technology companies to prioritize safety, it is not surprising to find that a substantial majority (85%) of global citizens want to see a global framework/rules to regulate AI. This view is held consistently across the Global North and Global South.

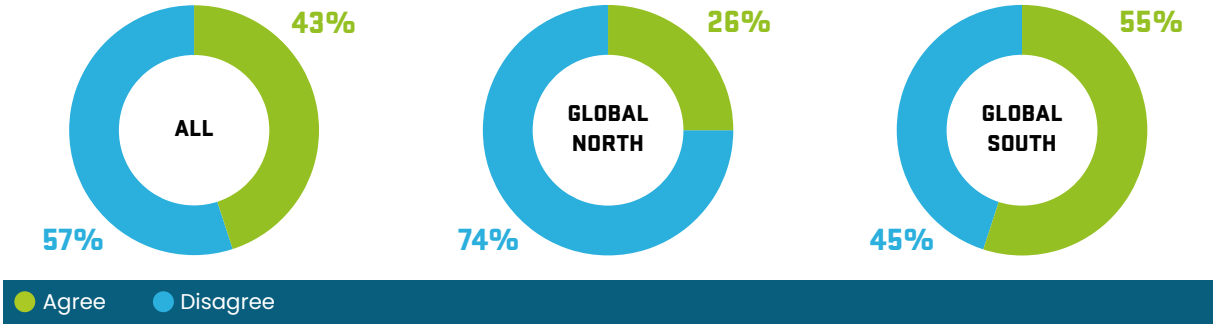
THERE SHOULD BE A GLOBAL FRAMEWORK/RULES TO REGULATE ARTIFICIAL INTELLIGENCE.



PROTECTING YOUNGER USERS

There is a clear divergence between citizens of the Global North and Global South over whether tech companies do enough to protect young users. A majority of citizens in the Global South think they do (55%), compared to only 26% in the Global North.

TECHNOLOGY COMPANIES DO ENOUGH TO PROTECT YOUNG USERS



Women (59%) are more likely than men (55%) to disagree that tech companies are doing enough, as are over 55s compared to under 35s (67% vs. 50%). Global citizens with children in the household are more likely than those who do not have children (52% vs. 36%) to feel that tech companies are doing enough.

Global citizens support restricting children's use of social media. Most (60%) think that people under 16 should be allowed to have social media accounts. But less than one in ten (9%) would be happy with no restrictions at all. A majority (51%) want verified parental or guardian consent. Support for a minimum age of 16 is higher in the Global North (50%) than the Global South (33%).

Q. Should people under age 16 be allowed to have social media accounts?

	All	Global North	Global South
YES (TOTAL)	60%	50%	67%
YES, WITHOUT RESTRICTIONS	9%	10%	10%
YES, BUT ONLY WITH VERIFIED PARENTAL/GUARDIAN CONSENT	51%	43%	57%
NO, MINIMUM AGE SHOULD BE 16	40%	50%	33%

If we look at this on a country-by-country basis, views vary a great deal. Support for restrictions is highest in France (63%), Spain (63%), Italy, (58%), Türkiye (56%) and Australia, where there is already a ban (55%). It is lowest in Vietnam (18%), Kazakhstan (20%), China (23%), India (24%), Egypt (25%) and Saudi Arabia (25%).

Q. Should people under age 16 be allowed to have social media accounts?

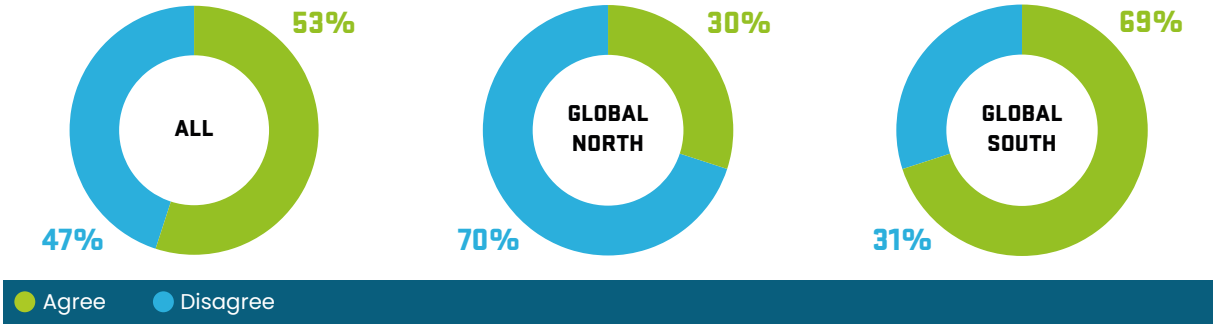
	YES	YES WITHOUT RESTRICTIONS	YES BUT ONLY WITH VERIFIED PARENTAL/GUARDIAN CONSENT	NO MINIMUM AGE SHOULD BE 16
FRANCE	37%	4%	33%	63%
SPAIN	37%	4%	33%	63%
ITALY	42%	5%	37%	58%
TURKIYE	44%	7%	37%	56%
AUSTRALIA	45%	7%	38%	55%
UNITED KINGDOM	46%	5%	41%	54%
NEW ZEALAND	47%	9%	38%	53%
POLAND	50%	7%	43%	50%
GERMANY	52%	8%	44%	48%
COLOMBIA	52%	5%	47%	48%
CANADA	55%	7%	48%	45%
IVORY COAST	55%	9%	46%	45%
SWEDEN	56%	11%	45%	44%
JAPAN	58%	7%	51%	42%
ARGENTINA	58%	6%	52%	42%
MEXICO	60%	5%	55%	40%
SENEGAL	61%	9%	52%	39%
MOROCCO	61%	8%	53%	39%
UNITED STATES	62%	6%	56%	38%
INDONESIA	63%	3%	60%	37%
BRAZIL	63%	8%	55%	37%
SOUTH AFRICA	64%	5%	59%	36%
SOUTH KOREA	65%	10%	55%	35%
KENYA	72%	6%	66%	28%
NIGERIA	73%	6%	67%	27%
GHANA	74%	8%	66%	26%
EGYPT	75%	14%	61%	25%
SAUDI ARABIA	75%	15%	60%	25%
INDIA	76%	26%	50%	24%
CHINA	77%	9%	68%	23%
KAZAKHSTAN	80%	25%	55%	20%
VIETNAM	82%	12%	70%	18%

FOCUS ON CRYPTOCURRENCIES

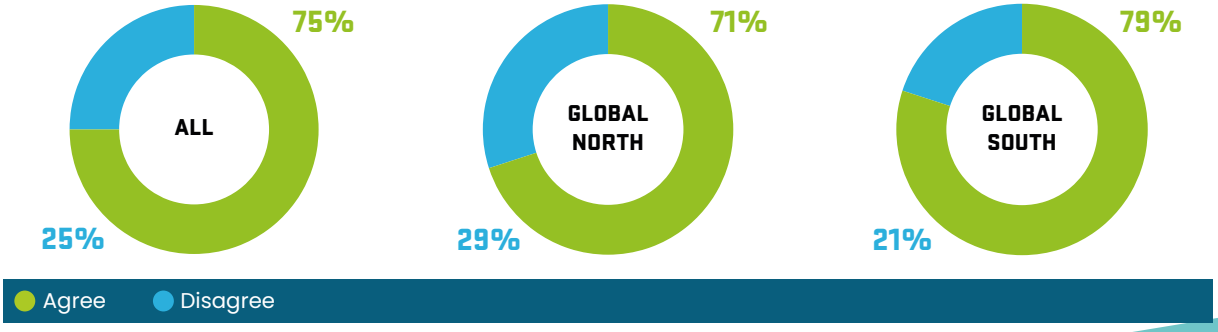
Global citizens are split on whether cryptocurrencies are a positive innovation for the global financial system. While 54% agree with this statement, 46% disagree. Positivity is more than twice as high in the Global South (69%) compared to Global North (30%). Regionally, Europe (28%) and Oceania (32%) are the least positive and Africa (81%) and MENA (71%) the most positive.

Under 35s (67%) are much more positive than over 55s (35%), and men are more positive than women (58% vs.49%).

CRYPTOCURRENCIES LIKE BITCOIN ARE A POSITIVE INNOVATION FOR THE GLOBAL FINANCIAL SYSTEM



GOVERNMENTS SHOULD DO MORE TO REGULATE CRYPTOCURRENCY MARKETS



Although there is positivity about cryptocurrencies, a clear majority (76%) want governments to do more to regulate cryptocurrency markets. Agreement is higher in the Global South than the Global North (79% vs. 71%), perhaps a reflection of the greater enthusiasm for cryptocurrency in the Global South.

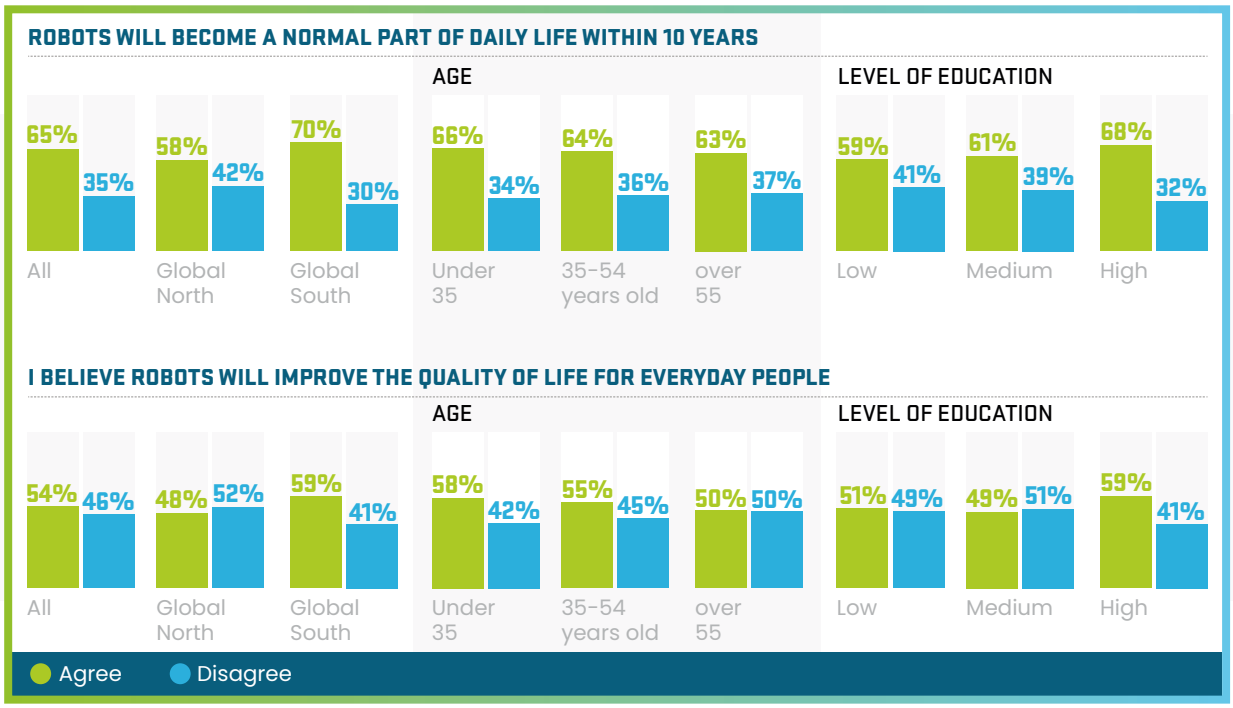
Despite wanting more government regulation, global citizens do not have a great deal of faith in their country's financial system. Half (50%) say they are confident in the fairness and transparency of their country's financial system but 50% disagree. Confidence is higher in the global South than the Global North (55% vs. 42%).



ARE ROBOTS THE FUTURE?

Global citizens expect robots to become commonplace. Most (65%) agree robots will become a normal part of daily life in 10 years, particularly in the Global South (70% vs. 58% in the Global North). There are no differences in this belief by age, unlike in other areas of technology.

This belief is more prevalent among global citizens with a high level of education (68% compared to 59% with a low level and 61% with a medium level), global citizens living in urban rather than rural areas (66% vs. 62%) and global citizens with children in the household compared to those without children (68% vs. 62%).

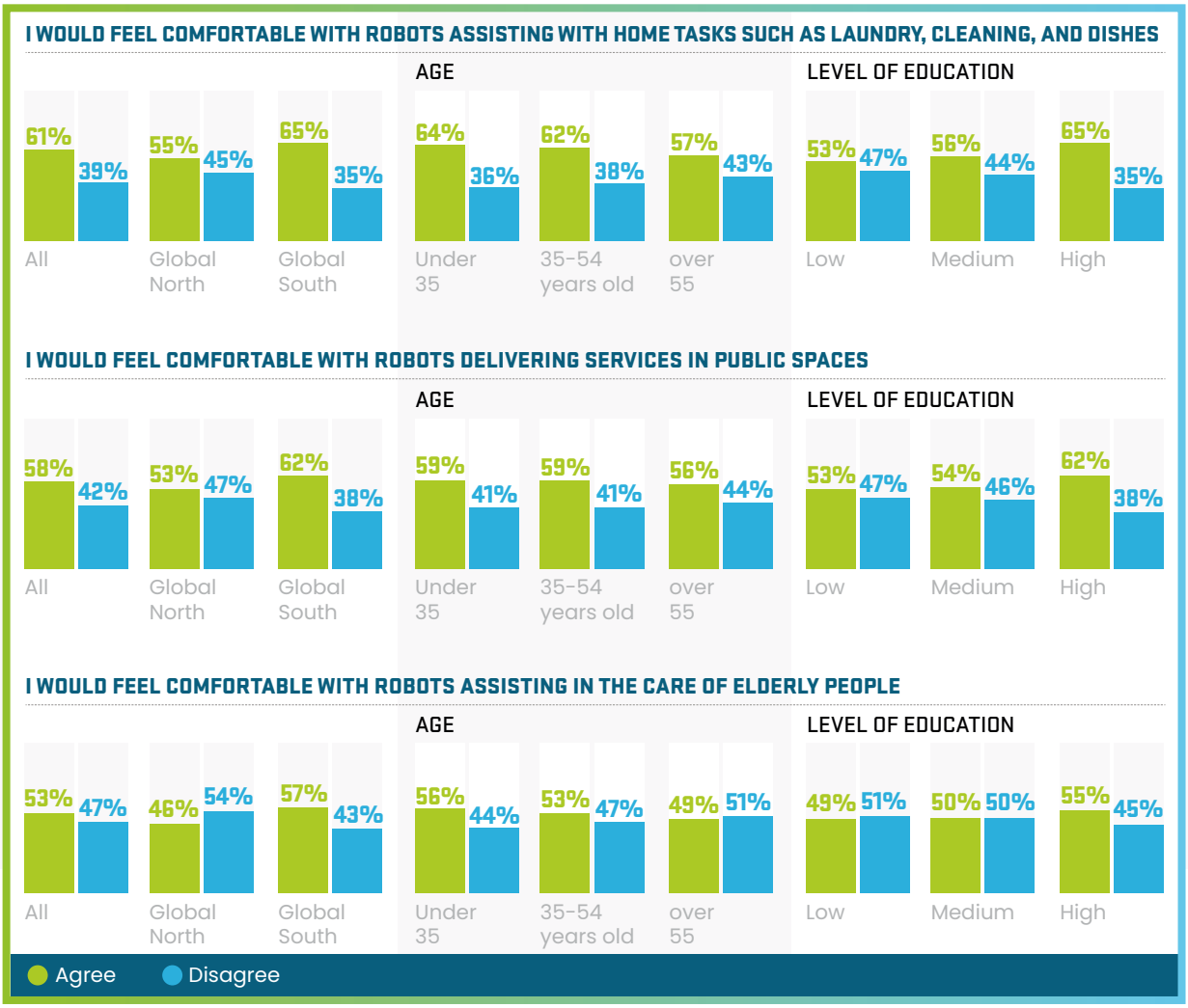


But global citizens are less convinced that robots will make life better. Just over half (54%) agree robots will improve the quality of life for everyday people. Optimism is greater in the Global South, where a clear majority agree (59%) compared to less than half in the Global North (48%).

