

GLOBALIZATION 4.0

The Human Experience

Presented to the World Economic Forum by SAP + Qualtrics

Survey methodology

An original survey research project with more than 10,000 respondents across 29 countries that comprise 74% of the global population

- **LENGTH OF INTERVIEW**
11.5 minutes (median)
- **SURVEY TYPE**
Attitudinal
- **SURVEY FIELDDED**
January 4-17, 2019
- **PANELISTS**
Online, general population
- **RESPONSES**
10,069 participants across 29 countries

Worldwide targeted sample of adults (ages 18+) drawn from standing online research panels.

Sample stratified to ensure representation across 8 regions; countries selected on size within region (by population) and panel availability.

Quotas based on country-specific age and gender distributions.

Composition of regions

WESTERN EUROPE

Germany
(n=315)

France
(n=317)

United Kingdom
(n=317)

Italy
(n=316)

Spain
(n=209)

SUB-SAHARAN AFRICA

Nigeria
(n=356)

South Africa
(n=210)

MIDDLE EAST & NORTH AFRICA

Egypt
(n=420)

Turkey
(n=420)

Morocco
(n=209)

Algeria
(n=198)

Saudi Arabia
(n=210)

EASTERN EUROPE & CENTRAL ASIA

Russia
(n=529)

Ukraine
(n=315)

Poland
(n=315)

Romania
(n=314)

SOUTH ASIA

India
(n=839)

Pakistan
(n=197)

Bangladesh
(n=183)

EAST ASIA & PACIFIC

China
(n=843)

Indonesia
(n=315)

Japan
(n=313)

LATIN AMERICA & CARIBBEAN

Brazil
(n=420)

Mexico
(n=313)

Colombia
(n=209)

Argentina
(n=208)

Peru
(n=211)

NORTH AMERICA

United States
(n=735)

Canada
(n=315)

RESEARCH THEMES

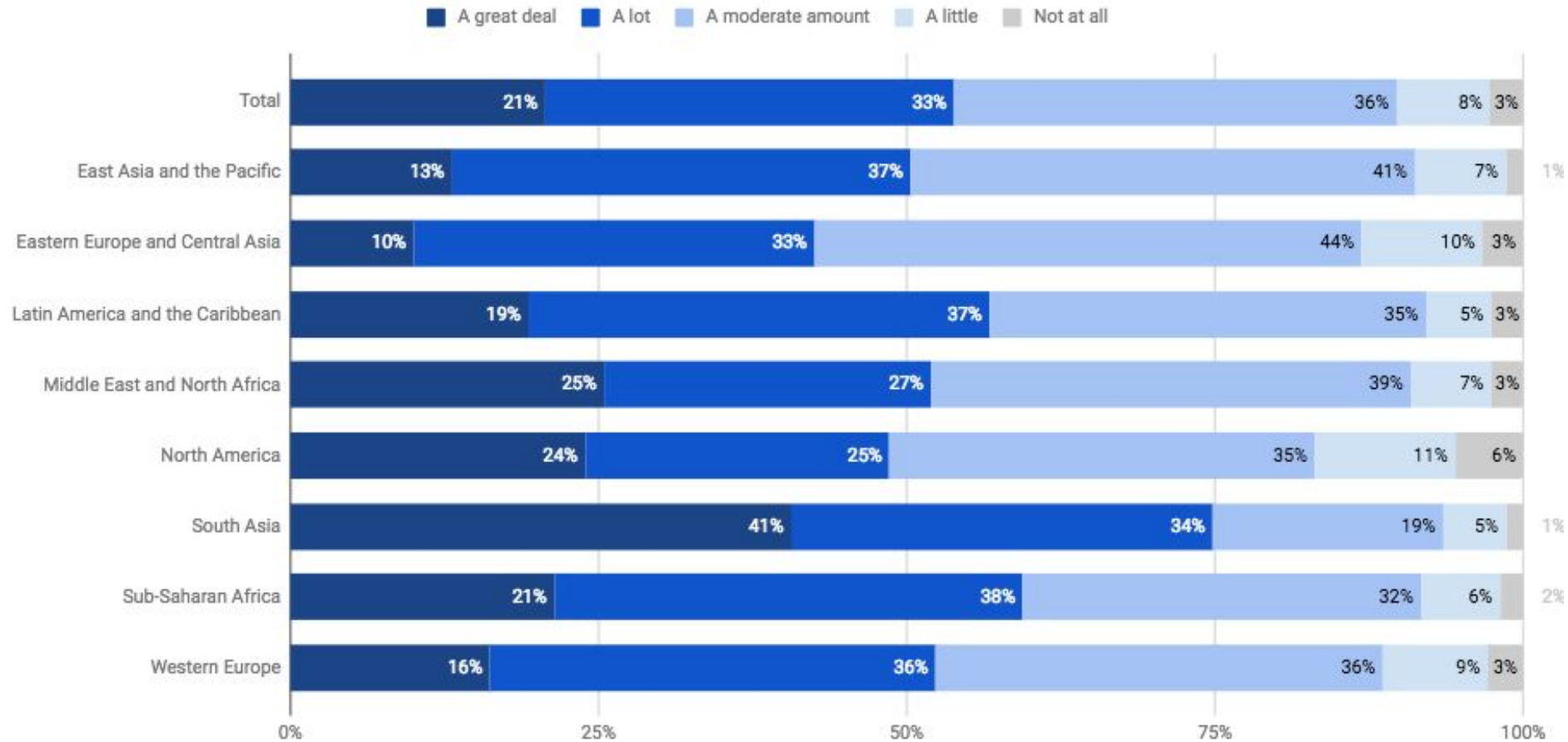
1. How do we save the planet without killing economic growth?
2. How do we make sure technology makes life better not worse?
3. Can you be a patriot and a global citizen?
4. What should work look like in the future?
5. How do we create a fairer economy?
6. How do we get countries working better together?

How do we save the planet without killing economic growth?

A majority of all respondents trust climate science, especially in South Asia, but 17% in North America express little to no trust.

QUESTION

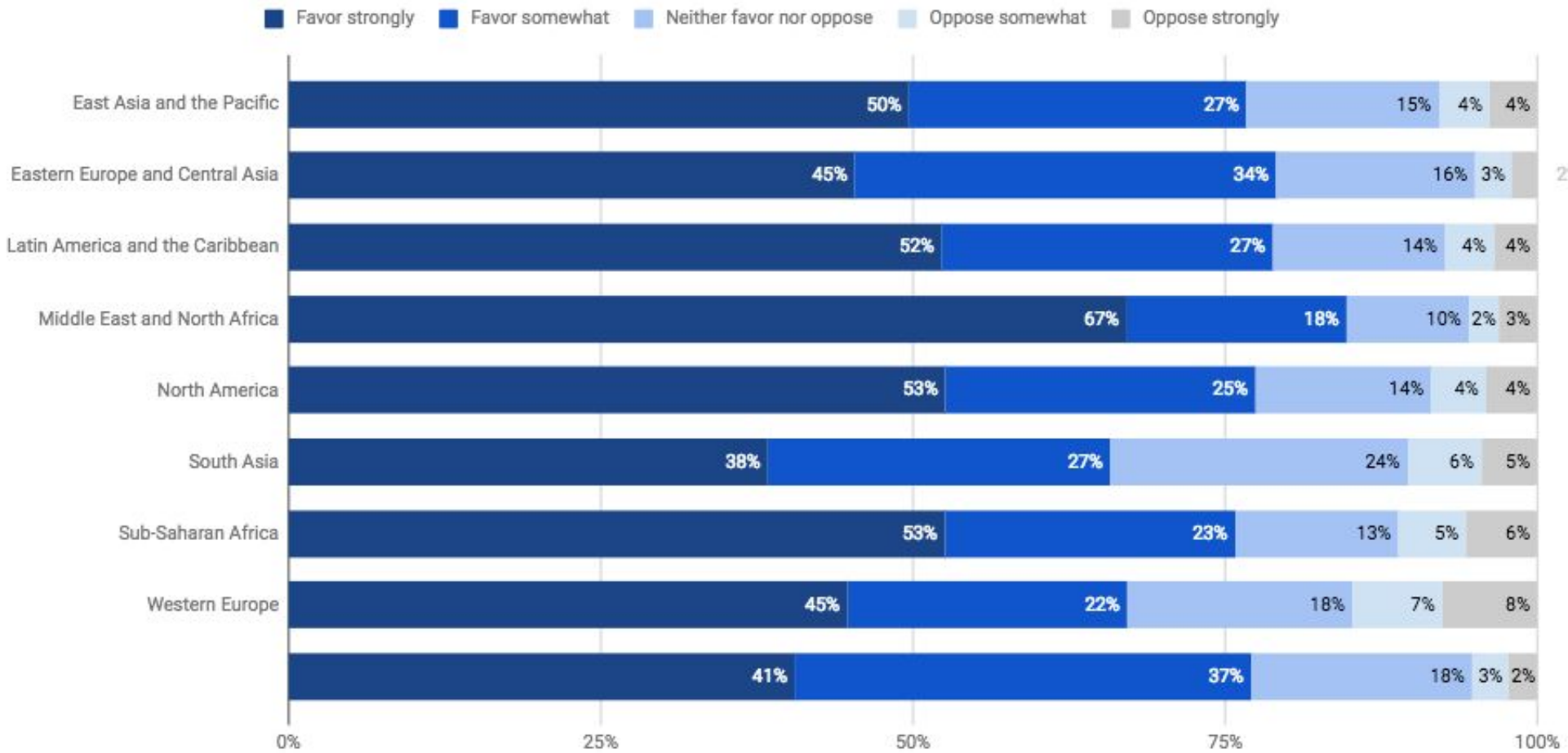
How much do you trust what scientists say about the environment?



Penalties on polluters are popular worldwide, with majorities in many regions strongly favoring such policies.

QUESTION

Do you favor or oppose policies that put extra taxes on businesses that pollute?

