



# An Analysis of Global Threats Through the Eyes of the General Public

## A Six Country Review

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October 2020

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# Summary of research and findings

In September, Kekst CNC asked representative samples of the general public in six markets – the UK, U.S., Germany, France, Sweden and Japan – about their perception of “current threats”.

From a list of 24 potential threats, we asked the survey respondents to answer with their top three in three different categories. Threats to the country where they live, threats to the world and threats to their own personal security.

In analysing the results, we have grouped these threats into five areas – economic, environment, health, political, terror/security and have used the WEF Global Risks Report to help assign a risk level for each before mapping public sentiment against each. The country specific and combined analysis form the remainder of this presentation.

The results show just how deeply COVID-19 has impacted upon communities around the world with both the current and potentially new pandemics at the top of public consciousness.

The results also reinforce how important the world’s public views climate change and other environmental factors. Climate change is viewed as the second greatest threat to individuals and to the world but is replaced by terrorism in relation to their own country. Terrorism is actually seen as the greatest threat in three of the European markets surveyed, above COVID-19.

There are some very striking country-by-country differences particularly in relation to national security with a Trump win scoring highly in the U.S. (a Biden win is not too far behind) with the racial divide and riots also featuring more than in other markets. Brexit and cyber attacks are a focus in the UK and religious fundamentalism appears as a particular concern in Sweden. China scores highly as a threat in Japan.

# The Kekst CNC COVID-19 Opinion Tracker

## Overview and methodology



### 6 countries surveyed

- U.S.
- UK
- Germany
- France
- Sweden
- Japan



### 1,000 respondents per market each month

Nationally representative sample of the general public



### Research conducted throughout the course of the pandemic

Fieldwork from 16-22 September 2020



### Polling conducted by Kekst CNC Research

Research, data and analytics, covering qualitative and quantitative products and consulting services

# Threats to you

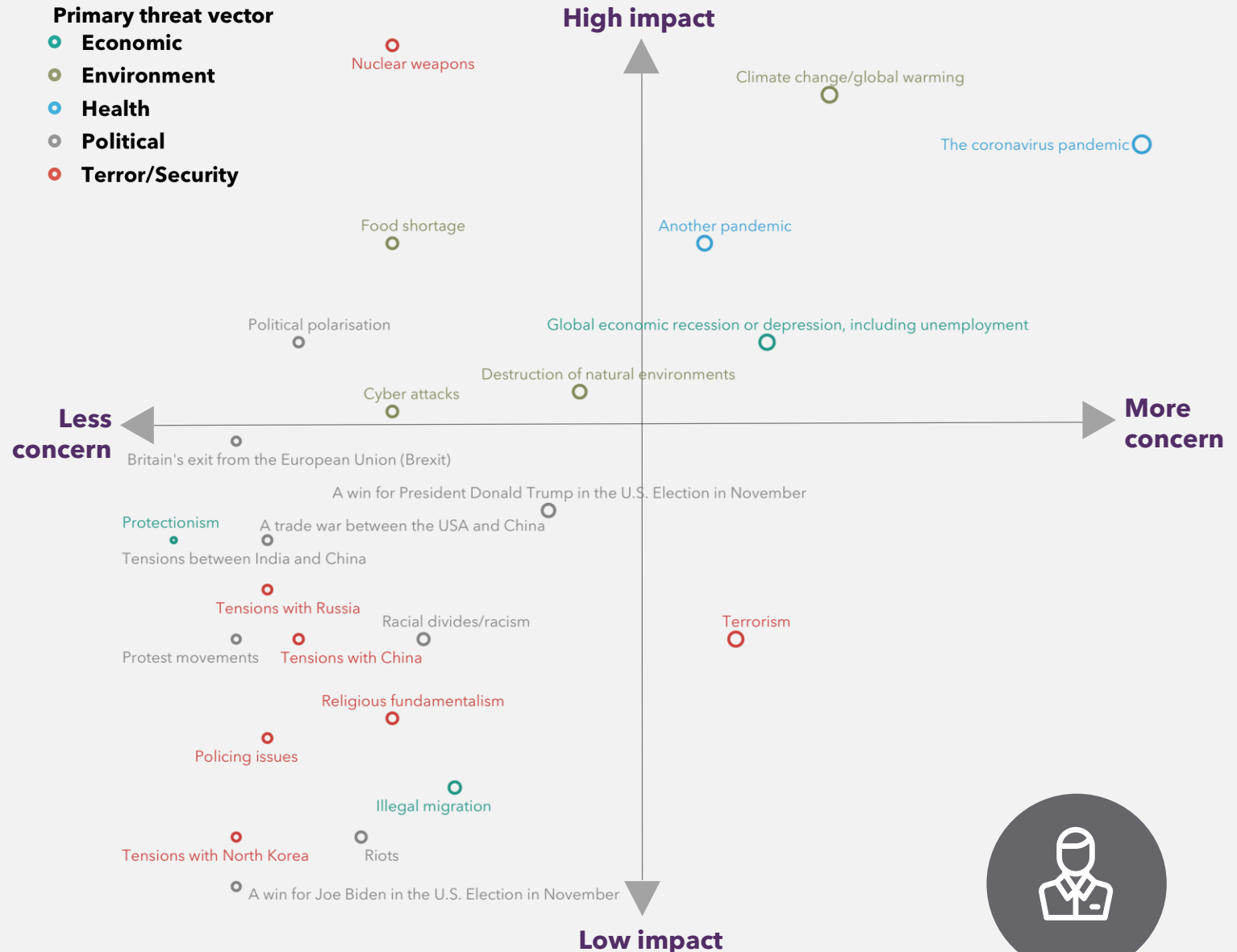
Despite the imminent threat of the novel coronavirus the public across markets are able to keep in mind the imminent threat that climate change poses. Concern about climate change is second only to the current pandemic and rates above any accompanying recession or depression and the threat of a repeat pandemic

