



# FUTURE RISKS SURVEY 2022 SPAIN

Ipsos Public Affairs  
June 2022



GAME CHANGERS



# METHODOLOGY AND PROFILE

# A

# METHODOLOGY



## TARGET

4449 **experts** interviewed  
in **58 countries**  
- **201 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 10<sup>th</sup> to June 9<sup>th</sup> 2022

May 13<sup>th</sup> to June 9<sup>th</sup> 2022



## METHODOLOGY

**Online** interviews

Survey link was sent by Axa to their community of Experts (internal and external).

**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.

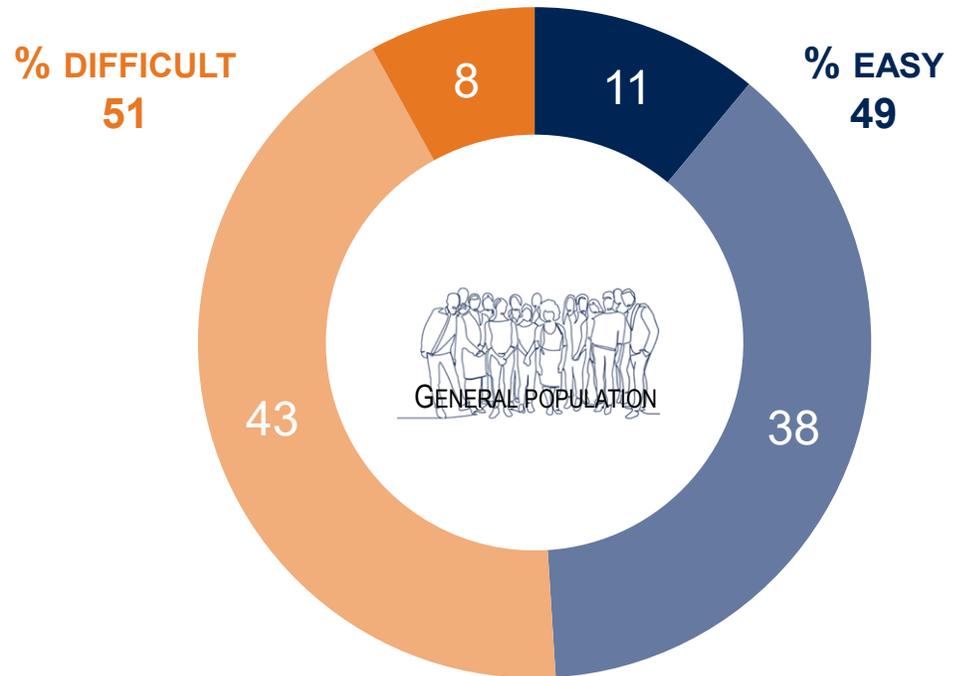
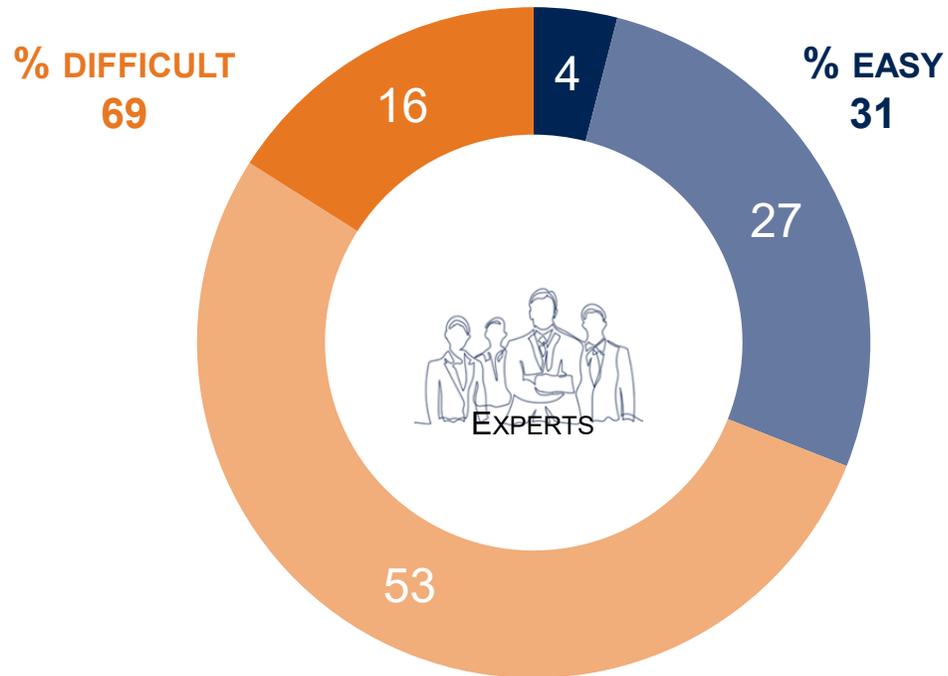
# FUTURE RISKS TOP 10 RANKING

# B

# ¿SON LOS RIESGOS FUTUROS FÁCILES DE PREDECIR?

## ALL COUNTRIES

■ Very easy to predict   ■ Somewhat easy to predict   ■ Somewhat difficult to predict   ■ Very difficult to predict



 New question

*Regarding future risks overall, would you say they are getting...*

# ARE FUTURE RISKS EASY TO PREDICT? – PER CLUSTER

Very easy to predict
  Somewhat easy to predict
  Somewhat difficult to predict
  Very difficult to predict



EXPERTS

% Easy



GENERAL POPULATION

% Easy





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

# EVOLUTION OF THE TOP 10 FUTURE RISKS



2018	2019	2020	2021	2022
1 CLIMATE CHANGE	CLIMATE CHANGE	PANDEMICS AND INFECTIOUS DISEASES	CLIMATE CHANGE	CLIMATE CHANGE
2 CYBERSECURITY RISKS	CYBERSECURITY RISKS	CLIMATE CHANGE	CYBER SECURITY RISKS	GEOPOLITICAL INSTABILITY
3 GEOPOLITICAL INSTABILITY	GEOPOLITICAL INSTABILITY	CYBERSECURITY RISKS	PANDEMICS AND INFECTIOUS DISEASES	CYBER SECURITY RISKS
4 NATURAL RESOURCES MANAGEMENT	SOCIAL DISCONTENT AND LOCAL CONFLICTS	GEOPOLITICAL INSTABILITY	GEOPOLITICAL INSTABILITY	ENERGY RISKS
5 SOCIAL DISCONTENT AND LOCAL CONFLICTS	NATURAL RESOURCES MANAGEMENT	SOCIAL DISCONTENT AND LOCAL CONFLICTS	SOCIAL DISCONTENT AND LOCAL CONFLICTS	PANDEMICS AND INFECTIOUS DISEASES
6 ARTIFICIAL INTELLIGENCE AND BIG DATA	ARTIFICIAL INTELLIGENCE AND BIG DATA	NEW THREATS TO SECURITY	NATURAL RESOURCES AND BIODIVERSITY RISKS	SOCIAL TENSIONS AND MOVEMENTS
7 NEW THREATS TO SECURITY	POLLUTION	MACROECONOMIC RISKS	NEW SECURITY THREATS AND TERRORISM	NATURAL RESOURCES AND BIODIVERSITY RISKS
8 POLLUTION	PANDEMICS AND INFECTIOUS DISEASES	NATURAL RESOURCES AND BIODIVERSITY RISKS	FINANCIAL STABILITY RISKS	FINANCIAL STABILITY RISKS
9 MEDICAL ADVANCES AND INNOVATIONS	NEW THREATS TO SECURITY	FINANCIAL RISKS	MACRO-ECONOMIC RISKS	MACRO-ECONOMIC RISKS
10 PANDEMICS AND INFECTIOUS DISEASES	MACROECONOMIC RISKS	POLLUTION	RISKS RELATED TO ARTIFICIAL INTELLIGENCE AND BIG DATA	MONETARY AND FISCAL POLICIES RISKS

■ ENVIRONMENT & ENERGY
 ■ TECH & DATE
 ■ 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 - EXPERTS



AMERICA		AFRICA	
1	CLIMATE CHANGE	1	CLIMATE CHANGE
2	CYBER SECURITY RISKS	2	CYBER SECURITY RISKS
3	GEOPOLITICAL INSTABILITY	3	PANDEMICS AND INFECTIOUS DISEASES
4	SOCIAL TENSIONS AND MOVEMENTS	4	GEOPOLITICAL INSTABILITY
5	PANDEMICS AND INFECTIOUS DISEASES	5	FINANCIAL STABILITY RISKS
6	ENERGY RISKS	6	MONETARY AND FISCAL POLICIES RISKS
7	NATURAL RESOURCES AND BIODIVERSITY RISKS	7	SOCIAL TENSIONS AND MOVEMENTS
8	FINANCIAL STABILITY RISKS	8	MACRO-ECONOMIC RISKS
9	NEW SECURITY THREATS AND TERRORISM	9	NEW SECURITY THREATS AND TERRORISM
10	MONETARY AND FISCAL POLICIES RISKS	10	ENERGY RISKS

