



GLOBAL STATES OF MIND

NEW METRICS FOR WORLD LEADERS

OCTOBER 2013

GALLUP®

Global States of Mind 2013 — Gallup's second annual global audit — tackles one huge issue: Through classical economics, we know what people worldwide are spending and transacting — we know the economics of every society. But no one really seems to know for sure what people are *thinking* or how they are *feeling*.

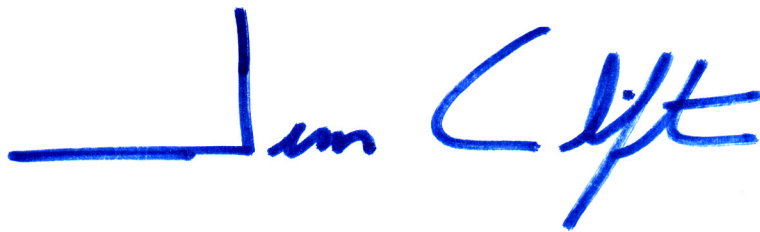
Here's an example: Prior to the Arab Spring, most experts looked at the rising GDPs of Tunisia and Egypt and assumed that people's well-being in those countries was improving as well. That was a miscalculation of historic proportions. Even as GDPs were increasing, the Gallup World Poll showed the percentages of people with "thriving" well-being were crashing in both countries. Hardly anyone knew what the people were *thinking* — not any major institution, not any country's intelligence agency. I don't recall a single expert saying, "These societies are as brittle as they've ever been and they're manifesting the conditions for a massive regionwide revolution."

Everyone missed it. What we all learned real quickly, though, is that classical economic data do not necessarily reveal conditions for revolution. Rather, they are evident within the metrics of well-being and behavioral economics. Measuring GDP and highly unreliable unemployment data, as well as imports and exports, does little to forecast instability and revolution. We are more likely to predict revolution when we can review metrics of hope, suffering, perceptions of government corruption, number of good jobs, and perceptions of safety and food security.

To give world leaders just those metrics, Gallup now offers Gallup Analytics, a Web-based dashboard that shows global data on well-being and behavioral economics, country by country, across more than 160 countries and areas. This tool offers a vital wealth of new behavioral economics to the classical economic indicators that leaders already use.

We think Gallup Analytics is a game changer for world leaders and their teams. That's because predictive analytics that don't include well-being and behavioral economics metrics don't predict at all.

Regards,

A handwritten signature in blue ink, appearing to read "Jim Clifton". The signature is stylized and fluid, with a long horizontal line extending to the left of the name.

Jim Clifton
Chairman & CEO
Gallup

This report reveals high-level data that Gallup collected as part of its major multiyear initiative known as the Gallup World Poll. The indicators in this report provide leaders with information about countries' performance on the Gallup Macroeconomic Path — a behavioral-based leadership model for successful societies.

ABOUT THE GALLUP WORLD POLL

Gallup continuously surveys in more than 160 countries and is committed to doing so for the entire century. The Gallup World Poll provides a scientific window into the well-being, attitudes, and behaviors of most of the world's residents through randomly selected, nationally representative samples. Between 2005 and 2012, Gallup completed more than 1 million interviews.

Gallup research shows that factors beyond classical economic measures affect people's attitudes and behaviors. The World Poll was created with input from renowned economists, psychologists, sociologists, and political scientists and provides leaders with better tools to examine the future of economies, government performance, and the overall momentum of the world's population.

Gallup is entirely responsible for the management, design, and control of the World Poll. Identities of all surveyed respondents are confidential. Gallup is not associated with any political orientation, party, or advocacy group and does not accept partisan groups as clients.

The data presented in this report come from Gallup surveys in 141 countries in 2012. A few countries featured in the inaugural *Global States of Mind* report were not surveyed in 2012, such as Swaziland and Lesotho. In some countries, government restrictions prevented interviewers from asking select questions, particularly sensitive questions related to government performance.