Optimism is also greater among men than women (58% vs. 50%), under 35s (58% compared to 50% of over 55s), global citizens with a high level of education (59% compared to 51% with a low level of education and 49% with a medium level), and global citizens living in urban areas (56% vs. 51% in rural areas).

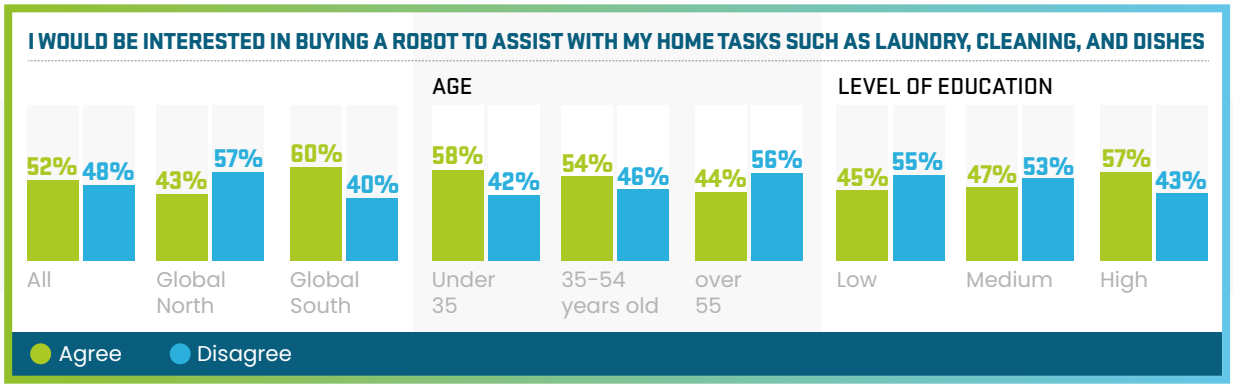
GLOBAL CITIZENS FEEL MORE COMFORTABLE ABOUT ROBOTS PERFORMING SOME TASKS THAN OTHERS:

- 61% with assisting with home tasks such as laundry, cleaning and dishes
- 58% with delivering services in public spaces
- 53% with assisting in the care of elderly people



Comfort levels are higher with the same groups who are more likely to feel robots will improve the quality of life: citizens in the Global South, men, under 35s, global citizens with high levels of education and those living in urban areas. For instance, 58% of men would feel comfortable with robots assisting with elderly care compared to 47% of women, while 54% of global citizens living in urban areas feel comfortable about this compared to 50% living in rural areas.

There is a clear demand to purchase robots that can help with housework. Around half (52%) of global citizens would be interested in buying a robot to assist with home tasks such as laundry, cleaning and dishes.



Appetite to purchase robots to help with housework is again much higher in the Global South than the Global North (60% vs. 43%) and among men (55% vs. 50% of women), white collar rather than blue collar workers (57% vs. 49%), under 35s (58% vs. 44% of over 55s), global citizens with a high level of education (57% vs. 45% with a low level and 47% with a medium level), and global citizens living in urban rather than rural areas (54% vs. 51%).

These are the global citizens who tend to be more enthusiastic about technological advancement and more optimistic about technology's ability to improve life.

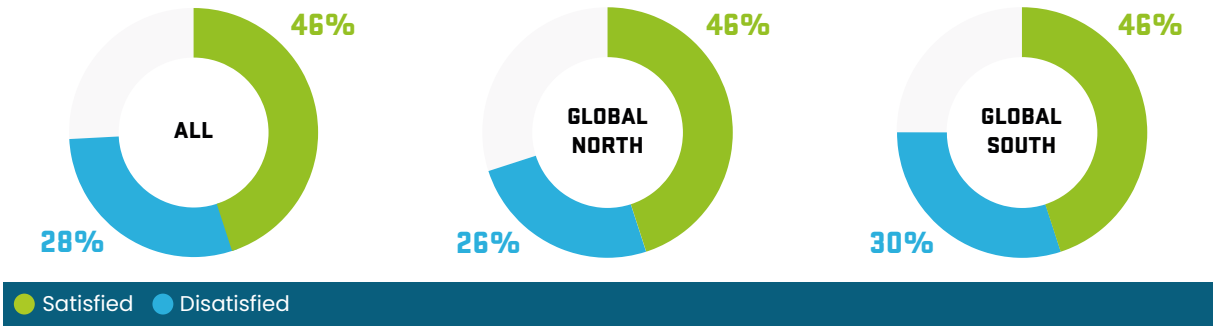
HEALTHCARE IMPROVEMENTS, HEALTHY EATING AND LONGEVITY

SATISFACTION WITH HEALTHCARE SYSTEMS

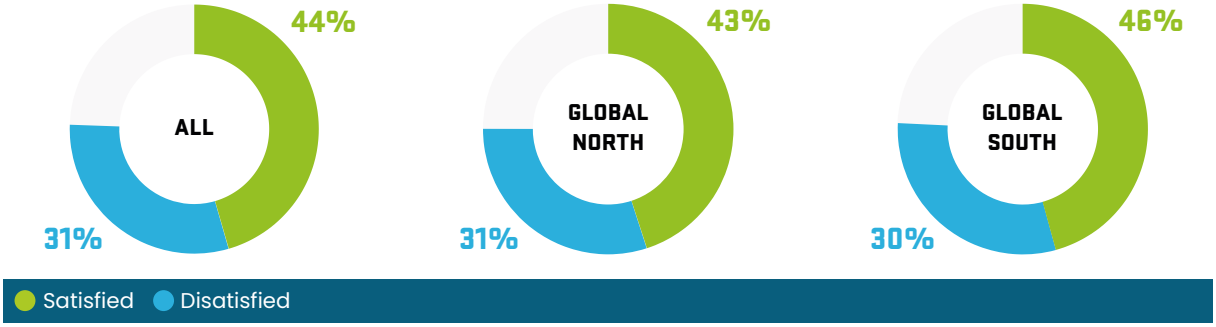
Global citizens are not satisfied with their healthcare. On the dimensions we asked about, satisfaction is lowest with respect to having an adequate amount of doctors (37%), with citizens in the Global North more likely to be dissatisfied (43% vs. 35%).

Less than half are satisfied with affordable healthcare (44%) and the quality of healthcare in hospitals (46%). This is consistent across both the Global North and Global South. Satisfaction with innovative digital services is even lower, with only 41% satisfied overall, though satisfaction is higher in the Global South than the Global North (44% vs. 35%).

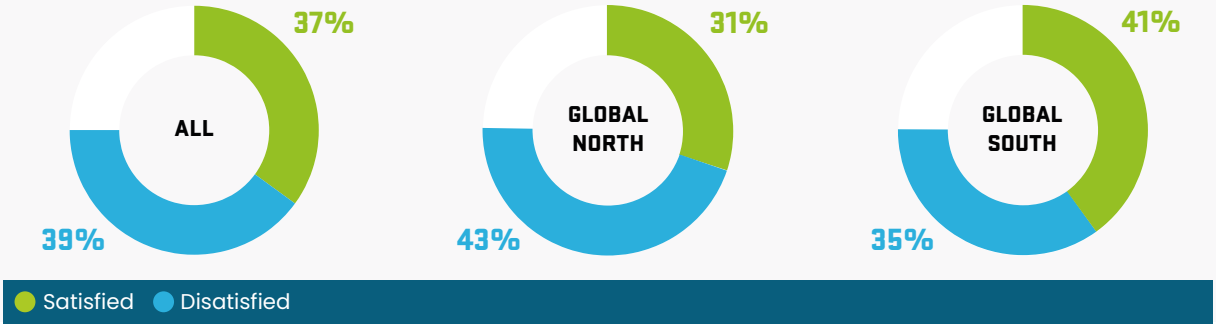
QUALITY OF CARE IN HOSPITALS (E.G. CONSULTATIONS, SURGERY)



AFFORDABLE HEALTHCARE



ADEQUATE NUMBER OF DOCTORS (I.E., SHORT WAIT TIMES, PRESENCE IN RURAL OR DEPRIVED AREAS)

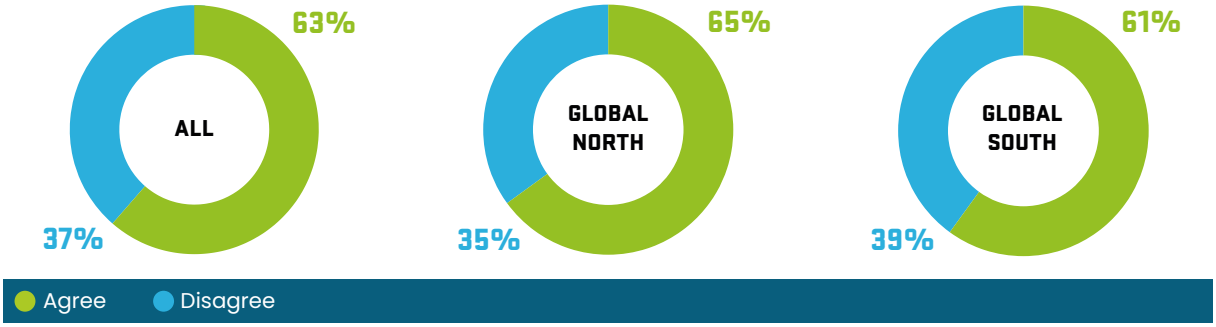


TAKING ACTION TO IMPROVE HEALTHCARE

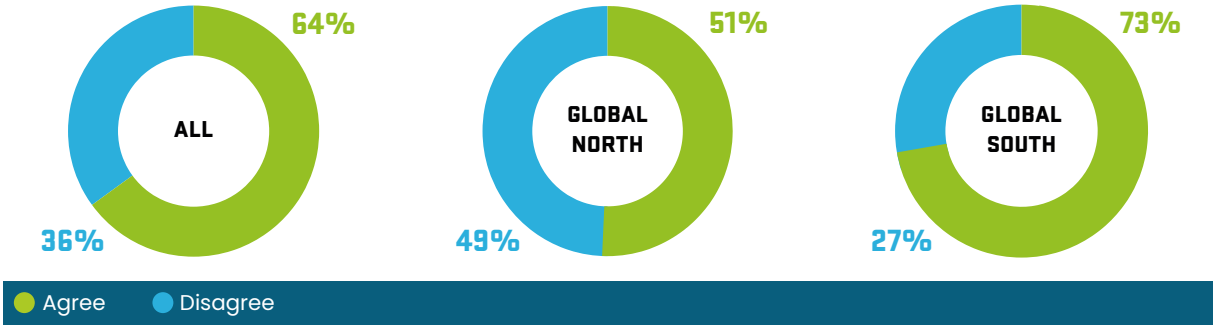
Global citizens are willing to pay more for better healthcare. Against a backdrop of low levels of satisfaction with healthcare, a clear majority agree that making healthcare affordable for everyone is worth higher taxes (63% agree). Citizens in the Global North, where health is more of a priority, are more willing to pay higher taxes for affordable healthcare (65% vs. 61% in the Global South).

→ Agreement is highest in Oceania (75%) and Africa (73%) and lowest in South America (46%) and MENA (49%).

MAKING HEALTHCARE AFFORDABLE FOR EVERYONE IS WORTH HIGHER TAXES



I WOULD PREFER TO PAY HIGHER COSTS FOR TOP-QUALITY DOCTORS AND TREATMENT THAN HAVE FREE CARE OF LOWER QUALITY

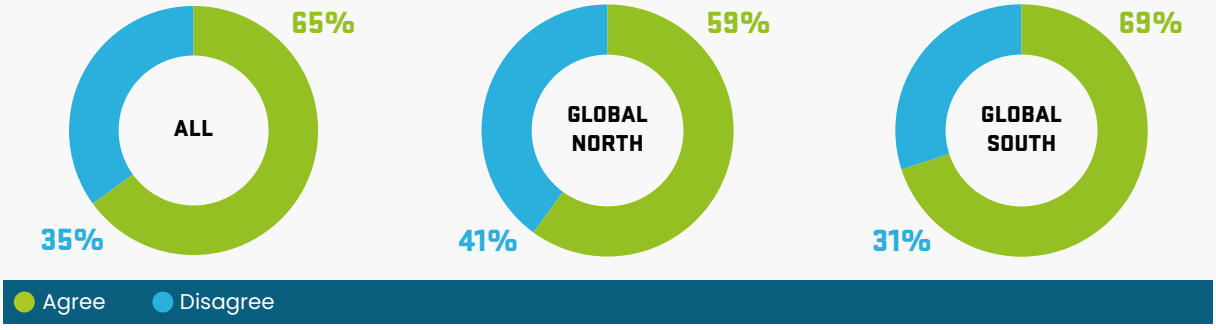


Around two thirds (64%) would be happy to pay higher costs for top-quality doctors and treatment than have free care of lower quality. This is particularly the case in the Global South, where 73% are open to paying higher costs compared to 51% in the Global North.

Those with a higher level of education are more willing to pay higher costs for high quality doctors (69% compared to 56% of those with low levels of education and 58% of those with medium levels). Under 35s are also more willing (70% compared to 58% of over 55s).

Global citizens are open to sharing their personal data to improve healthcare. Two-thirds (65%) agree they would do so to improve medical research that helps people live longer, healthier lives. Agreement is higher in the Global South than the Global North (69% vs. 59%).

I WOULD BE WILLING TO SHARE MY PERSONAL HEALTH DATA WITH PRIVATE COMPANIES AND THE GOVERNMENT TO IMPROVE MEDICAL RESEARCH (THAT HELPS PEOPLE LIVE LONGER, HEALTHIER LIVES)



Willingness to share personal data is higher among men (68%) than women (62%), among under 35s (68%) compared to over 55s (64%) and those with a high level of education (68% vs. 62% with a low or medium level of education).

HEALTHY EATING

Diet is a key determinant of good health but rising prices have led almost all global citizens to choose cheaper, less nutritious food. More than nine in ten (92%) reported doing this in the prior three months and 46% say this has happened often. This is more common in the Global South than the Global North (52% have done so often compared to 38% in the Global North and 94% have done this at least once compared to 89% in the Global North).

Q. In the past three months, how often have you chosen cheaper but less nutritious food because of rising prices?

	All	Global North	Global South	Under 35	35-54 years old	Over 55	Children in the household	No children in the household
VERY OFTEN	22%	17%	26%	27%	23%	14%	25%	19%
OFTEN	24%	21%	26%	28%	25%	19%	26%	22%
SOMETIMES	31%	33%	29%	29%	31%	33%	30%	32%
RARELY	15%	18%	13%	11%	14%	21%	13%	17%
NEVER	8%	11%	6%	4%	7%	14%	6%	9%
IT HAPPENED	92%	89%	94%	96%	93%	86%	94%	91%
IT HAPPENED OFTEN OR MORE	46%	38%	52%	55%	48%	33%	52%	42%

Global citizens with children in the household are more likely than those without to have chosen cheaper, less nutritious food in the past three months (94% vs. 91%). Global citizens with bigger families are more likely than those with smaller families to have done this often – the figures are 42% among those with no children in the household, 49% among those with one child and 56% among those with three or more children.

→ This is also more likely to be a regular occurrence in rural than urban areas (52% vs. 44%) and among under 35s (55% compared to 33% of over 55s).

Cost is the biggest barrier to healthy eating. More than three-fifths (63%) mention cost, particularly in the Global South (65% compared to 59% in the Global North).

→ Limited availability (31% vs.15%), a lack of nutrition knowledge (29% vs.17%) and family preferences (29% vs. 20%) are also more common factors in the Global South compared to the Global North. Citizens of the Global North are more likely to say they currently eat a balanced and healthy diet (25% vs.12% in the Global South).

Under 35s are more likely than over 55s to mention all the barriers to healthy eating. Most notably, 31% lack time to cook compared to only 13% of over 55s.