SPAIN	
1	CLIMATE CHANGE
2	GEOPOLITICAL INSTABILITY
3	CYBER SECURITY RISKS
4	ENERGY RISKS
5	SOCIAL TENSIONS AND MOVEMENTS
6	NATURAL RESOURCES AND BIODIVERSITY RISKS
7	MACRO-ECONOMIC RISKS
8	PANDEMICS AND INFECTIOUS DISEASES
9	FINANCIAL STABILITY RISKS
10	RISKS RELATED TO CHANGING DEMOGRAPHICS

EUROPE		ASIA PACIFIC AND MIDDLE EAST	
1	CLIMATE CHANGE	1	CLIMATE CHANGE
2	GEOPOLITICAL INSTABILITY	2	PANDEMICS AND INFECTIOUS DISEASES
3	CYBER SECURITY RISKS	3	CYBER SECURITY RISKS
4	ENERGY RISKS	4	GEOPOLITICAL INSTABILITY
5	NATURAL RESOURCES AND BIODIVERSITY RISKS	5	ENERGY RISKS
6	SOCIAL TENSIONS AND MOVEMENTS	6	FINANCIAL STABILITY RISKS
7	PANDEMICS AND INFECTIOUS DISEASES	7	POLLUTION
8	MACRO-ECONOMIC RISKS	8	NATURAL RESOURCES AND BIODIVERSITY RISKS
9	FINANCIAL STABILITY RISKS	9	MACRO-ECONOMIC RISKS
10	MONETARY AND FISCAL POLICIES RISKS	10	NEW SECURITY THREATS AND TERRORISM

\*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, 2<sup>nd</sup> 4 points, etc. up to 5<sup>th</sup> 1 point. The ranking is based on the total numbers of points per risk.

# TOP 10 FUTURE RISKS PER CLUSTER – GENERAL POPULATION



## AMERICA

- 1 CLIMATE CHANGE
- 2 PANDEMICS AND INFECTIOUS DISEASES
- 3 CYBER SECURITY RISKS
- 4 NEW SECURITY THREATS AND TERRORISM
- 5 SOCIAL TENSIONS AND MOVEMENTS
- 6 FINANCIAL STABILITY RISKS
- 7 ENERGY RISKS
- 8 GEOPOLITICAL INSTABILITY
- 9 NATURAL RESOURCES AND BIODIVERSITY RISKS
- 10 CHRONIC ILLNESSES

## AFRICA

- 1 PANDEMICS AND INFECTIOUS DISEASES
- 2 CLIMATE CHANGE
- 3 NEW SECURITY THREATS AND TERRORISM
- 4 POLLUTION
- 5 CYBER SECURITY RISKS
- 6 FINANCIAL STABILITY RISKS
- 7 CHRONIC ILLNESSES
- 8 ENERGY RISKS
- 9 NATURAL RESOURCES AND BIODIVERSITY RISKS
- 10 LONG-TERM EXPOSURE TO HARMFUL SUBSTANCES

### SPAIN

- 1 CLIMATE CHANGE
- 2 PANDEMICS AND INFECTIOUS DISEASES
- 3 GEOPOLITICAL INSTABILITY
- 4 NATURAL RESOURCES AND BIODIVERSITY RISKS
- 5 ENERGY RISKS
- 6 CYBER SECURITY RISKS
- 7 FINANCIAL STABILITY RISKS
- 8 CHRONIC ILLNESSES
- 9 SOCIAL TENSIONS AND MOVEMENTS
- 10 NEW SECURITY THREATS AND TERRORISM

## EUROPE

- 1 CLIMATE CHANGE
- 2 PANDEMICS AND INFECTIOUS DISEASES
- 3 ENERGY RISKS
- 4 GEOPOLITICAL INSTABILITY
- 5 POLLUTION
- 6 NATURAL RESOURCES AND BIODIVERSITY RISKS
- 7 SOCIAL TENSIONS AND MOVEMENTS
- 8 NEW SECURITY THREATS AND TERRORISM
- 9 CYBER SECURITY RISKS
- 10 FINANCIAL STABILITY RISKS

## ASIA PACIFIC AND MIDDLE EAST

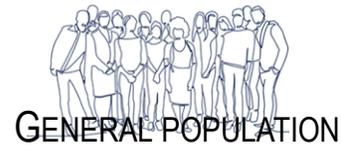
- 1 PANDEMICS AND INFECTIOUS DISEASES
- 2 CLIMATE CHANGE
- 3 GEOPOLITICAL INSTABILITY
- 4 CYBER SECURITY RISKS
- 5 ENERGY RISKS
- 6 NATURAL RESOURCES AND BIODIVERSITY RISKS
- 7 SOCIAL TENSIONS AND MOVEMENTS
- 8 FINANCIAL STABILITY RISKS
- 9 POLLUTION
- 10 NEW SECURITY THREATS AND TERRORISM

\*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, 2<sup>nd</sup> 4 points, etc. up to 5<sup>th</sup> 1 point. The ranking is based on the total numbers of points per risk.

# ATTITUDES TOWARDS RISK AND GLOBAL LEVEL OF VULNERABILITY

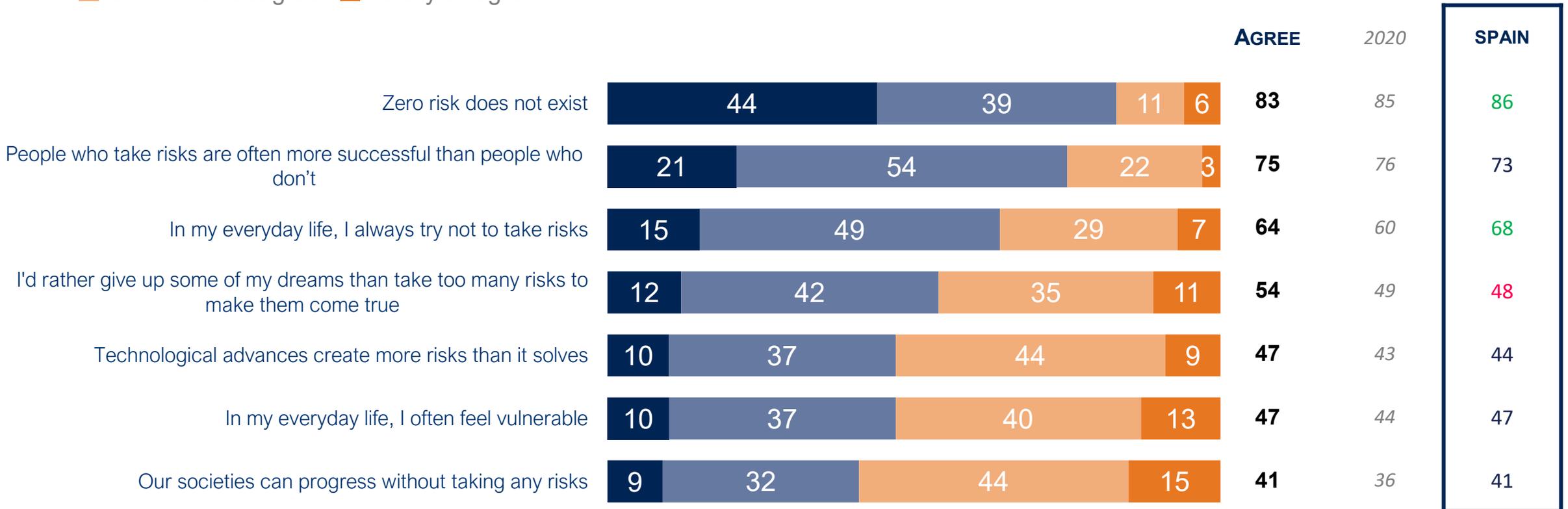
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# OPINION TOWARDS VARIOUS IDEAS ON RISK



