

FUTURE RISKS SURVEY 2023 SPAIN



GAME CHANGERS



Ipsos Public Affairs
June 2023

METHODOLOGY AND PROFILE

A

METHODOLOGY



TARGET

3 226 experts interviewed
in **50 countries**
- **96 in Spain**



EXPERTS



GENERAL
POPULATION

Survey conducted in **15 countries** among representative samples of the population aged 18 y.o. and more in each country.
• **1000 in Spain**



COLLECTION DATES

May 10th to June 16th 2023

May 10th to June 14th 2023



METHODOLOGY

Online interviews

Survey link was sent by Axa to their community of experts (internal and external: mainly clients and brokers).

Online interviews via Ipsos Access Panel.

Quota method applied to gender, age, occupation, region and market size.

READING NOTE

- For Global results and sub-totals by clusters, each country weighs the same.
- Positive significant differences in **green**, negative significant differences in **red**.

FUTURE RISKS TOP 10 RANKING

B



EXPERTS



GENERAL POPULATION

TOP 10 FUTURE RISKS

Please rank the top 5 future risks that you selected, based on their potential impact on society at large in the next 5 to 10 years.

EXPERTS	RANK	GENERAL POPULATION
Climate change	1	Climate change
Cyber Security risks	2	Pandemics and infectious diseases
Geopolitical instability	3	Cyber Security risks
Risks related to Artificial Intelligence and big data	4	Social tensions and movements
Energy risks	5	Energy risks
Natural resources and biodiversity risks	6	New security threats and terrorism
Financial stability risks	7	Financial stability risks
Social tensions and movements	8	Pollution
Pandemics and infectious diseases	9	Geopolitical instability
Macro-economic risks	10	Natural resources and biodiversity risks

**This top 10 is a ranking of all risks; it has been calculated the same way since 2018. When a risk is ranked first, it gives it 5 points, 2nd 4 points, etc. up to 5th 1 point. The ranking is based on the total numbers of points per risk.*

EVOLUTION OF THE TOP 10 FUTURE RISKS



	2018	2019	2020	2021	2022	2023
1	Climate change	Climate change	Pandemics and infectious diseases	Climate change	Climate change	Climate change
2	Cybersecurity risks	Cybersecurity risks	Climate change	Cyber security risks	Geopolitical instability	Cyber security risks
3	Geopolitical instability	Geopolitical instability	Cybersecurity risks	Pandemics and infectious diseases	Cyber security risks	Geopolitical instability
4	Natural resources management	Social discontent and local conflicts	Geopolitical instability	Geopolitical instability	Energy risks	Risks related to Artificial Intelligence and big data
5	Social discontent and local conflicts	Natural resources management	Social discontent and local conflicts	Social discontent and local conflicts	Pandemics and infectious diseases	Energy risks
6	Artificial intelligence and big data	Artificial intelligence and big data	New threats to security	Natural resources and biodiversity risks	Social tensions and movements	Natural resources and biodiversity risks
7	New threats to security	Pollution	Macroeconomic risks	New security threats and terrorism	Natural resources and biodiversity risks	Financial stability risks
8	Pollution	Pandemics and infectious diseases	Natural resources and biodiversity risks	Financial stability risks	Financial stability risks	Social tensions and movements
9	Medical advances and innovations	New threats to security	Financial risks	Macro-economic risks	Macro-economic risks	Pandemics and infectious diseases
10	Pandemics and infectious diseases	Macroeconomic risks	Pollution	Risks related to Artificial Intelligence and big data	Monetary and fiscal policies risks	Macro-economic risks

■ Environment & Energy
 ■ Tech & Data
 ■ Society, Politics & Regulation
 ■ Medicine & Health
 ■ Economy, Finance & Business Environment

Please rank the top 5 future risks that you selected, based on their potential impact on society at large in the next 5 to 10 years.

*This top 10 is a ranking of all risks; it has been calculated the same way since 2018. When a risk is ranked first, it gives it 5 points, 2nd 4 points, etc. up to 5th 1 point. The ranking is based on the total numbers of points per risk.



TOP 10 FUTURE RISKS PER CLUSTER - EXPERTS



AMERICA

- 1 Climate change
- 2 Cyber security risks
- 3 Risks related to Artificial Intelligence and big data
- 4 Natural resources and biodiversity risks
- 5 Geopolitical instability
- 6 Pandemics and infectious diseases
- 7 Macro-economic risks
- 8 Financial stability risks
- 9 Social tensions and movements
- 10 Monetary and fiscal policies risks

AFRICA

- 1 Climate change
- 2 Financial stability risks
- 3 Cyber security risks
- 4 Macro-economic risks
- 5 Monetary and fiscal policies risks
- 6 Pandemics and infectious diseases
- 7 Risks related to Artificial Intelligence and big data
- 8 Geopolitical instability
- 9 Social tensions and movements
- 10 Energy risks

SPAIN

- 1 CLIMATE CHANGE
- 2 GEOPOLITICAL INSTABILITY
- 3 CYBER SECURITY RISKS
- 4 ENERGY RISKS
- 5 RISKS RELATED TO ARTIFICIAL INTELLIGENCE AND BIG DATA
- 6 NATURAL RESOURCES AND BIODIVERSITY RISKS
- 7 SOCIAL TENSIONS AND MOVEMENTS
- 8 MACRO-ECONOMIC RISKS
- 9 RISKS RELATED TO CHANGING DEMOGRAPHICS
- 10 ETHICAL RISKS REGARDING THE USE OF TECHNOLOGY

EUROPE

- 1 Climate change
- 2 Geopolitical instability
- 3 Cyber security risks
- 4 Risks related to Artificial Intelligence and big data
- 5 Social tensions and movements
- 6 Energy risks
- 7 Natural resources and biodiversity risks
- 8 Risks related to changing demographics
- 9 Financial stability risks
- 10 Macro-economic risks

ASIA PACIFIC AND MIDDLE EAST

- 1 Climate change
- 2 Cyber security risks
- 3 Risks related to Artificial Intelligence and big data
- 4 Pandemics and infectious diseases
- 5 Financial stability risks
- 6 Energy risks
- 7 Geopolitical instability
- 8 Pollution
- 9 Risks related to the future of Work
- 10 Chronic illnesses (cancer, diabetes, heart conditions...)

EVOLUTION OF THE TOP 10 FUTURE RISKS



	2021		2022		2023
1	Pandemics and infectious diseases	▲	Climate change	=	Climate change
2	Climate change	▼	Pandemics and infectious diseases	=	Pandemics and infectious diseases
3	New security threats and terrorism	▲	Geopolitical instability	▲	Cyber security risks
4	Cyber security risks	=	Cyber security risks	▲	Social tensions and movements
5	Pollution	▲	Energy risks	=	Energy risks
6	Social discontent and local conflicts	▼	New security threats and terrorism	=	New security threats and terrorism
7	Natural resources and biodiversity risks	▼	Social tensions and movements	▲	Financial stability risks
8	Financial stability risks	▼	Pollution	=	Pollution
9	Geopolitical instability	▼	Natural resources and biodiversity risks	▼	Geopolitical instability
10	Chronic illnesses	▼	Financial stability risks	▼	Natural resources and biodiversity risks

■ Environment & Energy
 ■ Tech & Data
 ■ Society, Politics & Regulation
 ■ Medicine & Health
 ■ Economy, Finance & Business Environment

Please rank the top 5 future risks that you selected, based on their potential impact on society at large in the next 5 to 10 years.



TOP 10 FUTURE RISKS PER CLUSTER – GENERAL POPULATION



GENERAL POPULATION

AMERICA

- 1 Climate change
- 2 Cyber security risks
- 3 New security threats and terrorism
- 4 Social tensions and movements
- 5 Pandemics and infectious diseases
- 6 Financial stability risks
- 7 Risks related to AI and big data
- 8 Monetary and fiscal policies risks
- 9 Energy risks
- 10 Natural resources and biodiversity risks

AFRICA

- 1 Climate change
- 2 Pandemics and infectious diseases
- 3 Pollution
- 4 New security threats and terrorism
- 5 Cyber security risks
- 6 Financial stability risks
- 7 Chronic illnesses
- 8 Risks related to AI and big data
- 9 Natural resources and biodiversity risks
- 10 Monetary and fiscal policies risks

SPAIN	
1	CLIMATE CHANGE
2	PANDEMICS AND INFECTIOUS DISEASES
3	FINANCIAL STABILITY RISKS
4	NATURAL RESOURCES AND BIODIVERSITY RISKS
5	CYBER SECURITY RISKS
6	GEOPOLITICAL INSTABILITY
7	ENERGY RISKS
8	SOCIAL TENSIONS AND MOVEMENTS
9	CHRONIC ILLNESSES
10	RISKS RELATED TO ARTIFICIAL INTELLIGENCE AND BIG DATA

EUROPE

- 1 Climate change
- 2 Energy risks
- 3 Pandemics and infectious diseases
- 4 Pollution
- 5 Social tensions and movements
- 6 Geopolitical instability
- 7 Natural resources and biodiversity risks
- 8 Cyber security risks
- 9 Financial stability risks
- 10 New security threats and terrorism

ASIA PACIFIC AND MIDDLE EAST

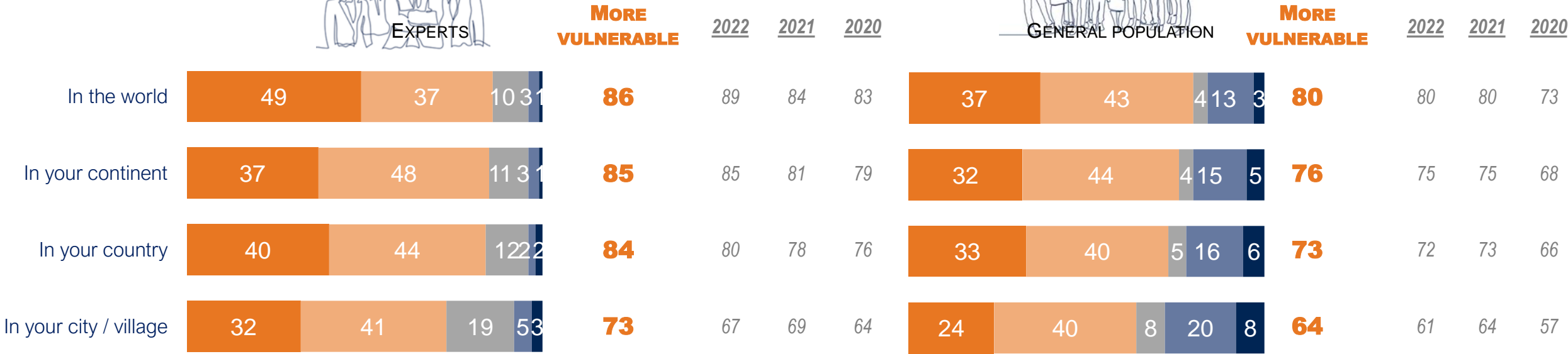
- 1 Climate change
- 2 Cyber security risks
- 3 Pandemics and infectious diseases
- 4 Energy risks
- 5 Geopolitical instability
- 6 Risks related to AI and big data
- 7 Social tensions and movements
- 8 Financial stability risks
- 9 Natural resources and biodiversity risks
- 10 New security threats and terrorism

**This top 10 is a ranking of all risks; it has been calculated the same way as in 2021. When a risk is ranked first, it gives it 5 points, 2nd 4 points, etc. up to 5th 1 point. The ranking is based on the total numbers of points per risk.*

LEVEL OF VULNERABILITY OF POPULATIONS COMPARED TO 5 YEARS AGO

ALL COUNTRIES

■ MUCH MORE VULNERABLE
 ■ A LITTLE MORE VULNERABLE
 ■ NEITHER MORE NOR LESS VULNERABLE
■ A LITTLE LESS VULNERABLE
 ■ MUCH LESS VULNERABLE




When you think about the way in which things have been evolving in the past 5 years, would you say that people are...