Q. What are the biggest barriers to eating a balanced and healthy diet for you?

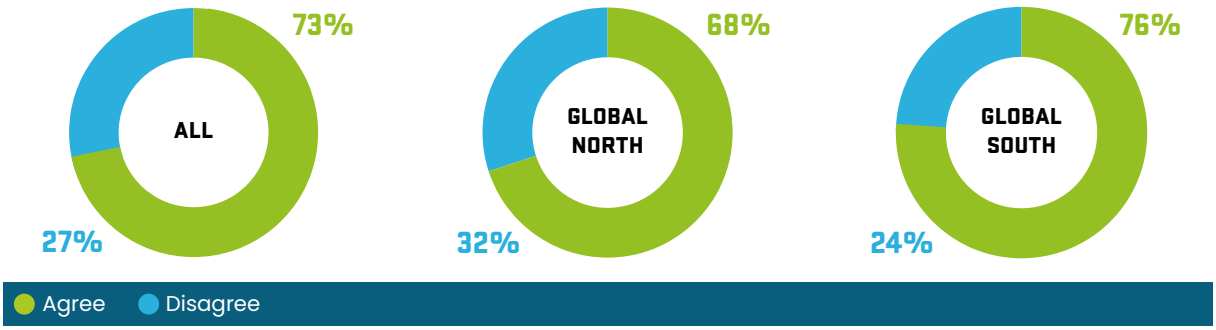
	All	Global North	Global South	Under 35	35-54 years old	Over 55	Children in the household	No children in the household
COST OF HEALTHY FOODS	63%	59%	65%	64%	66%	58%	61%	65%
PREFERENCES OF FAMILY /HOUSEHOLD	26%	20%	29%	28%	26%	21%	21%	31%
LIMITED AVAILABILITY WHERE I SHOP /LIVE	25%	15%	31%	29%	24%	19%	21%	28%
LACK OF TIME TO COOK	24%	25%	24%	31%	26%	13%	23%	26%
LIMITED NUTRITION KNOWLEDGE	24%	17%	29%	28%	23%	19%	21%	27%
I CURRENTLY EAT A BALANCED AND HEALTHY DIET	17%	25%	12%	11%	14%	29%	21%	13%

Global citizens with children in the household are less likely than those without to say they currently eat a healthy and balanced diet (13% vs. 21%). These global citizens are more likely to mention all the barriers asked about but we see the biggest gap on family preferences, with 31% of those with children saying this is a barrier compared to 21% without children.

VIEWS ON LONGEVITY

Global citizens think that increasing human longevity is a good thing but not if younger generations carry the cost. Around three-quarters (73%) do not support longer lives if it means younger generations have to bear the financial and care responsibilities of a disproportionately large elderly population.

INCREASING HUMAN LONGEVITY IS A GOOD THING, BUT NOT IF IT RESULTS IN YOUNGER GENERATIONS BEARING THE FINANCIAL AND CARE RESPONSIBILITIES OF A DISPROPORTIONATELY LARGE ELDERLY POPULATION



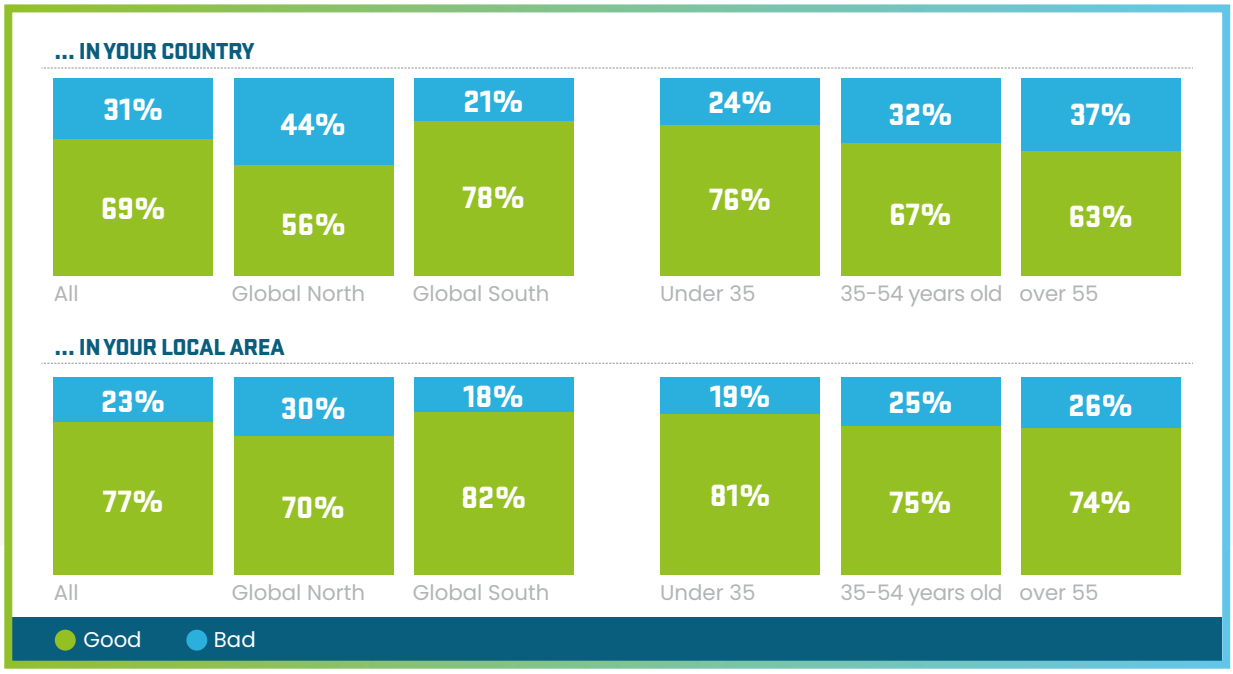
Citizens in the Global South are more likely to agree (76% compared to 68% in the Global North). This view is also more widely held among under 35s (78%) compared to over 55s (66%). It is understandable that these global citizens are concerned that younger generations may have to bear the cost of aging populations. This could undermine social cohesion which, as we shall see in the next chapter, is an aspect of society young people feel positive about despite widespread discussion about fragmentation.

BRINGING TOGETHER FRAGMENTED SOCIETIES

SOCIAL COHESION AND SATISFACTION WITH PLACE

Global citizens are positive about social cohesion where they live. Most believe social cohesion is good in their country (69%) and the figure is even higher for their local area (77%). Citizens of the Global South are the most positive about both their country (78% vs. 56% in the Global North) and their local area (82% vs. 70%).

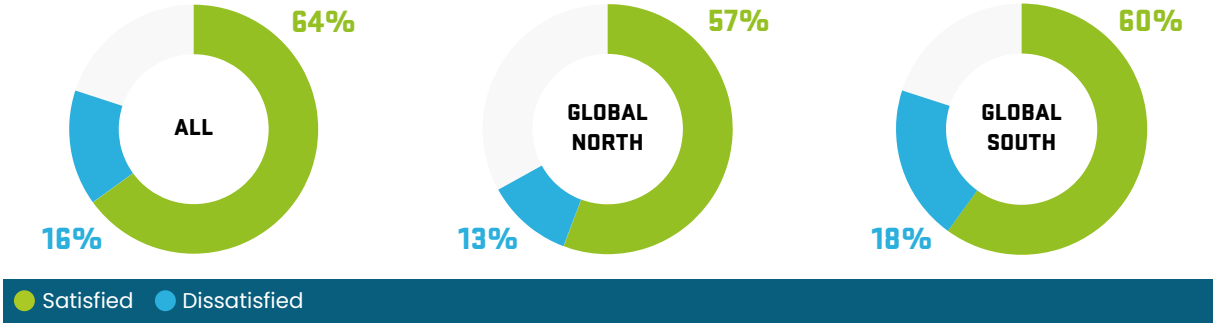
Q. In your opinion, what is the state of social cohesion (e.g. meeting and talking regularly with others, doing activities together) today...?



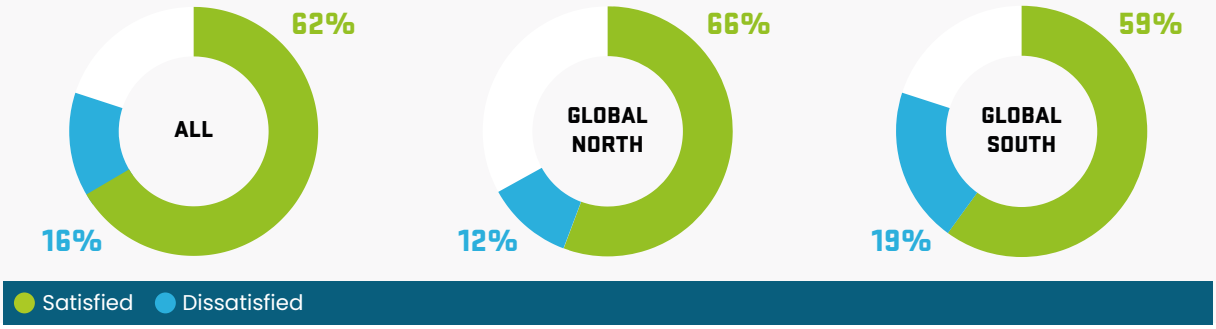
Some groups are more upbeat about social cohesion than others. Young global citizens are more positive than older global citizens about social cohesion in their country, with 76% of under 35s saying it is good compared to 67% of 25 to 54 year olds and 63% of over 55s. We see the same pattern in local areas, although the differences are less marked (81% vs. 75% and 74%).

Global citizens are generally satisfied with the safety and quality of their local area. Most report feeling safe in the places they frequent (64% are satisfied vs.16% dissatisfied) and with the quality of the environment where they live (62% are satisfied vs. 17% dissatisfied). Satisfaction with having safe and comfortable housing is lower, at 54%, with 24% satisfied.

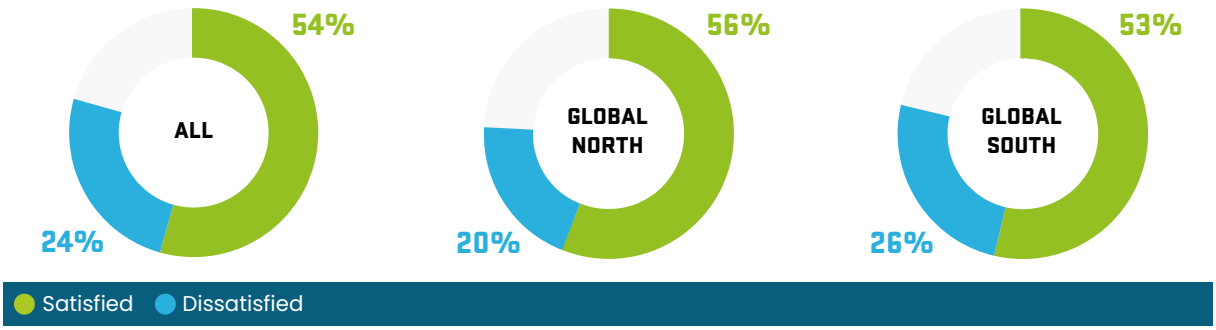
THE EXTENT TO WHICH YOU FEEL SAFE IN THE PLACES YOU REGULARLY FREQUENT



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



YOUR ABILITY TO ACCESS SAFE AND COMFORTABLE HOUSING



In contrast to the pattern seen on other questions, satisfaction levels are higher among citizens of the Global North. For instance, 67% are satisfied with feeling safe compared to 60% in the Global South, and 66% are satisfied with their quality of environment compared to 59% of the Global South.

SATISFACTION IS ALSO HIGHER IN RURAL THAN IN URBAN AREAS

- 65% vs. 62% are satisfied with feeling safe.
- 66% vs. 61% are satisfied with their quality of environment.
- 56% vs. 54% are satisfied with having safe housing.

THE BENEFITS AND COSTS OF IMMIGRATION

Migration can be a divisive issue but most global citizens acknowledge various benefits of immigration. The three main benefits citizens highlight are bringing cultural diversity (31%), supporting economic growth (29%) and filling jobs in essential sectors (also 29%). However, 24% of global citizens say that immigration does not bring any benefits at all.

Q. In your opinion, what are the main advantages of immigration in your country?

	All	Global North	Global South
IT BRINGS CULTURAL DIVERSITY	31%	29%	32%
IT HELPS FILL JOBS IN ESSENTIAL SECTORS (HEALTHCARE, ELDERLY CARE, FOOD SERVICES...)	29%	41%	21%
IT SUPPORTS ECONOMIC GROWTH	29%	26%	30%
IT PROMOTES INNOVATION AND ENTREPRENEURSHIP	17%	8%	23%
IT HELPS OFFSET POPULATION AGING	15%	20%	11%
IT CONTRIBUTES TO PUBLIC FINANCES	13%	10%	16%
IMMIGRATION DOES NOT BRING ANY ADVANTAGES	24%	24%	24%

Citizens in the Global North are particularly likely to say that filling jobs in essential sectors is a benefit (41% vs. 21% in the Global South), while citizens in the Global South are much more likely to mention promoting innovation and entrepreneurship (23% vs. 8%).

→ Under 35s are more likely than over 55s to see immigration as beneficial, citing economic growth (32% vs. 24%), cultural diversity (33% vs. 27%) and innovation and entrepreneurship (21% vs. 12%). While over 55s are more likely to say immigration brings no benefits (30% vs. 18% of under 35s), they are also more likely to say it helps fill jobs in essential sectors (35% vs. 28% of under 35s).

Global citizens with high levels of education are more likely to mention most benefits and only 21% say immigration does not bring any advantages, compared to 28% of global citizens with a low level of education and 29% with a medium level.

However, global citizens also believe that immigration brings disadvantages. Crime is the top concern (41%), followed by increased competition for jobs (30%). Job competition is a particular concern in the Global South (37% vs. 20% in the Global North). Only one in eight (12%) say that immigration does not bring any disadvantages.

Q. In your opinion, what are the main disadvantages of immigration in your country?

	All	Global North	Global South
IT INCREASES CRIME OR SECURITY RISKS	41%	40%	41%
IT INCREASES COMPETITION FOR JOBS AND LOWERS WAGES	30%	20%	37%
IT CREATES SOCIAL TENSIONS	25%	28%	23%
IT INCREASES PRESSURE ON HOUSING AND INFRASTRUCTURE	24%	27%	22%
IT INCREASES PRESSURE ON PUBLIC SERVICES	23%	23%	22%
IT WEAKENS TRADITIONS AND CULTURAL IDENTITY	17%	17%	17%
IMMIGRATION DOES NOT BRING ANY DISADVANTAGES	12%	15%	10%

Younger global citizens under 35 are more likely to be concerned about competition for jobs (35% compared to 23% of over 55s) but concerns are otherwise consistent across different demographic groups.

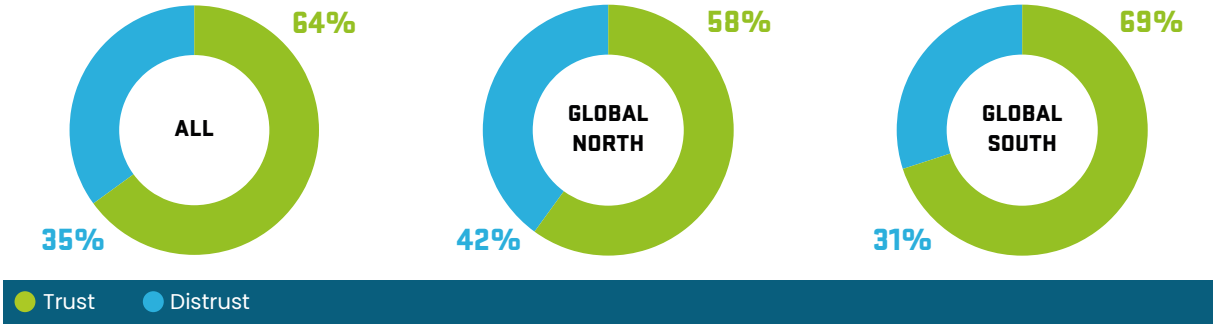
TRUST IN MEDIA AND INSTITUTIONS

Trust in the media can be a powerful safeguard against fragmentation. A majority still trust traditional media to provide accurate and reliable information. Around two in three say they trust national radio broadcasters (65%), national TV broadcasters (62%) and newspapers (61%). However, a third say they distrust them.