## ALL COUNTRIES

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

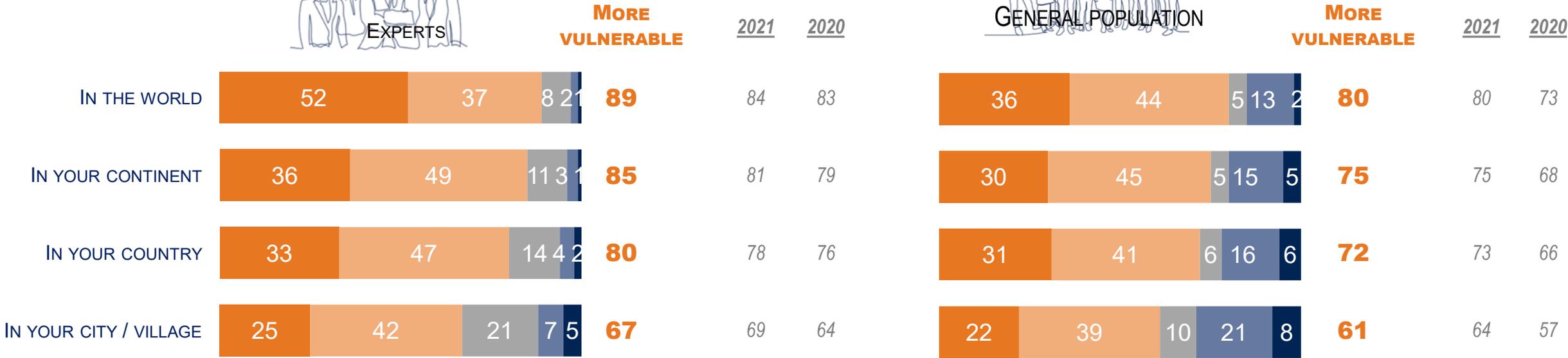


*Do you agree or disagree with the following statements?*

# 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



		EUROPE	UNITED KINGDOM	FRANCE	GERMANY	SWITZERLAND	ITALY	SPAIN	BELGIUM	IRELAND	POLAND
IN THE WORLD	89	91	92	91	90	86	94	90	88	97	85
IN YOUR CONTINENT	85	86	90	84	88	84	92	86	87	91	79
IN YOUR COUNTRY	80	79	86	80	81	56	85	85	78	70	73
IN YOUR CITY / VILLAGE	67	63	62	64	60	42	71	75	62	58	70

## % MORE VULNERABLE



		EUROPE	FRANCE	BELGIUM	UNITED KINGDOM	ITALY	SPAIN	SWITZERLAND	GERMANY
IN THE WORLD	80	82	83	81	85	79	80	81	81
IN YOUR CONTINENT	75	77	79	77	80	78	78	70	74
IN YOUR COUNTRY	72	72	77	74	79	77	78	52	65
IN YOUR CITY / VILLAGE	61	58	55	65	63	70	67	42	45

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

# GEOPOLITICAL TENSIONS AND GLOBALIZATION

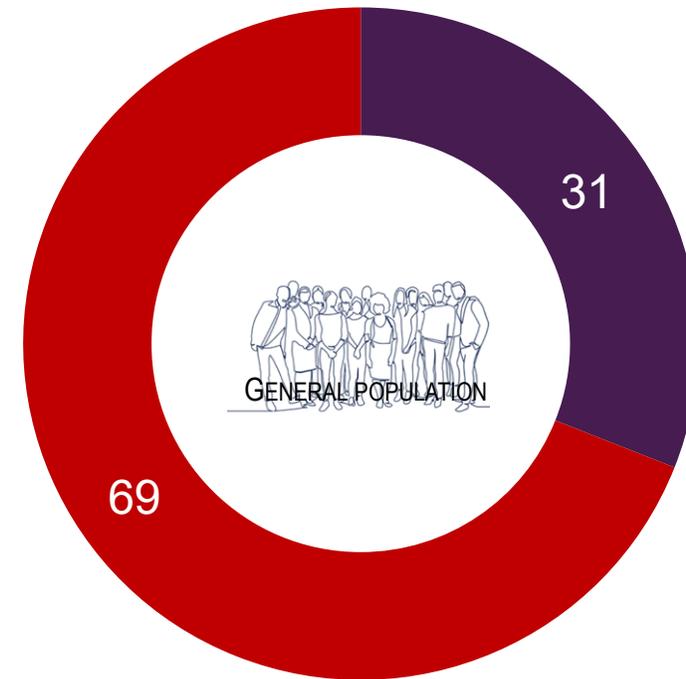
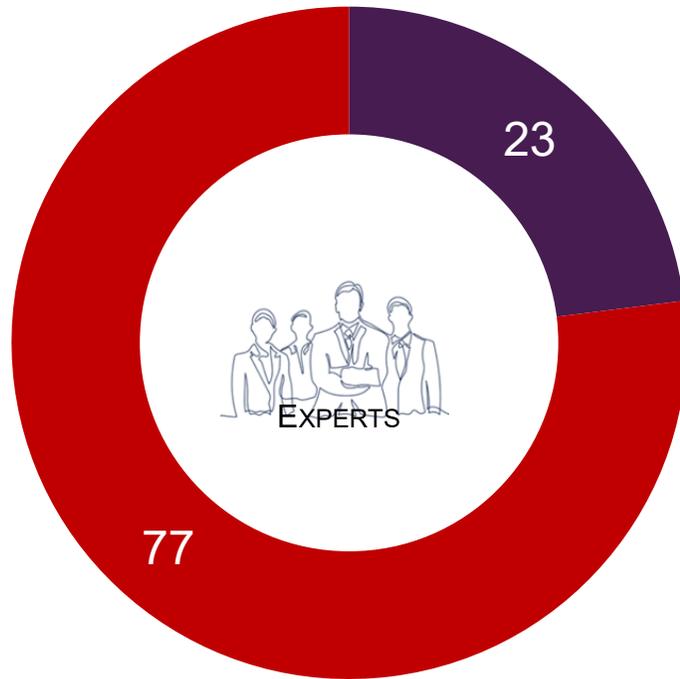
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# OPINION TOWARDS GEOPOLITICAL TENSIONS

## ALL COUNTRIES

■ Geopolitical tensions have always existed and the risk is very low that actual tensions escalate into global wars

■ Geopolitical tensions are getting more and more serious and could lead to a new era of global wars



! New question

*Regarding geopolitical tensions, to which of the following opinions do you feel closer?*

# OPINION TOWARDS GEOPOLITICAL TENSIONS – PER CLUSTER

■ Geopolitical tensions have always existed and the risk is very low that actual tensions escalate into global wars

■ Geopolitical tensions are getting more and more serious and could lead to a new era of global wars



# THE RISK THAT GEOPOLITICAL TENSIONS LEAD TO CERTAIN CONSEQUENCES

**ALL COUNTRIES**

VERY IMPORTANT
  SOMEWHAT IMPORTANT
  SOMEWHAT NOT IMPORTANT
  NOT IMPORTANT AT ALL



EXPERTS

IMPORTANT

SPAIN



GENERAL POPULATION

IMPORTANT

SPAIN

... become persistent in the future?



93



89

... spread around the globe?



91

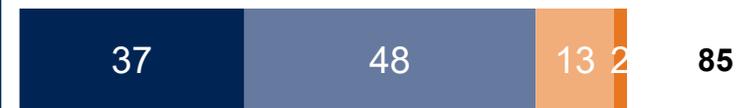


89

... threaten your country's food and energy supply?



90

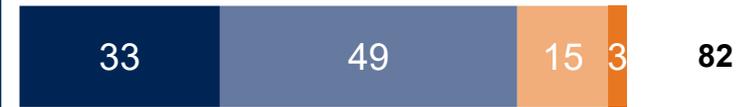


89

... lead to a global war?