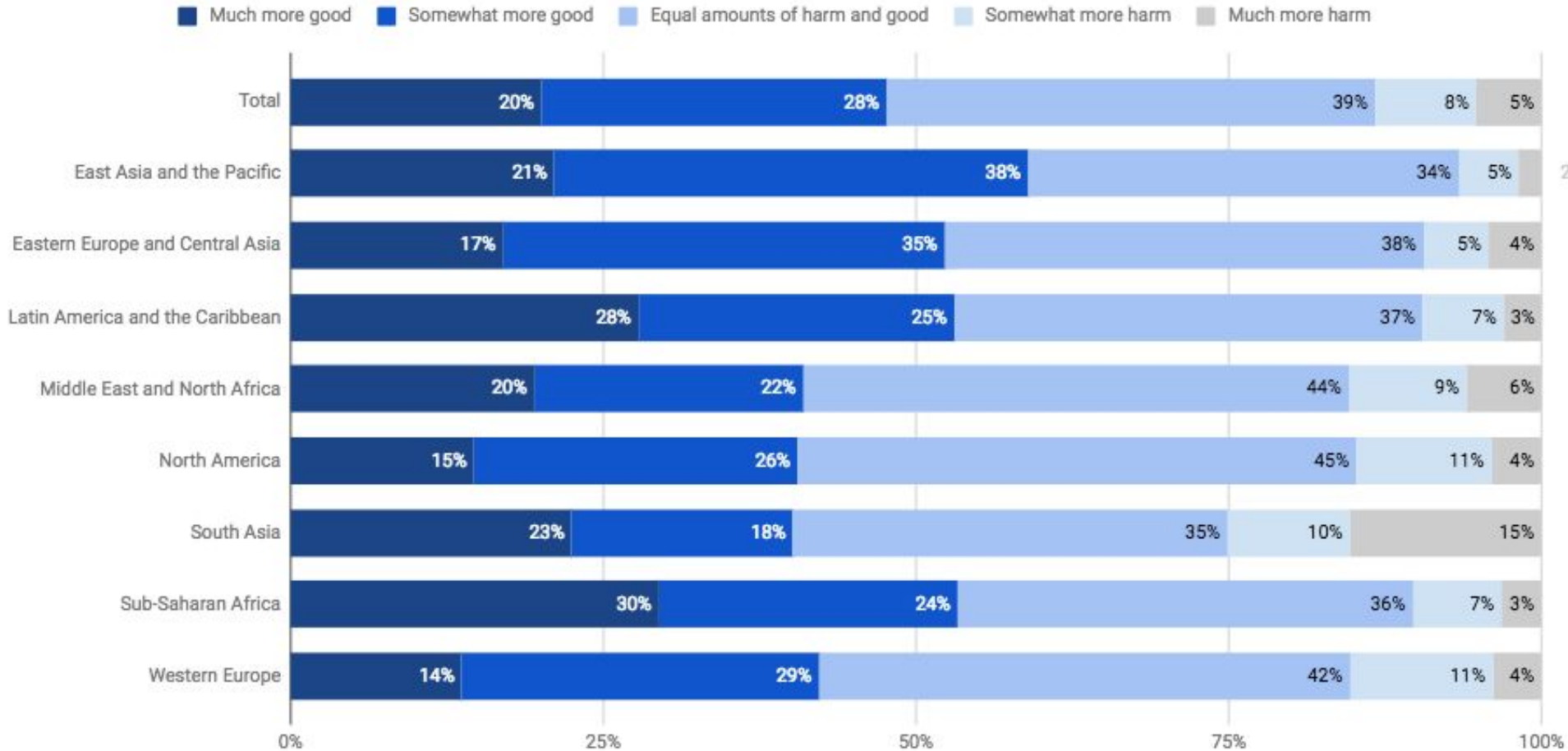


**Would you say that technology does more
harm or good in society?**

Globally, technology is seen as doing much more good than harm, although 35-45% of respondents in every region are ambivalent.

QUESTION

Would you say that technology does more harm or good in society?



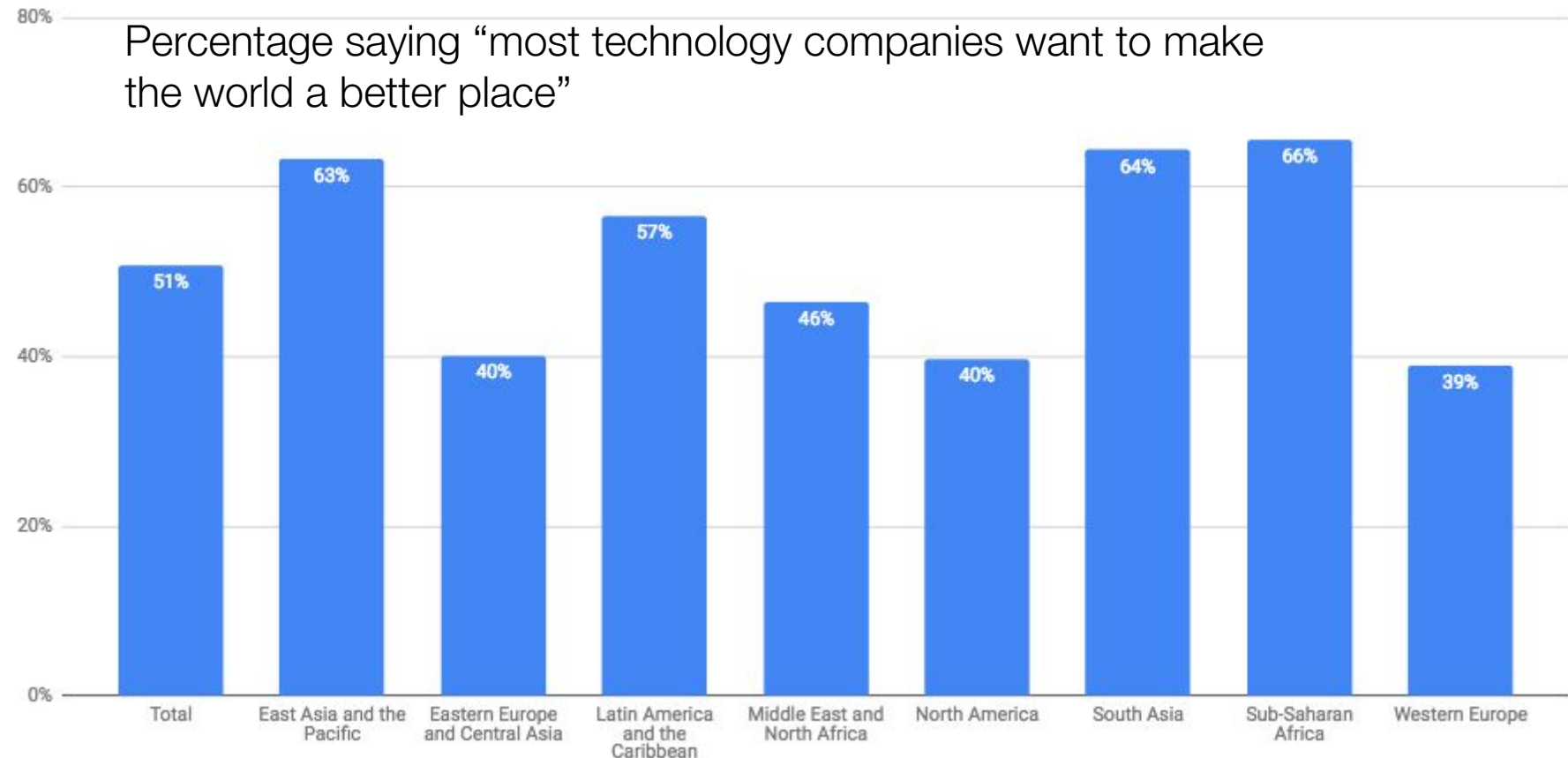
Global respondents are divided in their judgments, but super majorities in several regions see tech companies as altruistic.

QUESTION

Which comes closer to your view, even if neither is exactly right?

“Most technology companies want to make the world a better place” OR

“Most technology companies only want to make money”

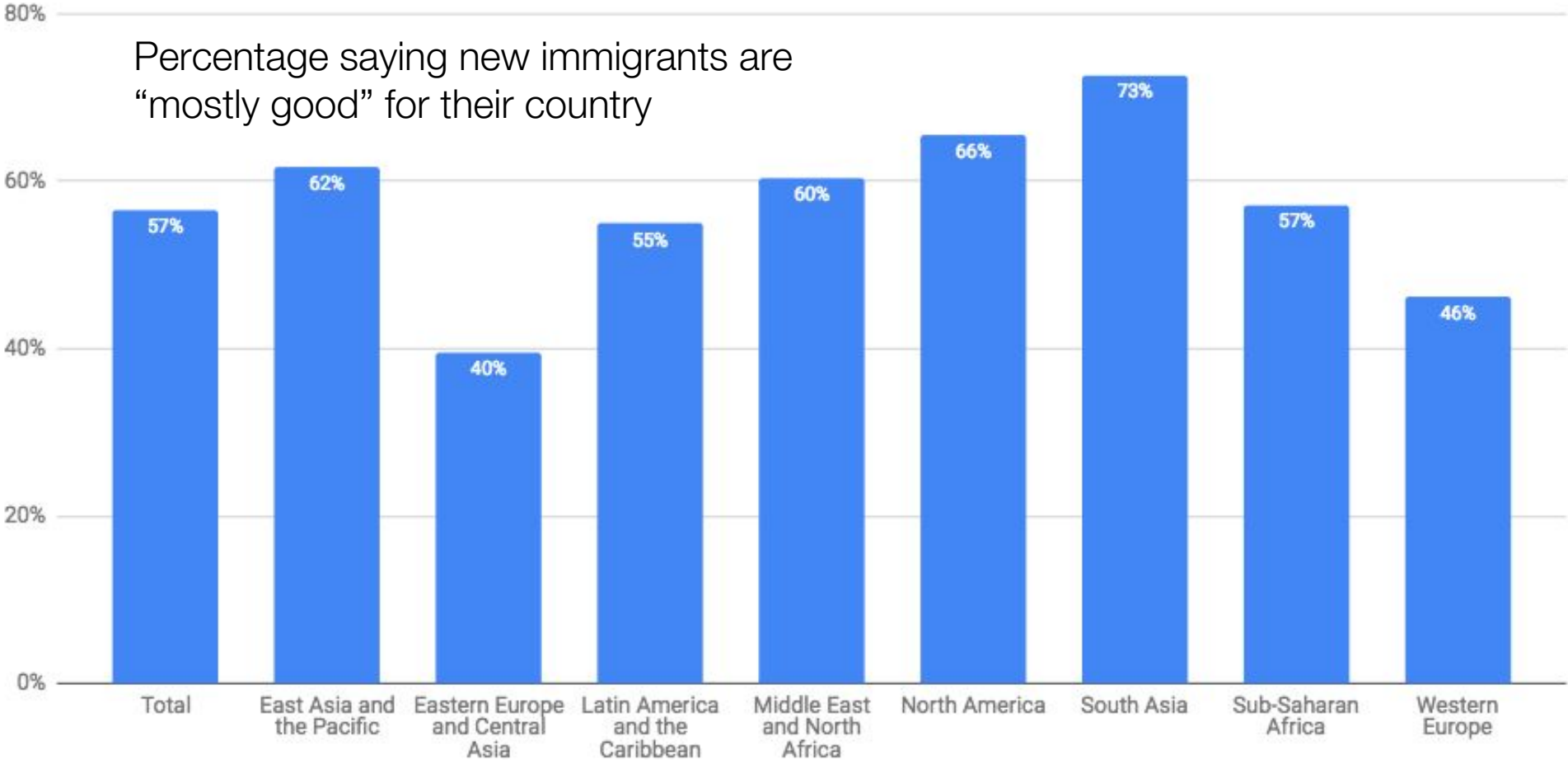


Can you be a patriot and a global citizen?