In 2020 the public are no more concerned about the threat that Nuclear weapons poses to them than racial divides, riots and policing

The shrewdness of the public is on display as concern about another pandemic runs fourth in the list of top concerns even as attention is on the current virus. This implies that build back better is also going have to mean never again from the public's point of view

Illegal migration fails to register significantly as a threat to 'me' in the public conscience with only 12% of people putting it in their top three concerns

*Concern as measured by the proportion of the public listing a threat in the top three they are most concerned about  
Potential impact as derived in the WEF Global Risks Report 2020 and Kekst assessment*



# Threats to your country

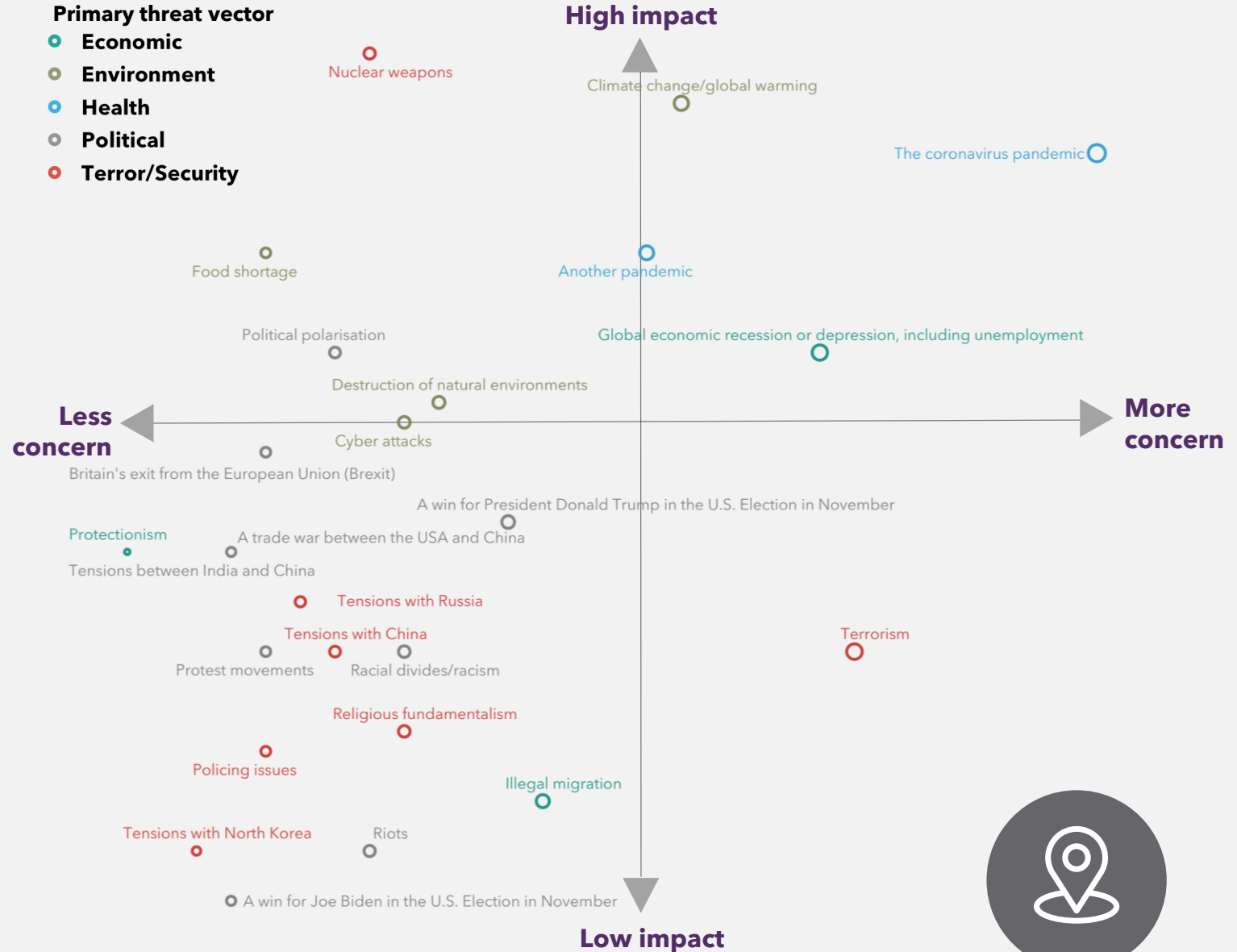
Cyber is yet to break through to the public consciousness as a threat to their country ranking 10th of all threats