LEVEL OF VULNERABILITY OF POPULATIONS – PER CLUSTER AND COUNTRY


% MORE VULNERABLE



EXPERTS

	ALL	EUROPE	FRANCE	BELGIUM	UNITED KINGDOM	ITALY	SPAIN	SWITZERLAND	GERMANY
In the world	86	89	87	91	89	94	88	87	90
In your continent	85	87	85	92	87	89	83	84	84
In your country	84	80	83	86	87	89	76	53	73
In your city / village	73	64	67	68	66	75	69	37	58

% MORE VULNERABLE



GENERAL POPULATION

	ALL	EUROPE	FRANCE	BELGIUM	UNITED KINGDOM	ITALY	SPAIN	SWITZERLAND	GERMANY
In the world	86	82	82	83	85	80	82	79	81
In your continent	85	78	81	80	82	79	79	70	73
In your country	84	74	79	79	81	79	78	54	69
In your city / village	73	62	61	69	68	70	73	42	50

When you think about the way in which things have been evolving in the past 5 years, would you say that people are...

FOCUS ON TECH-RELATED RISKS

C

PACE OF EMERGENCE OF RISKS - % RAPIDLY EMERGING



Rapidly emerging

ALL COUNTRIES



2020	2021	2022	EXPERTS		GENERAL POPULATION	2022	2021	Spain 2023
42	44	46	55	Risks related to Artificial Intelligence and big data	48	40	40	50
51	48	48	53	Disruptive technologies	43	45	44	44
47	39	40	49	Ethical risks regarding the use of technology	42	40	39	53
48	52	50	47	Tech-related economic risks	41	44	42	41
51	51	45	47	Risks related to the future of Work	43	42	41	50
47	39	47	45	Risks related to changing health practices and new occupational diseases	39	38	41	39
39	49	44	45	Energy risks*	41	41	40	45
35	30	46	44	Financial stability risks	39	39	38	42
37	36	39	43	Risks related to medical advances and innovations	40	38	37	42
47	43	42	42	Cyber security risks	41	41	38	49
44	42	39	42	Macro-economic risks	38	38	38	44
44	41	36	42	Risks related to evolving regulation and litigation	40	44	40	50
41	39	42	41	Risks related to smart and autonomous systems	39	38	38	40

How would you qualify the pace of emergence of this risk? To those who selected the risk in their top 5

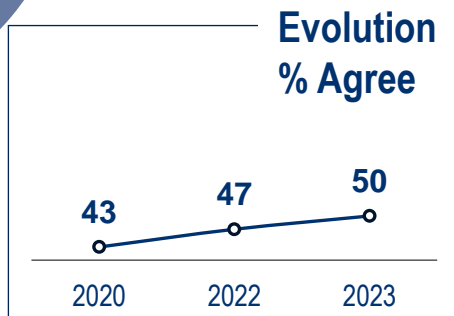
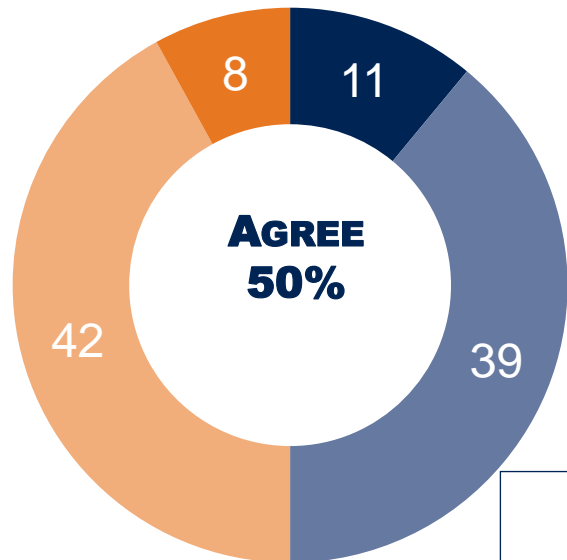
TECHNOLOGICAL ADVANCES CREATE MORE RISKS THAN IT SOLVES



GENERAL POPULATION

ALL COUNTRIES

■ Totally agree ■ Somewhat agree
■ Somewhat disagree ■ Totally disagree



Do you agree or disagree with the following statements?

	% AGREE				2022	2020
ASIA-PACIFIC	9	43	43	5	52	
Japan	4	43	49	4	47	44
China	15	42	38	5	57	53
Hong Kong	7	44	46	3	51	58
Australia	10	44	41	5	54	47
EUROPE	8	38	46	8	46	
France	10	42	42	6	52	49
Belgium	7	40	46	7	47	42
UK	8	41	46	5	49	39
Italy	10	37	42	11	47	39
Spain	7	40	45	8	47	37
Switzerland	7	37	48	8	44	35
Germany	7	31	50	12	38	31
AFRICA	17	40	32	11	57	
Nigeria	18	37	30	15	55	49
Morocco	17	42	34	7	59	53
AMERICA	12	37	41	10	49	
USA	11	38	42	9	49	42
Mexico	16	31	38	15	47	35

RISKS RELATED TO ARTIFICIAL INTELLIGENCE AND BIG DATA



EXPERTS

RISK N°4 OVERALL

RISK N°5 IN SPAIN

LEVEL OF VULNERABILITY

 **52%**
(+8 VS 2022)

55% IN SPAIN

RAPIDLY EMERGING FOR 55% (+9 VS 2022)

63% IN SPAIN

 AWARENESS 17%
(+1 VS 2022)

11% IN SPAIN

PREPAREDNESS OF PUBLIC AUTHORITIES 7% (-7)

LOWEST SCORE AMONG 25 RISKS

0% IN SPAIN



PREPAREDNESS OF THE PRIVATE SECTOR 16% (-6)

LOWEST SCORE AMONG 25 RISKS

18% IN SPAIN



GENERAL POPULATION

RISK N°11 OVERALL

RISK N°10 IN SPAIN

LEVEL OF VULNERABILITY

 **56%**
(+1 VS 2022)

64% IN SPAIN

RAPIDLY EMERGING FOR 48% (+8 VS 2022)

50% IN SPAIN



AWARENESS 38% (-5 VS 2022)
LOWEST SCORE AMONG 25 RISKS

38% IN SPAIN

PREPAREDNESS OF PUBLIC AUTHORITIES 29% (-10)

LOWEST SCORE AMONG 25 RISKS

27% IN SPAIN



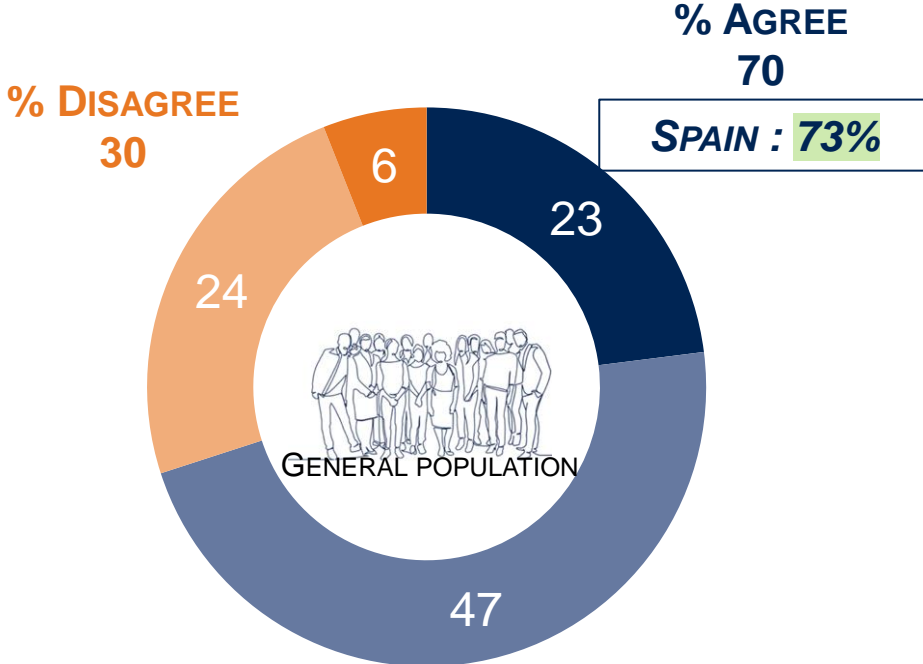
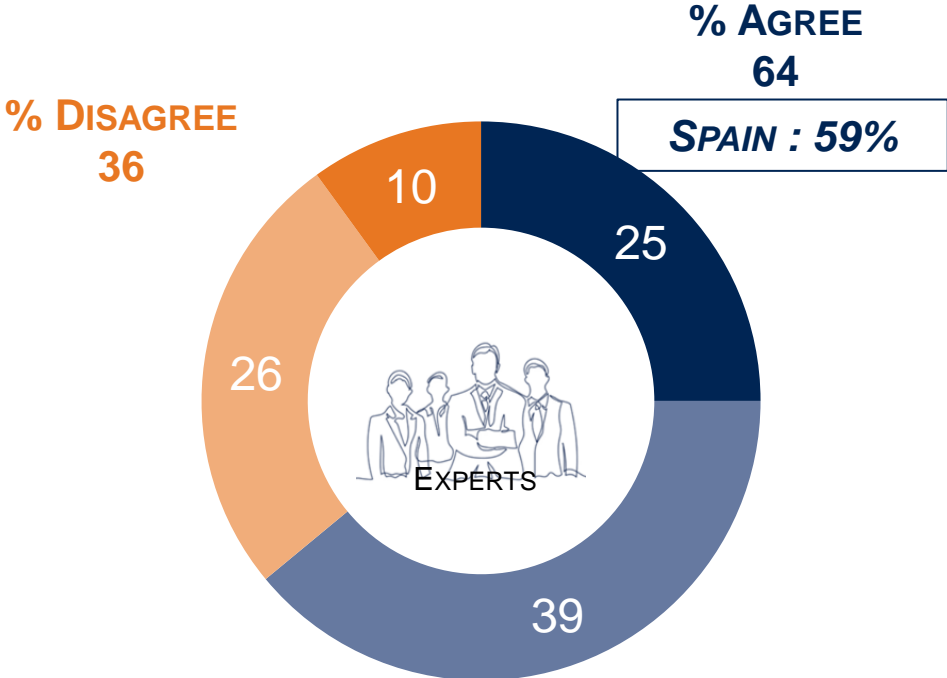
PREPAREDNESS OF THE PRIVATE SECTOR 31% (-9)

27% IN SPAIN

THERE IS A NEED FOR A BREAK IN AI AND DISRUPTIVE TECHNOLOGIES RESEARCH

ALL COUNTRIES

TOTALLY AGREE SOMEWHAT AGREE SOMEWHAT DISAGREE TOTALLY DISAGREE



 New question

Do you agree or disagree with the following statements?