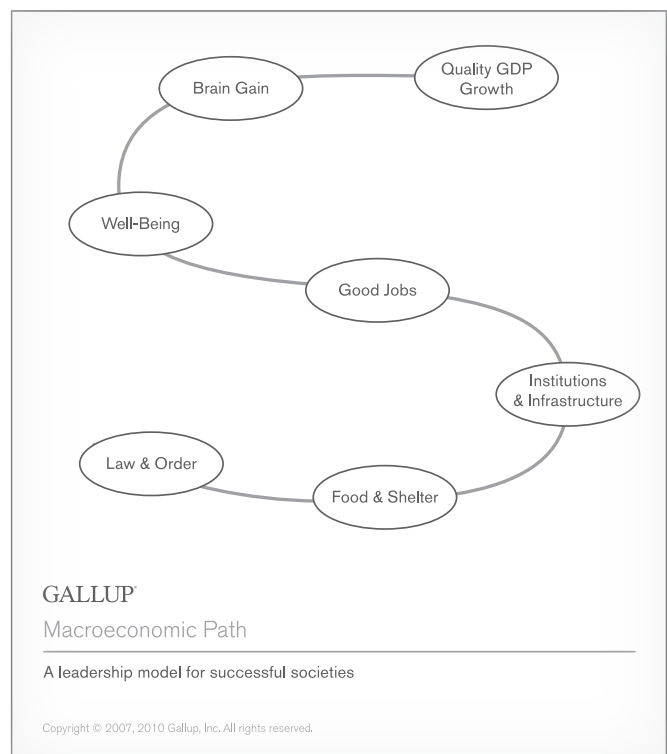
A MACROECONOMIC MODEL FOR SUCCESSFUL SOCIETIES

The Gallup Macroeconomic Path provides the framework Gallup researchers believe societies must follow to thrive. The model highlights the link between every resident's individual contribution and the overall success of a community or country. Gallup's global network of

researchers and analysts employ their knowledge of this path to construct surveys, collect data, and provide strategic advice based on the results.

The heart of the path is well-being. Just as great workplaces must deliberately create conditions to produce engaged employees and customers, communities must deliberately promote well-being to attract the best talent and promote quality GDP growth. As engaged employees and customers make growth and prosperity possible for companies, engaged residents do the same for their communities.

The fundamental needs of a community's residents, such as food and shelter, form the early steps of the path, followed by higher order needs such as good jobs and well-being. Many communities succeed at addressing basic needs, but they fail in achieving the latter steps of the path.



Least Likely to Feel Safe	
	Feel safe
Venezuela	26%
South Africa	27%
Chad	33%
Botswana	35%
Gabon	35%
Afghanistan	39%
Dominican Republic	39%
Russia	39%
Madagascar	40%
Bolivia	40%

Most Likely to Feel Safe	
	Feel safe
Qatar	92%
Georgia	91%
Singapore	90%
Indonesia	89%
Myanmar	89%
Hong Kong	88%
Norway	87%
Niger	86%
Rwanda	86%
Tajikistan	86%

Law and Order is the bedrock of a community's well-being, binding it together.

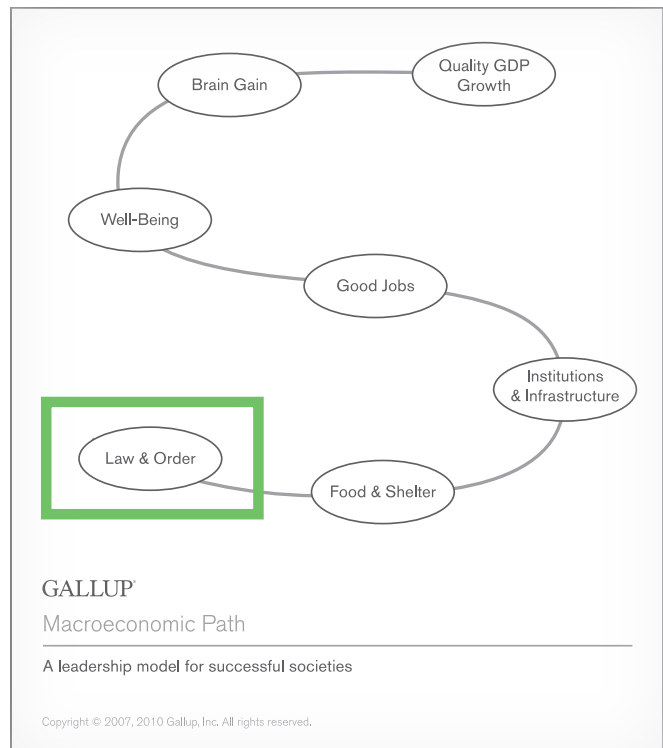
Law and Order gauges people's sense of personal security in their neighborhoods and their personal experiences with crime and law enforcement.