In most regions new immigrants are seen as “mostly good;” only in Europe do majorities see new immigrants as “mostly bad.”

QUESTION

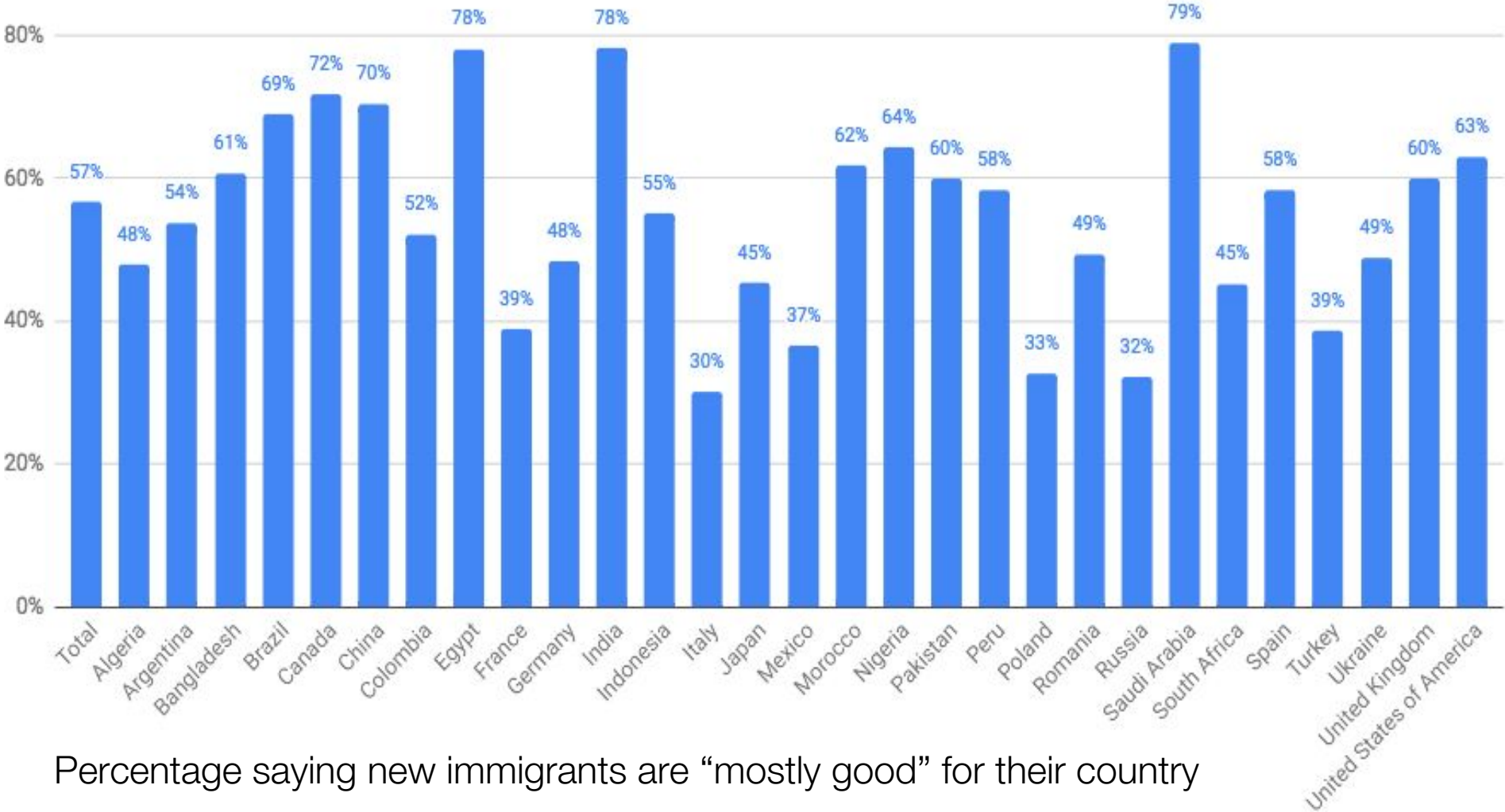
Would you say that new immigrants are mostly good or mostly bad for [your country]?



France, Italy, Poland, Russia, and Turkey stand out as countries especially pessimistic about new immigrants.

QUESTION

Would you say that new immigrants are mostly good or mostly bad for [your country]?

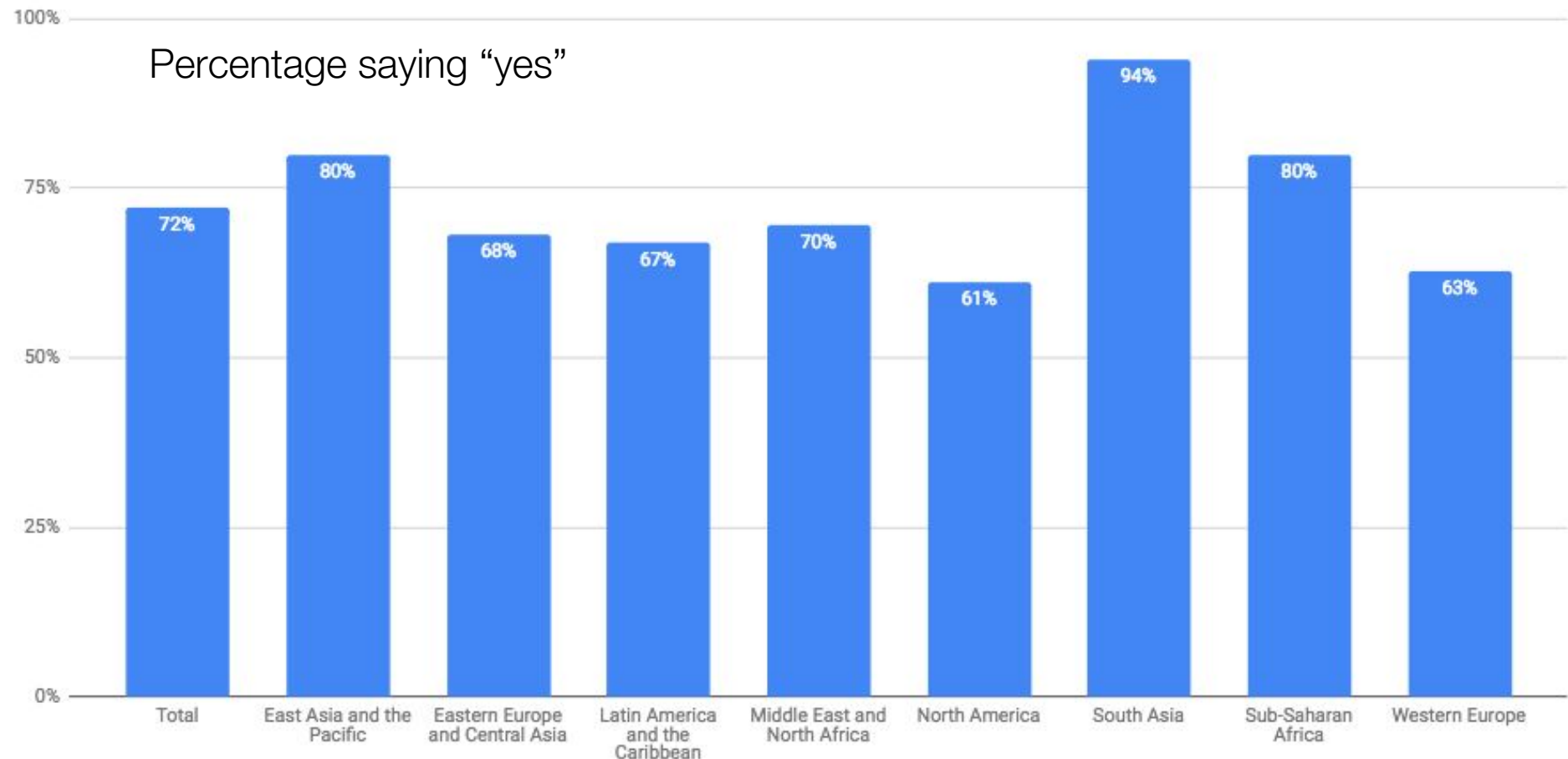


Percentage saying new immigrants are “mostly good” for their country

Majorities in every global region think their country has an obligation to help other countries in the world.

QUESTION

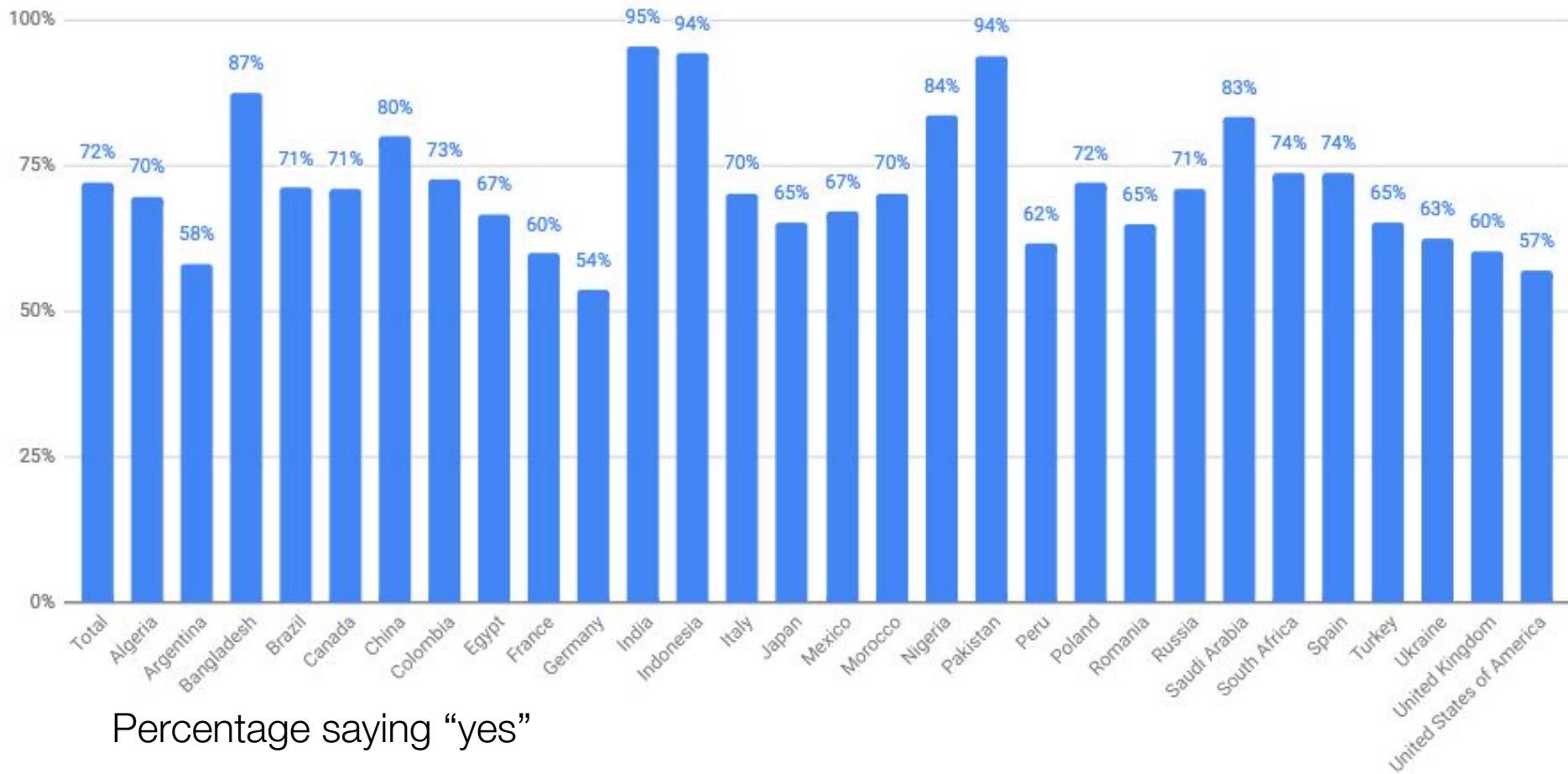
Generally speaking, do you think [your country] has a responsibility to help other countries in the world?