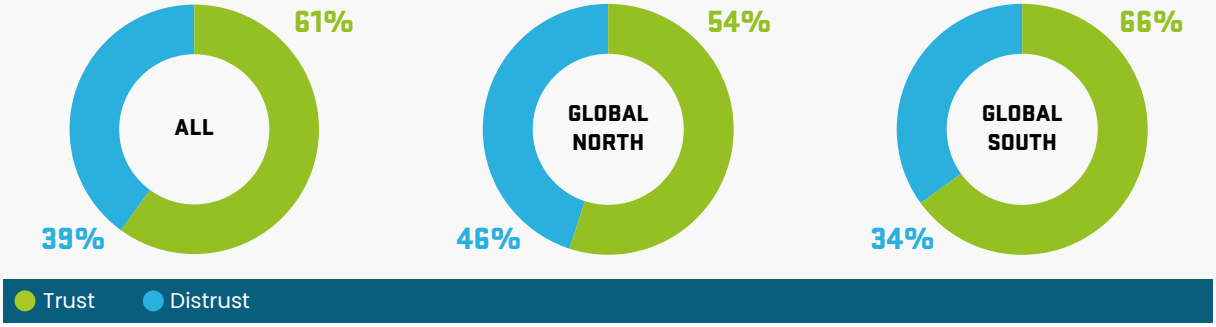
→ Global citizens have lower levels of trust in online-only news outlets (52%) and have the least amount of trust in independent content creators/influencers (only 39% trust and 61% distrust).

Q. How much do you trust each of the following to provide accurate and reliable information?

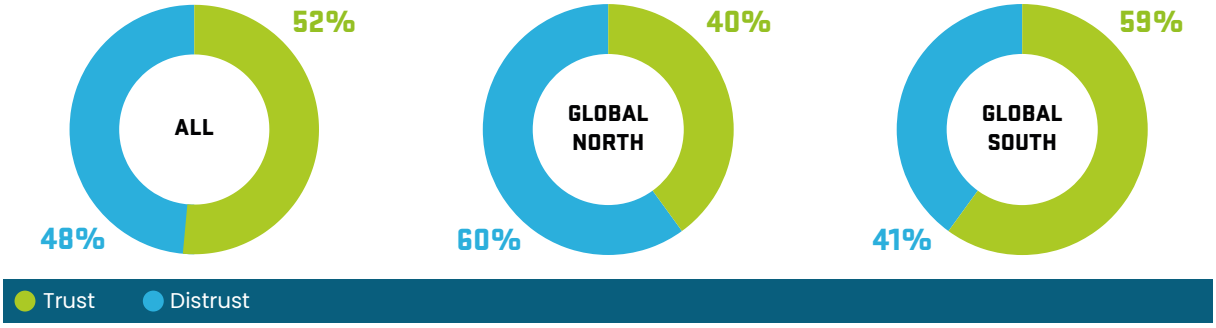
NATIONAL RADIO BROADCASTERS



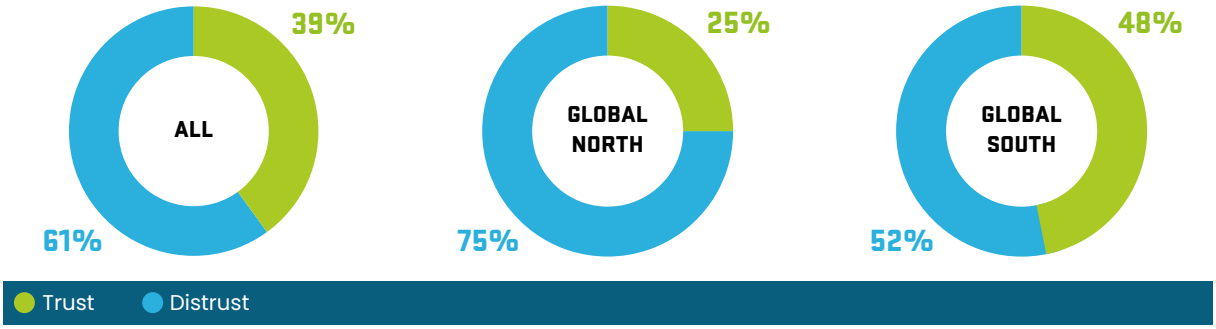
NEWSPAPERS (PRINT OR DIGITAL)



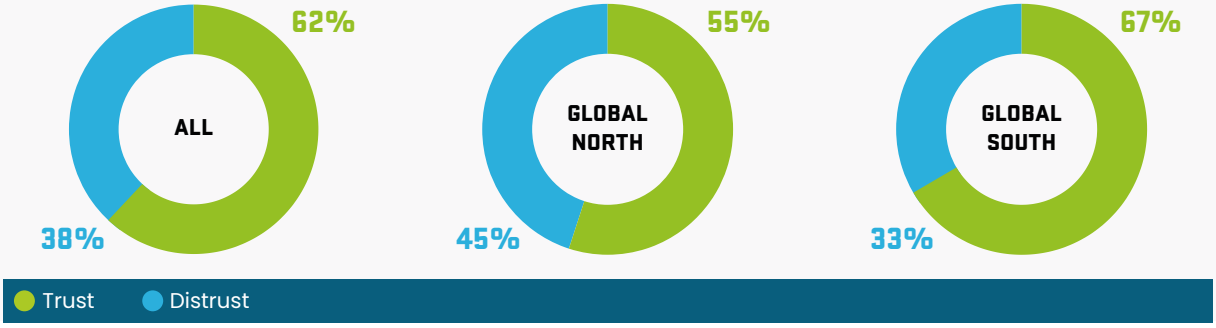
ONLINE-ONLY NEWS OUTLETS



INDEPENDENT CONTENT CREATORS/INFLUENCERS



NATIONAL TV BROADCASTERS

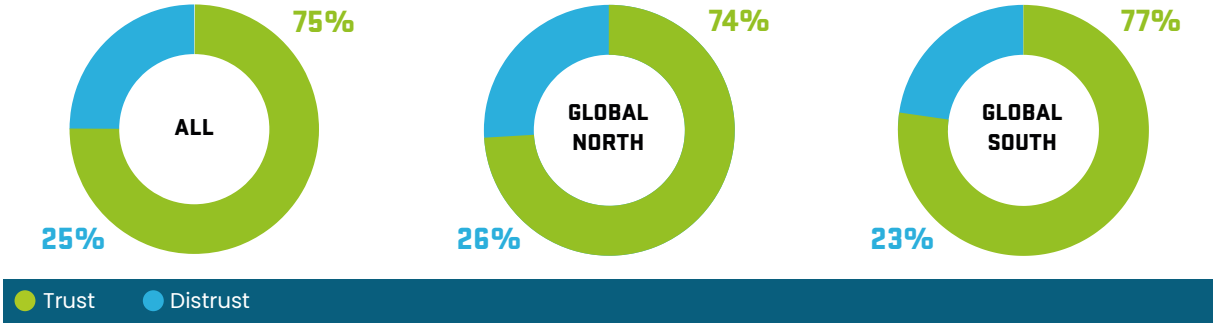


TRUST IN DIFFERENT MEDIA VARIES BY LOCATION AND DEMOGRAPHICS:

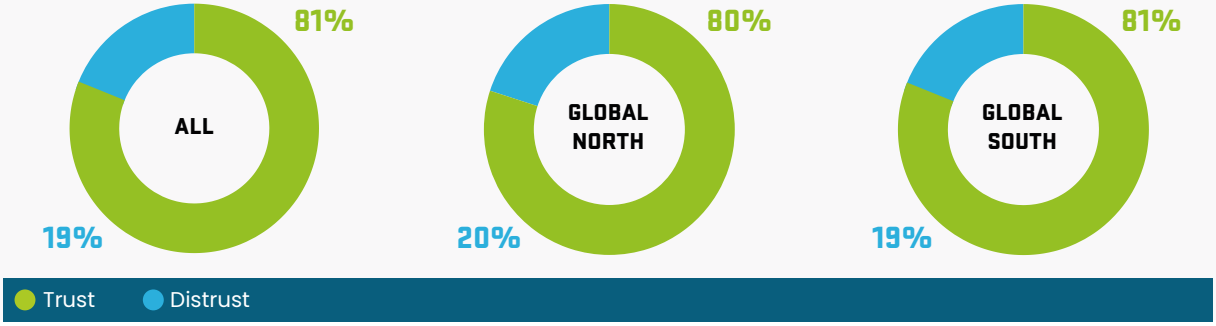
- **Citizens in the Global South** are more likely to trust all the media we asked about but the gap is widest when it comes to influencers – 45% trust them to be an accurate and reliable source of information compared to only 25% in the Global North.
- Levels of trust in traditional media are **higher among white collar workers** and global citizens with high levels of education. For instance, 64% of global citizens with a high level of education trust newspapers compared to 58% with a low level of education and 57% with a medium level. For white collar workers, the figure is 64% compared to 58% among blue collar workers.
- **Younger global citizens** are more likely to trust online sources, with 48% trusting influencers compared to only 27% of over 55s, while 57% trust online news outlets compared to 45% of over 55s.
- **Citizens living in rural areas are more likely than their urban counterparts to trust all the media sources** asked about. For instance, 66% trust national TV broadcasters compared to 60% of global citizens living in urban areas.

Although traditional media are trusted for accuracy by many global citizens, they are regarded as biased. There are high levels of agreement that traditional media are politically biased (75%). This view is consistently held across different demographic groups and there is little difference between the Global North and Global South.

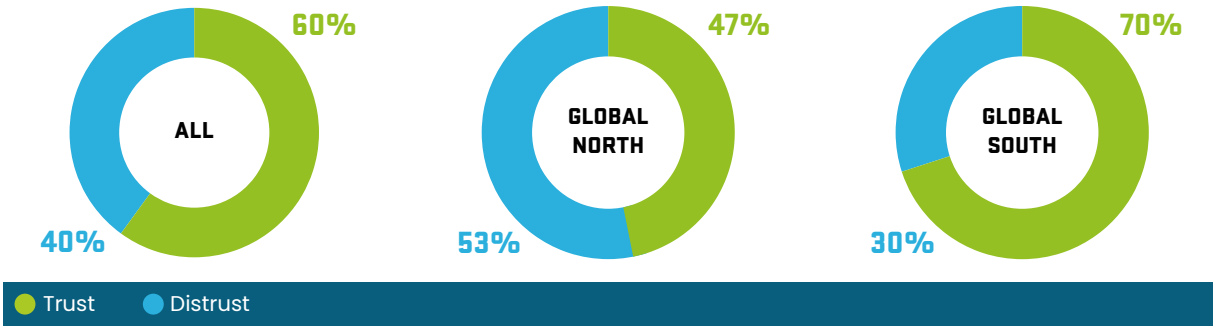
TRADITIONAL MEDIA ARE POLITICALLY BIASED



SOCIAL MEDIA HAS MADE SOCIETY MORE POLARIZED



ONLINE CONTENT CREATORS REFLECT THE CONCERNS OF ORDINARY PEOPLE BETTER THAN TRADITIONAL JOURNALISTS



An even higher proportion of global citizens believe that social media has made society more polarized. Four-fifths (81%) think this is the case. This view is again consistently held across different demographic groups. One difference is that under 35s, who are more favorable towards online sources in other respects, are more likely to agree with this (83% vs. 79% of 35 to 54 year olds and 78% of over 55s). One possible explanation is that they have been more exposed to polarizing discourses on social media.

But online sources trump traditional media for relevance. Most global citizens (60%) believe that online content creators reflect the concerns of ordinary people better than journalists. Agreement is particularly high in the Global South compared to the Global North (70% vs. 47%). Views also differ by age, with 70% of under 35s believing this to be the case compared to 60% of 35 to 54 year olds and 49% of over 55s.

In comparison to the trust global citizens have in the media, there are very low levels of trust in political institutions to act in their country's best interest. Only 27% trust political institutions, while 46% are distrustful. Despite this, as we have seen in Chapter 3, national political leaders are considered the most influential factor for creating widespread prosperity.

Q. How much do you trust each of the following to act in the public's best interest in your country?

	All	Global North	Global South
CENTRAL BANK OR ECONOMIC AND FINANCIAL REGULATORY	45%	36%	53%
	24%	29%	20%
FAITH-BASED OR RELIGIOUS	39%	22%	52%
	34%	49%	22%
POLITICAL	27%	20%	33%
	46%	42%	41%

Trust Distrust

NB. BASE EXCLUDES CHINA, EGYPT AND SAUDI ARABIA

There are higher levels of trust in central banks (45% trust them to act in the country's best interest while 24% distrust them). Trust in faith based or religious institutions sits in between the two (39% trust, 34% distrust).

Citizens of the Global South are more likely to trust each of these institutions but the gap is particularly wide with faith-based/ religious institutions (52% trust them compared to only 22% in the Global North).

SOCIAL PROTECTION

Global citizens want stronger social protection systems to improve solidarity. Given global citizens' concerns about financial stability and social fragmentation, a large majority want social protection and health care systems in their country to be strengthened because there is not enough solidarity with the people who need it.

Three-quarters (75%) agree with this, whereas only 25% say that social protections should be reduced because it is too expensive and encourages assistance.

Q. In your country, what should be the priority for the social protection system (unemployment assurance, pensions…) and the health care system?

	All	Global North	Global South
THEY SHOULD BE STRENGTHENED, BECAUSE THERE IS NOT ENOUGH SOLIDARITY WITH THE PEOPLE WHO NEED IT	75%	72%	77%
THEY SHOULD BE REDUCED, BECAUSE IT IS TOO EXPENSIVE AND ENCOURAGES ASSISTANCE	25%	28%	23%

Agreement is consistent across different demographic groups. The one exception is that global citizens living in urban areas are more likely to agree compared to those in rural areas (77% vs. 72%).

Agreement is also consistent by region. However, there are some wide variations by country, with 48% in France saying social protection should be reduced compared to only 13% in China and Türkiye.

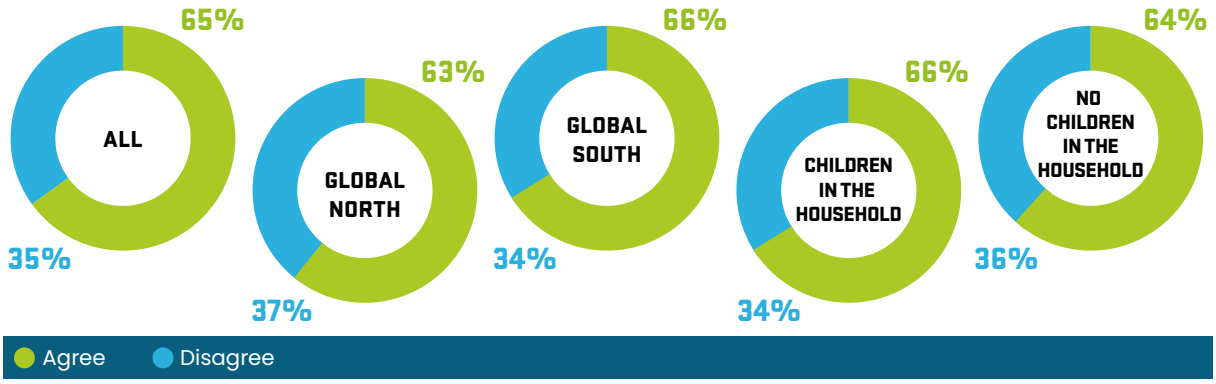
Education and work, the focus of our next chapter, also have an important role to play in building more prosperous and stable societies.

EDUCATION AND WORK: HOW CAN WE DO BETTER?

WHERE IS EDUCATION FALLING SHORT?