75



85

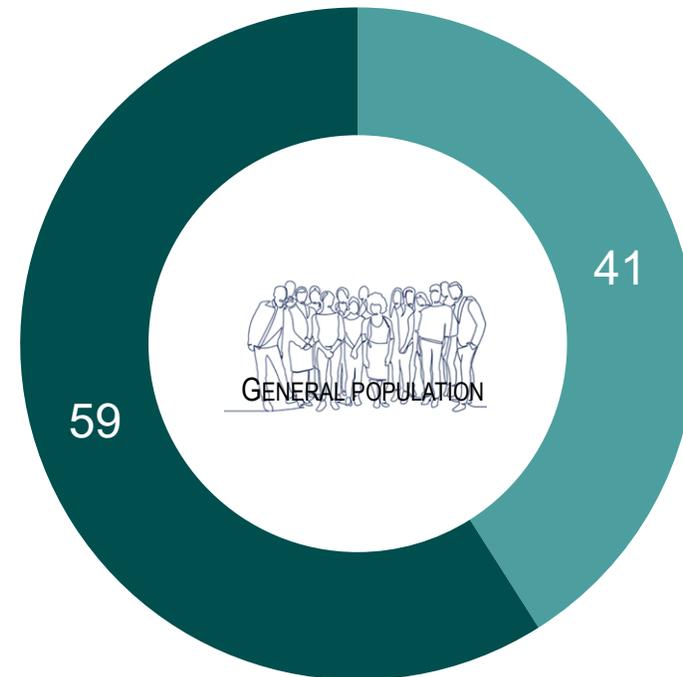
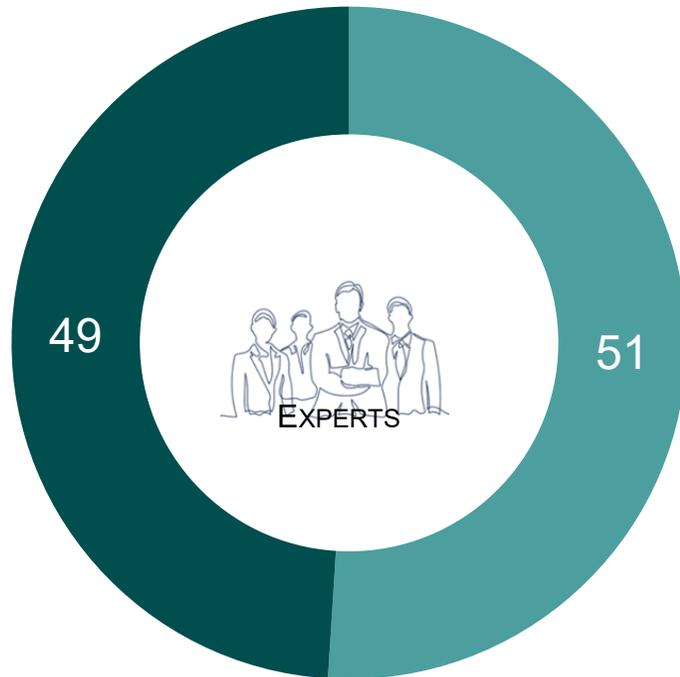


# OPINION TOWARDS GLOBALIZATION

## ALL COUNTRIES

■ Globalization will slow down overtime, as most countries in the world will try to protect themselves from global risks

■ Globalization will increase overtime, as most countries will try to find collective solutions to global risks



*Regarding risks that may happen at the global level in the future, to which of the following opinions do you feel closer?*

# OPINION TOWARDS GLOBALIZATION – PER CLUSTER

■ Globalization will slow down overtime, as most countries in the world will try to protect themselves from global risks

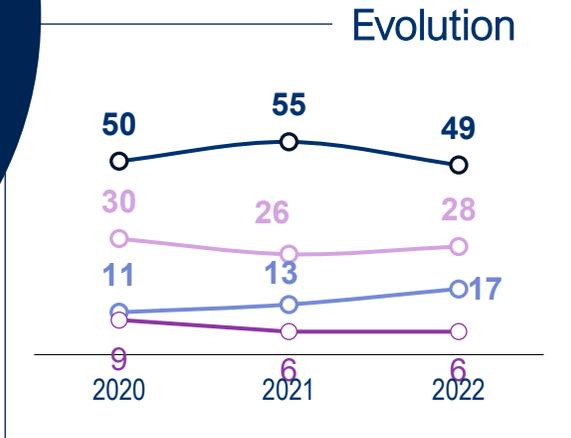
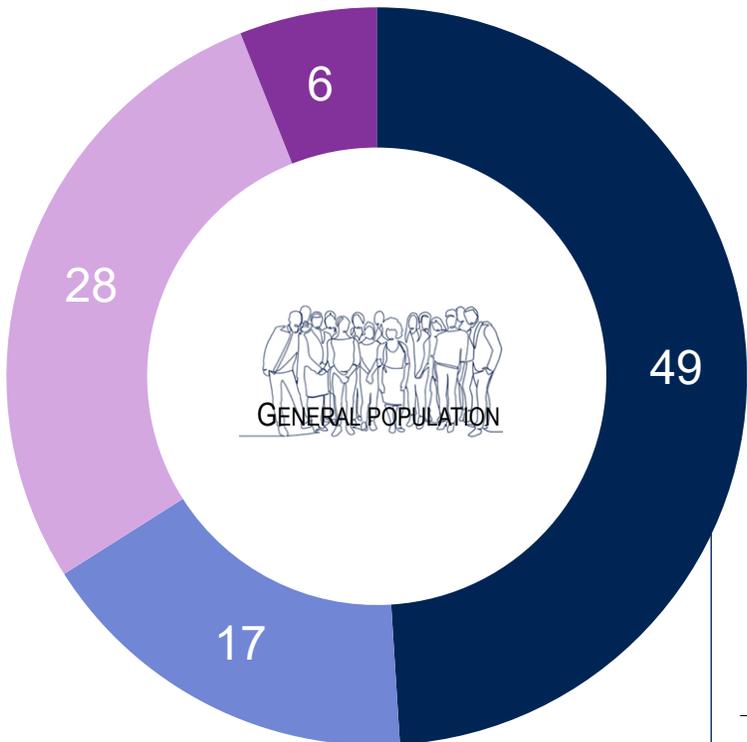
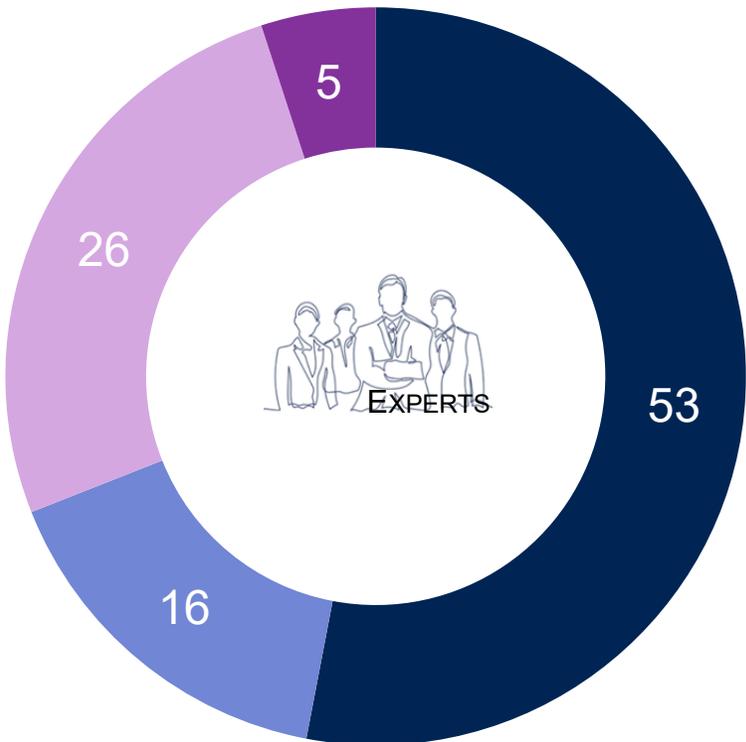
■ Globalization will increase overtime, as most countries will try to find collective solutions to global risks



# THE MOST EFFECTIVE LEVEL OF DECISIONS WHEN FACING FUTURE RISKS

## ALL COUNTRIES

- At global level
- At the continents' level
- At the countries' level
- At the cities' level