South Asian countries (India, Pakistan, and Bangladesh) as well as India, Nigeria, and Saudi Arabia show especially widespread support for international aid.

QUESTION

Generally speaking, do you think [your country] has a responsibility to help other countries in the world?

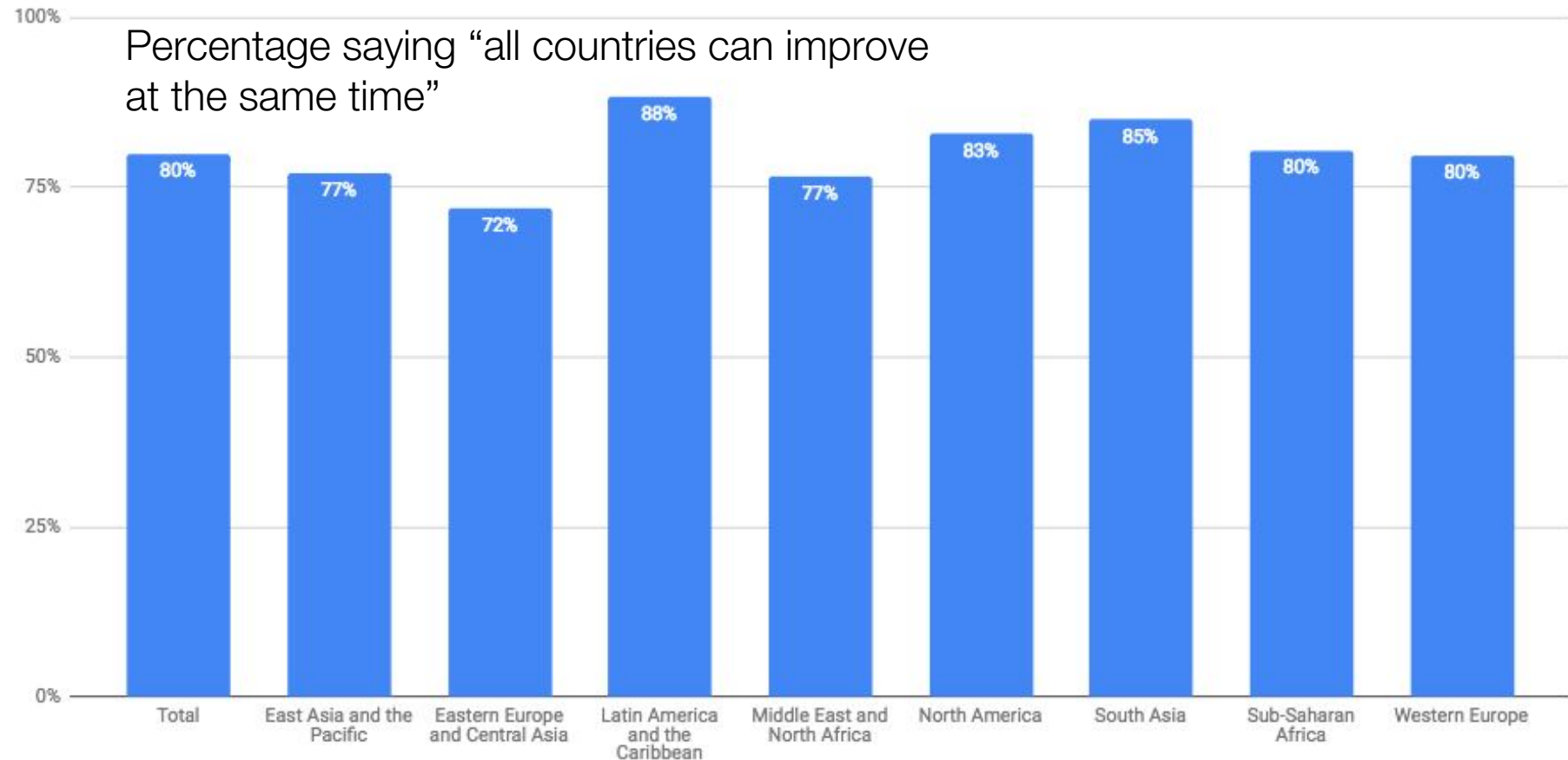


Percentage saying "yes"

Overwhelming majorities in every region reject the notion of improvement as a zero-sum game.

QUESTION

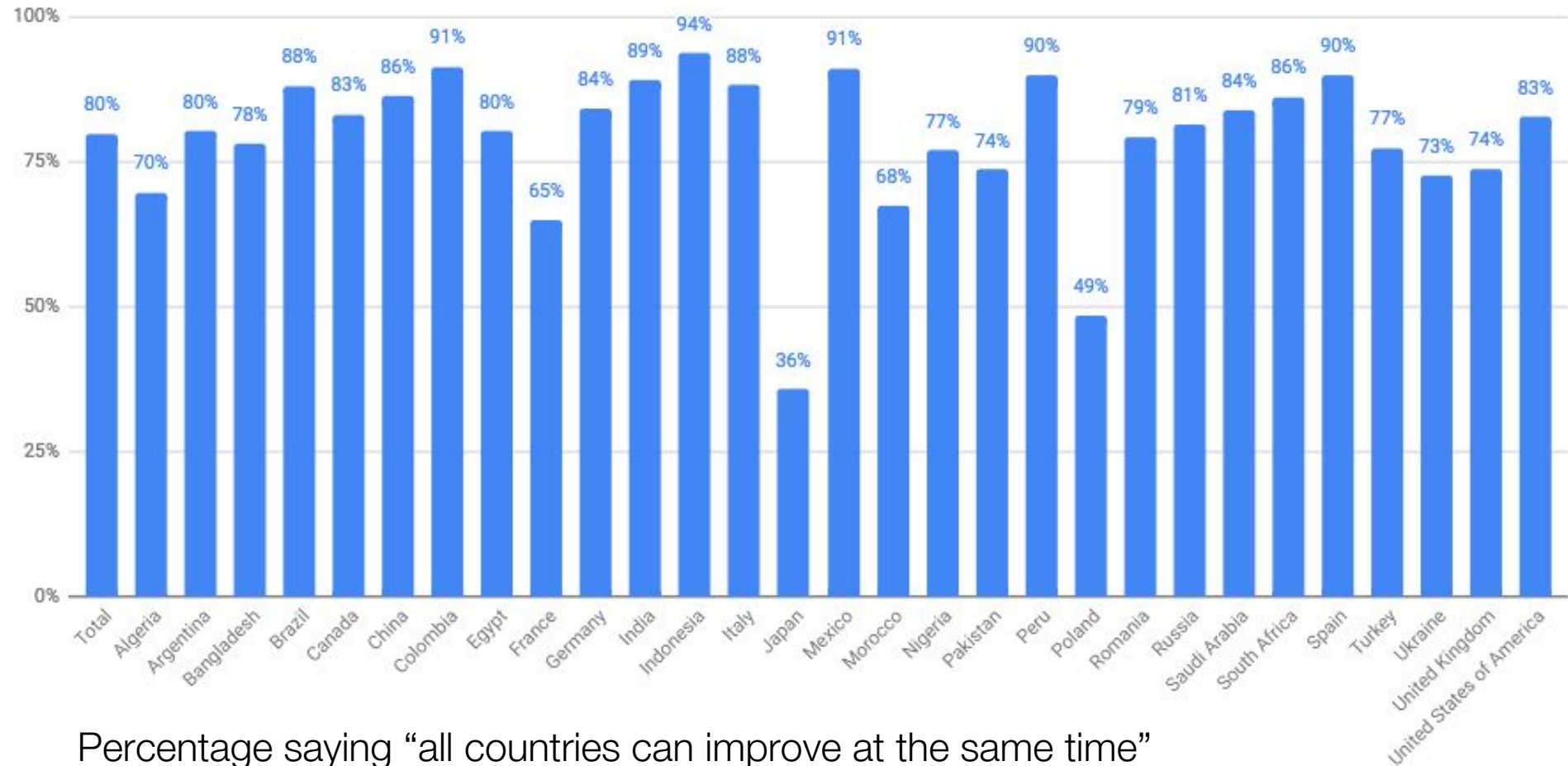
Generally speaking, do you think that all countries can improve at the same time or that if some countries improve others must become worse off?



Across all but two included countries (Japan and Poland), overwhelming majorities believe that all countries can improve at the same time.

QUESTION

Generally speaking, do you think that all countries can improve at the same time or that if some countries improve others must become worse off?