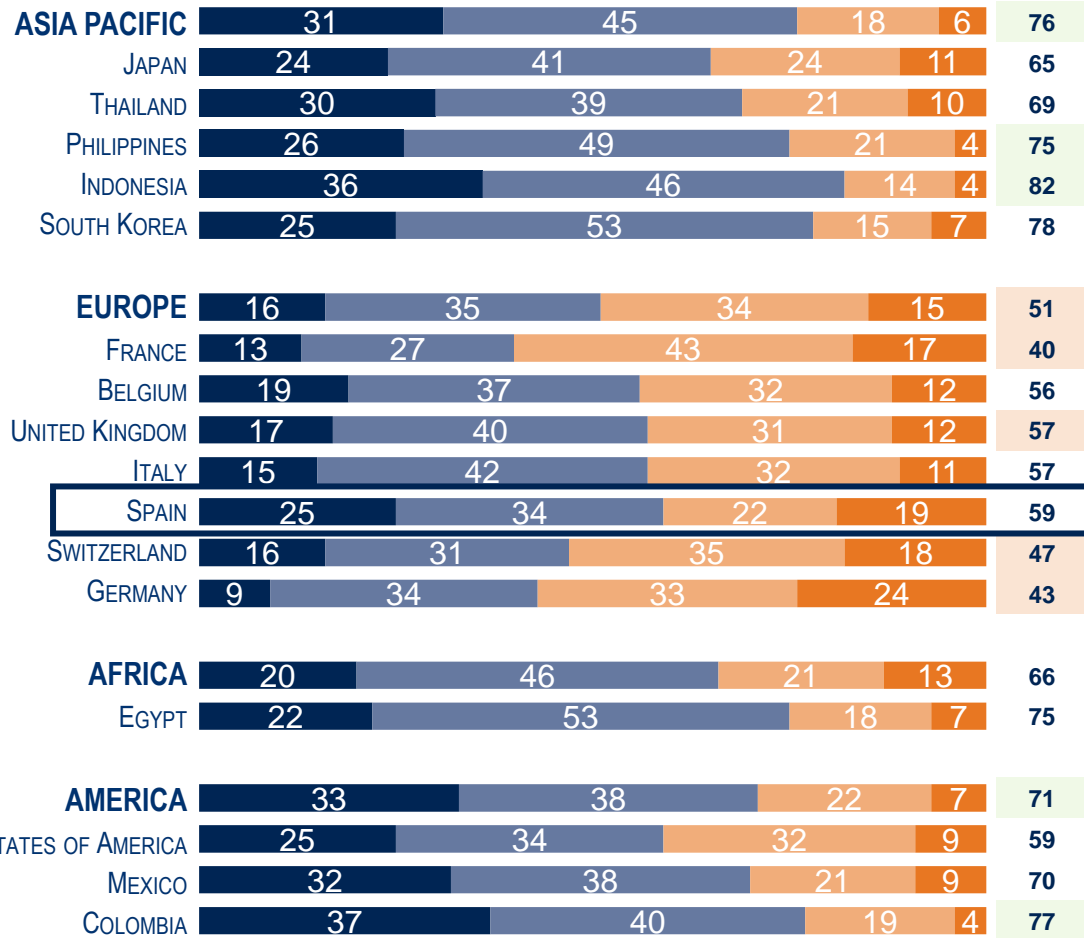
THERE IS A NEED FOR A BREAK IN AI AND DISRUPTIVE TECHNOLOGIES RESEARCH

TOTALLY AGREE
 SOMEWHAT AGREE
 SOMEWHAT DISAGREE
 TOTALLY DISAGREE



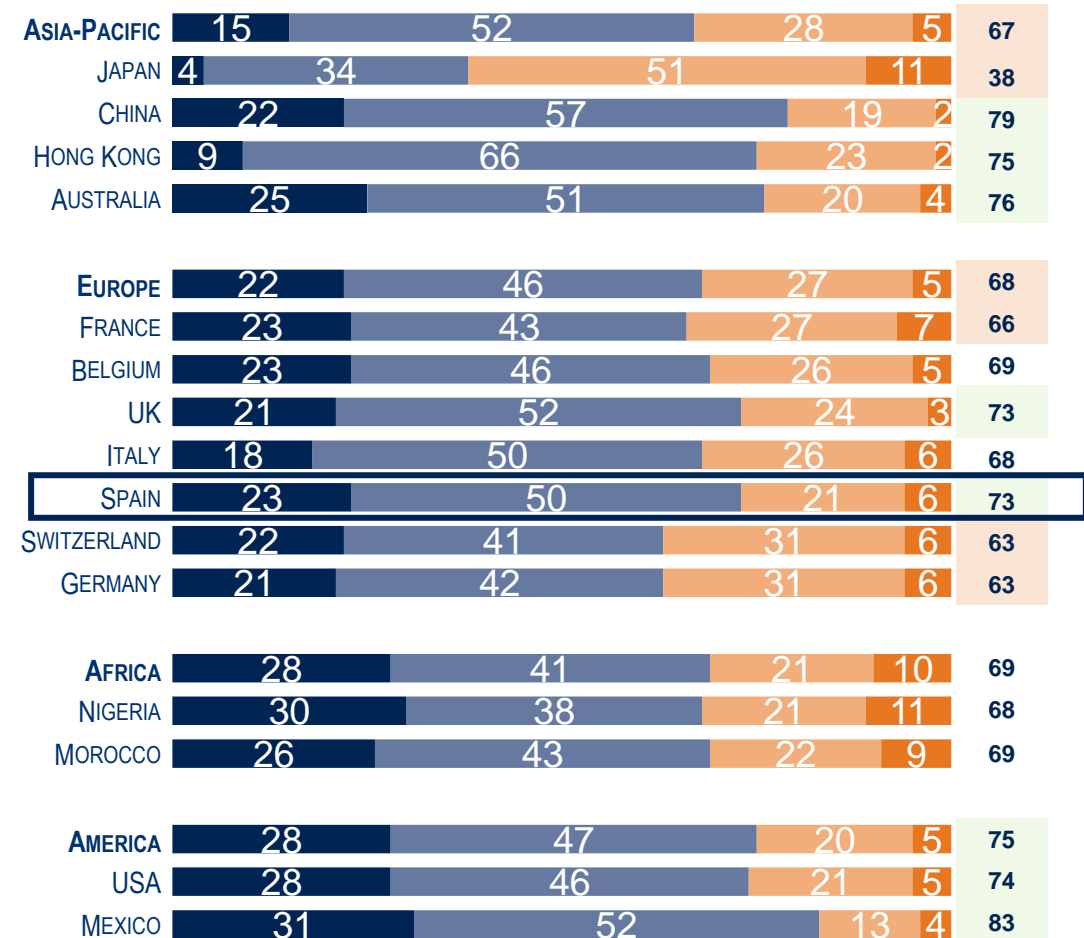
EXPERTS

% Agree



GENERAL POPULATION

% Agree



F CYBER SECURITY RISKS



EXPERTS

RISK N°2 OVERALL

RISK N°3 IN SPAIN

LEVEL OF VULNERABILITY

 **73%**

(+2 VS 2022)

70% IN SPAIN

RAPIDLY EMERGING FOR 42% (= 2022)

29% IN SPAIN



AWARENESS 42% (+3 VS 2022)

46% IN SPAIN

PREPAREDNESS OF PUBLIC AUTHORITIES 26% (+1)

9% IN SPAIN



PREPAREDNESS OF THE PRIVATE SECTOR 45% (+3)

30% IN SPAIN



GENERAL POPULATION

RISK N°3 OVERALL

RISK N°5 IN SPAIN

LEVEL OF VULNERABILITY

 **68%**

(+1 VS 2022)

73% IN SPAIN

RAPIDLY EMERGING FOR 41% (= 2022)

49% IN SPAIN



AWARENESS 55% (+1 VS 2022)

59% IN SPAIN

PREPAREDNESS OF PUBLIC AUTHORITIES 41% (+1)

47% IN SPAIN



PREPAREDNESS OF THE PRIVATE SECTOR 41% (=)

49% IN SPAIN

OPINION TOWARDS THE RISK OF A CYBERATTACK

ALL COUNTRIES

■ VERY IMPORTANT
 ■ SOMEWHAT IMPORTANT
 ■ SOMEWHAT NOT IMPORTANT
 ■ NOT IMPORTANT AT ALL



% IMPORTANT

ALL COUNTRIES

SPAIN



% IMPORTANT

ALL COUNTRIES

SPAIN

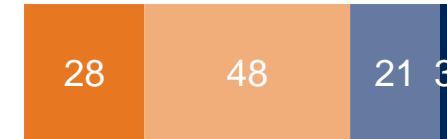
A massive cyberattack happens in your country?



87

84

A massive cyberattack happens in your country?



76

70

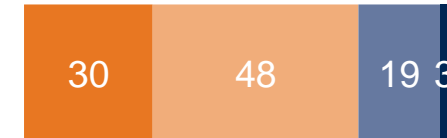
A global and massive cyberattack happens?



86

79

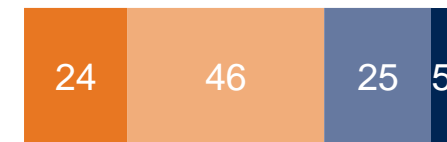
A global and massive cyberattack happens?



78

75

You will personally suffer from a cyberattack in the coming year (banking account, identity theft, social networks, etc.)



70

64

New question

Let's now focus on risks related to cyber security. Do you think there is an important risk that...