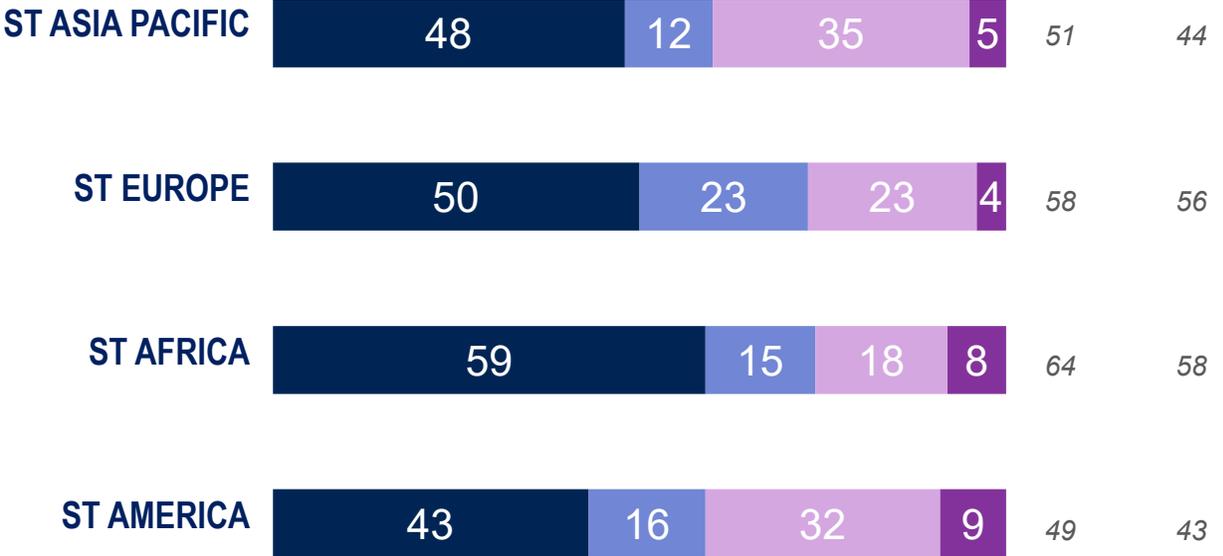
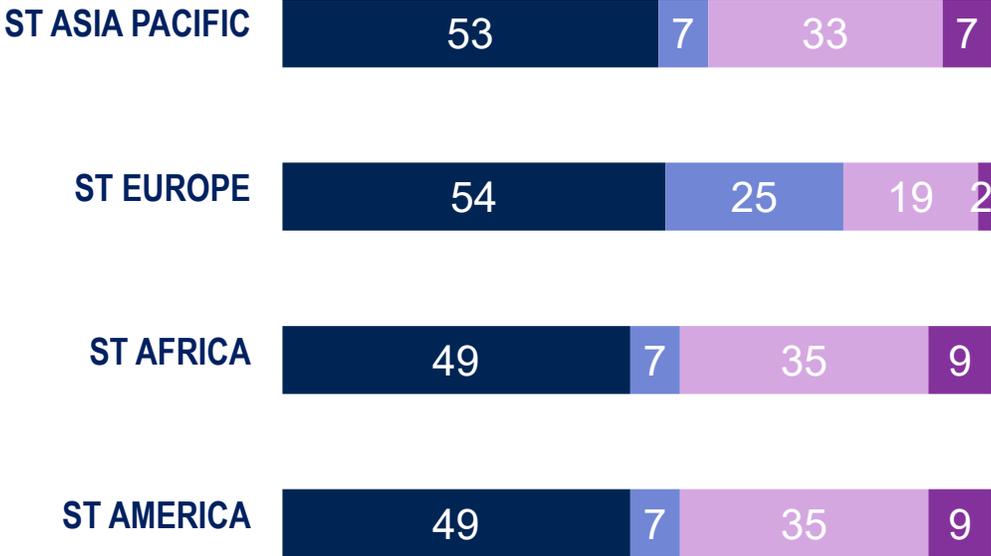


When you think of these future risks, at what level should decisions be made to be most effective?



# THE MOST EFFECTIVE LEVEL OF DECISIONS WHEN FACING FUTURE RISKS – PER CLUSTER

■ At global level      ■ At the continents' level  
■ At the countries' level      ■ At the cities' level



*When you think of these future risks, at what level should decisions be made to be most effective?*



# LEVEL OF TRUST TOWARD DIFFERENT ACTORS IN RELATION WITH FUTURE RISKS

# E

# LEVEL OF TRUST TOWARD DIFFERENT ACTORS TO LIMIT FUTURE CRISIS

**ALL COUNTRIES**

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



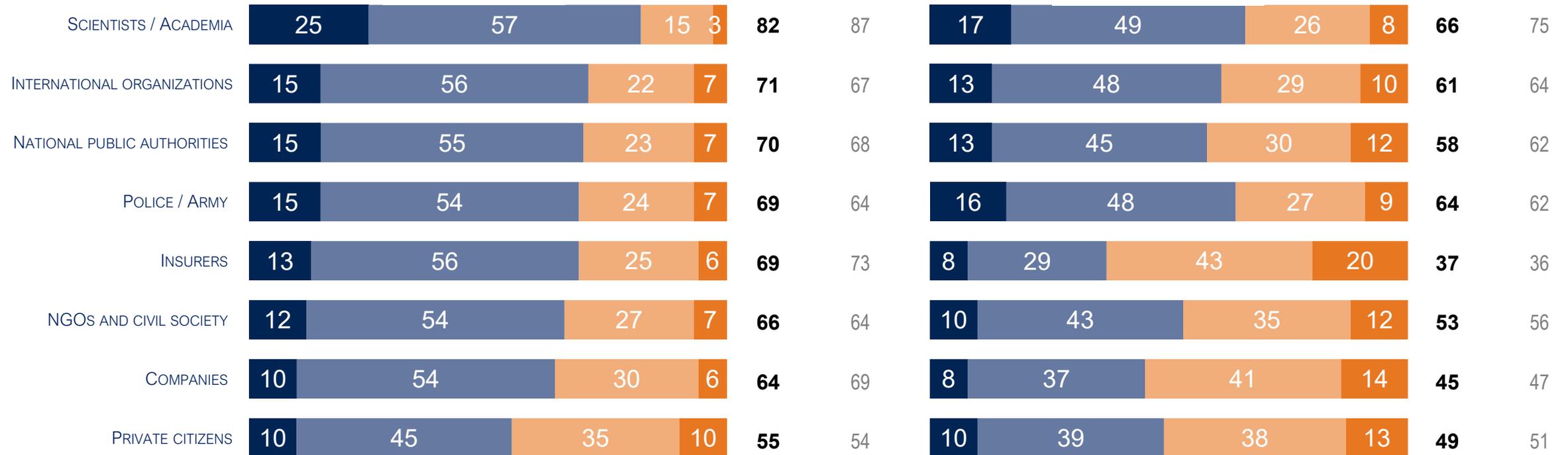
EXPERTS

Yes 2021



GENERAL POPULATION

Yes 2021



*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 TOWARD DIFFERENT ACTORS TO LIMIT FUTURE CRISIS – PER CLUSTER AND COUNTRY