Gallup sees strong relationships between people's answers to these questions and external measures related to economic and social development, reinforcing how high crime rates can suppress social cohesion and negatively affect economic performance.

In the city or area where you live, do you have confidence in the local police force?

Do you feel safe walking alone at night in the city or area where you live?

Within the last 12 months, have you had money or property stolen from you or another household member?



FOOD AND SHELTER

Countries Struggling Most to Afford Food	
	Not enough money for food
Guinea	77%
Niger	74%
Zambia	72%
Madagascar	70%
Cambodia	67%
Republic of the Congo (Brazzaville)	67%
Haiti	67%
Gabon	66%
Cameroon	65%
Malawi	62%

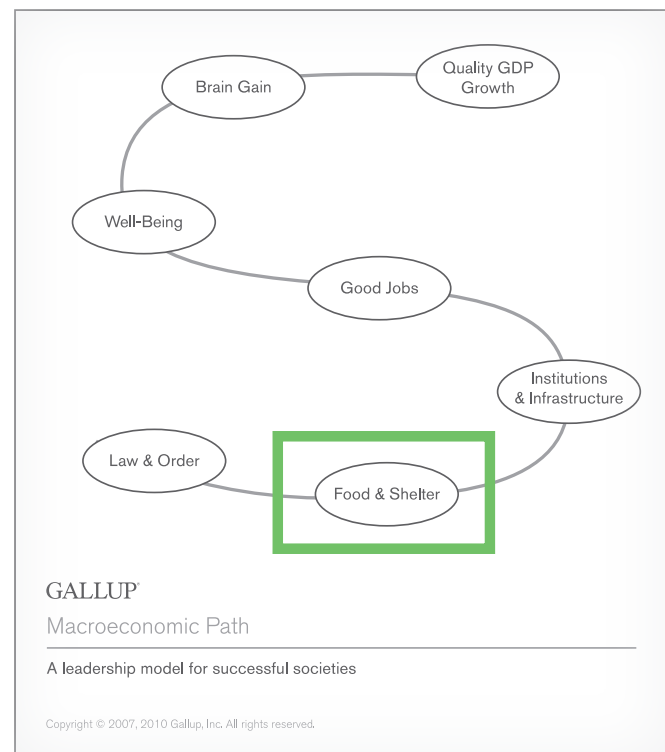
Countries Struggling Least to Afford Food	
	Not enough money for food
Sweden	7%
Netherlands	7%
Norway	7%
China	7%
Denmark	6%
Japan	5%
Austria	5%
Germany	4%
Switzerland	4%
Kuwait	1%

Food and Shelter measures the capability people have to meet their basic needs for food and shelter. This point on the path is an effective indicator of the prevalence of poverty across individuals in a group, country, or region.

As would be expected, people in wealthier countries report fewer problems affording the basics than those in lesser-developed countries. However, even in the wealthiest countries, some percentage of the population struggles with this.

Have there been times in the past 12 months when you did not have enough money to buy food that you or your family needed?

Have there been times in the past 12 months when you did not have enough money to provide adequate shelter or housing for you and your family?



Highest and Lowest Perceptions of Government Corruption in Free Press Countries*			
	Corruption is widespread in government		Corruption is widespread in government
Czech Republic	94%	United Kingdom	43%
Lithuania	90%	Netherlands	33%
Ghana	89%	Australia	33%
Portugal	88%	Finland	30%
South Africa	88%	Luxembourg	26%
Italy	86%	Norway	25%
Costa Rica	82%	New Zealand	24%
South Korea	80%	Switzerland	23%
Hungary	79%	Denmark	15%
Cyprus	77%	Sweden	14%

*According to Freedom House 2013 Media Freedom Status

Institutions and Infrastructure measures confidence in key institutions, including the military, the judicial system, the national government, and the honesty of elections, and evaluates infrastructure, including roads, education, environment, healthcare, and housing.