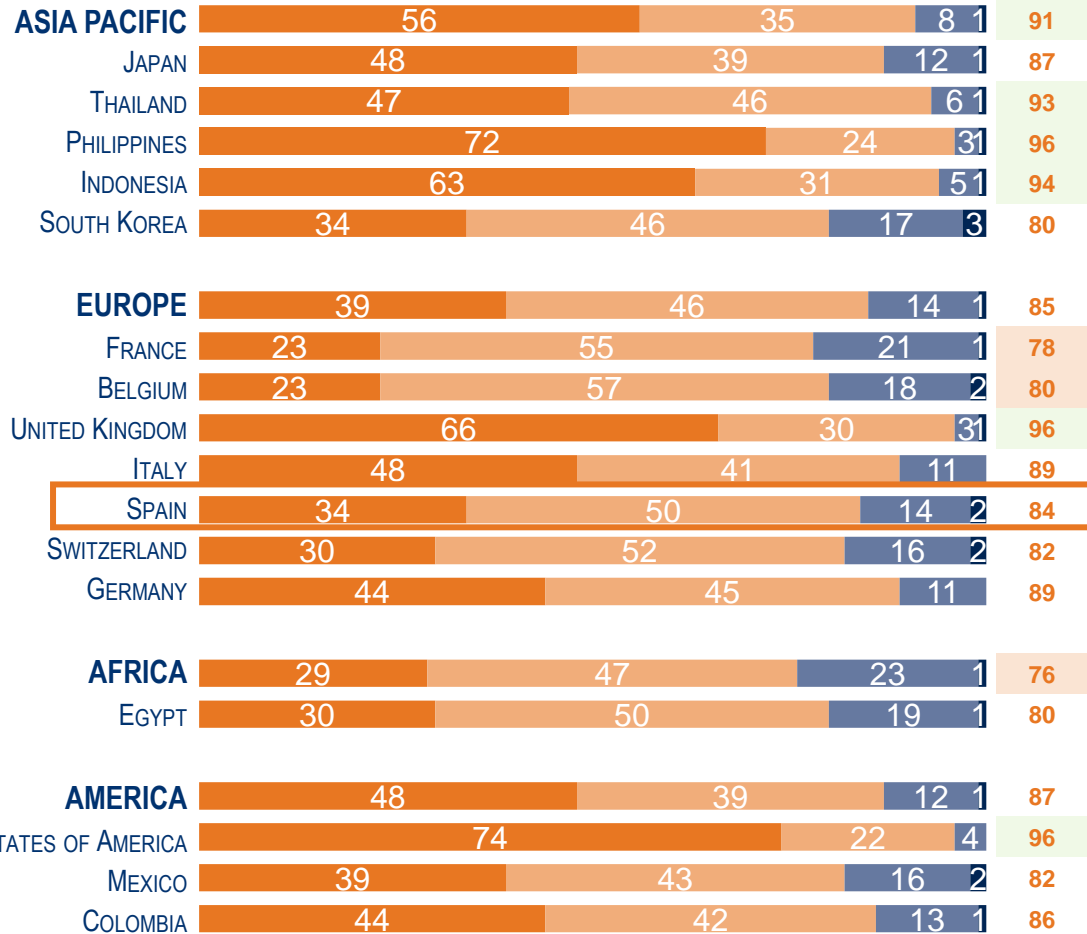
...A MASSIVE CYBERATTACK HAPPENS IN YOUR COUNTRY?

■ VERY IMPORTANT
 ■ SOMEWHAT IMPORTANT
 ■ SOMEWHAT NOT IMPORTANT
 ■ NOT IMPORTANT AT ALL



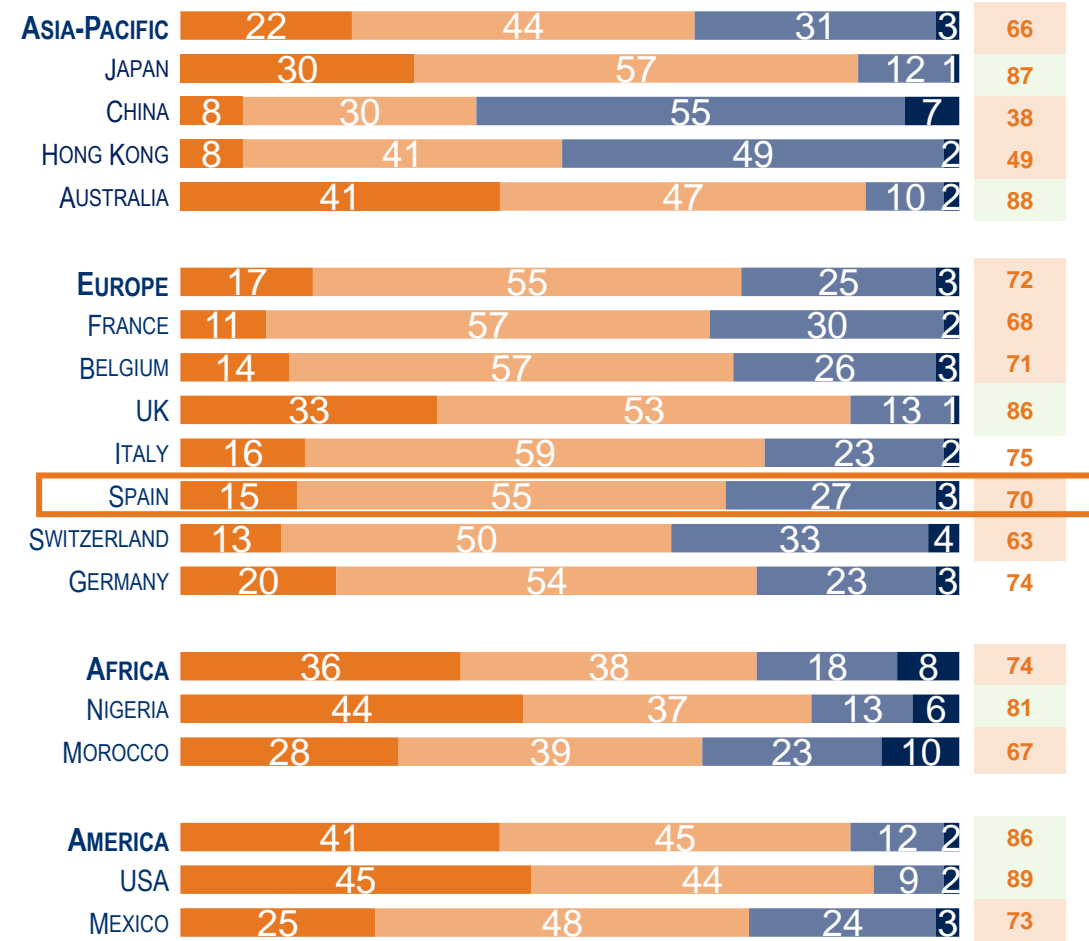
EXPERTS

% Important



GENERAL POPULATION

% Important



Let's now focus on risks related to cyber security. Do you think there is an important risk that...
New question

OPINION TOWARDS THE CONSEQUENCES OF A CYBERATTACK

ALL COUNTRIES

■ VERY IMPORTANT
 ■ SOMEWHAT IMPORTANT
 ■ SOMEWHAT NOT IMPORTANT
 ■ NOT IMPORTANT AT ALL



EXPERTS

% IMPORTANT

ALL COUNTRIES

SPAIN



GENERAL POPULATION

% IMPORTANT

ALL COUNTRIES

SPAIN

A paralysis of health services (hospitals, emergency, etc.)



86

79



80

80

A collapse of banking & financial systems



83

73



79

77

A paralysis of all administrative services (taxes, benefits, civil status, etc.)



80

69



76

75

A massive power cut (black out)



79

72



76

73

A serious catastrophe (nuclear or industrial accident, etc.)



66

47



72

67



New question

And do you think there is an important risk that the following events happen in your country because of a cyberattack?

FOCUS ON SOCIAL TENSIONS AND INEQUALITIES

D

F SOCIAL TENSIONS AND MOVEMENTS



EXPERTS

RISK N°8 OVERALL

RISK N°7 IN SPAIN

LEVEL OF VULNERABILITY

 **62%**

(+6 VS 2022)

59% IN SPAIN

RAPIDLY EMERGING FOR 41% (+1 VS 2022)

48% IN SPAIN



AWARENESS 43% (+6 VS 2022)

21% IN SPAIN

PREPAREDNESS OF PUBLIC AUTHORITIES 14% (+1)

0% IN SPAIN



PREPAREDNESS OF THE PRIVATE SECTOR 21% (+6)

17% IN SPAIN



GENERAL POPULATION

RISK N°4 OVERALL

RISK N°8 IN SPAIN

LEVEL OF VULNERABILITY

 **66%**

(+6 VS 2022)

65% IN SPAIN

RAPIDLY EMERGING FOR 37% (-1 VS 2022)

33% IN SPAIN



AWARENESS 61% (+3 VS 2022)

61% IN SPAIN

PREPAREDNESS OF PUBLIC AUTHORITIES 32% (=)

37% IN SPAIN



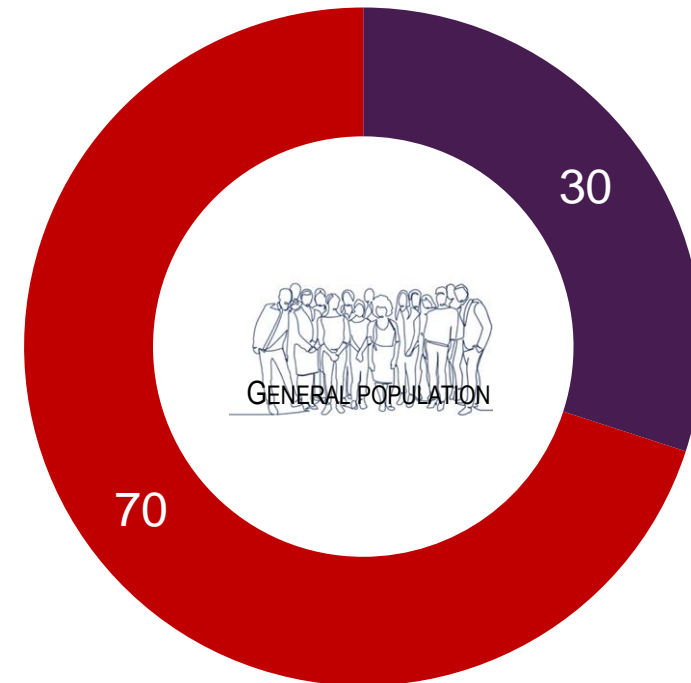
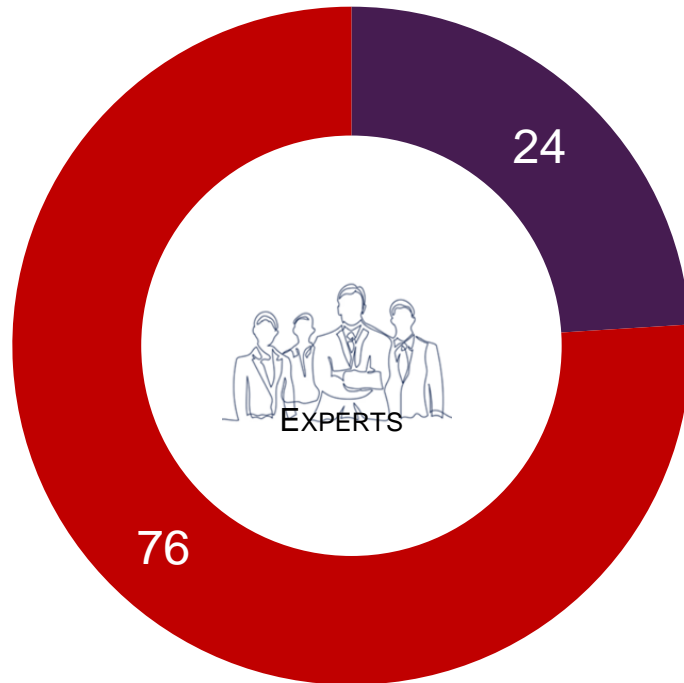
PREPAREDNESS OF THE PRIVATE SECTOR 32% (=)

40% IN SPAIN

OPINION ON INEQUALITIES AND SOCIAL TENSIONS

ALL COUNTRIES

- Inequalities and social tensions in my country are continuous and may not escalate in the future
- Inequalities are becoming more and more serious and could lead to increasing social tensions and fragmentation in my country



! New question

Regarding inequalities and social tensions, to which of the following opinions do you feel closer?