EXPERTS



GENERAL POPULATION

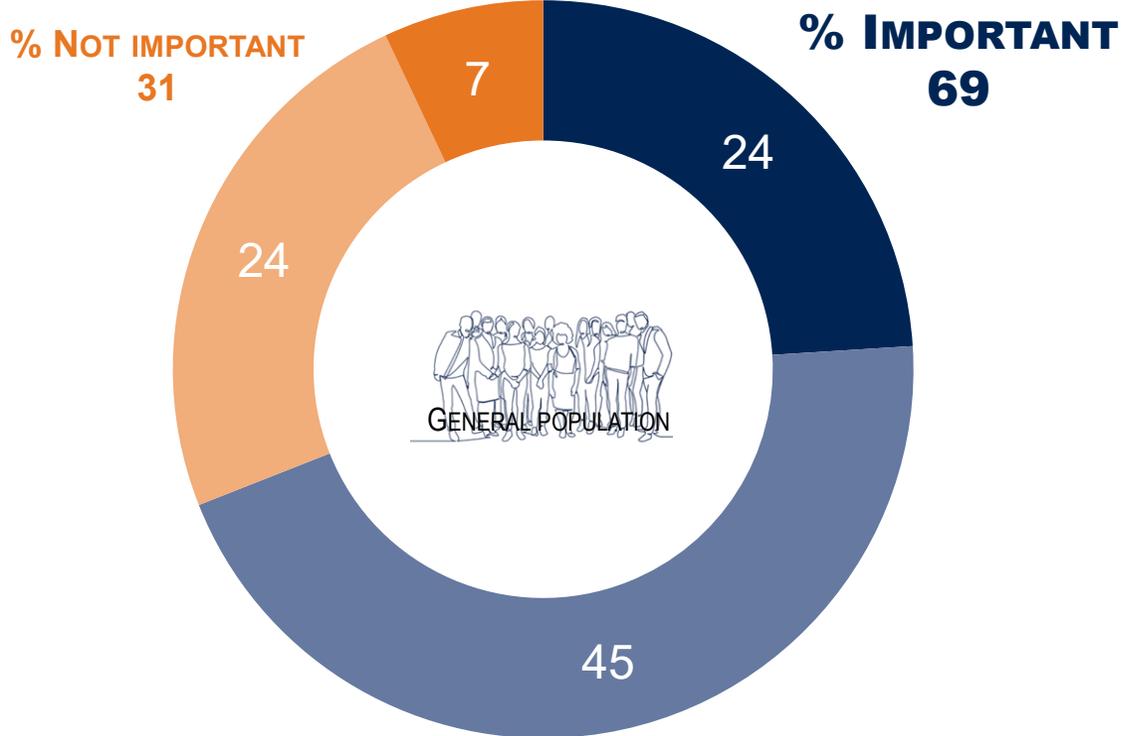
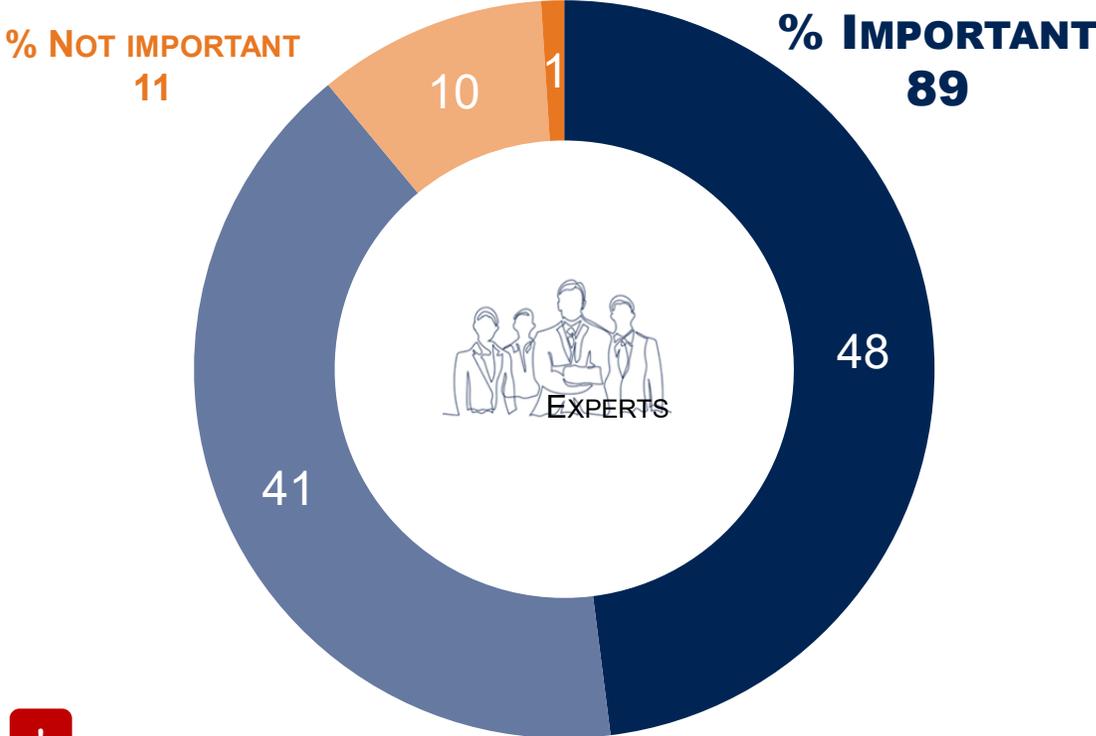
% YES	EXPERTS					GENERAL POPULATION					
	EUROPE	SPAIN	ASIA PACIFIC	AMERICA	AFRICA	EUROPE	SPAIN	ASIA PACIFIC	AMERICA	AFRICA	
Scientists / Academia	<b>82</b>	78	85	75	78	<b>66</b>	65	66	59	69	78
International organizations	<b>71</b>	62	79	68	66	<b>61</b>	57	66	60	60	77
National public authorities	<b>70</b>	61	77	63	59	<b>58</b>	52	55	63	56	73
Police / Army	<b>69</b>	73	74	65	62	<b>64</b>	61	63	61	65	75
Insurers	<b>69</b>	64	80	68	81	<b>37</b>	29	36	36	40	55
NGOs and civil society	<b>66</b>	59	72	60	71	<b>53</b>	52	54	45	52	74
Companies	<b>64</b>	63	75	63	66	<b>45</b>	42	49	40	47	55
Private citizens	<b>55</b>	47	66	53	67	<b>49</b>	45	49	39	54	65

*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



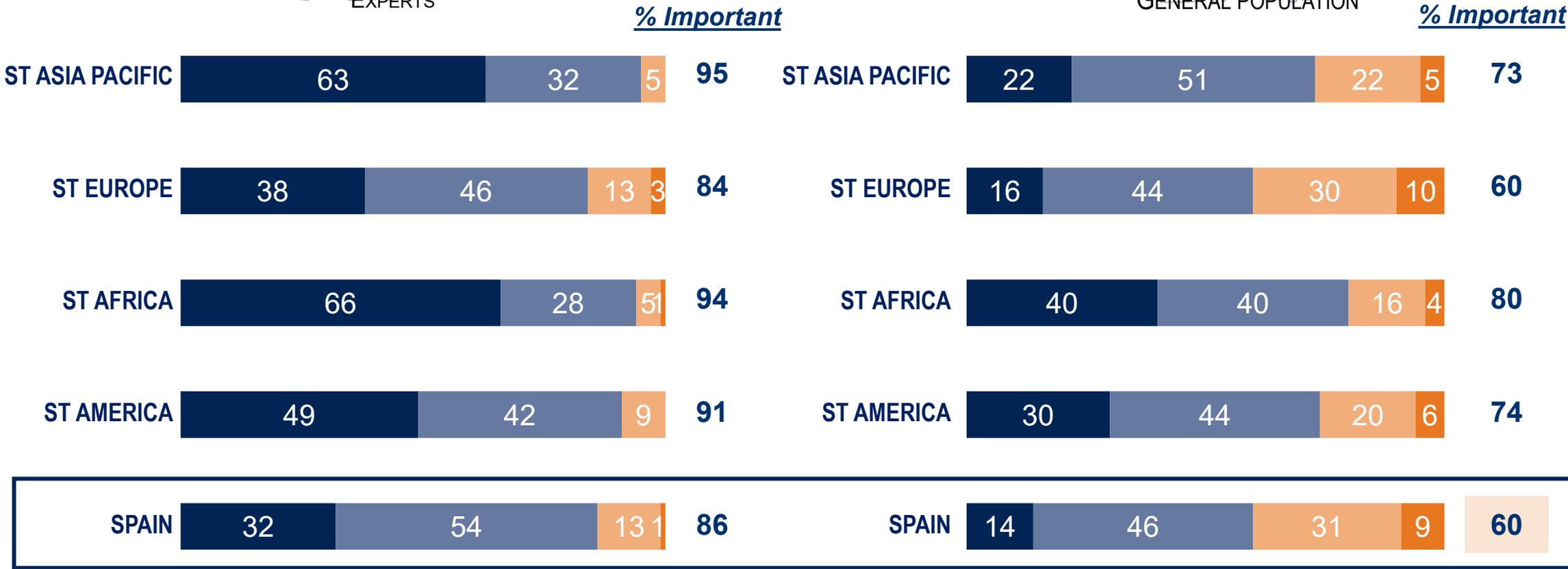
New question

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



# THE ROLE OF INSURERS TO LIMIT THE IMPACT OF FUTURE RISKS – PER CLUSTER

Very important
  Somewhat important
  Not very important
  Not important at all



# LEVEL OF VULNERABILITY PER RISKS

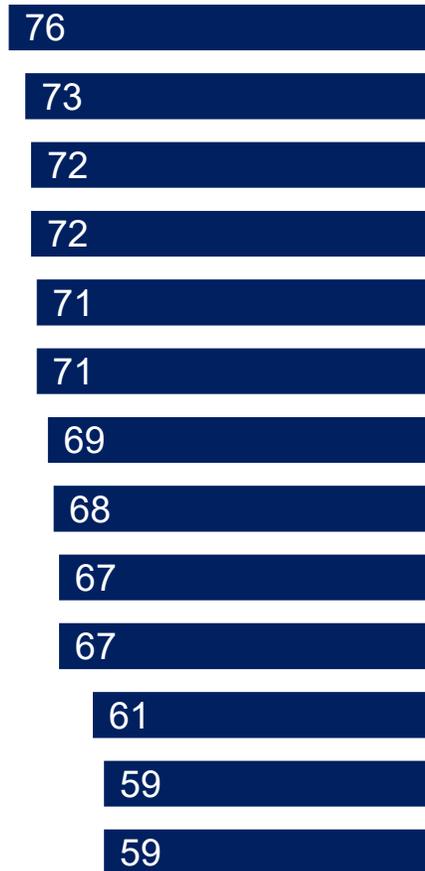
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# LEVEL OF VULNERABILITY PER RISKS