Highest and Lowest Perceptions of Government Corruption in Partly Free Press Countries*			
	Corruption is widespread in government		Corruption is widespread in government
Tanzania	95%	Sri Lanka	64%
Kenya	93%	Haiti	64%
Greece	92%	Brazil	63%
Nigeria	92%	Venezuela	63%
Uganda	91%	Nicaragua	56%
Kosovo	90%	Turkey	53%
Bosnia and Herzegovina	89%	Uruguay	50%
Malawi	88%	Somaliland region	39%
Indonesia	88%	Hong Kong	30%
Thailand	87%	Georgia	25%

*According to Freedom House 2013 Media Freedom Status

People in countries where high percentages see widespread corruption in their government tend to have less confidence in their national institutions and in law and order, which suggests that corruption actively undermines the foundations of well-being.

Measures of government corruption and other questions that could be considered critical of the government are sensitive in some countries. Sometimes these questions are so sensitive that they are not asked, and if they are, the results may reflect residents' reluctance to criticize the government. This is particularly true in countries where media freedom is limited, which makes it useful to study these perceptions within the context of measures such as those from Freedom House.

Highest and Lowest Perceptions of Government Corruption in Not Free Press Countries*			
	Corruption is widespread in government		Corruption is widespread in government
Chad	92%	Mexico	63%
Cameroon	89%	Azerbaijan	62%
Honduras	87%	Ecuador	62%
Russia	80%	Kazakhstan	62%
Zimbabwe	78%	Syria	55%
Paraguay	77%	Tajikistan	47%
Republic of the Congo (Brazzaville)	77%	Vietnam	47%
Cambodia	77%	Belarus	36%
Afghanistan	77%	Singapore	15%
Yemen	76%	Rwanda	5%

*According to Freedom House 2013 Media Freedom Status

Is corruption widespread within businesses located in (country), or not?

Is corruption widespread throughout the government in (country), or not?

In the city or area where you live, are you satisfied or dissatisfied with the public transportation systems?

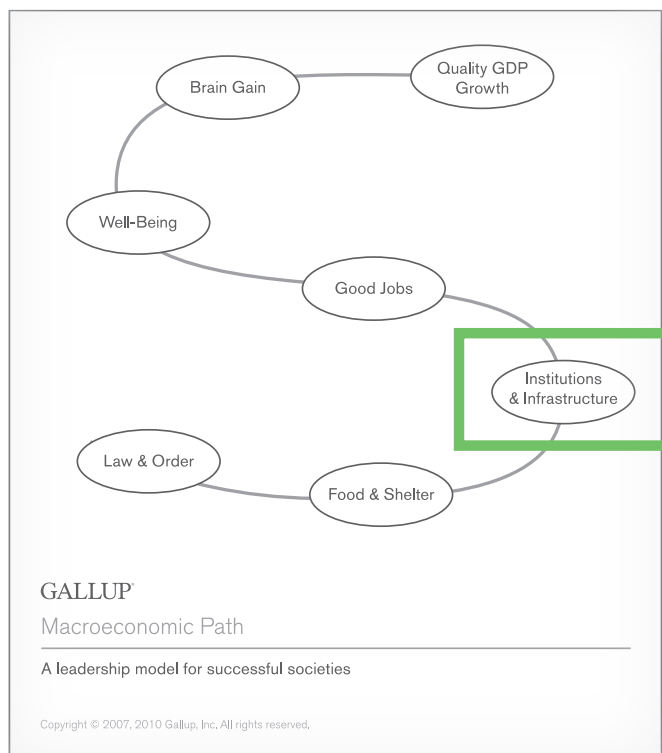
In the city or area where you live, are you satisfied or dissatisfied with the roads and highways?

In the city or area where you live, are you satisfied or dissatisfied with the quality of air?

In the city or area where you live, are you satisfied or dissatisfied with the quality of water?

In the city or area where you live, are you satisfied or dissatisfied with the availability of good affordable housing?

In the city or area where you live, are you satisfied or dissatisfied with the availability of quality healthcare?



Do you have confidence in each of the following, or not? How about the military?

Do you have confidence in each of the following, or not? How about the judicial system and courts?

Do you have confidence in each of the following, or not? How about the national government?

Do you have confidence in each of the following, or not? How about honesty of elections?