OPINION ON INEQUALITIES AND SOCIAL TENSIONS – PER CLUSTER AND COUNTRY

■ Inequalities and social tensions in my country are continuous and may not escalate in the future

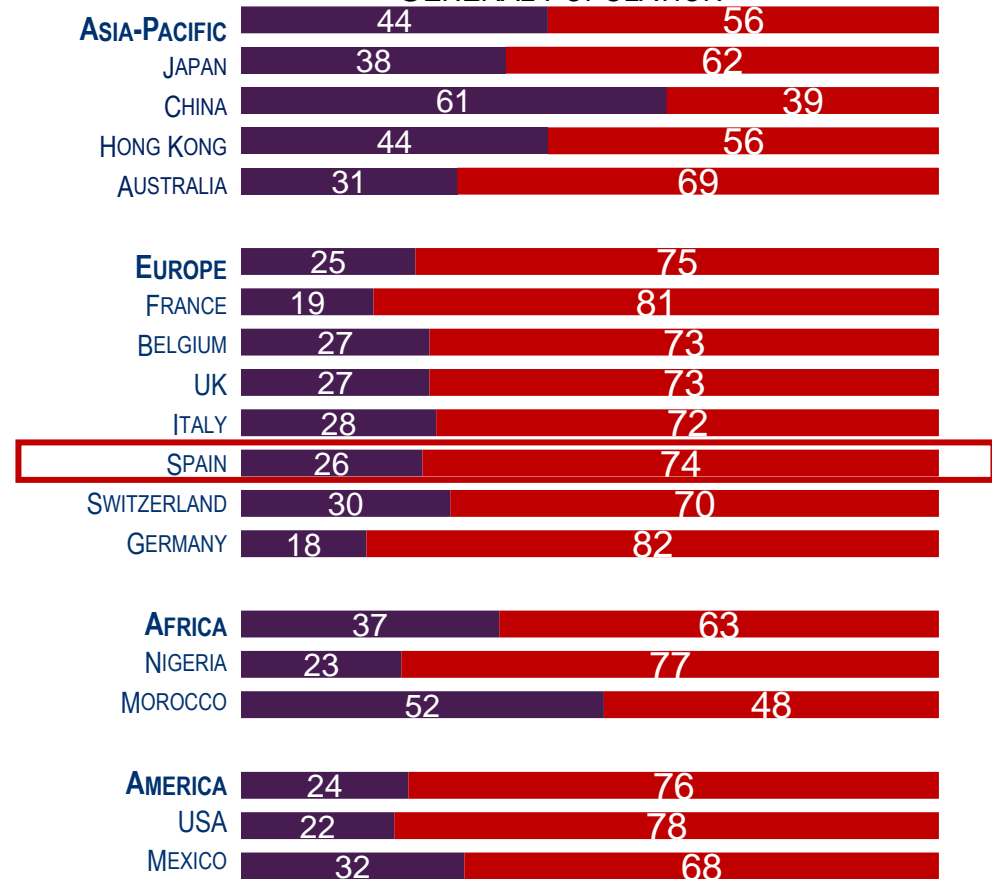
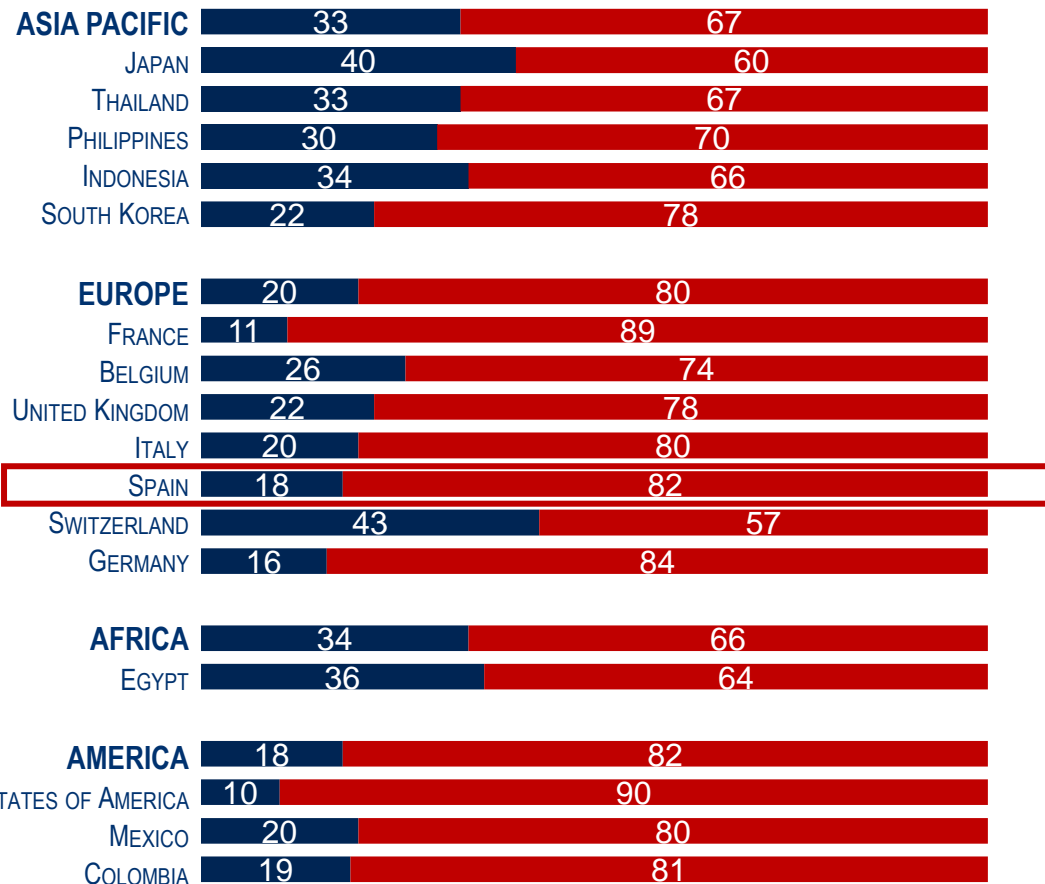
■ Inequalities are becoming more and more serious and could lead to increasing social tensions and fragmentation in my country