A win for President Trump is the 6th ranked concern with 13% of the public globally putting it in their top three threats to their country. That figure rises to 25% in the United States. Polarisation on this point is not quite symmetrical – only 18% of American think a Biden win is a top-three threat to the US and only 5% of the public globally agree

When it comes to threats to 'my country' terrorism leaps up to become the second greatest threat that people perceive

The public are not yet widely concerned about any ongoing geo-political tensions outside of the US. Neither tensions with Russia or China generally, nor the recent tensions between India and China specifically, illicit high levels of public concern.

Illegal migration is seen as more of a threat to my country than to me, but that is the exception that proves the rule. Concerns for me and the country are strongly colinear



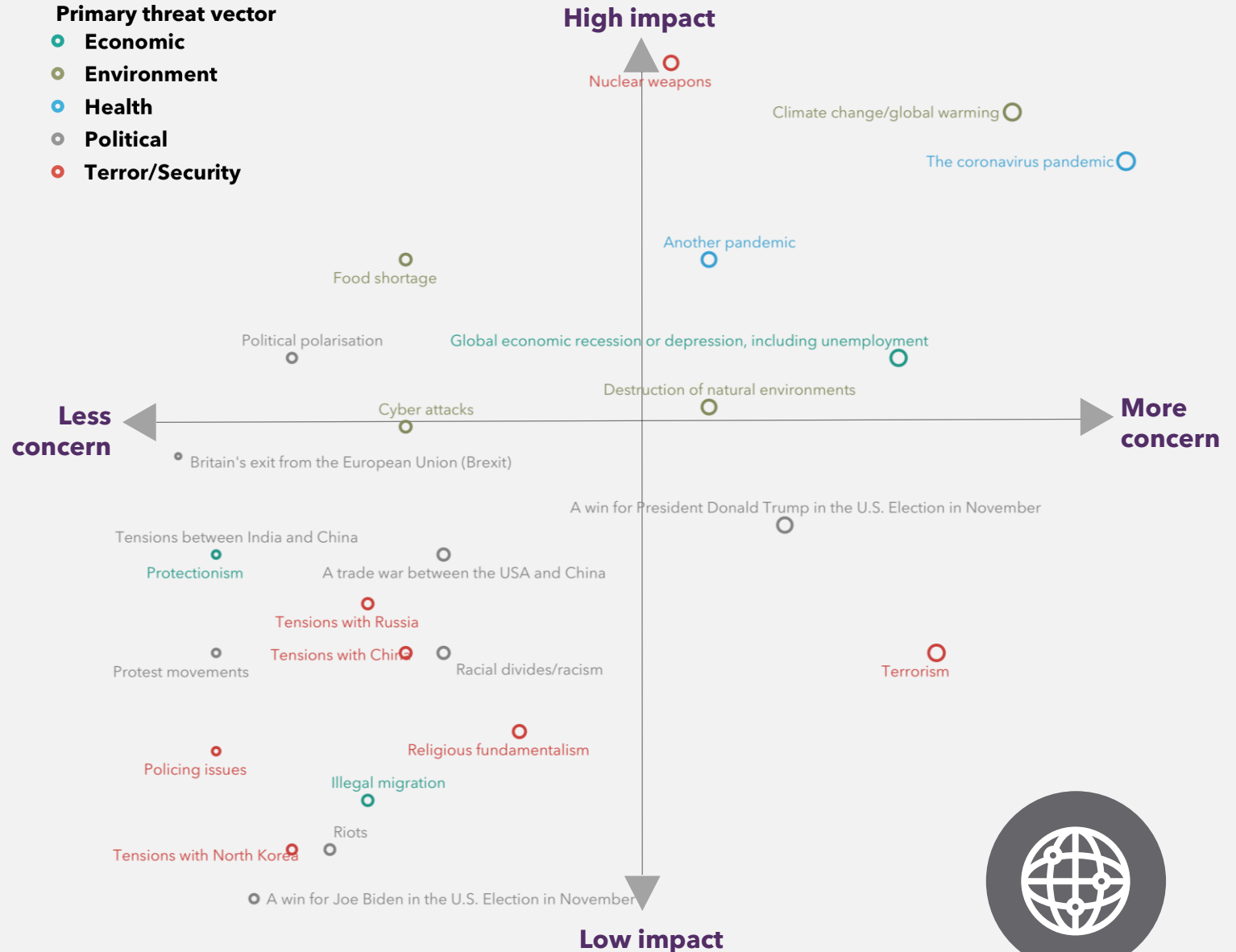
# Threats to the world

When the public are asked to weigh the threats to the world as a whole climate change closes up on the coronavirus pandemic as the top threat

The threat of a Trump win rises to 5th. But even despite this rather novel political risk the top right quadrant of the risk map in late 2020 is dominated by disasters whose mechanism is health and environmental while a large cluster of security threats rate as low concern in the public mind

There is significant concern about the threat posed to the world by the destruction of Natural environments separate from the clear threat that climate change poses offering another salient pressure point for campaigning on the environment