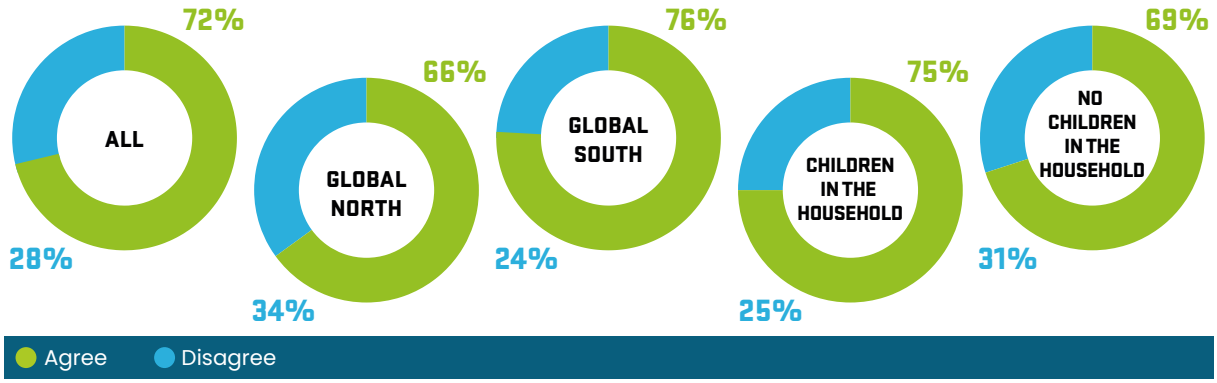
Most global citizens believe university is no longer worth the cost. Two-thirds agree (65%) that this is the case, and views do not diverge a great deal between the Global South (66%) and the Global North (63%). Agreement is particularly high in Asia (70%) and Africa (68%) and lower in MENA (61%), Europe (60%) and South America (58%). The belief that university is not worth the money is consistent across different demographic groups.

UNIVERSITY EDUCATION IS NO LONGER WORTH THE COST FOR MOST PEOPLE



A the same time that most global citizens are losing faith in a university education, they also feel that higher education in their country is unattainable for ordinary people. This suggests that affordability may be contributing to perceptions that university is not worth the cost. More than seven in ten (72%) agree that access to higher education is too expensive for the average citizen. Agreement is particularly high in the Global South compared to the Global North (76% vs. 66%). Regionally, citizens in Europe (62%) are less likely to agree, while citizens in North America (77%) and Africa (82%) are more likely. Agreement is higher among global citizens with children in the household (75% compared to 69% without children).

IN MY COUNTRY, ACCESS TO HIGHER EDUCATION IS TOO EXPENSIVE FOR THE AVERAGE CITIZEN



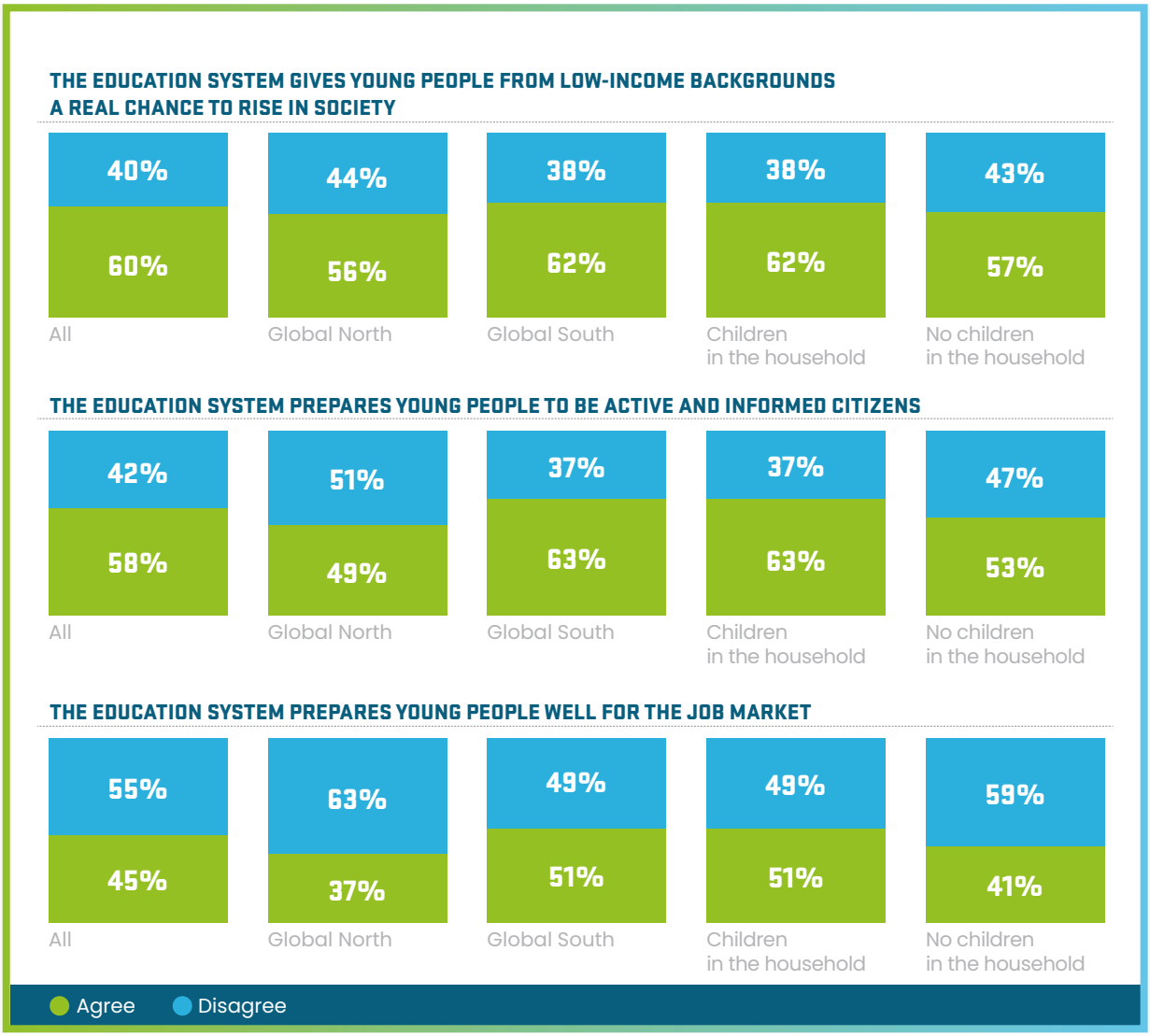
Most feel the education system in their country is not preparing young people for employment. More than half (55%) disagree that it is preparing young people well for the job market. Views are more positive in the Global South than the Global North, with 51% agreeing that it does, compared to 37% in the Global North. Global citizens with children in the household are more likely to feel the education system is preparing young people for work (51% compared to 41% who do not have children).

60%
OF GLOBAL CITIZENS THINK THAT THE EDUCATION SYSTEM IN THEIR COUNTRY GIVES YOUNG PEOPLE FROM LOW-INCOME BACKGROUNDS A REAL CHANCE TO RISE IN SOCIETY

BUT 65%
OF GLOBAL CITIZENS BELIEVE THAT UNIVERSITY EDUCATION IS NO LONGER WORTH THE COST FOR MOST PEOPLE

Education systems are regarded as doing better on social mobility and preparing young people for citizenry. Three in five (60%) believe the education system in their country gives young people from low-income backgrounds the chance to rise in society, while a similar proportion (58%) say it prepares young people to be active and informed citizens. Agreement on both is higher in the Global South than the Global North: 63% vs. 49% feel the education system prepares young people to be active citizens and 62% vs. 56% feel it enables social mobility.

Q. To what extent do you agree or disagree with the following statements relating to the education system in your country?

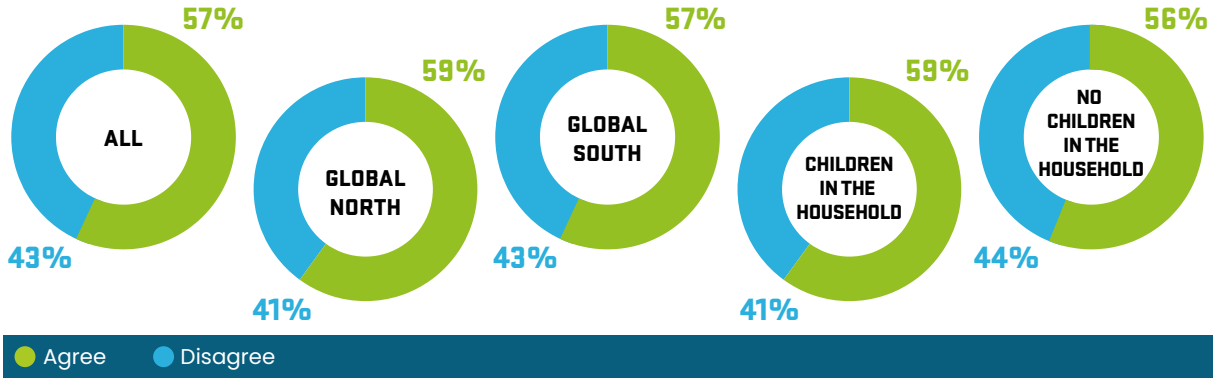


Global citizens with children in the household are more likely to agree on both counts than those without children: 63% vs. 53% feel the education system prepares young people to be active citizens and 62% vs. 57% feel it enables social mobility.

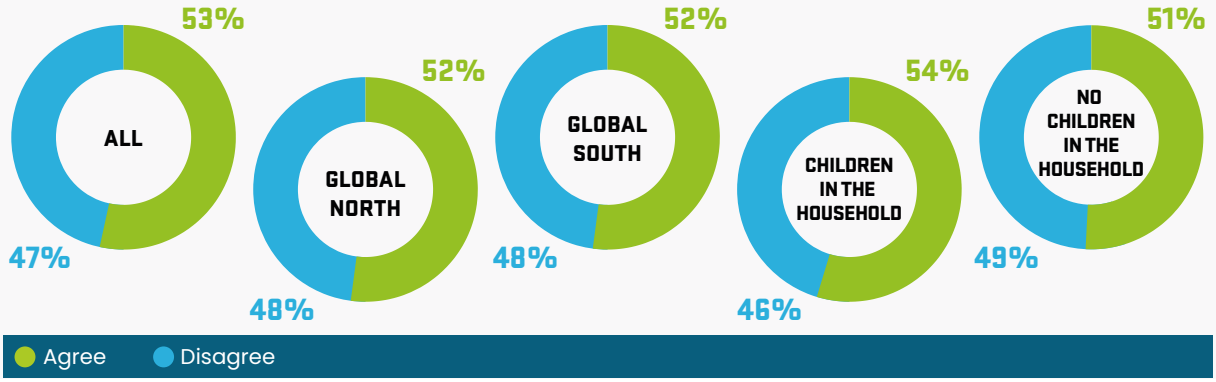
Many global citizens have concerns about the education system in their country. Most (53%) disagree that teachers in their country are adequately paid and valued, with this view more common in the Global South than the Global North (49% vs. 43%). Global citizens with children are more likely to believe teachers are paid and valued sufficiently (51% vs.43%).

Almost half (47%) disagree that public schools have the resources to provide a quality education and a similar proportion (43%) disagree that they provide a safe and supportive environment for students. There are no differences between the Global North and the Global South.

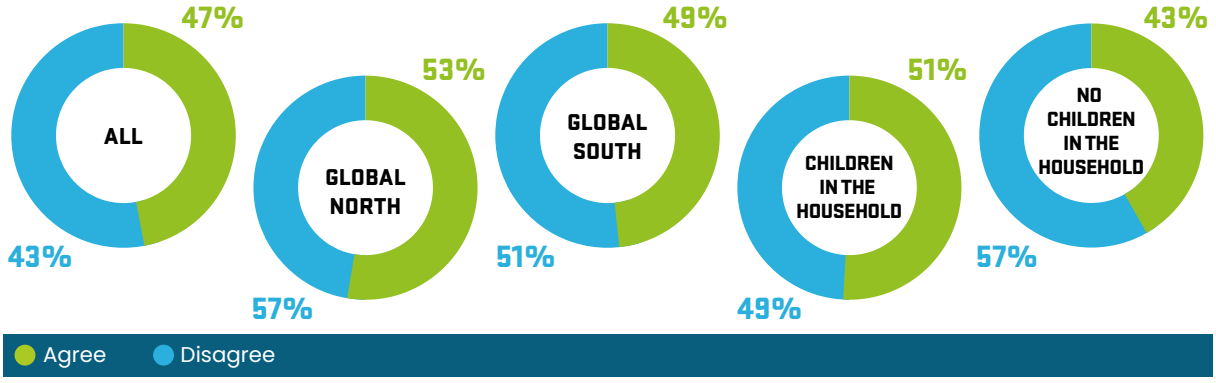
SCHOOLS IN MY COUNTRY PROVIDE A SAFE AND SUPPORTIVE ENVIRONMENT FOR STUDENTS



IN MY COUNTRY, PUBLIC SCHOOLS HAVE THE RESOURCES TO PROVIDE A QUALITY EDUCATION



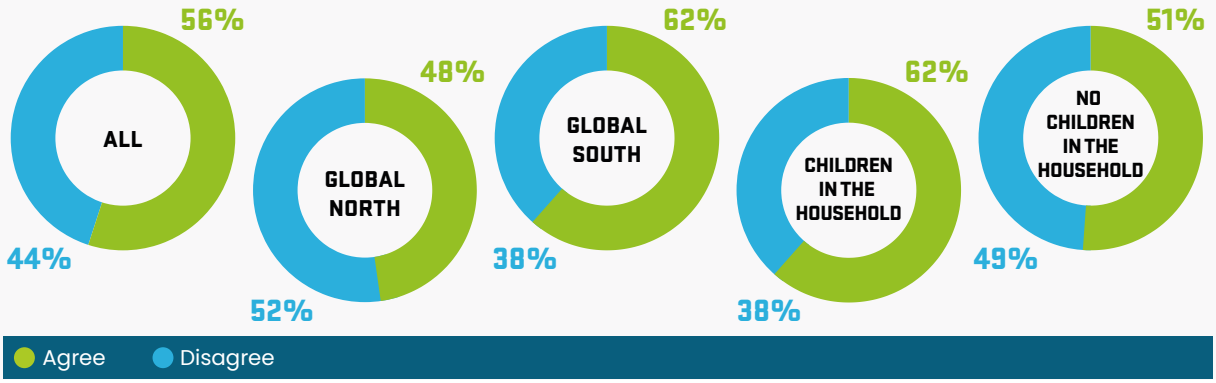
IN MY COUNTRY, THE EDUCATION SYSTEM ADEQUATELY PAYS AND RECOGNIZES THE VALUE OF TEACHERS



Global citizens with children in the household are more likely to agree than global citizens without children but not by a great deal (54% vs. 51% agree schools have the resources to provide a good education, while 59% vs. 56% agree schools provide a safe environment).

A majority of global citizens are also concerned about the pressures the education system in their country puts on young people. Just over half (56%) feel too much pressure is put on young people. Agreement is higher in the Global South than the Global North (62% vs. 48%). Global citizens with children in the household have higher levels of agreement, particularly those with larger families. Half (51%) of those without children agree, compared to 60% with one child, 67% with three or more children and 72% with four or more children.

IN MY COUNTRY, THE EDUCATION SYSTEM PUTS TOO MUCH PRESSURE ON YOUNG PEOPLE

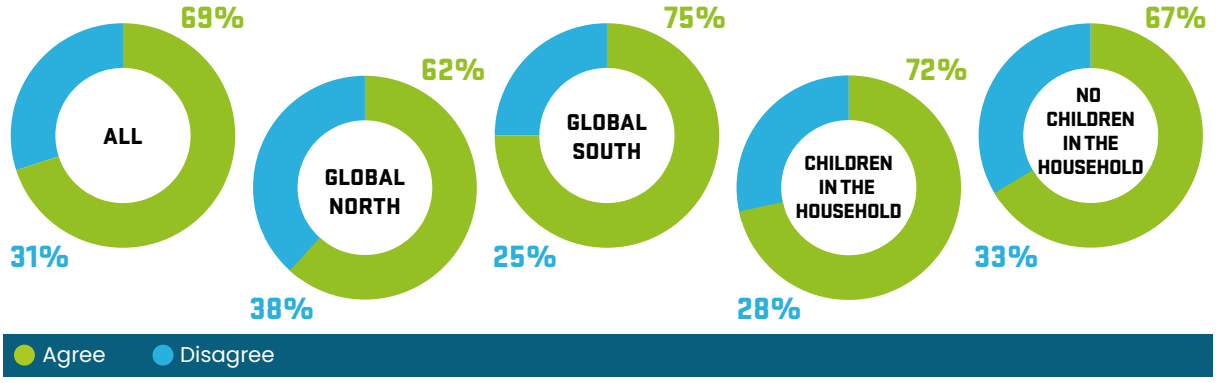


WHAT CHANGES DO GLOBAL CITIZENS WANT TO SEE TO THEIR EDUCATION SYSTEMS?