## ALL COUNTRIES



■ YES



Pollution

Energy risks

Pandemics and infectious diseases

Monetary and fiscal policies risks

Cyber security risks

Ethical risks regarding the use of technology

Long-term exposure to harmful substances

Natural resources and biodiversity risks

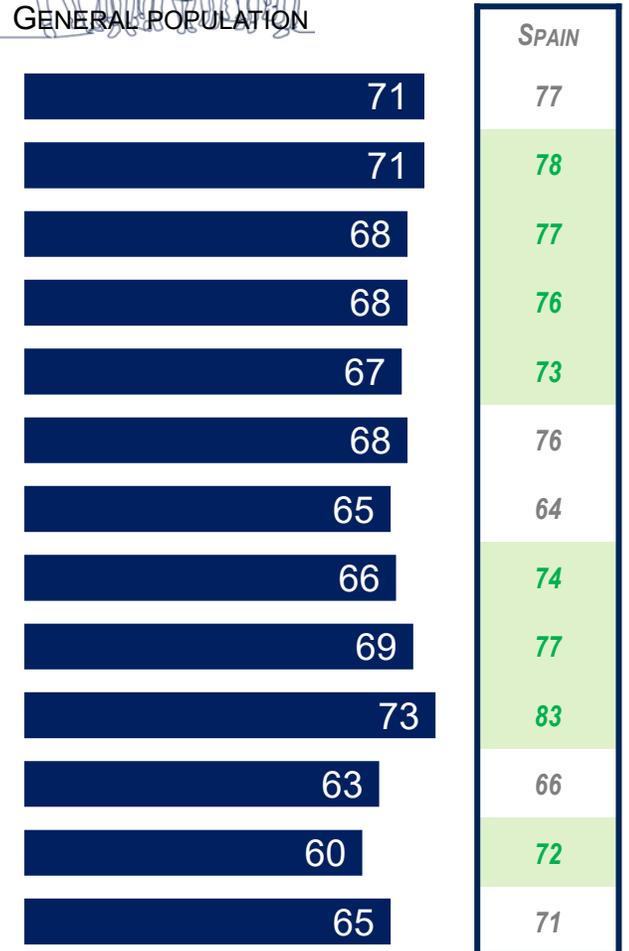
Chronic illnesses

Climate change

Risks related to the future of Work

Geopolitical instability

Risks related to changing demographics



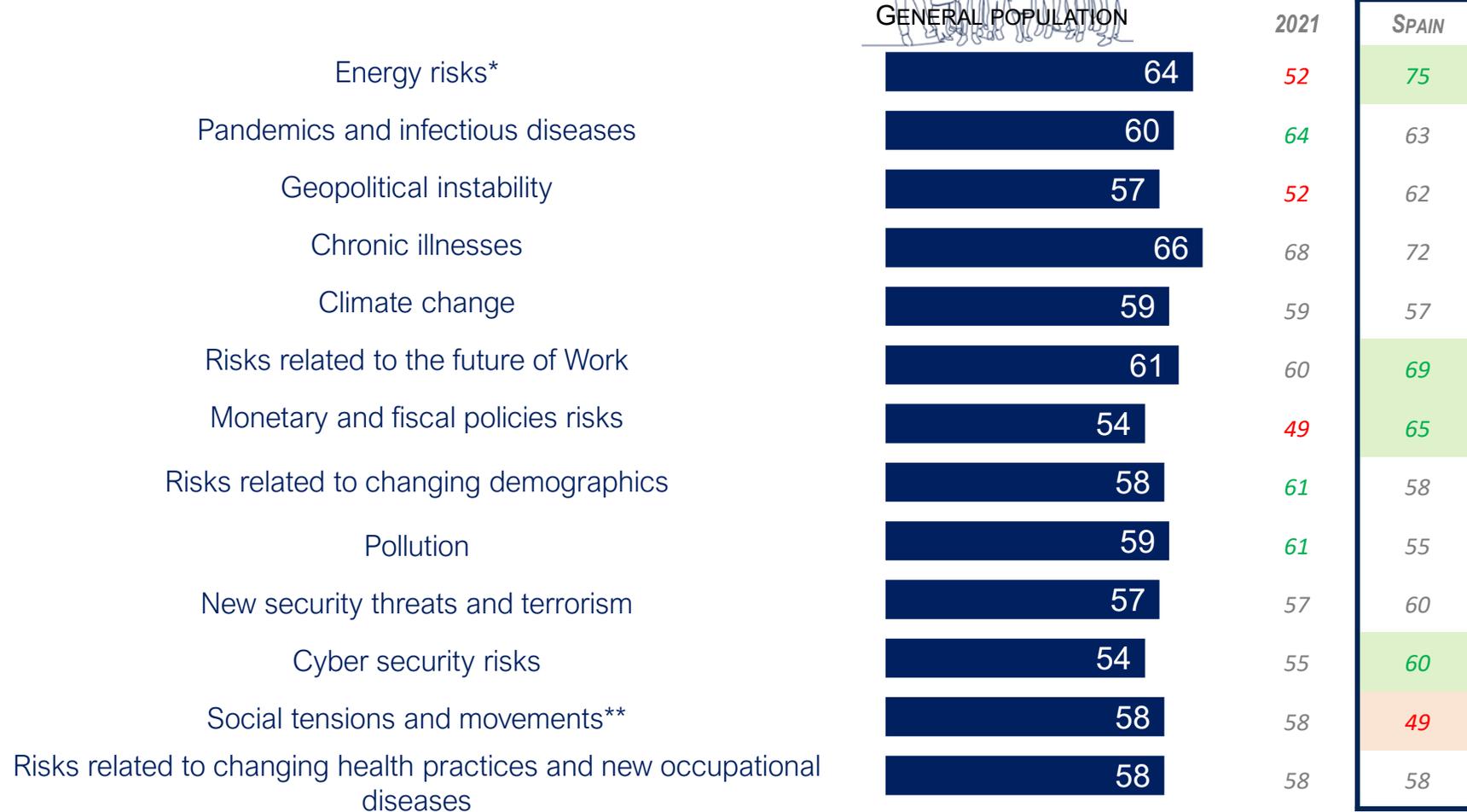
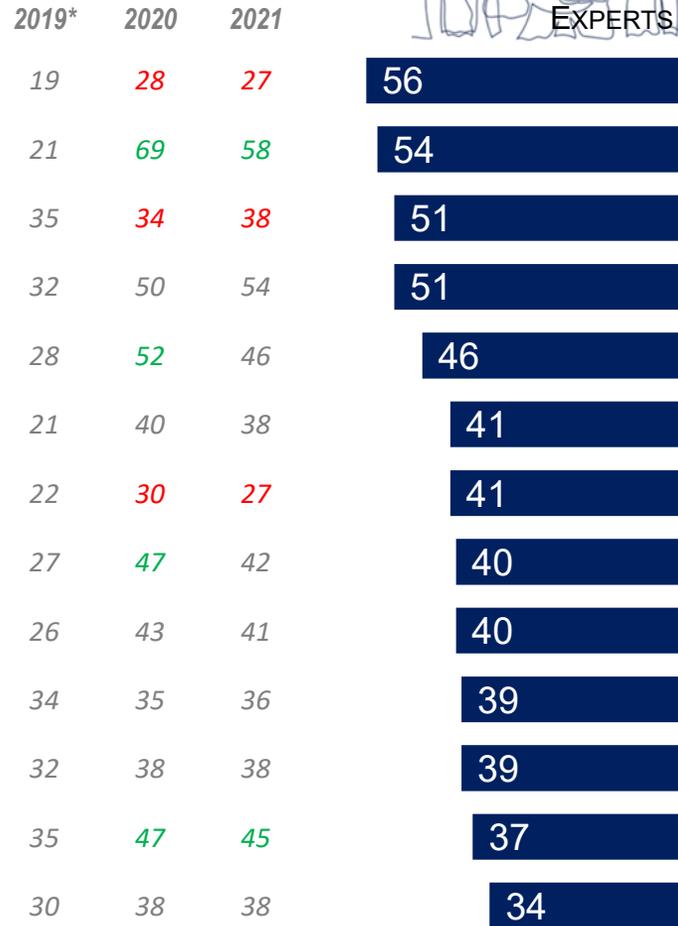
# AWARENESS OF THE GENERAL POPULATION ON FUTURE RISKS

# H

# AWARENESS OF THE GENERAL PUBLIC ON FUTURE RISKS

**AWARE**

## ALL COUNTRIES



To those who selected the risk in their top 5: Given the current knowledge of this future risk, how would you rate the awareness of the general public? \*In 2019, scale was: very satisfactory / quite satisfactory / quite unsatisfactory / very unsatisfactory

\*Previously the item was “Energy transition risks”