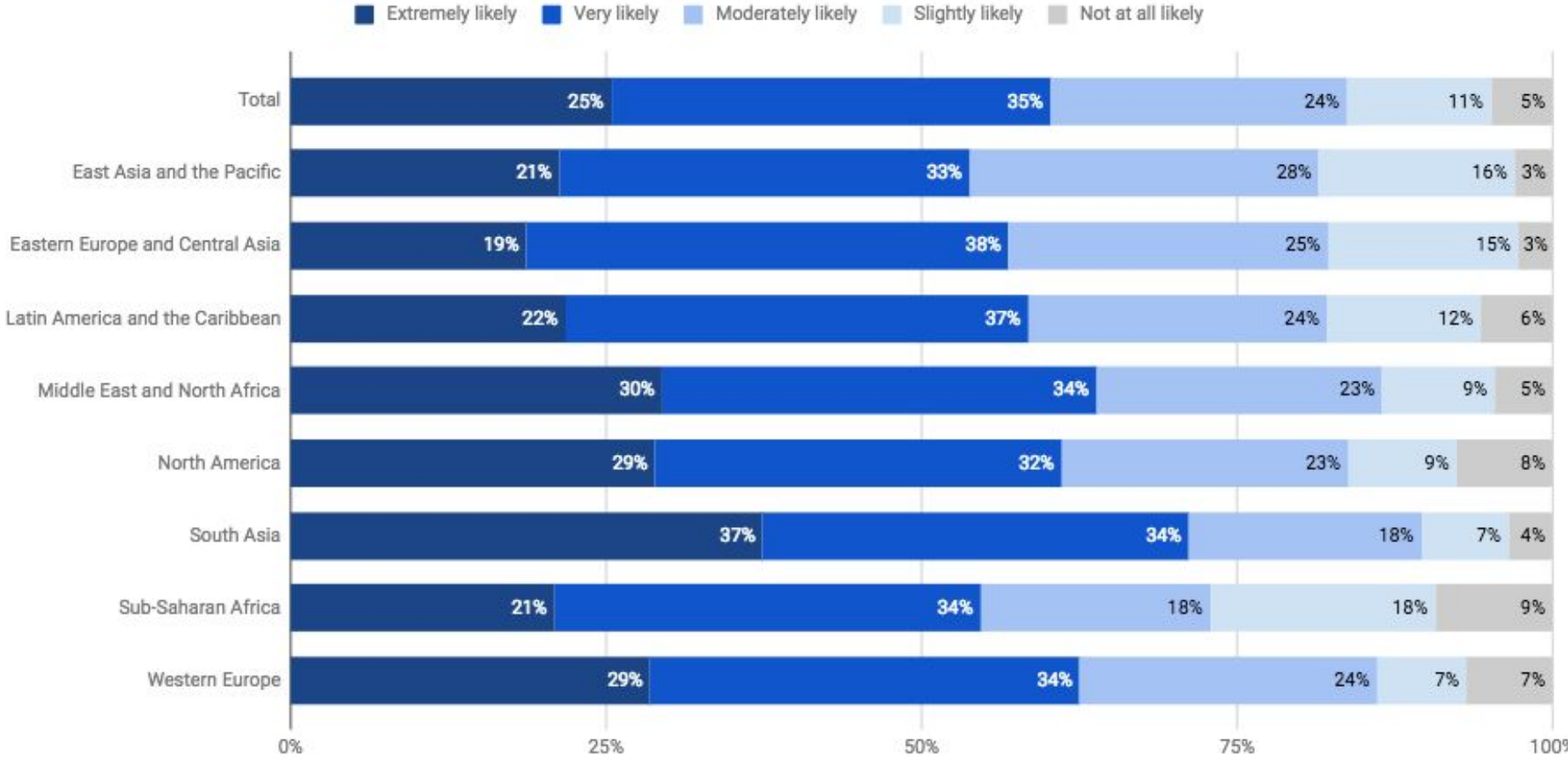
Percentage saying “all countries can improve at the same time”

What should work look like in the future?

Majorities of workers in every region expect their work to be similar in 5 years to what they do today.

QUESTION

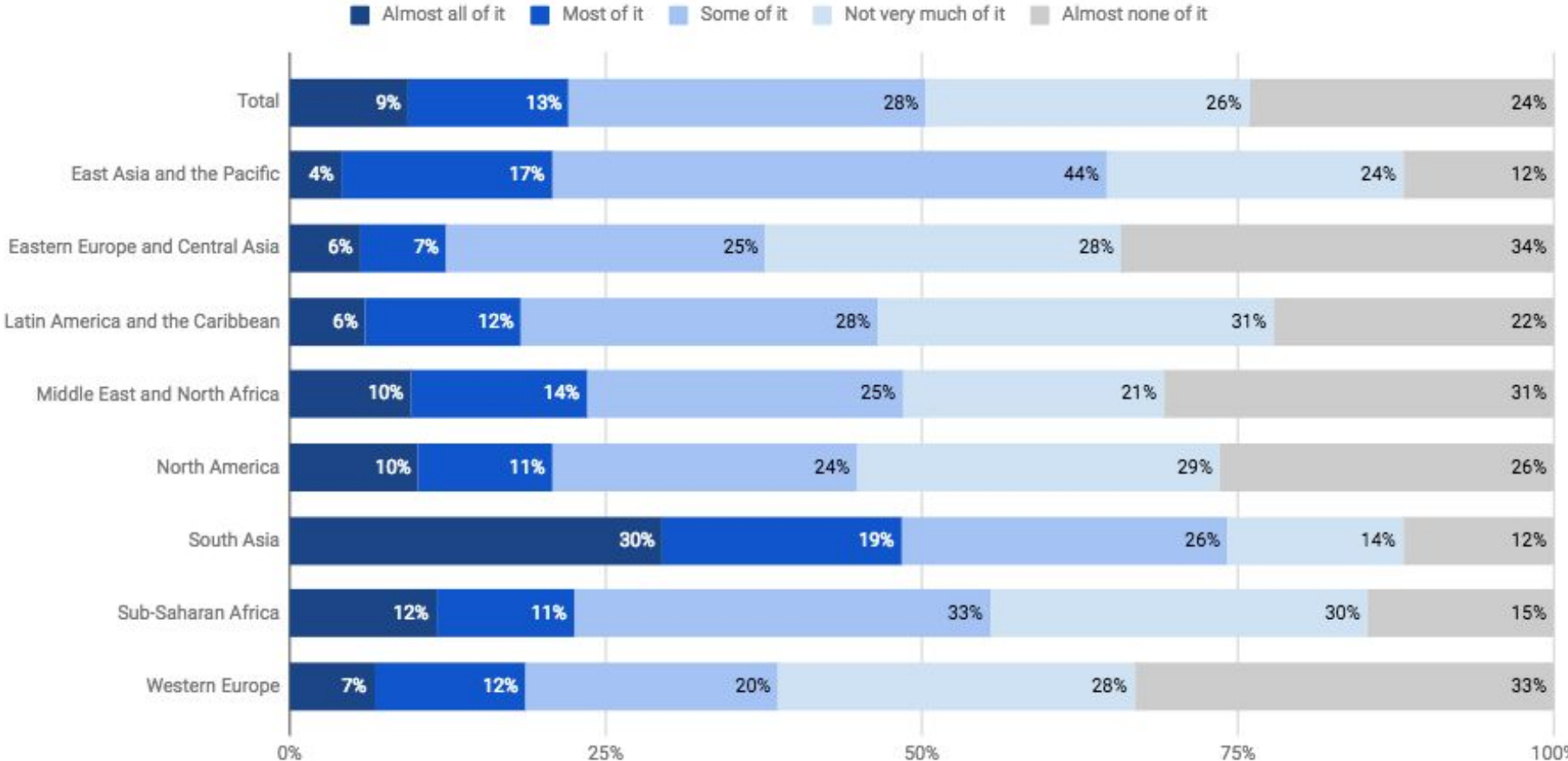
Supposing that you are still working, how likely are you to be doing the same kind of work in 5 years that you are doing today?



Most workers see technology as able to do only “some” or less of their work, but South Asians feel more replaceable than other respondents.

QUESTION

About how much of what you do in your job do you think could be done today by a machine or robot?

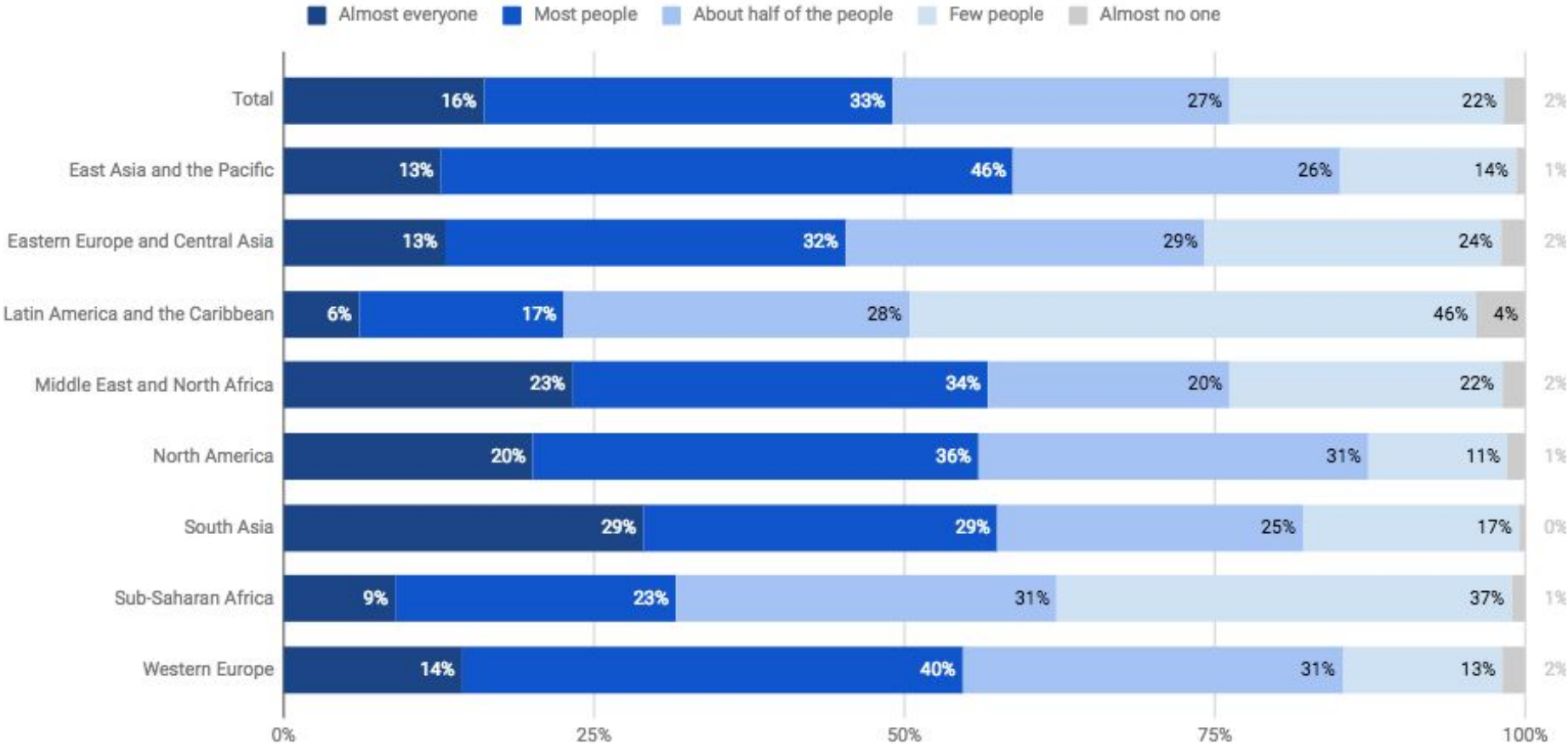


How do we create a fairer economy?