EXPERTS



GENERAL POPULATION



THE RISK THAT INEQUALITIES AND SOCIAL TENSIONS LEAD TO CERTAIN CONSEQUENCES

ALL COUNTRIES

■ VERY IMPORTANT
 ■ SOMEWHAT IMPORTANT
 ■ SOMEWHAT NOT IMPORTANT
 ■ NOT IMPORTANT AT ALL



% IMPORTANT

ALL COUNTRIES

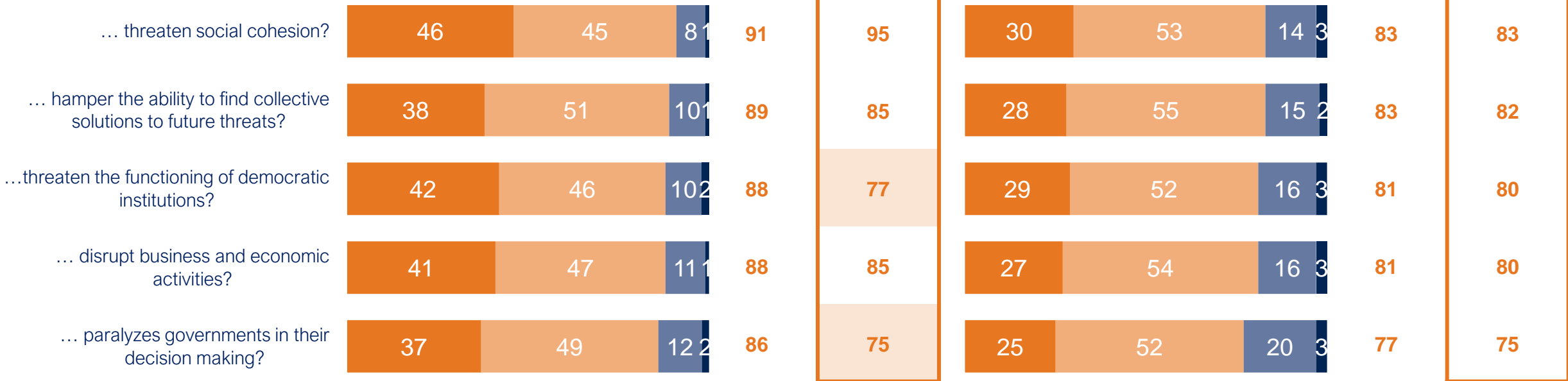
SPAIN



% IMPORTANT

ALL COUNTRIES

SPAIN



New question

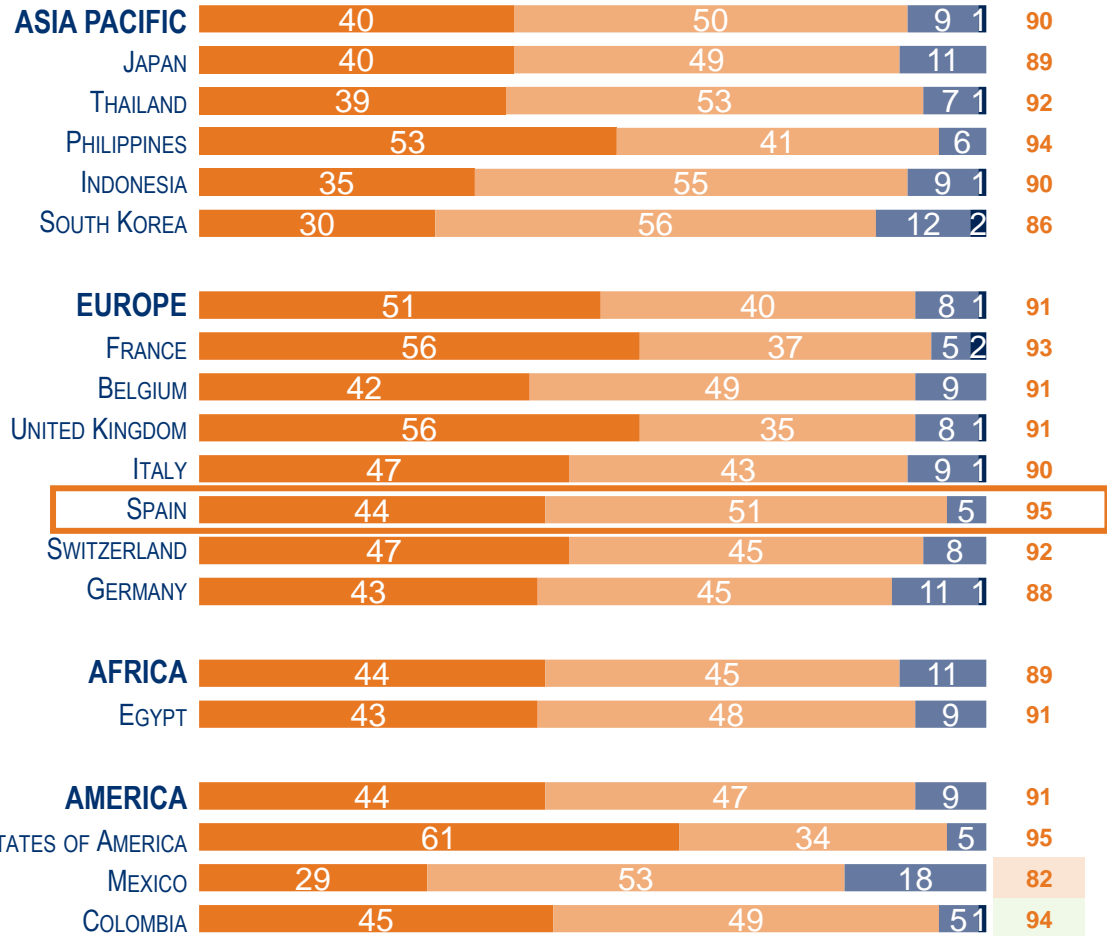
... THREATEN SOCIAL COHESION?