In the city or area where you live, are you satisfied or dissatisfied with the educational system or the schools?

Do you believe that children in (country) are treated with respect and dignity, or not?

Do most children in (country) have the opportunity to learn and grow every day, or not?

Does your home have a landline telephone?

Does your home have a cellular phone?

Does your home have a television?

Does your home have access to the Internet?



Lowest Payroll to Population Employment Rates	
Among all national adults	
	Payroll to Population
Nigeria	9%
Malawi	8%
Nepal	8%
Benin	7%
Guinea	6%
North Cyprus	6%
Tanzania	6%
Mali	5%
Burkina Faso	5%
Chad	5%

Highest Payroll to Population Employment Rates	
Among all national adults	
	Payroll to Population
Iceland	60%
Sweden	52%
Kuwait	51%
Belarus	48%
United Arab Emirates	48%
Czech Republic	47%
Singapore	47%
Israel	45%
Croatia	45%
Lithuania	45%

Good Jobs are what the world's residents want most.

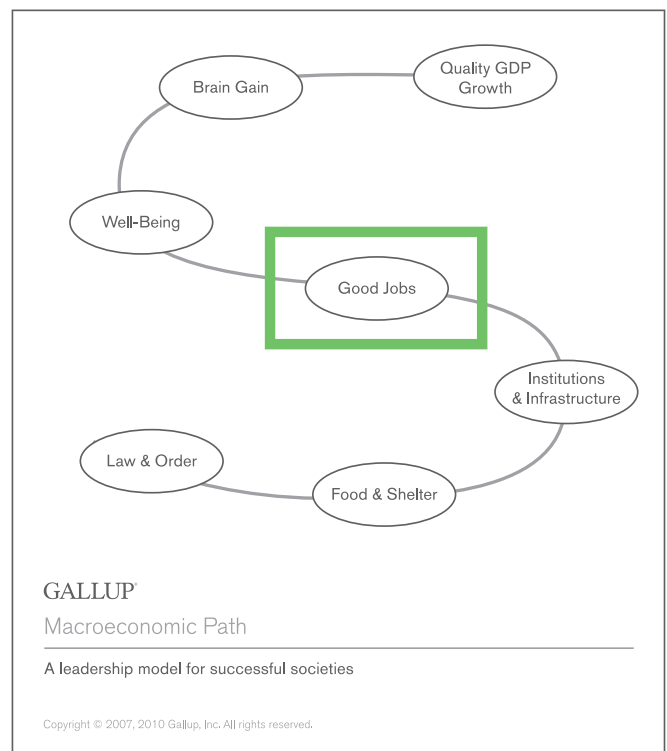
People's careers shape their identity and well-being, so it makes sense that Gallup's global surveys reveal that people with "good jobs" — those who work full time for an employer — tend to have the highest well-being. They are more likely rate their present and future lives positively than those who are self-employed, employed part time and looking for full-time work, or unemployed.

The Payroll to Population rate is the percentage of the population that is employed full time for an employer. It reflects the percentage of respondents in the population who are employed full time for an employer at least 30 hours per week.

Right now, do you think that economic conditions in the city or area where you live, as a whole, are getting better or getting worse?

Thinking about the job situation in the city or area where you live today, would you say that it is now a good time or a bad time to find a job?

In the city or area where you live, are you satisfied or dissatisfied with the availability of good job opportunities?



Well-Being measures the interconnected elements that contribute to health, happiness, and productivity, including work, social networks, personal economics, personal health, and citizen engagement.

Highest Suffering Worldwide	
	Suffering
Bulgaria	39%
Armenia	37%
Cambodia	34%
Haiti	32%
Hungary	32%
Madagascar	31%
Macedonia	31%
Iran	31%
Syria	29%
Afghanistan	29%

Lowest Suffering Worldwide	
	Suffering
Australia	2%
Venezuela	2%
Somaliland region	2%
Switzerland	2%
Nigeria	1%
United Arab Emirates	1%
Norway	1%
Sweden	1%
Qatar	1%
Iceland	1%

Gallup classifies respondents as “thriving,” “struggling,” or “suffering,” according to how they rate their current and future lives on a ladder scale with steps numbered from zero to 10 based on the Cantril Self-Anchoring Striving Scale. Those who rate their present life a 7 or higher and their life in five years an 8 or higher are classified as thriving, while those who rate both dimensions a 4 or lower are considered suffering. Respondents whose ratings fall in between are considered struggling.