Respondents observe disparities in access to education: majorities in Eastern Europe/Central Asia, Latin America, and Sub-Saharan Africa believe half or fewer have access.

QUESTION

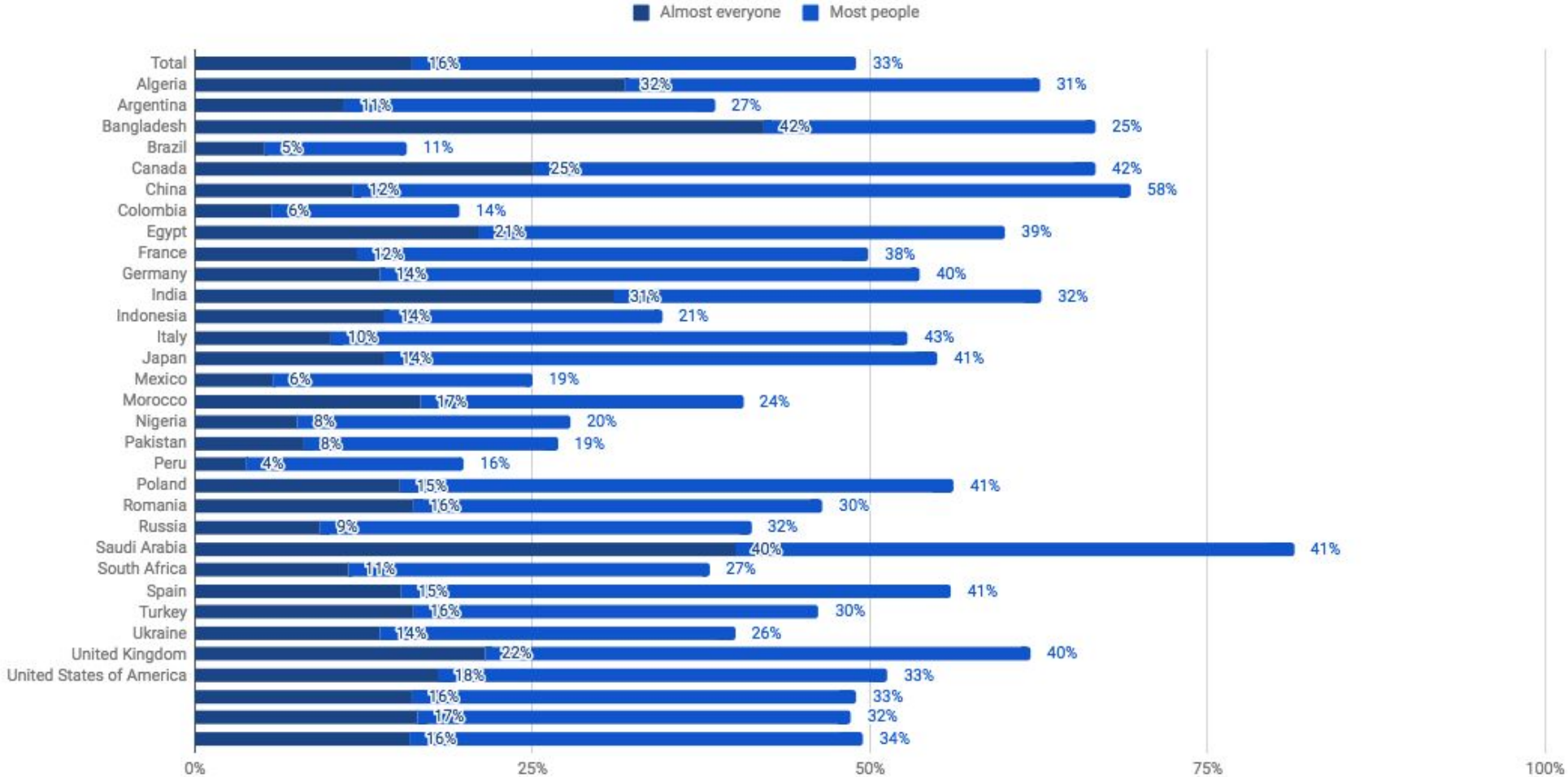
How many people in [your country] have access to a good education?



There is wide variation across countries in the belief that all or most people have access to quality education.

QUESTION

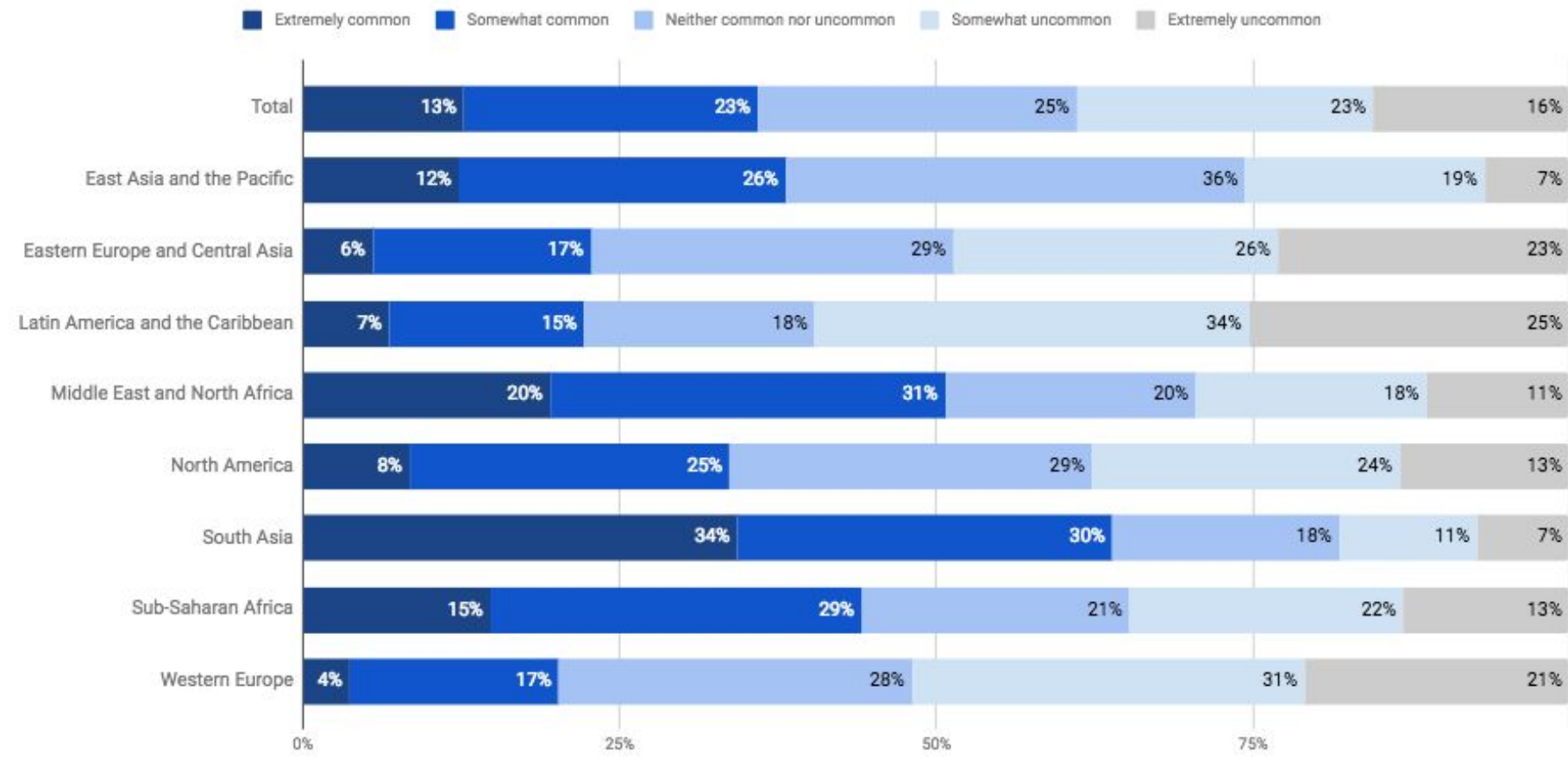
How many people in [your country] have access to a good education?



Respondents in Eastern Europe/Central Asia, Latin America, and Western Europe see upward mobility as elusive in their country.

QUESTION

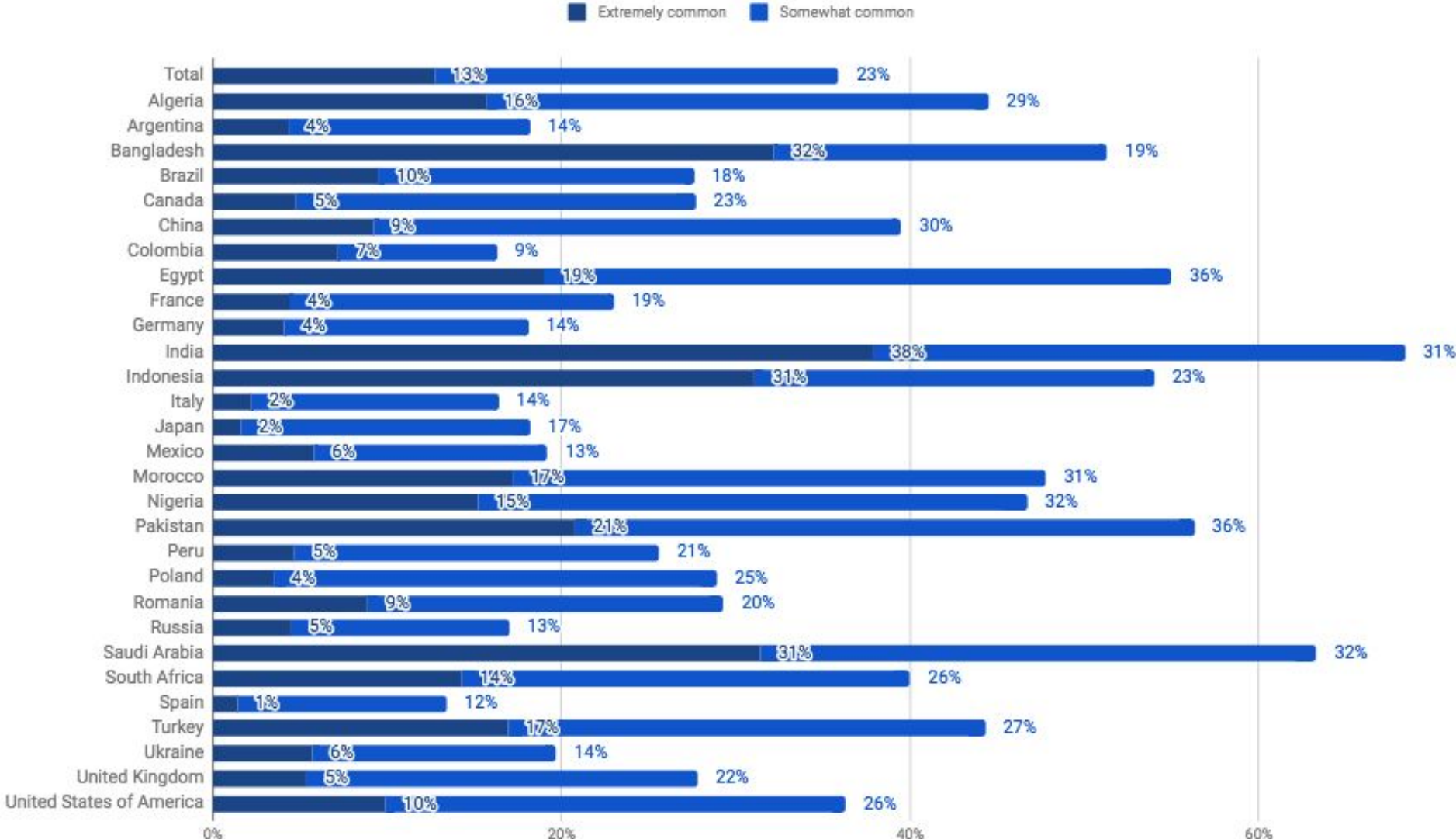
Thinking about [your country] today, how common is it for someone to start poor, work hard, and become rich?