Global citizens want governments to bring education systems up to date. Most (69%) agree that governments should prioritize vocational training over academic degrees because of AI, especially in the Global South (75% vs. 62% in the Global North).

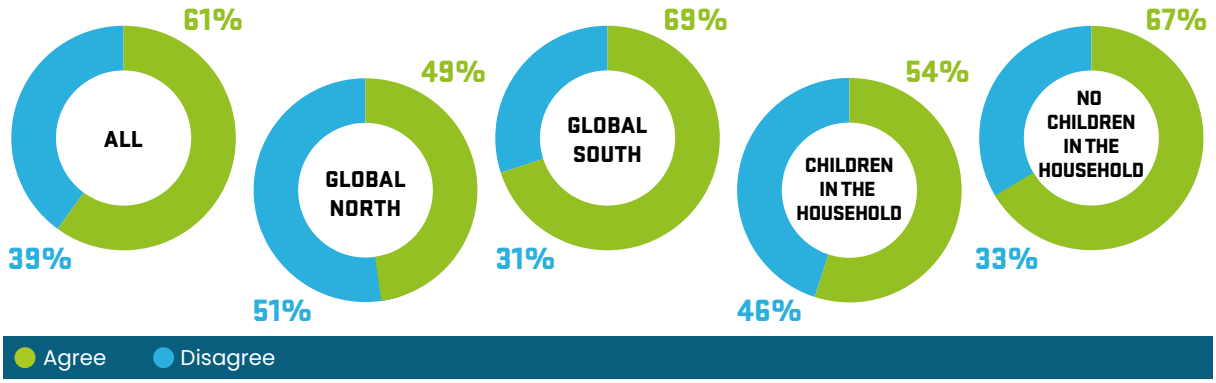
Agreement is higher in MENA (76%), Africa (74%) and Asia (73%), and lower in Europe and North America (both 65%) and Oceania (54%). Men are more likely than women (71% vs. 67%) and global citizens with children in the household (72% compared to 67% of those without) to want vocational training to be prioritized.

GOVERNMENTS SHOULD PRIORITIZE VOCATIONAL TRAINING OVER ACADEMIC DEGREES WITH AI REPLACING MANY WHITE-COLLAR JOBS



But global citizens also believe that parents must have a say. Three-fifths (61%) think parents should have more influence than governments over school curricula. This view is particularly robust in the Global South compared to the Global North (69% vs. 49%). It is also more prevalent among men (62% compared to 59% of women) and among under 35s (63% compared to 58% of over 55s).

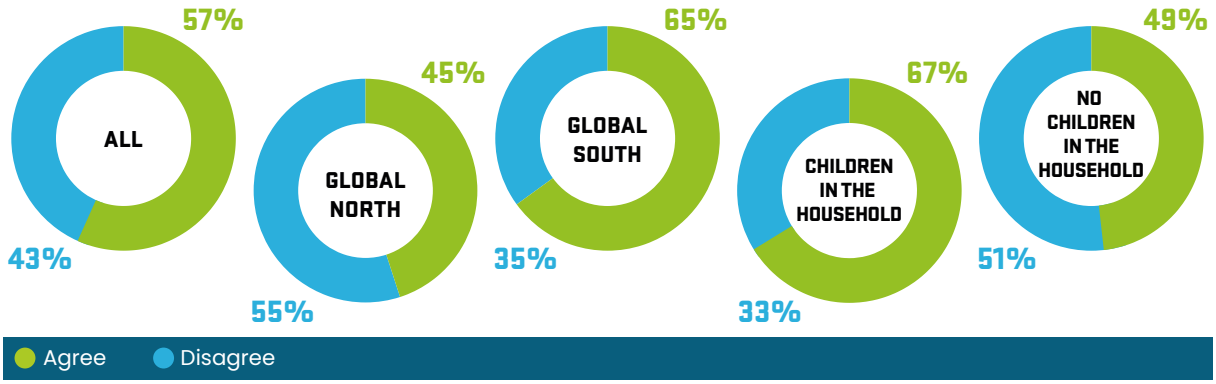
PARENTS SHOULD HAVE MORE INFLUENCE THAN GOVERNMENTS OVER SCHOOL CURRICULA



This belief is more widely held among global citizens with children in the household compared to those who do not have children (67% vs. 54%). It is particularly common among global citizens with larger families – 65% of those with one child want parents to have more influence than governments compared to 72% with three or more children.

Most global citizens are willing to pay more to fund a better education. More than half (57%) would be willing to pay more in taxes or private tuition for primary and secondary education to provide a better education to young people. Agreement is much higher in the Global South than the Global North (65% vs. 45%), reflecting the higher priority placed on education in the Global South.

I WOULD BE WILLING TO PAY MORE IN TAXES OR PRIVATE TUITION FOR PRIMARY AND SECONDARY EDUCATION TO PROVIDE A BETTER EDUCATION TO YOUNG PEOPLE



Global citizens with children in the household are much more likely than those without children to be willing to pay more (67% vs. 49%). Agreement is also higher among white collar compared to blue collar workers (62% vs. 53%), under 35s compared to over 55s (64% vs. 48%), and those with high levels of education (61% compared to 46% with low levels of education).

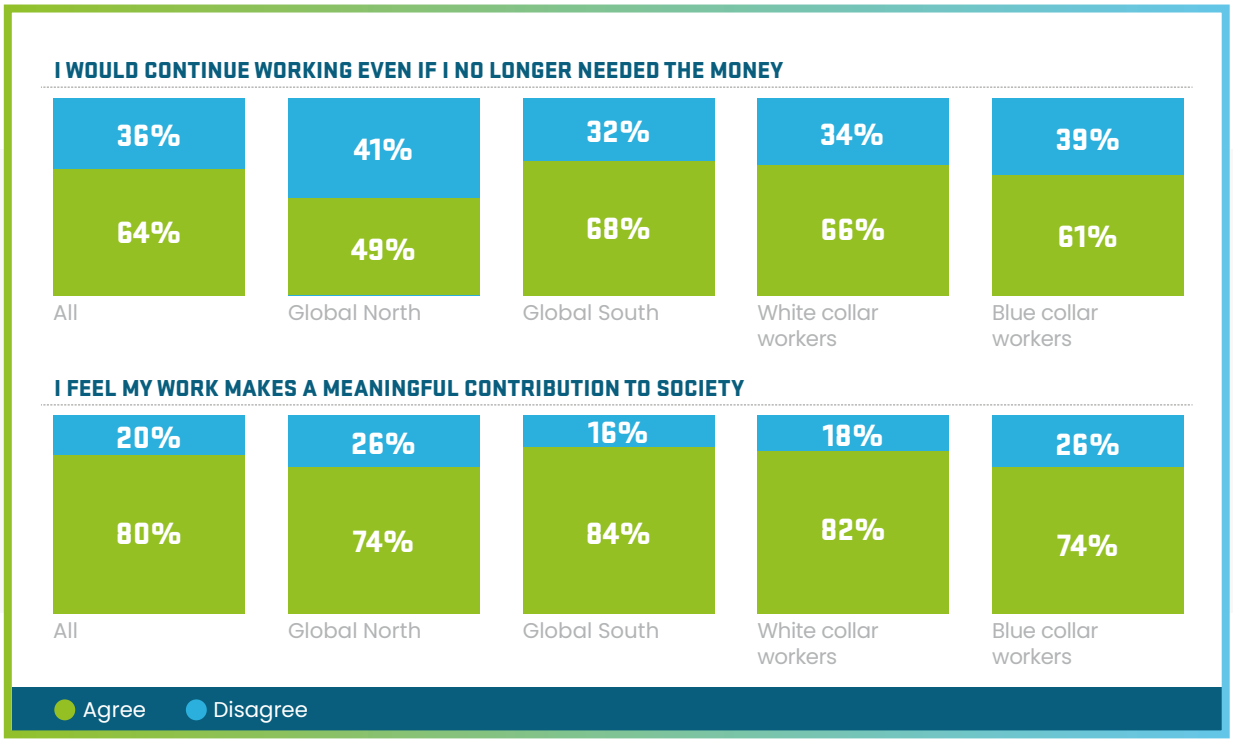
WHAT SORT OF WORK DO GLOBAL CITIZENS WANT?

80%

OF WORKERS FEEL THEIR WORK MAKES A MEANINGFUL CONTRIBUTION TO SOCIETY BUT LOW PAY IS THE MOST IMPORTANT REASON FOR FINDING A NEW JOB

Work matters to global citizens. Most global citizens who work would continue to do so even if they did not need the money (64%) and 80% feel their work makes a meaningful contribution to society.

Workers in the Global South are more likely to agree with both statements (68% would continue work compared to 59% in the Global North and 84% believe their work is meaningful compared to 74% in the Global North.



BASE: GLOBAL CITIZENS WHO ARE WORKING

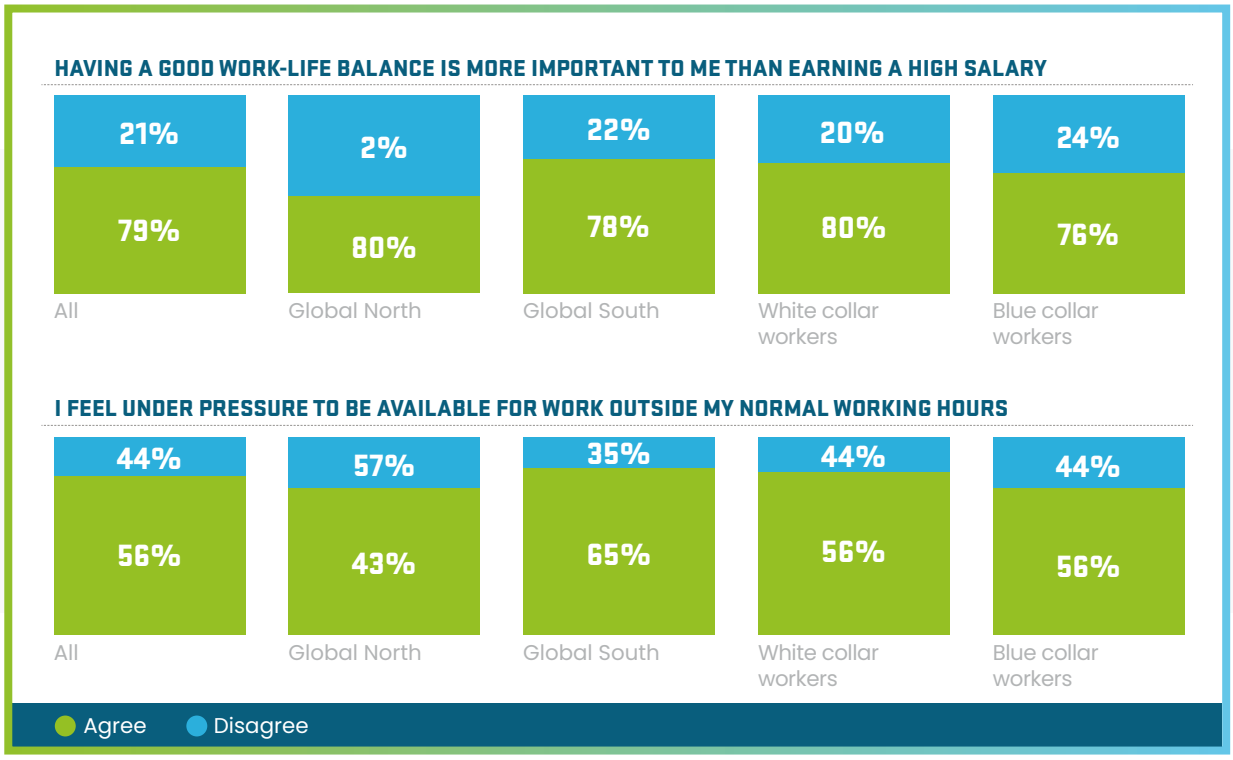
White collar workers are more likely than blue collar workers to say they would continue working if they did not need the money (66% vs. 61%) and to regard their work as meaningful (82% vs. 74%).

THE FOLLOWING GROUPS ARE ALSO MORE LIKELY TO FEEL THEIR WORK IS MEANINGFUL:

- Older global citizens (84% of over 55s compared to 78% of under 35s).
- Those with children in the household compared to those without (84% vs. 76%).
- Global citizens in a relationship compared to those who are single (82% vs. 77%).
- Global citizens with a high level of education (83% compared to 71% with a low level of education).

Although work is important, global citizens want a good work–life balance. Most (79%) working global citizens feel this is more important than having a high salary.

White collar workers are more likely than blue collar workers to say this (80% vs. 76%), as are over 55s compared to under 35s (83% vs. 76%), global citizens with high levels of education versus low levels (80% vs. 70%) and global citizens who are in a relationship rather than single (80% vs.77%).



BASE: GLOBAL CITIZENS WHO ARE WORKING

However, many feel under pressure to be available outside working hours. More than half (56%) of global citizens who are working say this is the case, especially in the Global South (65% vs. 43% in the Global North). Younger workers aged under 35 are more likely than over 55s to feel this pressure (61% vs. 45%), as are those with high levels of education (58% vs. 53% with low levels and 52% with medium levels), and global citizens living in rural areas (59% vs. 55% in urban areas).

This pressure is also greater among working global citizens with children in the household, especially those with bigger families. Just under half (49%) without children feel they should be available outside their normal working hours, compared to 59% with one child and 67% with three or more children.

Although global citizens value meaningful work, pay is the main reason that could prompt workers to leave their current job. Just under half (48%) mention this. Difficult working conditions comes second at 28%.

→ Workers in the Global South are more likely to consider leaving their job due to low pay (52% vs. 43% in the Global North), fewer opportunities (23% vs. 18%) and unsafe workplaces (21% vs. 16%). Workers in the Global North are more likely to mention negative workplace culture (22% vs.13%) and uninteresting work which lacks meaning (16% vs. 9%).

Q. In your work and professional life, what are the reasons that might lead you to leave your current job? You can choose up to two answers

	All	Global North	Global South	White collar workers	Blue collar workers
LOW PAY	22%	17%	26%	94%	91%
DIFFICULT WORKING CONDITIONS (HOURS, WORKLOAD)	22%	17%	26%	94%	91%
FEW OPPORTUNITIES FOR PROMOTION	22%	17%	26%	94%	91%
POOR OR UNSUPPORTIVE MANAGEMENT	22%	17%	26%	94%	91%
UNSAFE OR UNHEALTHY WORKPLACE	22%	17%	26%	94%	91%
NEGATIVE WORKPLACE CULTURE	22%	17%	26%	94%	91%
WORK IS UNINTERESTING OR LACKS MEANING	22%	17%	26%	94%	91%
NOT ENOUGH FLEXIBILITY (REMOTE WORK)	22%	17%	26%	94%	91%

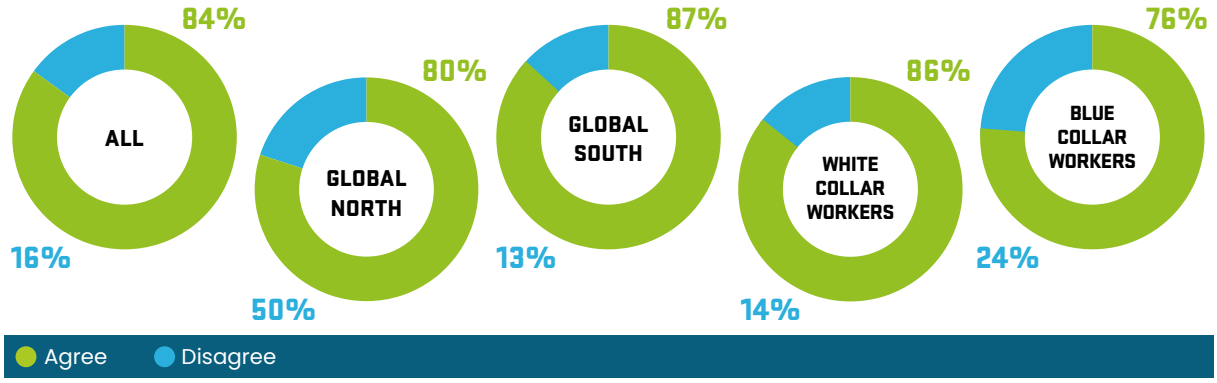
BASE: GLOBAL CITIZENS WHO ARE WORKING

Blue collar and white collar workers have different priorities. Blue collar workers are more likely than white collar workers to mention low pay (52% vs. 47%, although this is still the top reason for white collar workers) and working conditions (31% vs. 26%).