■ VERY IMPORTANT
 ■ SOMEWHAT IMPORTANT
 ■ SOMEWHAT NOT IMPORTANT
 ■ NOT IMPORTANT AT ALL



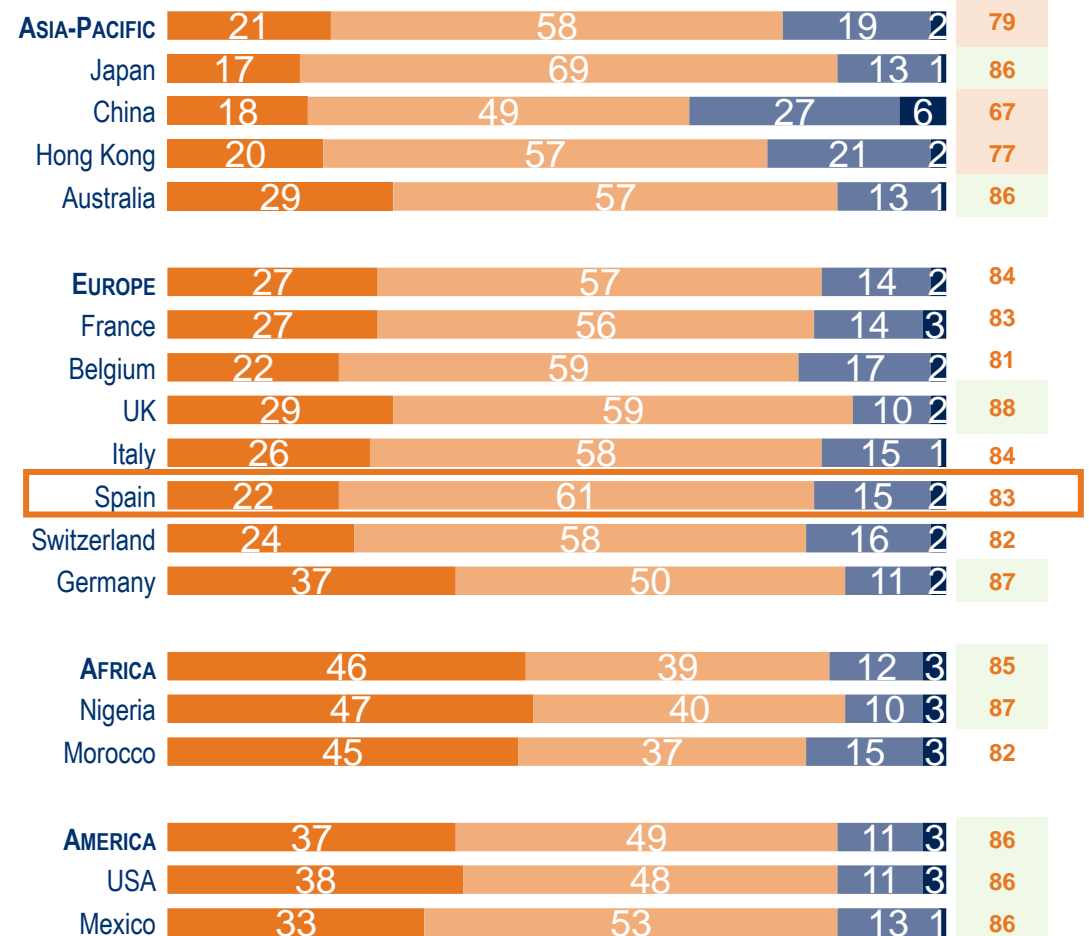
EXPERTS

% Important



GENERAL POPULATION

% Important



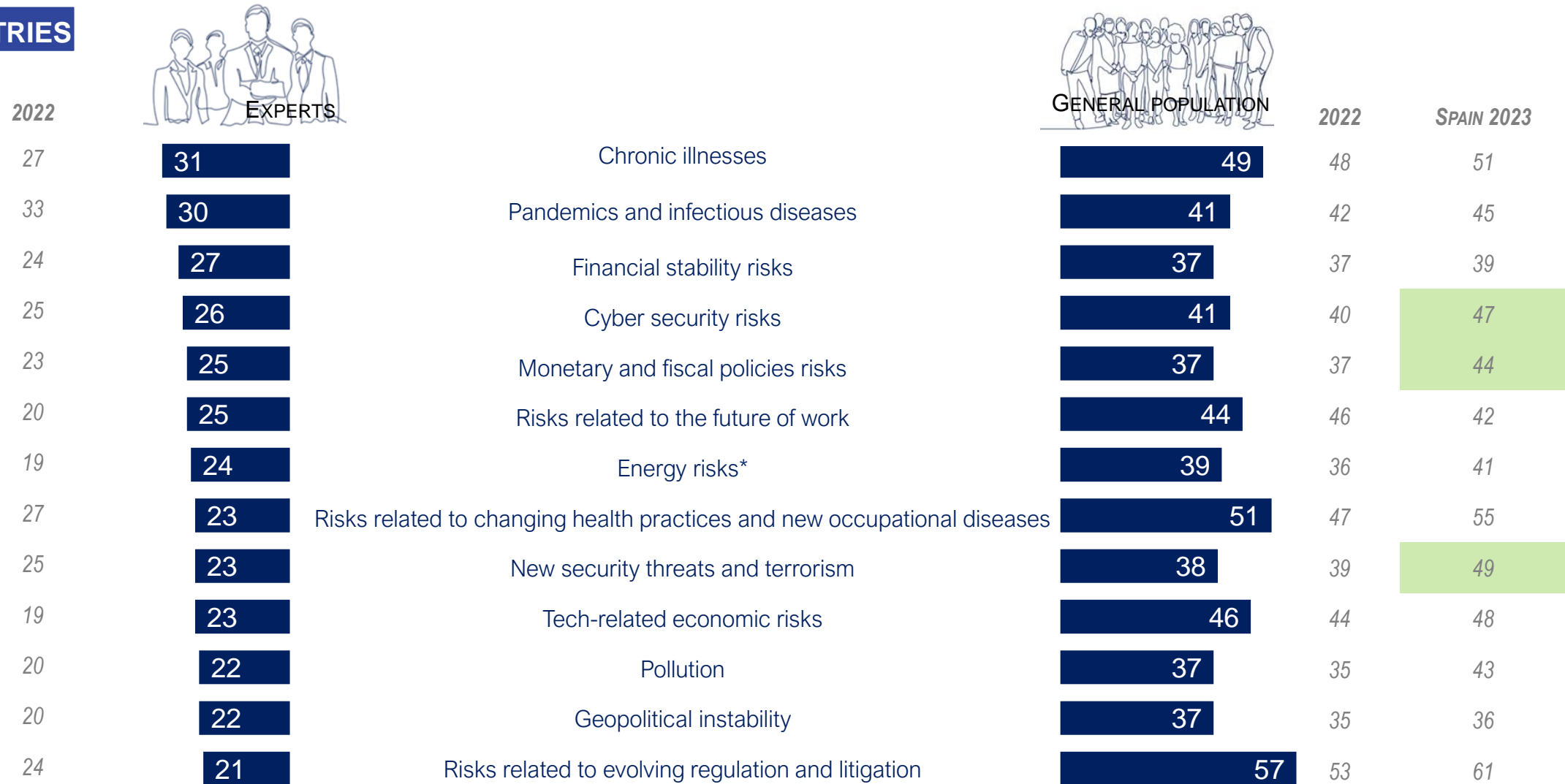
PREPAREDNESS OF PUBLIC AUTHORITIES AND THE PRIVATE SECTOR FOR FUTURE RISKS

E

PREPAREDNESS OF PUBLIC AUTHORITIES FOR FUTURE RISKS - % YES

■ YES

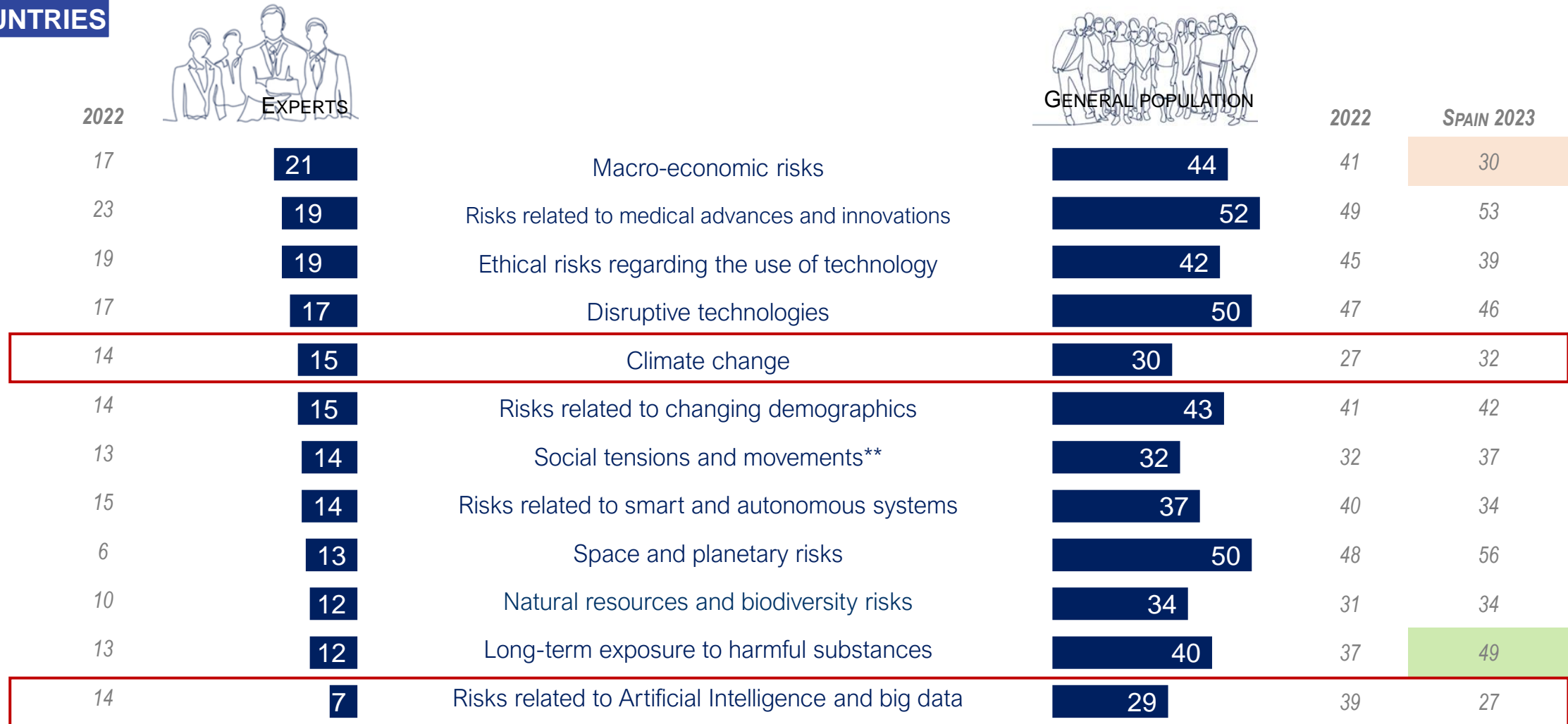
ALL COUNTRIES



PREPAREDNESS OF PUBLIC AUTHORITIES FOR FUTURE RISKS - % YES

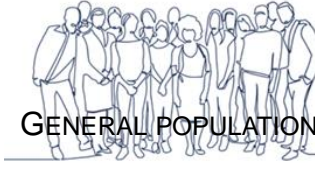
■ YES

ALL COUNTRIES



PREPAREDNESS OF THE PRIVATE SECTOR FOR FUTURE RISKS - % YES

ALL COUNTRIES



PREPAREDNESS OF THE PRIVATE SECTOR FOR FUTURE RISKS - % YES

ALL COUNTRIES



EXPERTS

■ YES



GENERAL POPULATION

	2022		2022	SPAIN 2023
29	28	Disruptive technologies	50	56
16	27	Space and planetary risks	50	59
26	26	Pollution	36	42
22	25	New security threats and terrorism	35	43
24	23	Risks related to changing demographics	42	40
22	23	Risks related to smart and autonomous systems	39	39
20	23	Climate change	29	30
15	21	Social tensions and movements	32	40
14	21	Natural resources and biodiversity risks	32	34
18	19	Long-term exposure to harmful substances	38	42
22	16	Risks related to Artificial Intelligence and big data	31	27
15	16	Geopolitical instability	31	37

**OPINION ABOUT
PROGRESS, RISK
MANAGEMENT AND
LEVEL OF TRUST
TOWARDS
DIFFERENT
ACTORS**

F

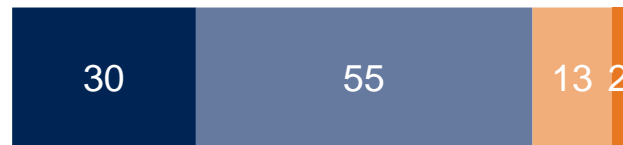
OPINION ABOUT PROGRESS AND RISK MANAGEMENT

ALL COUNTRIES

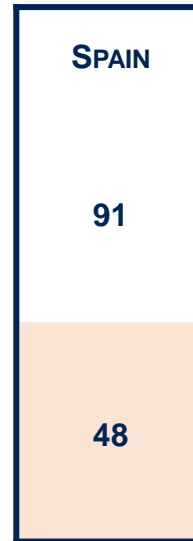
TOTALLY AGREE
 SOMEWHAT AGREE
 SOMEWHAT DISAGREE
 TOTALLY DISAGREE



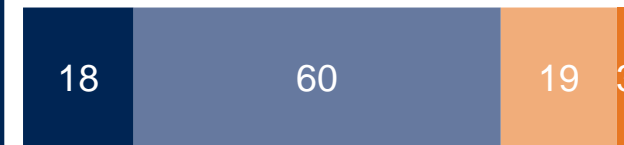
A collective form of progress (benefiting individuals, economies and society) is still within reach



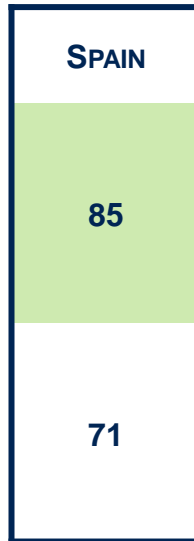
ALL COUNTRIES



% AGREE

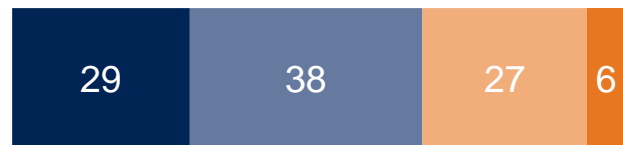


ALL COUNTRIES

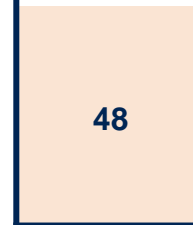


% AGREE

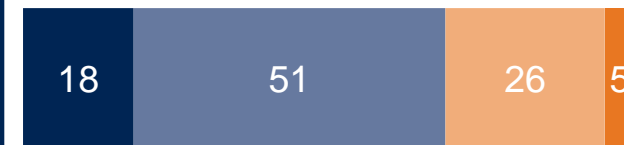
We, as individuals, economies, and society, have what it takes to fight and manage future risks



ALL COUNTRIES



% AGREE



ALL COUNTRIES



% AGREE



New question

Do you agree or disagree with the following statements?

LEVEL OF TRUST TOWARDS DIFFERENT ACTORS TO LIMIT THE CONSEQUENCES OF A NEW GLOBAL CRISIS

ALL COUNTRIES

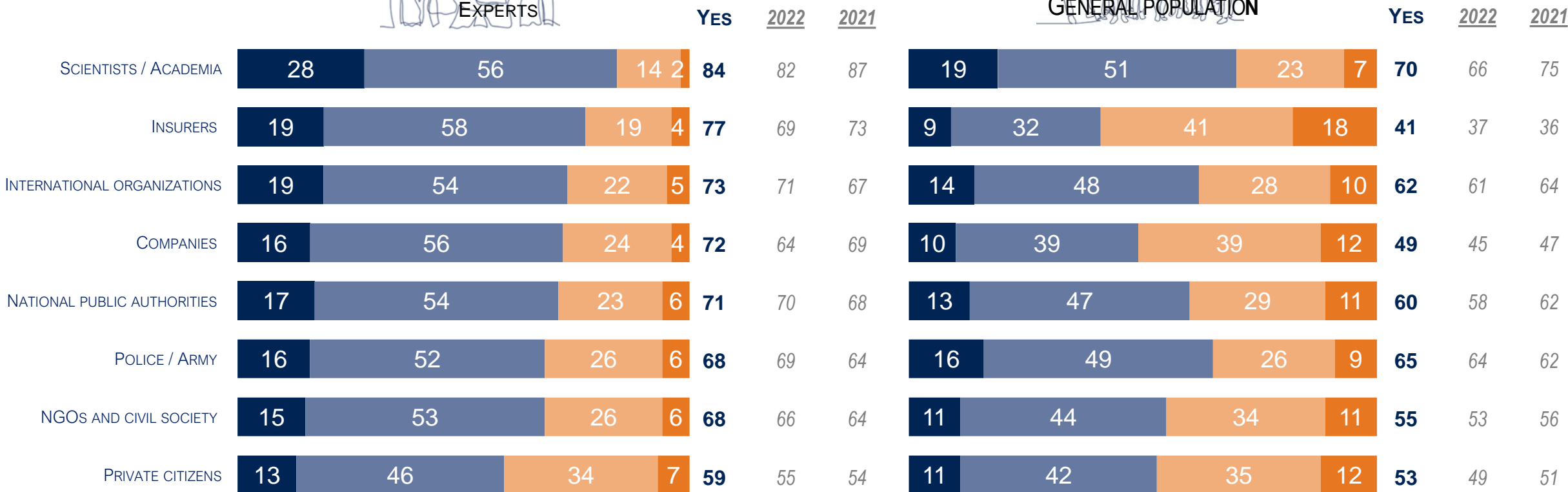
Yes, totally
 Yes, somehow
 No, somehow
 No, not at all



EXPERTS



GENERAL POPULATION



If a new global crisis happens in the next 12 months, would you trust the following actors to limit the consequences of this new crisis in the world?