On the whole there is a strong relationship between the potential impact that a threat could have and the level of concern amongst the general public. The largest discrepancies are to be found in the top-left of our chart where some high impact threats are rated low-concern



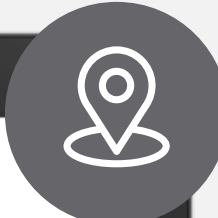


# Threats to personal security



Your security	UK	USA	Germany	Sweden	France	Japan	Average
Coronavirus	36%	28%	28%	24%	34%	45%	33%
Climate change	18%	14%	23%	26%	25%	31%	23%
Recession/depression	25%	15%	17%	18%	20%	29%	21%
Terrorism	23%	12%	19%	25%	32%	9%	20%
Another pandemic	23%	17%	19%	25%	21%	12%	20%
Destruction of natural environments	9%	8%	26%	18%	13%	16%	15%
Trump win	9%	23%	18%	18%	9%	4%	14%
Illegal migration	12%	9%	16%	15%	13%	4%	12%
Don't know	11%	9%	11%	7%	9%	13%	10%
Racial divides/racism	9%	16%	9%	9%	8%	8%	10%
Religious fundamentalism	7%	6%	10%	16%	15%	2%	9%
Nuclear weapons	6%	6%	9%	12%	10%	11%	9%
Cyber attacks	15%	10%	6%	5%	6%	11%	9%
Food shortage	10%	8%	6%	6%	8%	13%	9%
Riots	6%	14%	8%	6%	10%	3%	8%
Political polarisation	5%	9%	8%	8%	3%	4%	6%
China	4%	6%	4%	3%	4%	14%	6%
Policing issues	7%	6%	4%	7%	7%	1%	5%
USA/China trade war	2%	7%	5%	6%	5%	7%	5%
Russia	5%	4%	6%	7%	3%	2%	5%
Biden win	1%	17%	2%	2%	2%	2%	4%
Brexit	19%	2%	2%	1%	1%	1%	4%
Protest movements	5%	10%	3%	2%	4%	1%	4%
North Korea	2%	4%	3%	3%	2%	7%	4%
India/China tensions	1%	4%	2%	2%	2%	2%	2%
Protectionism	1%	4%	1%	1%	2%	3%	2%