White collar workers are more likely to mention a lack of promotion opportunities (22% vs. 18%), unsupportive management (21% vs.18%), negative workplace culture (18% vs. 15%) and not enough flexibility (10% vs. 8%).

Despite concerns about the impact of AI on jobs, global citizens are optimistic about their ability to adapt to a changing world. Most global citizens (84%) who are working agree that they have the skills needed to adapt to changes in their profession, particularly in the Global South (87% vs. 80%). White collar workers are more optimistic than blue collar workers (86% vs. 76%).

I HAVE THE SKILLS NEEDED TO ADAPT TO CHANGES IN MY PROFESSION



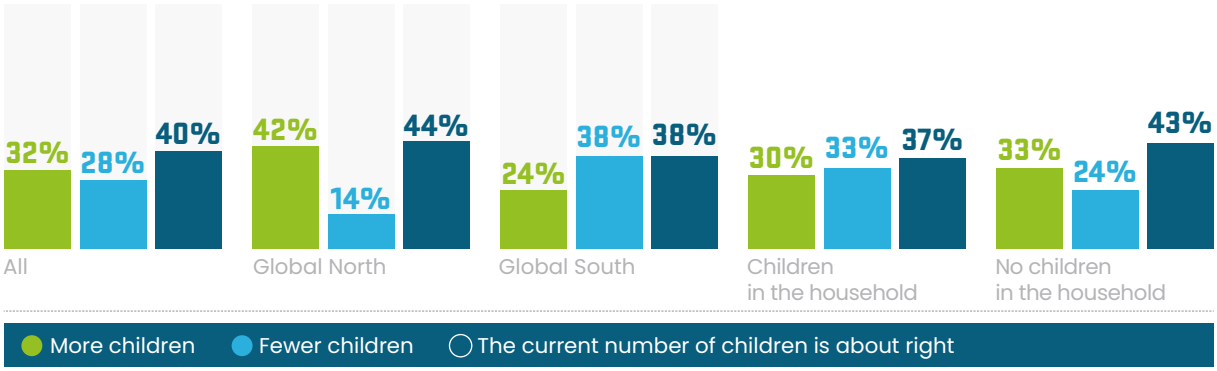
BASE: GLOBAL CITIZENS WHO ARE WORKING

While they may have doubts about how well education systems are keeping up to date, global citizens have faith in their own abilities to adjust to a rapidly changing world.

FUTURE GENERATIONS

Birthrates are falling across the world but only a minority of global citizens want people in their country to have more children. Around one in three (32%) want people to have more children and a similar number (28%) would like to see fewer. Two-fifths (40%) believe that the current number of children is about right.

Q. In your view, do you wish people in your country had...?



The desire for people in their country to have more children is much more prevalent in the Global North than the Global South (42% vs. 24%).

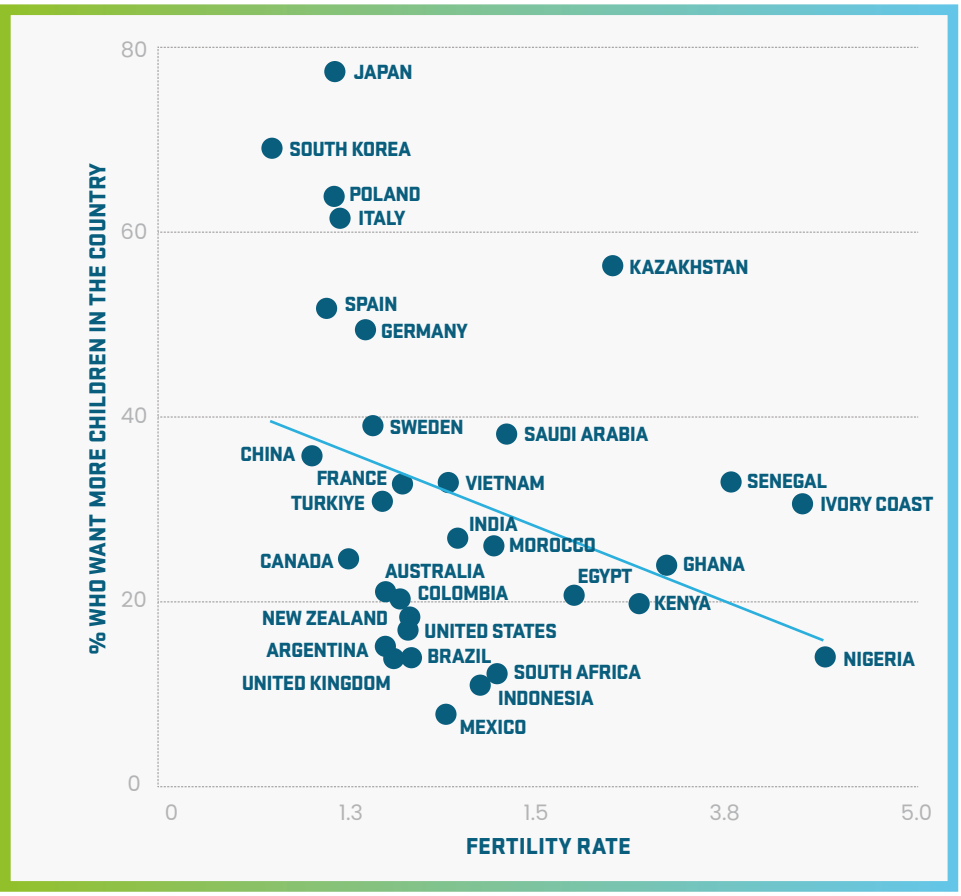
THIS PERSPECTIVE IS ALSO MORE COMMON AMONG THESE GROUPS:

- Men compared to women (37% vs. 26%).
- Over 55s compared to under 35s (also 37% vs. 26%).
- Couples compared to those who are single (35% vs. 27%).

In some countries, there is a clear relationship between fertility rates and the desire for people to have more children. Nigeria has the highest fertility rate and one of the lowest percentages of global citizens who would like to see people in their country have more children. In Japan, we see the opposite pattern; low fertility and a widespread desire for more children.

However, the correlation across all 32 countries in our survey is not so clear cut. Countries such as Argentina, Canada and the United Kingdom have lower fertility rates but also a low proportion of global citizens wanting people in their country to have more children. Kazakhstan, on the other hand, has one of the highest rates of fertility and highest proportions saying they want people to have more children.

FERTILITY RATE VS. WANT MORE CHILDREN BY COUNTRY



2024 FERTILITY RATES.

SOURCE: HTTPS://DATA.WORLDBANK.ORG/INDICATOR/SP.DYN.TFRT.IN

	FERTILITY RATE	WANT PEOPLE IN COUNTRY TO HAVE MORE CHILDREN
ARGENTINA	1.50	15%
AUSTRALIA	1.48	21%
BRAZIL	1.61	14%
CANADA	1.25	25%
CHINA	1.01	36%
COLOMBIA	1.63	18%
EGYPT	2.74	21%
FRANCE	1.61	33%
GERMANY	1.36	49%
GHANA	3.34	24%
INDIA	1.96	27%
INDONESIA	2.12	11%
ITALY	1.18	61%
IVORY COAST	4.23	31%
JAPAN	1.15	77%
KAZAKHSTAN	2.98	56%
KENYA	3.17	20%
MEXICO	1.89	8%
MOROCCO	2.21	26%
NEW ZEALAND	1.57	20%
NIGERIA	4.38	14%
POLAND	1.14	64%
SAUDI ARABIA	2.31	38%
SENEGAL	3.77	33%
SOUTH AFRICA	2.21	12%
SOUTH KOREA	0.75	69%
SPAIN	1.10	52%
SWEDEN	1.43	39%
TÜRKIYE	1.48	31%
UNITED KINGDOM	1.55	14%
UNITED STATES	1.63	17%
VIETNAM	1.90	33%

There has been a great deal of debate about why birthrates are falling. According to the global citizens surveyed, cost of living is the biggest factor. More than half (57%) think cost of living pressures limit people's ability to have children, followed by housing costs/ shortages (35%).

Personal barriers such as difficulty finding a partner (19%) or unequal caregiving (11%) score lower. Under 35s (23%) and 35 to 54 year olds (22%) are more likely to mention fertility challenges than over 55s (18%).

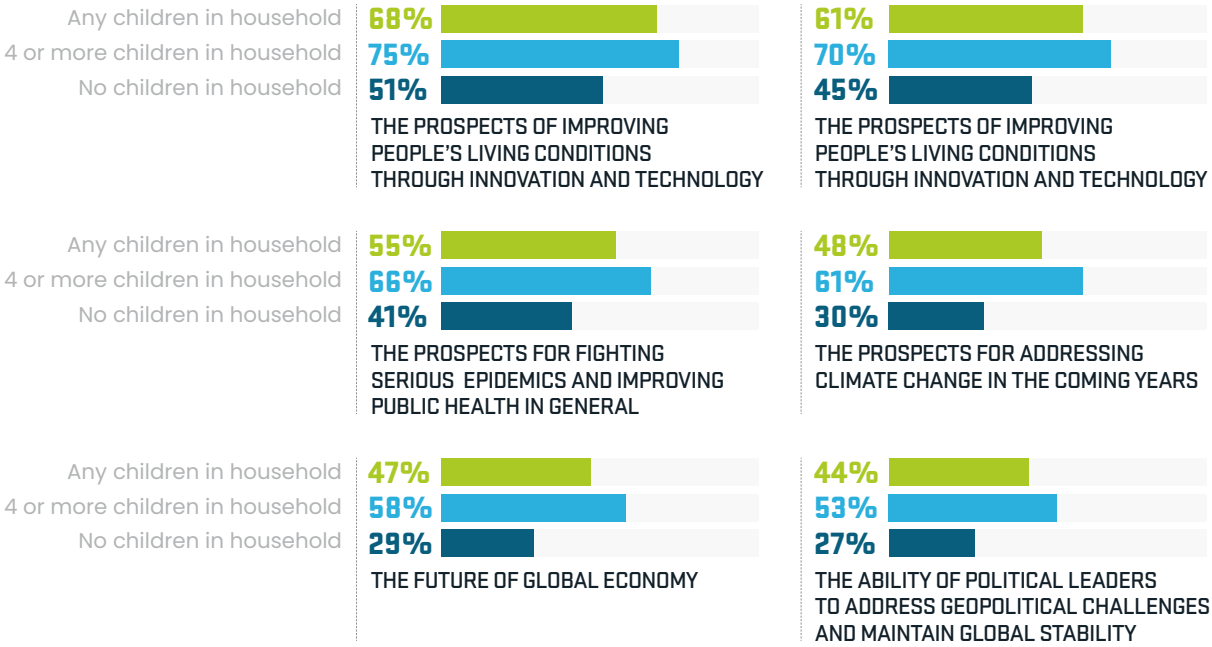
Childcare cost/availability (27% vs. 20%) and housing costs (38% vs. 33%) are more of a barrier in the Global North than the Global South, whereas in the Global South health/fertility challenges are mentioned more often (25% vs. 16%).

Q. In your view, which factors most limit people's ability to have the number of children they would like?

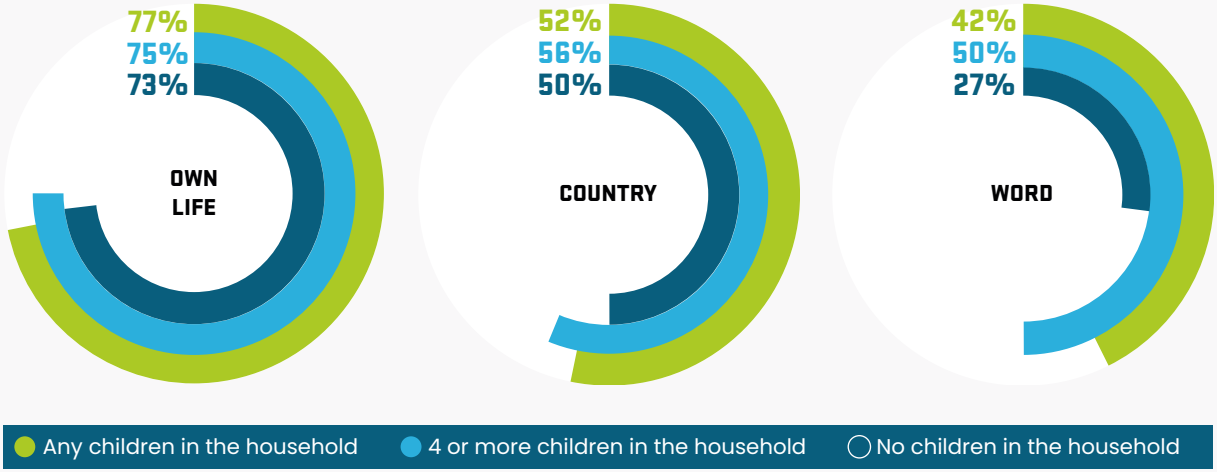
	All	Global North	Global South	Children in the household	No children in the household
OVERALL COST OF LIVING OR PERSONAL DEBT/FINANCIAL PRESSURES	57%	57%	57%	57%	57%
HIGH HOUSING COSTS OR LACK OF SUITABLE HOUSING	35%	38%	33%	34%	36%
JOB INSECURITY OR LONG/INFLEXIBLE WORK HOURS	31%	31%	31%	31%	31%
PERSONAL PREFERENCE TO HAVE FEWER OR NO CHILDREN	27%	26%	28%	26%	28%
COST OR LIMITED AVAILABILITY OF CHILDCARE	23%	27%	20%	23%	23%
HEALTH OR FERTILITY CHALLENGES, INCLUDING AGE-RELATED FACTORS	21%	16%	25%	25%	18%
DIFFICULTY FINDING A PARTNER OR RELATIONSHIP INSTABILITY	19%	19%	19%	17%	20%
LACK OF FAMILY-FRIENDLY POLICIES (E.G., PAID LEAVE, FLEXIBLE WORK)	18%	19%	17%	19%	18%
LIMITED FAMILY/COMMUNITY SUPPORT NETWORKS OR SOCIAL SERVICES	12%	11%	14%	14%	11%
CONCERNS ABOUT THE CLIMATE, THE FUTURE OF THE EARTH	11%	12%	10%	11%	11%
UNEQUAL SHARING OF CAREGIVING AND HOUSEWORK	11%	10%	11%	11%	10%
OTHER	2%	3%	2%	2%	3%

There is not a huge amount of difference in the views of those with and without children in the household. However, global citizens with children are more likely to mention fertility challenges (25% vs.18% without children) and limited support networks (14% vs.11%), while those without children are more likely to mention difficulty finding a partner (20% vs.17% with children), housing costs (36% vs. 34%) and personal preferences (28% vs. 26%).

Our research suggests that hope is another factor influencing global citizens' feelings about having children. There is a clear relationship between optimism about the future and having children in the household. Global citizens with large families (four or more children) are the most optimistic of all.



GOING IN THE RIGHT DIRECTION....



IMPLICATIONS FOR INVESTORS, BUSINESSES AND POLICY MAKERS

The 2026 FII Priority Compass report provides rich insights into the priorities, hopes and fears of global citizens. These are some of the key implications of our research for business and policy audiences.

→ OPTIMISM ABOUT THE FUTURE

INVESTORS AND BUSINESSES

1. PRIORITIZE GLOBAL SOUTH MARKETS AS GROWTH SIGNALS, NOT JUST COST SAVINGS

Optimism is higher in the Global South, indicating a psychological expansion mindset prevalent among the workforce, adding value beyond lower operating costs.

Businesses and investors should treat Global South markets as genuine growth opportunities driven by consumerism and aspiration, not only as low-cost production or labor bases. This reframes market entry strategy: positioning, product ambition, and marketing should reflect an expansion-oriented, tech-forward consumer base, rather than a purely cost-driven or defensive rationale for entering these markets.