Across countries, measures of well-being correlate highly with income, education levels, and reported disease conditions. Individuals who are thriving have fewer disease conditions, fewer sick days, and higher incomes; are more highly educated; and have better work environments. Residents in countries with higher percentages of thriving respondents also report that the area they live in is a good place to live for people of different ethnicities, races, and cultures.

Compared with thriving respondents, struggling respondents are much more likely to worry about money on a daily basis, and suffering respondents are less likely to have basic necessities such as food and shelter.

Which one of these phrases comes closest to your own feelings about your household’s income these days: living comfortably on present income, getting by on present income, finding it difficult on present income, or finding it very difficult on present income?

Are you satisfied or dissatisfied with your standard of living, all the things you can buy and do?

Right now, do you feel your standard of living is getting better or getting worse?

Right now, do you think that economic conditions in the city or area where you live, as a whole, are getting better or getting worse?

Do you have any health problems that prevent you from doing any of the things people your age normally can do?

Now, please think about yesterday, from the morning until the end of the day. Think about where you were, what you were doing, who you were with, and how you felt. Did you feel well-rested yesterday?

Were you treated with respect all day yesterday?

Did you smile or laugh a lot yesterday?

Did you learn or do something interesting yesterday?

Did you experience the following feelings during a lot of the day yesterday? How about physical pain?

Did you experience the following feelings during a lot of the day yesterday? How about worry?

Did you experience the following feelings during a lot of the day yesterday? How about sadness?

Did you experience the following feelings during a lot of the day yesterday? How about enjoyment?

Did you experience the following feelings during a lot of the day yesterday? How about stress?

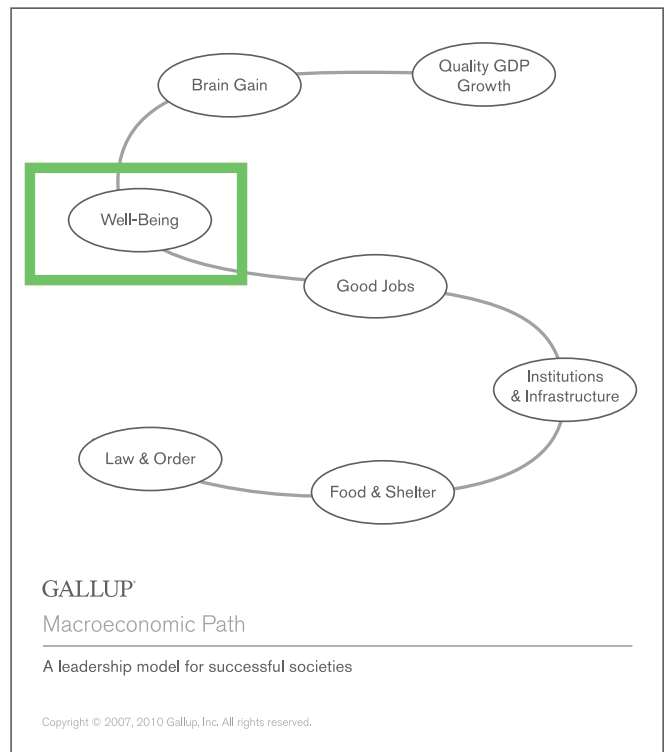
Did you experience the following feelings during a lot of the day yesterday? How about anger?

In the city or area where you live, are you satisfied or dissatisfied with the opportunities to meet people and make friends?

Have you done any of the following in the past month? How about donated money to a charity?

Have you done any of the following in the past month? How about volunteered your time to an organization?

Have you done any of the following in the past month? How about helped a stranger or someone you didn't know who needed help?



Please imagine a ladder, with steps numbered from zero at the bottom to 10 at the top. The top of the ladder represents the best possible life for you and the bottom of the ladder represents the worst possible life for you. On which step of the ladder would you say you personally feel you stand at this time?

Please imagine a ladder, with steps numbered from zero at the bottom to 10 at the top. The top of the ladder represents the best possible life for you and the bottom of the ladder represents the worst possible life for you. Just your best guess, on which step do you think you will stand in the future, say about five years from now?