LEVEL OF TRUST TOWARDS DIFFERENT ACTORS TO LIMIT THE CONSEQUENCES OF A NEW GLOBAL CRISIS – PER CLUSTER AND COUNTRY



ALL COUNTRIES



	% YES	ALL	EUROPE	FRANCE	BELGIUM	UNITED KINGDOM	ITALY	SPAIN	SWITZERLAND	GERMANY
Scientists / Academia	84	84	84	85	84	85	84	88	79	79
Insurers	77	69	69	70	63	67	79	71	76	56
International organizations	73	62	62	51	58	66	78	68	67	60
Companies	72	63	63	63	54	63	71	73	59	65
National public authorities	71	70	70	72	55	66	80	66	79	70
Police / Army	68	71	71	75	55	73	67	70	75	68
NGOs and civil society	68	63	63	61	62	68	63	60	61	57
Private citizens	59	51	51	49	44	50	54	52	56	56



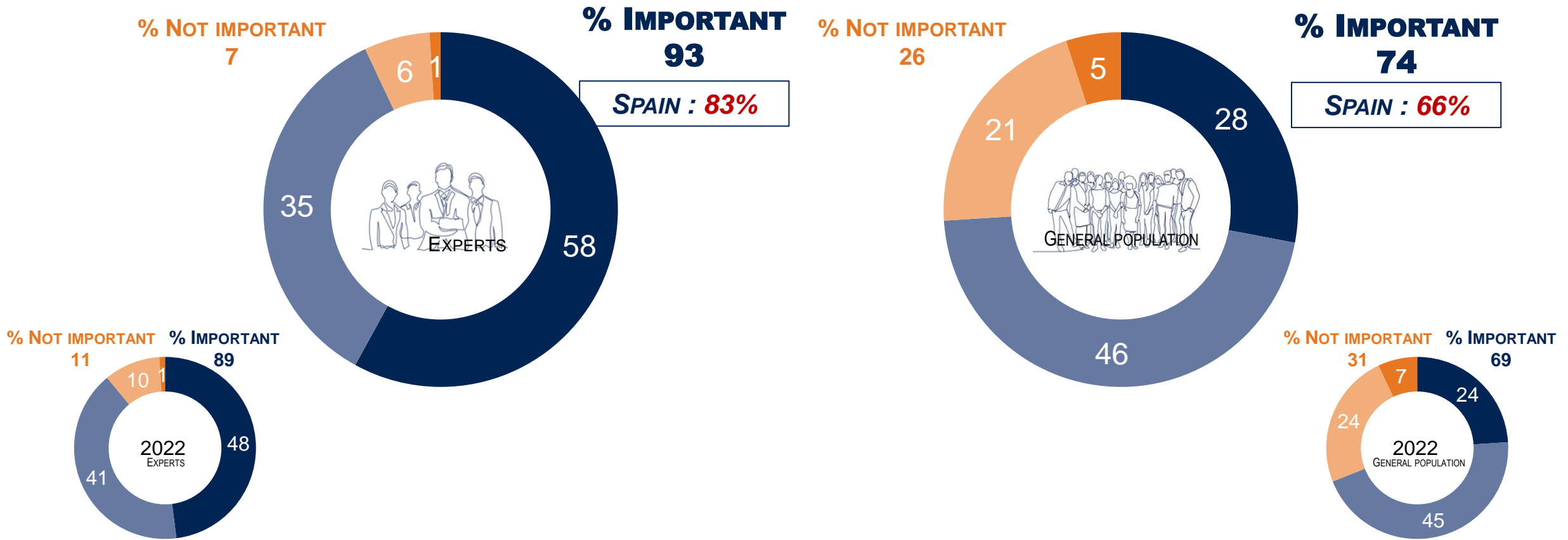
	% YES	ALL	EUROPE	FRANCE	BELGIUM	UK	ITALY	SPAIN	SWITZERLAND	GERMANY
Scientists / Academia	70	70	70	68	71	78	76	73	63	63
Police / Army	65	62	62	62	57	63	68	66	62	58
International organizations	62	58	58	50	54	63	60	66	56	59
National public authorities	60	56	56	48	49	57	57	62	62	56
NGOs and civil society	55	54	54	55	53	55	60	55	52	49
Private citizens	53	49	49	51	46	49	58	52	46	43
Companies	49	47	47	44	39	46	52	54	44	48
Insurers	41	34	34	26	27	37	39	40	39	33

If a new global crisis happens in the next 12 months, would you trust the following actors to limit the consequences of this new crisis in the world?

THE ROLE OF INSURERS TO LIMIT THE IMPACT OF FUTURE RISKS

ALL COUNTRIES

■ Very important
 ■ Somewhat important
 ■ Not very important
 ■ Not important at all



Do you think that in the future the role of insurers in the protection against these emerging risks will be*...

THE ROLE OF INSURERS TO LIMIT THE IMPACT OF FUTURE RISKS

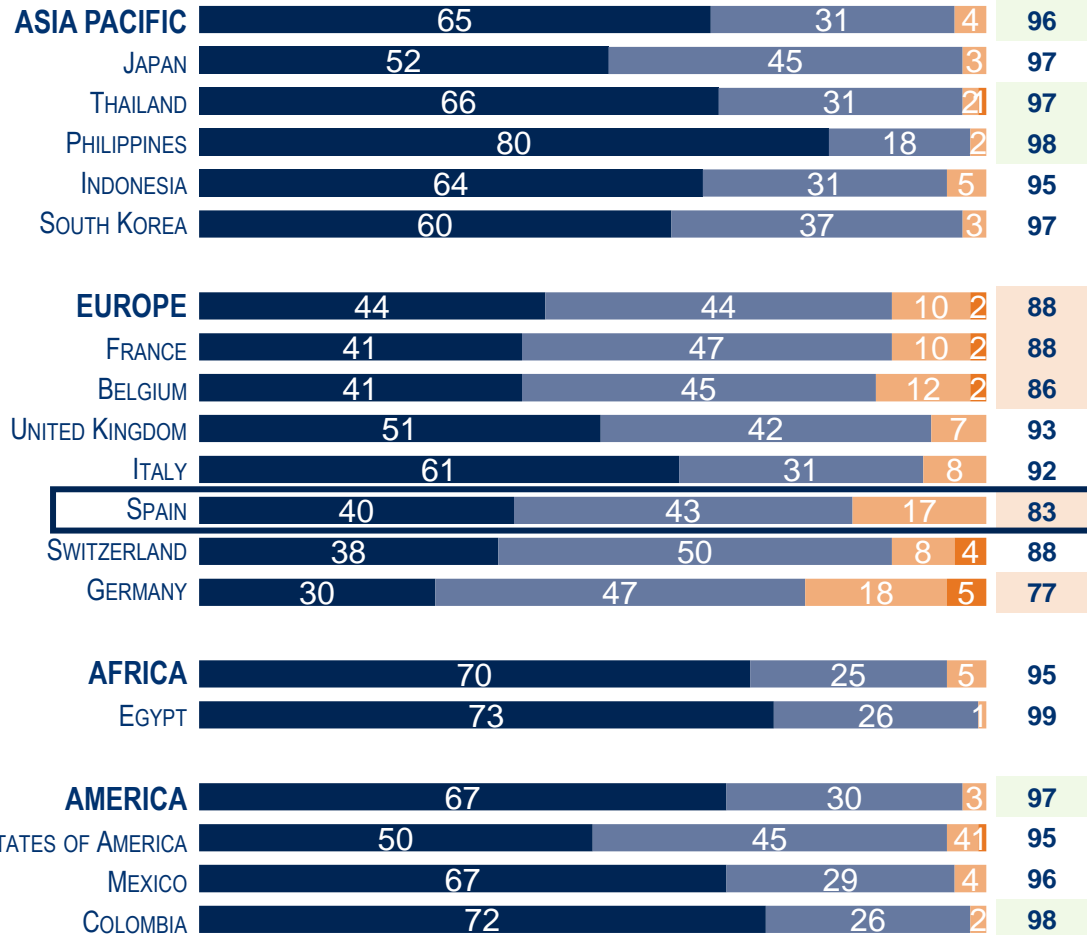
■ Very important ■ Somewhat important
■ Not very important ■ Not important at all

ALL COUNTRIES



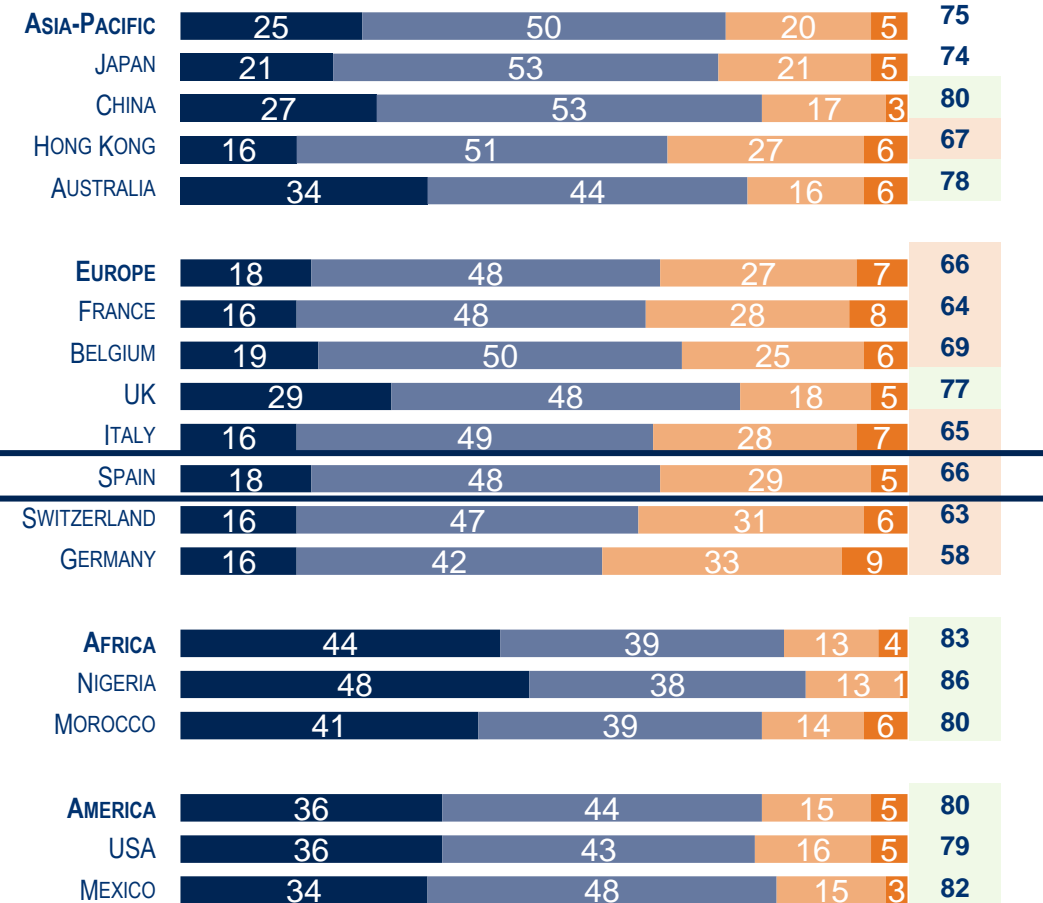
EXPERTS

% Important



GENERAL POPULATION

% Important



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GAME CHANGERS

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You act better when you are sure.