2. DESIGN PRODUCTS THAT ADDRESS ANXIETY, NOT JUST OPTIMISM

People with a pessimistic mindset still spend, but their purchasing decisions are shaped by anxieties and insecurities that need to be addressed directly.

Businesses should not assume that spending signals confidence: pessimistic individuals spending often reflects a need for reassurance or risk reduction. Product design and positioning in these segments should speak to security, stability, and risk mitigation rather than aspiration or growth, since that is what is actually driving the purchase decision. This may be an especially critical factor in Global North markets.

3. MONITOR HOW LONG PERSONAL OPTIMISM CAN OFFSET COLLECTIVE PESSIMISM

A key open question is how long individual optimism can persist alongside broader collective pessimism.

Investors should treat current optimism-driven growth signals as potentially time-limited rather than assuming they are structural or permanent. This means tracking sentiment on a regular basis as part of market monitoring, to catch early signs of deterioration.

POLICYMAKERS

1. ADDRESS THE LEGITIMACY PROBLEM BEHIND GLOBAL NORTH PESSIMISM, NOT ONLY THE ECONOMIC ONE

Pessimism in the Global North persists despite higher living standards, pointing to a legitimacy problem that supersedes economic conditions.

Policymakers in Global North countries should recognize that economic performance alone will not resolve this pessimism, since living standards are already higher relative to a more optimistic Global South. More transparent, accountable, and responsive governance, rather than economic growth may restore public confidence.

→ PROSPERITY AND GROWTH

INVESTORS AND BUSINESSES

1. EXPAND BUDGETING, INSURANCE AND FINANCIAL STABILITY PRODUCTS

Financial insecurity is driving demand for budgeting tools, insurance and other products that provide financial stability.

Businesses should treat budgeting and insurance products as core opportunities in markets where insecurity is high, and investors should weigh financial-stability fintech more favorably where this insecurity is strongest.

2. TARGET YOUNGER SAVERS WITH SAVINGS AND MICRO-INVESTING PRODUCTS

Savings are a priority for younger people, generating demand for savings products, financial planning tools and micro-investing platforms.

Younger people represent an underserved population for savings-oriented products. Businesses should consider designing savings, planning and micro-investing offerings specifically around younger users' needs and behaviors rather than adapting products built for older, wealthier populations. Investors should treat this demand as a signal for where fintech growth is likely concentrated.

3. LOWER BARRIERS TO ENTREPRENEURSHIP WITH ACCESSIBLE FINTECH AND TOOLS

A lack of confidence in starting a business is generating demand for tools that facilitate entrepreneurship.

The barrier here is confidence, not just capital or skill, so products that reduce perceived complexity and risk are likely to find demand. Businesses should prioritize accessible, low-friction tools like no-code platforms that lower the practical and psychological barriers to starting a business. Investors should see this confidence gap as an indicator of unmet demand in tools that enable entrepreneurship.

4. LEAD WITH «MADE LOCALLY» AND «SECURE SUPPLY CHAIN» POSITIONING

There is public support for local production even when it increases prices, with «made locally» and «secure supply chains» acting as strong selling points.

Consumers are signaling a willingness to trade cost for perceived security and local benefit. Businesses should use local production and supply chain security as explicit marketing and product positioning, not just an operational choice. Investors should factor this preference into how they value companies with local or regionalized supply chains versus those relying on lower-cost, more distant production.

POLICYMAKERS

1. TREAT COST OF LIVING, POVERTY AND UNEMPLOYMENT AS TOP POLITICAL PRIORITIES, TAILORED BY REGION

Cost of living, poverty and unemployment are top priorities for global citizens, and financial insecurity carries political risk. The Global South places more emphasis on secure employment, while the Global North emphasizes social protection systems.

To advance political stability, governments in the Global South should consider prioritizing policies that expand secure, stable employment, while governments in the Global North should consider strengthening social protection systems.

2. DESIGN ENERGY TRANSITION POLICY AROUND AFFORDABILITY, NOT EMISSIONS ALONE

Concern over energy costs means energy transition policies should prioritize keeping costs affordable, not only reducing emissions.

Policymakers should treat affordability as an equally important criteria for energy policy, not a secondary consideration to emissions targets. Governments should build cost-mitigation measures (subsidies, phased implementation, targeted support for lower-income households) directly into transition policy design.

3. IMPROVE ACCESS TO FUNDING AND SUPPORT FOR ENTREPRENEURS

Entrepreneurs are seen as important for economic growth, but many think it is difficult to start a business, pointing to a need for better access to funding and support.

Policymakers should treat the gap between entrepreneurship's perceived importance and its practical accessibility as a policy failure worth addressing directly. Governments should prioritize improving access to start-up funding (grants, loan guarantees, public-private lending programs) and support services (advisory, regulatory simplification) to close this gap, rather than relying on entrepreneurship's popularity alone to drive activity.

→ TECHNOLOGY & AI

INVESTORS AND BUSINESSES

1. INVEST IN CONNECTIVITY, LOCAL LANGUAGE AND OFFLINE-FRIENDLY SERVICES

There is strong demand for digital services but global citizens also report clear barriers, poor internet access and language limitations that inhibit their ability to use them.

Demand alone will not convert into adoption where access barriers remain unaddressed. This creates an opportunity specifically at the intersection of connectivity, local-language support, and offline-capable design, areas that are currently underserved. Investors and businesses should treat these as adjacent, not separate, opportunities: closing the access gap is what increases the demand.

2. PRICE DECLINING OPTIMISM INTO VALUATION AND RISK MODELS

Public optimism about technology is declining, alongside growing concern about AI specifically.

Shifting public sentiment is a major indicator, not just a reputational concern, it can affect user adoption, regulatory appetite, and how markets price technology and AI companies. Investors should treat sentiment trends as a factor in valuation and risk assessment, not only a communications issue. Businesses should recognize that sustained skepticism, if unaddressed, can slow the adoption curves their growth projections depend on.

3. GET AHEAD OF REGULATION ON YOUTH ONLINE SAFETY

Public trust in how young people are protected online is low, particularly in the Global North.

This gap in trust increases the likelihood of tighter regulation on social media and digital platforms, especially in Global North markets where the concern is most pronounced. Businesses operating in or expanding into these markets should anticipate regulatory tightening as a probable near-term scenario rather than a simple risk. Investors should factor this regulatory exposure into how they assess platform and social media investments in these regions.

4. PRIORITIZE ROBOTS FOR HOUSEHOLD CHORES AS A NEAR-TERM OPPORTUNITY

Comfort with robots varies significantly by task and is highest for household chores compared to other applications.

This points to household chores as the clearest near-term consumer market for robotics, not because the technology is necessarily more mature there, but because public acceptance is highest. Investors and businesses should treat public comfort, not just technical readiness, as a leading signal for where robotics adoption is likely to happen first, and organize product and go-to-market efforts accordingly.

5. PRIORITIZE GLOBAL SOUTH AI OPPORTUNITIES

Global South citizens are more likely to say that AI is important in their daily life compared to the Global North. They are more than twice as likely to be willing to pay for an AI assistant to manage their personal schedule and emails.

This demand signals a market opportunity that is currently underserved. Investors and businesses should treat the Global South as a growth priority rather than a secondary market. There is a need to engage directly with local users and communities to understand what «useful AI» means in their specific context, instead of assuming products built for other markets will translate.

6. INVEST IN AI SKILLS AND TRAINING

Citizens of the Global South are much more willing to pay for classes to gain knowledge and skills in AI compared to citizens of the Global North.

Adoption and demand alone will not translate into effective or sustained use without skills-building. Businesses and investors have an opportunity, and, given the demand expressed, an incentive to support AI literacy and training as part of market entry, rather than treating it as separate from product strategy.

7. DIFFERENTIATE BEYOND FOUNDATION MODELS

Most global citizens believe that power over AI is concentrated in the hands of a small number of technology companies.

This perception itself is a market signal. It suggests public appetite for alternatives, and possible reputational or regulatory exposure for organizations seen as dominant. Businesses without foundation-model scale should see this as an opening to compete on trust, local relevance, and applications rather than infrastructure. Investors should study this concentration as a market risk, not only a competitive asset for the largest players.

POLICYMAKERS

1. INVEST IN INTERNET INFRASTRUCTURE AND LOCAL-LANGUAGE ACCESS, PRIORITIZING THE GLOBAL SOUTH

Digital access barriers persist, particularly in the Global South, even though citizens there are the most enthusiastic about technology.

This is a mismatch policymakers can directly address: enthusiasm is high, but infrastructure and language support are the binding constraints. Governments, particularly in the Global South, should consider public investment in internet infrastructure and local-language digital services, treating this as a policy area where the return on investment is supported by existing demand rather than one requiring demand generation.

2. SET CLEAR REQUIREMENTS FOR PLATFORMS TO PROTECT YOUNG PEOPLE

The public, particularly in the Global North, wants technology companies to do more to protect young people online.

This gives policymakers, especially in Global North countries where the concern is strongest, a mandate to set clear, enforceable expectations for platforms regarding youth protection, rather than relying on voluntary industry commitments. Where such requirements are introduced, they should be combined with mechanisms to verify and enforce compliance.

3. REGULATE SENSITIVE ROBOT USE CASES SUCH AS ELDERLY CARE CAREFULLY

Belief that robots are inevitable does not translate into full support. There is discomfort with robots in tasks like elderly care.

Policymakers should not treat perceived inevitability as public approval. Sensitive-care applications of robotics are subject to scrutiny, compared to low-stake uses such as household chores, and publics will likely demand specific safeguards, standards, or consultation requirements before deployment. Governments should avoid a single robotics policy that assumes national public comfort across all use cases.

4. LEGISLATE HUMAN RESPONSIBILITY FOR CONSEQUENTIAL AI DECISIONS

Public support for AI oversight is strong across regions, and there is a strong public preference that humans remain responsible for important decisions made with or by AI.

This gives policymakers a clear and broadly supported mandate to act, rather than a contested one requiring extensive public consultation to justify. Governments should consider rules that keep a human accountable for high-stakes AI-assisted decisions (health, justice, employment, finance) as a foundational policy principle.

5. FUND AI EDUCATION, WITH PRIORITY INVESTMENT IN THE GLOBAL SOUTH

There is strong public demand for AI skills and knowledge, particularly in the Global South.

This demand gives policymakers a public mandate to invest in AI education and digital skills programs, with the clearest need and public support in the Global South. Governments should consider public investment in AI literacy and skills training as part of broader digital education policy, recognizing that this is where both the demand and the potential impact on economic participation are currently strongest.

→ HEALTHCARE

INVESTORS AND BUSINESSES

1. SEGMENT HEALTH PRODUCTS BY REGION-SPECIFIC PRIORITIES

Health is a top priority overall, particularly in the Global North. In lower-income markets, staying healthy is valued for its role in enabling work more than general wellness.

A single wellness positioning will not resonate equally across markets. Businesses should segment product design and marketing around what health means in each market (general wellness and prevention in higher-income markets vs. work capacity and productivity-linked health in lower-income markets). Investors should factor in this distinction for healthtech opportunities rather than treating health demand as a uniform global category.

2. BUILD TRUST AND REPRESENTATIVE DATA WITH UNDERREPRESENTED GROUPS, ESPECIALLY WOMEN

Healthtech companies relying on voluntary data sharing may risk generating biased datasets if participation comes from young, educated men. Women's concerns need to be addressed to build trust.

Unrepresentative data is both a trust problem and a product-quality problem. Tools trained on biased/incomplete data will underserve marginalized populations. Businesses should treat closing this participation gap, starting with women's concerns specifically, as a prerequisite for reliable healthtech products, not a secondary diversity goal. Investors should factor data representativeness into their assessment of healthtech reliability.

3. TARGET FAMILY-SIZED, VALUE-FOCUSED NUTRITION PRODUCTS

There is demand for affordable, nutritious food, with the greatest need among larger families.

This points to a clear opportunity for food brands and foodtech companies to focus on family-sized, value-oriented products rather than premium or individual-serving formats. Businesses should consider affordability and portion design for larger households as the main opportunity, and investors should consider foodtech opportunities accordingly instead of defaulting to premium-market assumptions.

POLICYMAKERS

1. ADDRESS DOCTOR SHORTAGES AND FRAME HEALTH POLICY AROUND ECONOMIC SECURITY BY REGION

Health is a high priority for the public, particularly in the Global North, but satisfaction with healthcare is low, with doctor shortages remaining a key issue. In lower-income regions, where financial security comes first, health policies gain more support when linked to economic security and the ability to work.

A single healthcare policy narrative will not resonate equally across regions. In the Global North, policymakers should consider addressing doctor shortages and access issues as the most direct way to improving satisfaction. In lower-income regions, policymakers should frame and design health policy around its connection to economic security and work capacity.

2. DEVELOP A CROSS-GENERATIONAL PLAN FOR THE COSTS OF LONGER LIVES

Public support for longer, healthier lives depends on having a clear plan for managing the associated costs across generations.

Policymakers should not assume public support for longevity-focused health policy is unconditional. It is contingent on visible fairness in how costs (pensions, long-term care, healthcare spending) are distributed across age groups. Governments should consider developing and communicating a transparent, cross-generational funding plan alongside any policy aimed at extending healthy lifespans, rather than treating cost allocation as a secondary implementation detail.

3. STRENGTHEN PRIVACY PROTECTIONS AND CONSENT PROCESSES TO BUILD TRUST WITH WOMEN

Lower data-sharing among women contributes to less representative medical research; stronger privacy protections and clearer consent processes could help build trust and improve outcomes.

Policymakers should treat the current data gap as a trust and consent problem, not just a technical or research-design issue. Governments should consider strengthening privacy protections and simplify consent processes to address women's stated concerns, leading to better health outcomes for the entire population.

4. IMPROVE FOOD ACCESS FOR LARGE FAMILIES, RURAL HOUSEHOLDS, AND YOUNGER PEOPLE

Poor nutrition today contributes to higher healthcare costs later. Large families, rural households, and younger people face the greatest difficulty accessing affordable, healthy food.

Policymakers should treat nutrition policy as preventive healthcare policy, given the direct link to future healthcare costs. Governments should consider improving food supply and targeting support, such as subsidies or distribution programs, specifically toward the groups identified as struggling most: large families, rural households, and younger people, rather than applying universal food policy measures.

→ EDUCATION AND WORK

INVESTORS AND BUSINESSES

1. EXPAND TUTORING, EDTECH AND EDUCATION-LINKED SERVICES

Parents consistently prioritize spending on their children's education, creating strong long-term demand for tutoring, edtech, education services and housing near good schools.

This is a long-term demand driver rather than a short-term trend, since parents treat education spending as a priority. Businesses should treat tutoring, edtech and education-linked services as resilient categories worth the investment and should consider how proximity to education quality factors into related markets like real estate. Investors should view this demand as more stable than demand for non-essential consumer products.

2. BUILD ALTERNATIVES TO TRADITIONAL DEGREES

Doubts about the value and affordability of traditional degrees are creating openings for alternative education options, certifications, apprenticeships and skills-based training.

Skepticism toward traditional degrees signals opportunity for creating models that directly demonstrate job-relevant skills at lower cost. Businesses should prioritize building or investing in certification, apprenticeship and skills-based training offerings as credible alternatives, positioning them against the value and cost concerns global citizens express about traditional degrees. Investors should treat this doubt as an indicator of growth potential.

3. BALANCE PURPOSE-DRIVEN WORK WITH COMPETITIVE PAY

Meaningful work helps companies retain employees but only when pay is also competitive. Purpose does not substitute for compensation.

Businesses should not treat purpose and pay as substitutes, both need to be addressed together, with competitive pay as the baseline and purpose as an additive factor. Companies and investors evaluating talent strategy should be cautious of retention approaches that focus heavily on mission or purpose messaging without matching it to competitive pay.

POLICYMAKERS

1. FOSTER PUBLIC RESKILLING AND UPSKILLING OPPORTUNITIES

People are confident in their own ability to adapt their work skills as the world changes but see a role for government in fostering opportunities to reskill and upskill.

Policymakers should read this as a mandate for enabling infrastructure rather than direct skills provision. The public is not asking government to teach them new skills but seeks accessible opportunities and pathways for doing so themselves. Governments should prioritize funding and facilitating access to reskilling and upskilling programs through employers, education institutions or public programs.

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