\*\*Previously the item was “Social discontents and local conflicts”

# AWARENESS OF THE GENERAL PUBLIC ON FUTURE RISKS

■ AWARE

## ALL COUNTRIES



To those who selected the risk in their top 5: Given the current knowledge of this future risk, how would you rate the awareness of the general public? \*In 2019, scale was: very satisfactory / quite satisfactory / quite unsatisfactory / very unsatisfactory

# PREPAREDNESS OF PUBLIC AUTHORITIES FOR FUTURE RISKS



# PREPAREDNESS OF PUBLIC AUTHORITIES FOR FUTURE RISKS

■ YES

## ALL COUNTRIES



# PREPAREDNESS OF PUBLIC AUTHORITIES FOR FUTURE RISKS

■ YES

## ALL COUNTRIES



EXPERTS



GENERAL POPULATION

<u>2019*</u>	<u>2020</u>	<u>2021</u>					
13	22	17	19	Ethical risks regarding the use of technology	45	42	
12	16	14	19	Tech-related economic risks	44	46	
26	26	24	17	Macro-economic risks	41	37	
12	17	17	17	Disruptive technologies	47	36	
19	15	14	15	Risks related to smart and autonomous systems	40	53	
10	14	11	14	Risks related to Artificial Intelligence and big data	39	35	
11	16	19	14	Climate change	27	29	
-	19	19	14	Risks related to changing demographics	41	44	
7	9	18	13	Long-term exposure to harmful substances	37	40	
18	15	20	13	Social tensions and movements	32	31	
12	13	16	10	Natural resources and biodiversity risks	31	33	
17	22	12	6	Space and planetary risks	48	59	

# PREPAREDNESS OF THE PRIVATE SECTOR FOR FUTURE RISKS

# J

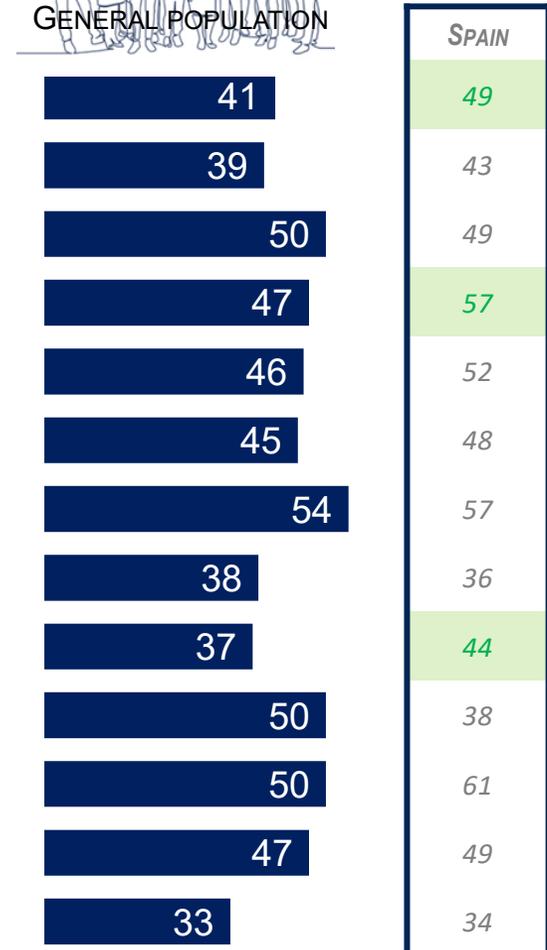
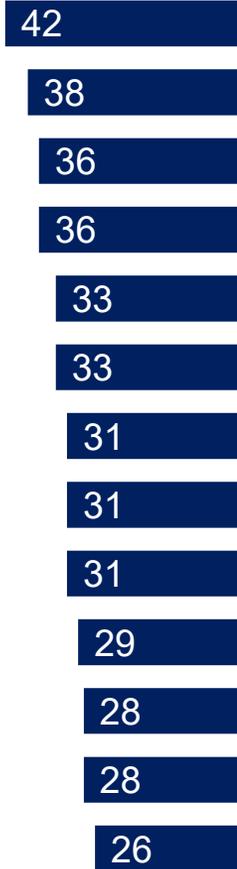


# PREPAREDNESS OF THE PRIVATE SECTOR FOR FUTURE RISKS

■ No, not at all 
 ■ No, not really 
 ■ Yes, somewhat 
 ■ Yes, absolutely

■ YES

## ALL COUNTRIES



# PREPAREDNESS OF THE PRIVATE SECTOR FOR FUTURE RISKS

■ No, not at all 
 ■ No, not really 
 ■ Yes, somewhat 
 ■ Yes, absolutely

■ YES

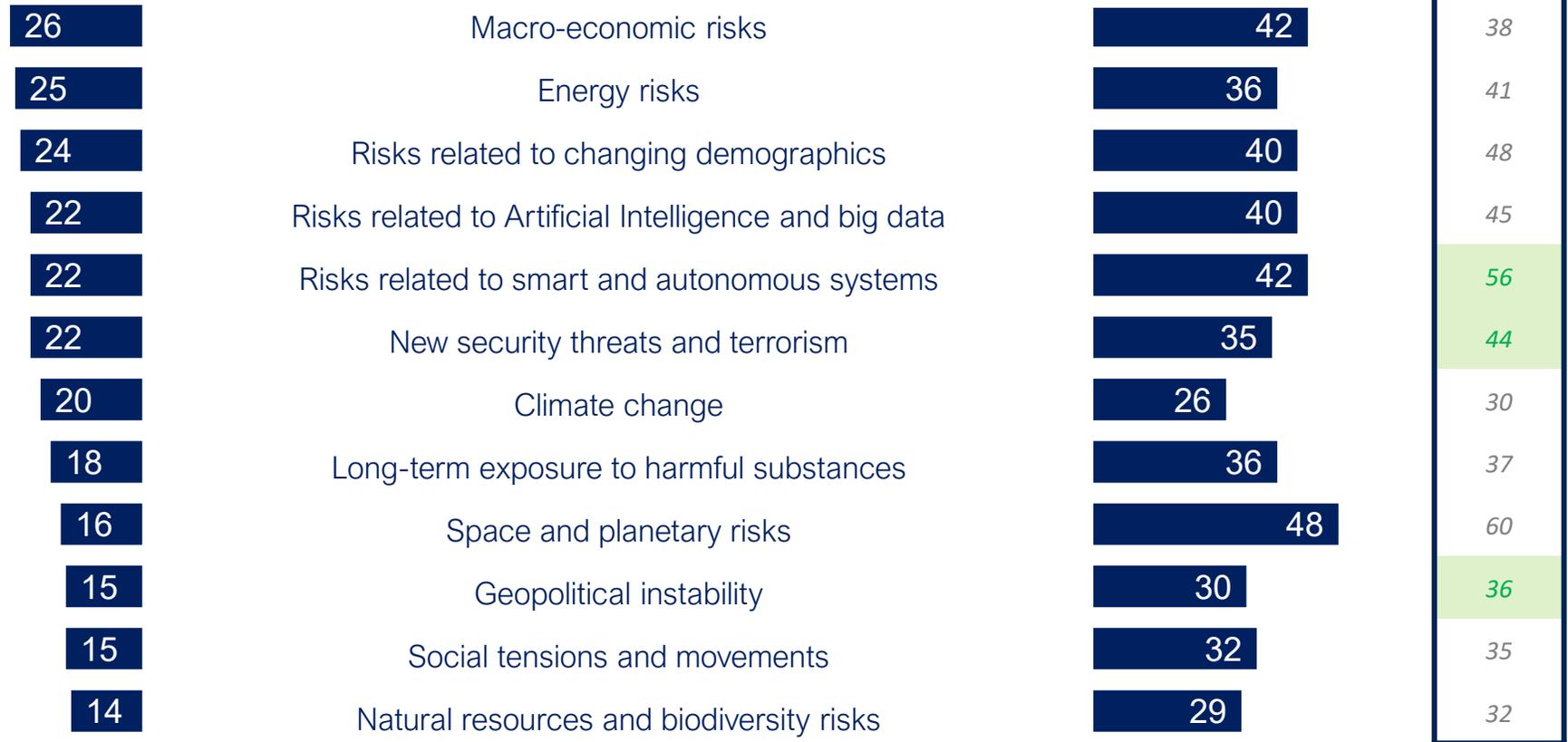
## ALL COUNTRIES



EXPERTS



GENERAL POPULATION



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ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg  
IPS:FP  
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# GAME CHANGERS

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In our world of rapid change, the need for reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth:  
**You act better when you are sure.**