Highest Likelihood to Move Away in Next 12 Months	
	Likely to move
Syria	43%
Ghana	38%
Qatar	36%
Cameroon	33%
Nigeria	30%
Gabon	30%
Sudan	29%
Botswana	28%
Guinea	26%
Somaliland region	26%

Lowest Likelihood to Move Away in Next 12 Months	
	Likely to move
Thailand	5%
Georgia	5%
Ukraine	5%
Russia	5%
Belarus	5%
Slovakia	5%
Azerbaijan	5%
Kyrgyzstan	4%
Vietnam	4%
Tajikistan	4%

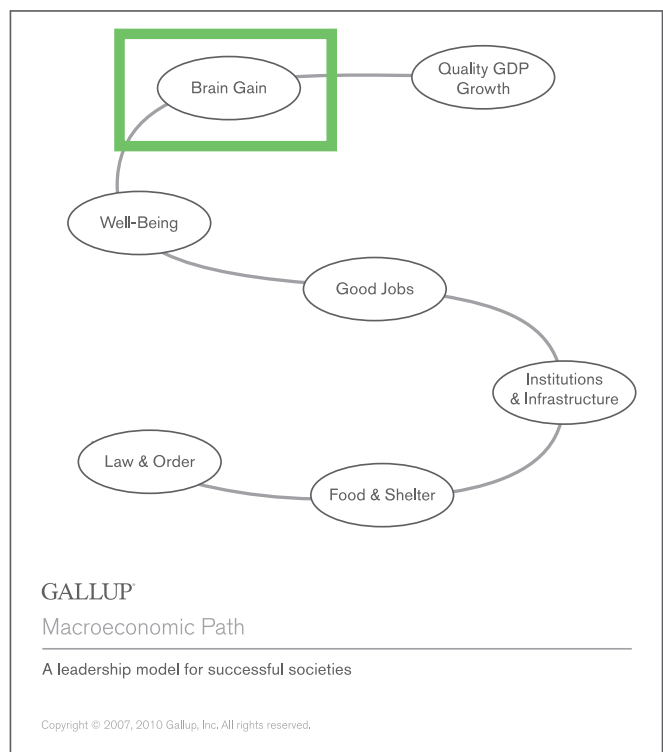
Brain Gain reflects a city's or country's ability to attract and retain talented people whose exceptional gifts and knowledge create new businesses and new jobs to help improve that city's or country's economy.

Gallup's worldwide studies document a clear relationship between "good jobs" and people's attachment to their communities. In countries where more people are employed full time for employers, residents are more likely to be satisfied with the communities they live in, more likely to recommend them to others, and considerably less likely to say they will probably leave them in the next year.

Are you satisfied or dissatisfied with the city or area where you live?

In the next 12 months, are you likely or unlikely to move away from the city or area where you live?

Would you recommend the city or area where you live to a friend or associate as a place to live, or not?





BEYOND THE PATH

LEADERSHIP APPROVAL

Do you approve or disapprove of the job performance of the leadership of this country?

Lowest and Highest Approval of Leadership in Free Press Countries*			
	Approve of country's leadership		Approve of country's leadership
Montenegro	28%	Switzerland	81%
Poland	28%	Luxembourg	75%
Japan	28%	Norway	67%
Costa Rica	27%	Suriname	65%
North Cyprus	24%	New Zealand	64%
Iceland	22%	Denmark	63%
Estonia	19%	Finland	63%
Lithuania	19%	Canada	60%
Hungary	17%	Sweden	58%
Czech Republic	13%	Germany	57%

*According to Freedom House 2013 Media Freedom Status

Leaders' ability to lead does not hinge on their constituents' support, but this support does make it easier for them to lead effectively.

In countries where citizens feel free to say what they think of their country's leadership, job approval ratings can be a useful barometer of not only how well the country is doing, but also how well its residents are doing, and their faith that their leadership is moving their country in the right direction.

Gallup's surveys show residents' perceptions of economic conditions are often related to approval ratings. In Europe, for example, people's ratings are strongly related to economic conditions. But economics are not the whole story. In Africa, governance issues such as the honesty of elections and the judicial system seem to matter much more.

Of all questions that Gallup asks worldwide, direct questions about a country's leadership are among the most sensitive.