Significant variation across countries suggests more belief in social mobility in developing countries.

QUESTION

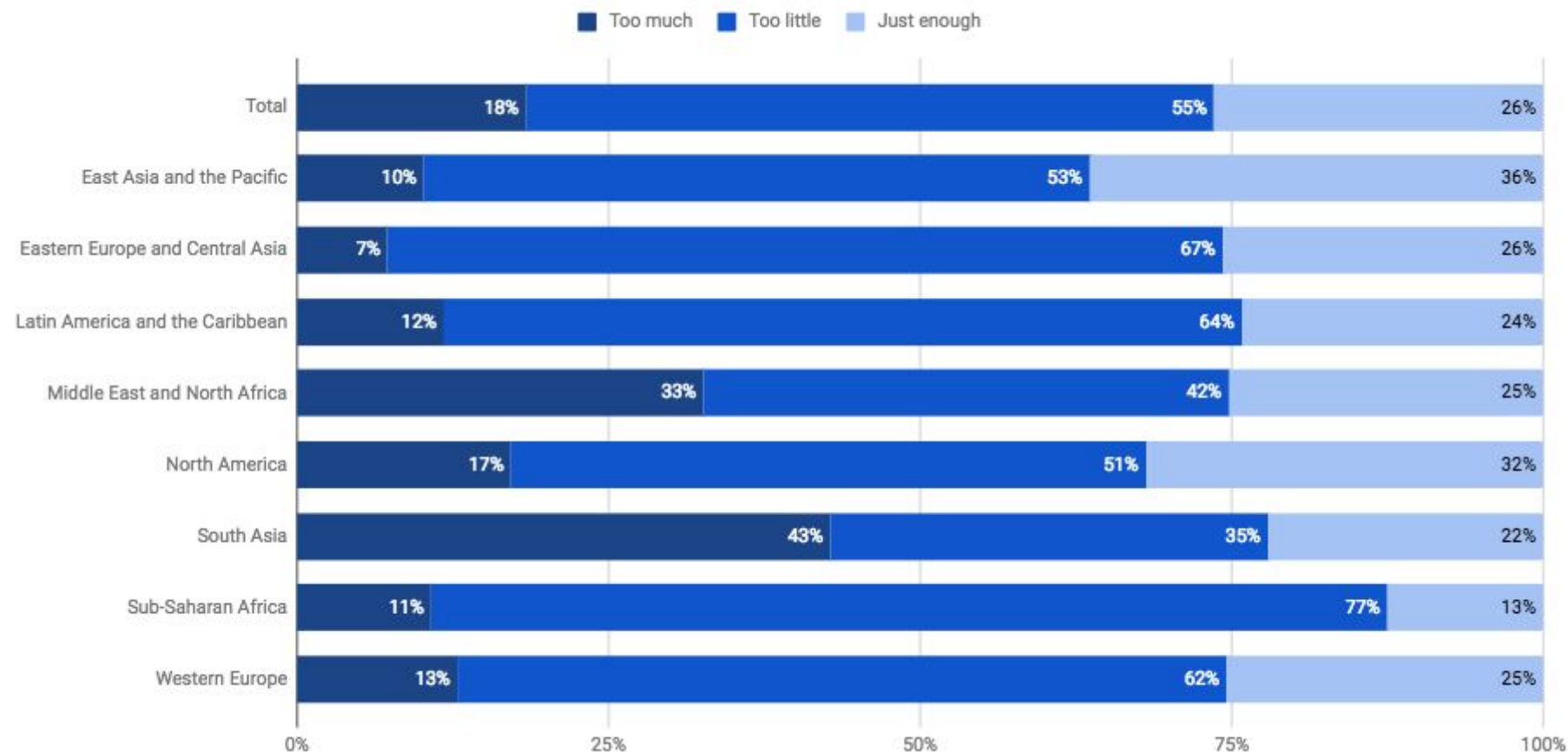
Thinking about [your country] today, how common is it for someone to start poor, work hard, and become rich?



Outside of the Middle East/North Africa and South Asia, majorities think their government does too little to provide opportunities to all people.

QUESTION

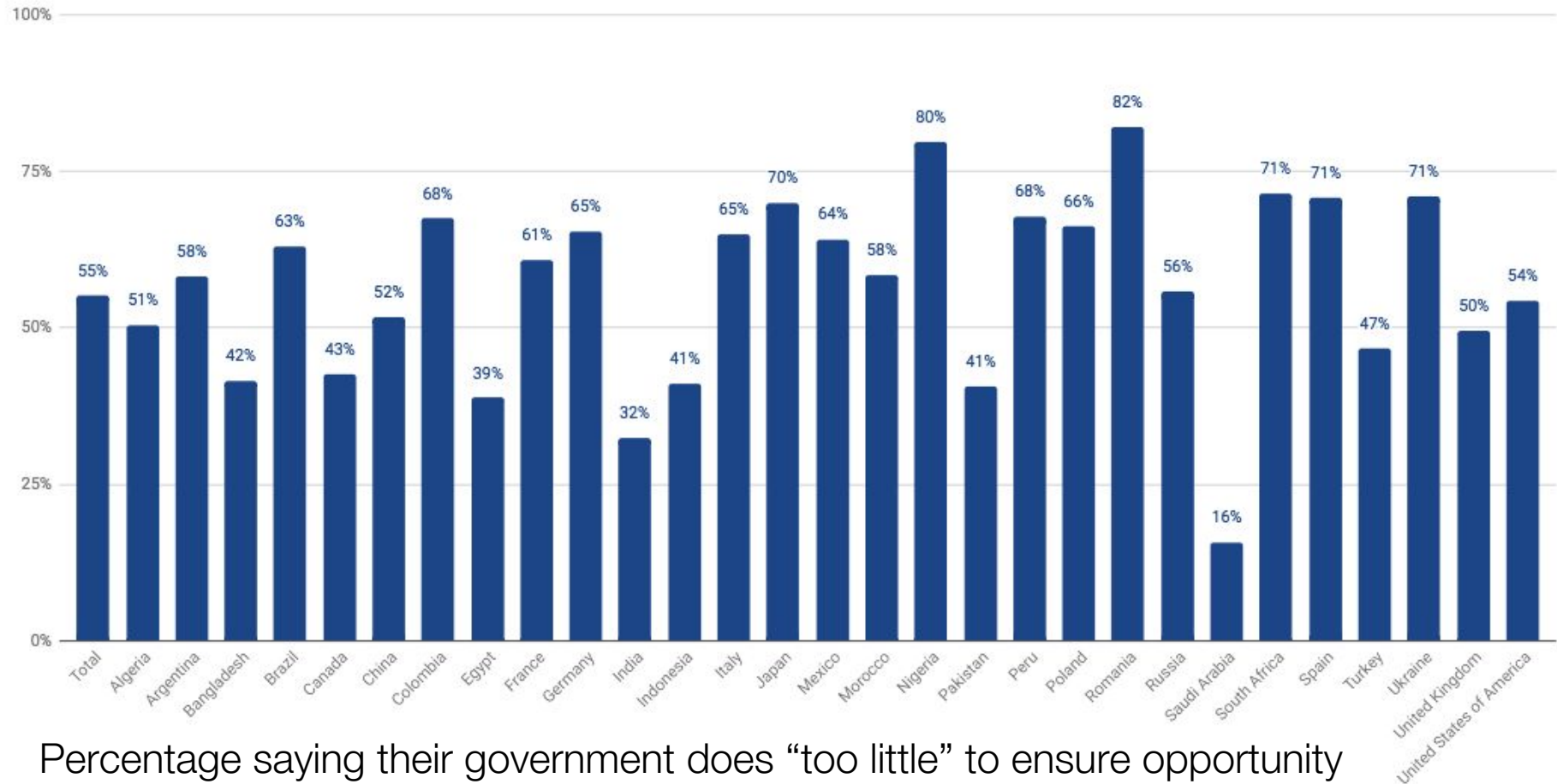
When it comes to laws and regulations to make sure that opportunities are available to all groups of people, would you say the government of [your country] is doing too much, too little, or just enough?



Response patterns vary widely, but majorities in 22 of 29 surveyed countries say their government does “too little.”

QUESTION

When it comes to laws and regulations to make sure that opportunities are available to all groups of people, would you say the government of [your country] is doing too much, too little, or just enough?