# Threats to national security



National security	UK	USA	Germany	Sweden	France	Japan	Average
Coronavirus	30%	23%	26%	25%	30%	47%	30%
Terrorism	32%	15%	20%	27%	36%	6%	23%
Recession/depression	24%	14%	22%	22%	22%	30%	22%
Climate change	14%	12%	19%	18%	17%	27%	18%
Another pandemic	16%	13%	20%	22%	18%	10%	17%
Illegal migration	15%	9%	20%	20%	17%	4%	14%
Trump win	13%	25%	16%	13%	5%	5%	13%
Destruction of natural environments	6%	5%	19%	15%	11%	11%	11%
Racial divides/racism	12%	17%	9%	10%	10%	3%	10%
Cyber attacks	17%	9%	8%	6%	7%	12%	10%
Religious fundamentalism	8%	6%	10%	17%	16%	2%	10%
Riots	7%	17%	10%	8%	12%	2%	9%
Don't know	7%	8%	9%	7%	9%	15%	9%
Nuclear weapons	9%	8%	8%	8%	10%	9%	9%
China	6%	9%	3%	3%	4%	21%	8%
Political polarisation	7%	10%	9%	9%	4%	6%	8%
Protest movements	5%	19%	6%	2%	9%	2%	7%
Russia	9%	7%	7%	11%	4%	3%	7%
Policing issues	5%	6%	4%	11%	8%	2%	6%
Food shortage	5%	8%	5%	4%	6%	7%	6%
Brexit	26%	2%	2%	2%	1%	1%	6%
USA/China trade war	2%	6%	6%	4%	3%	10%	5%
Biden win	2%	18%	2%	2%	1%	3%	5%
North Korea	2%	7%	2%	2%	2%	11%	4%
Protectionism	1%	3%	3%	2%	2%	3%	2%
India/China tensions	1%	3%	2%	1%	1%	2%	2%



# Threats to global security



Global security	UK	USA	Germany	Sweden	France	Japan	Average
Coronavirus	28%	25%	22%	19%	27%	40%	27%
Climate change	27%	18%	25%	27%	25%	23%	24%
Terrorism	25%	16%	22%	27%	28%	15%	22%
Recession/depression	22%	20%	17%	22%	20%	23%	21%
Trump win	21%	20%	24%	24%	13%	6%	18%
Another pandemic	18%	18%	16%	19%	18%	7%	16%
Destruction of natural environments	14%	9%	26%	19%	12%	13%	16%
Nuclear weapons	14%	13%	14%	18%	18%	15%	15%
Religious fundamentalism	11%	6%	14%	15%	14%	4%	11%
Racial divides/racism	11%	10%	8%	7%	7%	11%	9%
USA/China trade war	7%	7%	9%	8%	8%	14%	9%
Don't know	7%	9%	9%	7%	8%	13%	9%
Cyber attacks	13%	9%	6%	6%	7%	10%	9%
China	10%	7%	5%	7%	4%	17%	8%
Food shortage	6%	9%	7%	8%	10%	9%	8%
Illegal migration	6%	6%	11%	8%	11%	2%	7%
Russia	11%	6%	6%	8%	6%	3%	7%
Riots	4%	10%	9%	4%	7%	4%	6%
Political polarisation	5%	6%	7%	6%	3%	5%	5%
North Korea	5%	6%	4%	4%	4%	7%	5%
Biden win	2%	13%	3%	2%	2%	3%	4%
Protest movements	2%	6%	3%	2%	4%	2%	3%
India/China tensions	3%	4%	2%	2%	4%	3%	3%
Protectionism	2%	5%	2%	2%	3%	4%	3%
Policing issues	2%	5%	2%	3%	5%	1%	3%
Brexit	4%	3%	2%	1%	2%	1%	2%

# Kekst CNC Polling and Research

## Different by design

We use research to uncover hidden, sometimes counter-intuitive, truths about your brand, positioning, or business. We do not only work out what people say; we work out **how and why they think it**, giving you the data-led recommendations and advice to harness this insight to drive and improve your business, your brand, and your narrative



### Global experience, influence & capability

- Global footprint, across 13 offices Europe, US, the Middle East and Asia, with ability to poll in all markets
- Ran by former Downing Street pollsters



### Diverse perspectives

- Diverse international senior team
- Range of research methods to reach all individuals



### Qualitative and quantitative research combined

- Rather than specialise in one, we combine qualitative and quantitative methods
- Giving the richest possible insight



### Research and data to generate real insight

- We do not just produce polling tables, but use research to drive insight
- Conclusions and action-led recommendations from research, crafted by our experts



### Interaction with digital and creative

- Ideas-centric culture
- Integrated digital and creative services offering, complementing and enriching research
- Part of Publicis Groupe

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## Research contacts



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