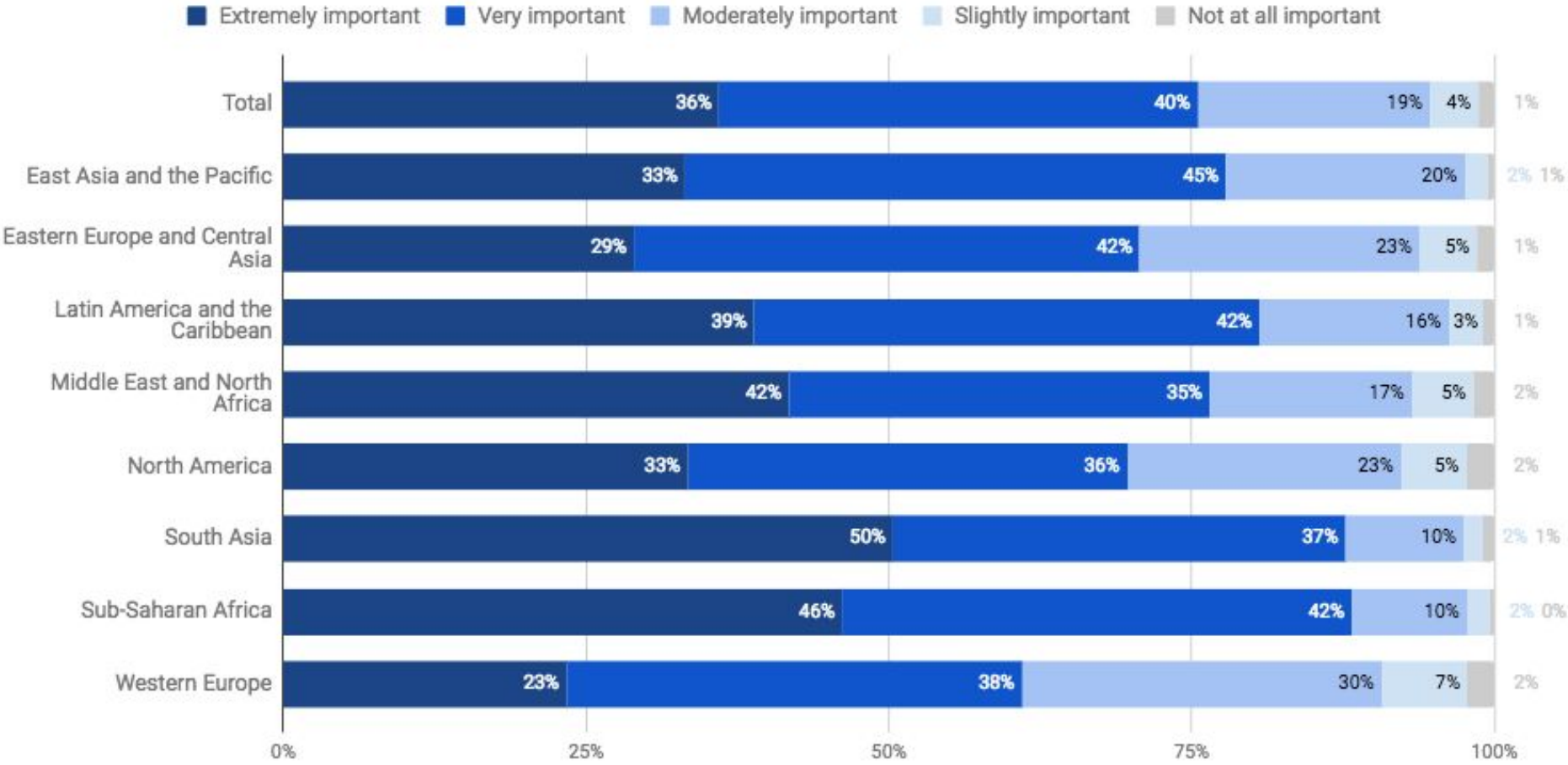


How do we get countries working better together?

Majorities in all regions and super majorities in most regions think cooperation between countries is very or extremely important.

QUESTION

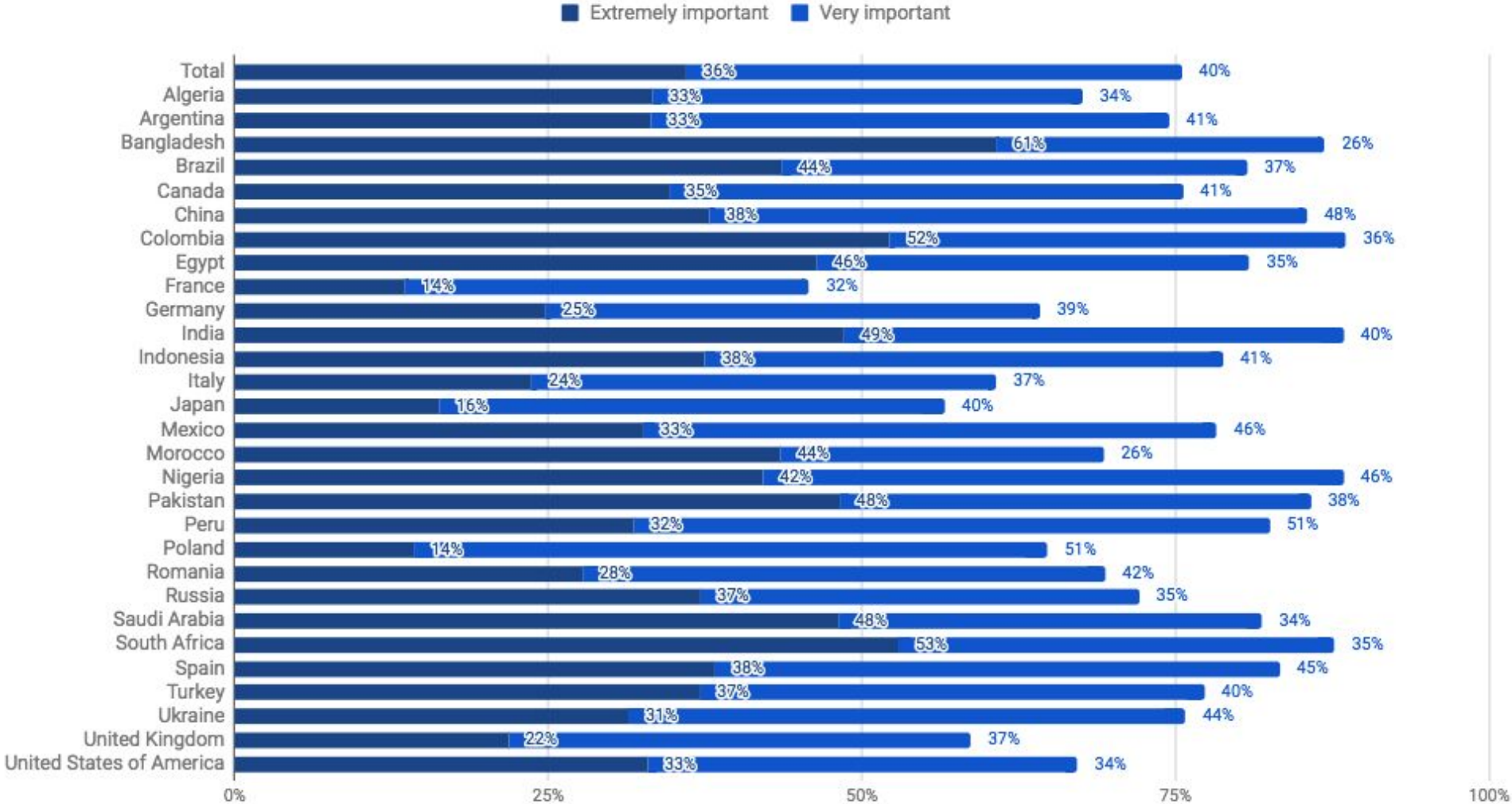
How important do you think it is that countries work together towards a common goal?



France, Germany, the UK, and Japan exhibit less support for international cooperation, but only in France do fewer than half of respondents call cooperation important.

QUESTION

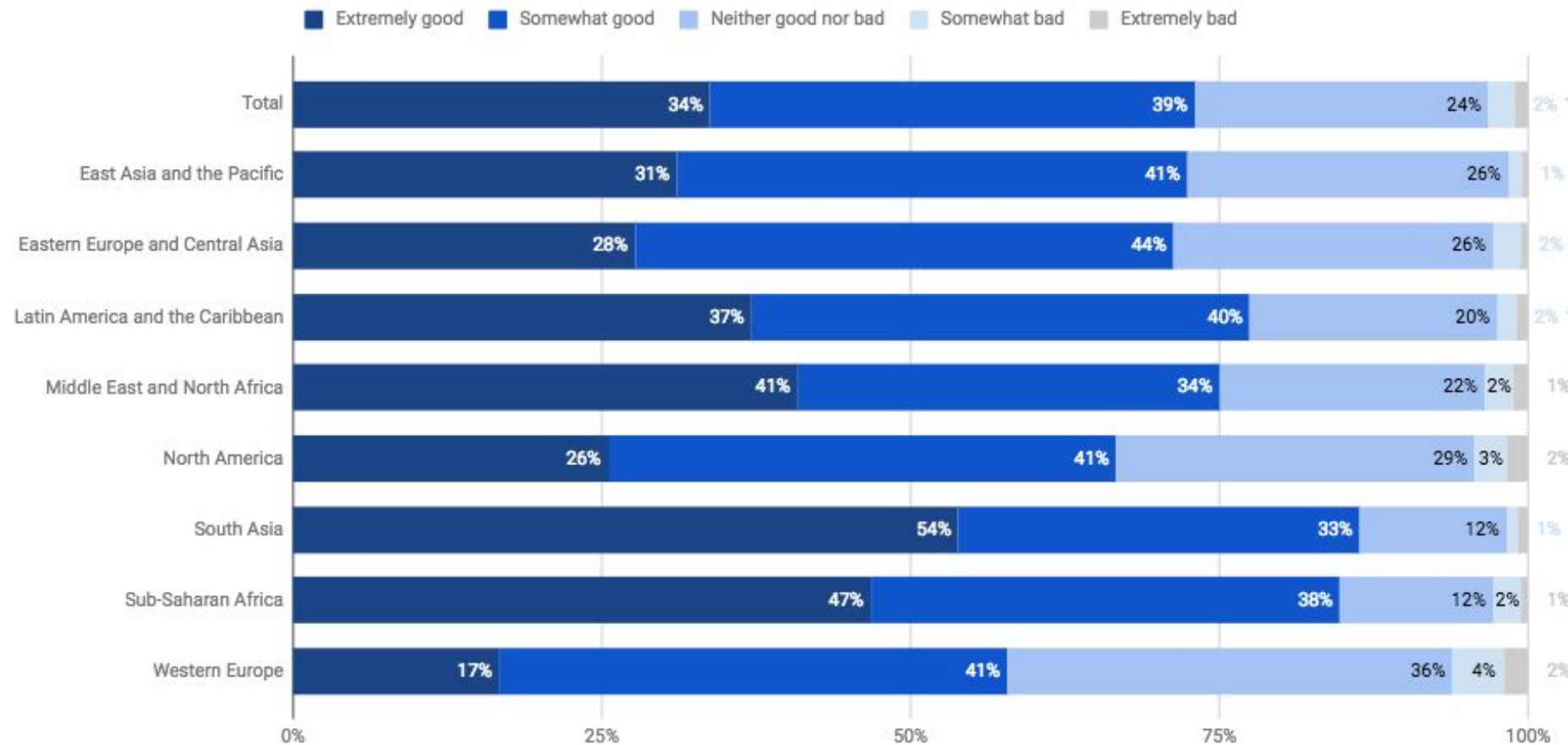
How important do you think it is that countries work together towards a common goal?



Majorities in all regions, especially in Sub-Saharan Africa and South Asia, see international cooperation as personally beneficial.

QUESTION

Generally speaking, when leaders from different countries work together is it good or bad for people like you?



The same countries that are skeptical about the importance of international cooperation expect fewer benefits of cooperation to trickle down to people like them.

QUESTION

Generally speaking, when leaders from different countries work together is it good or bad for people like you?