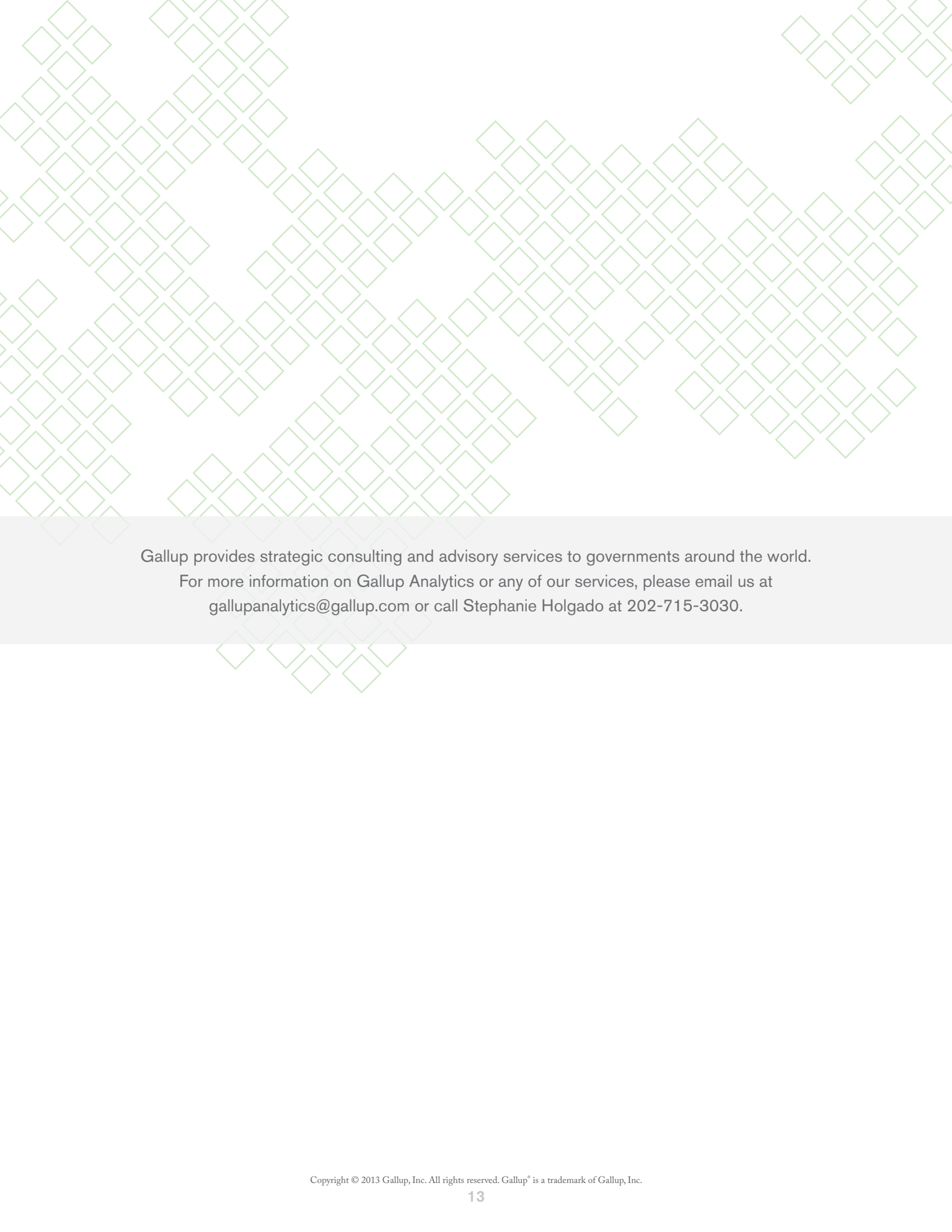
In nearly 20 countries, the question is too sensitive to ask, and in some countries — such as those with little media freedom — the responses may reflect citizens' reluctance to criticize the government.

Lowest and Highest Approval of Leadership in Partly Free Press Countries*			
	Approve of country's leadership		Approve of country's leadership
Peru	28%	Sri Lanka	82%
Mongolia	27%	Thailand	81%
Croatia	24%	Philippines	77%
Ukraine	23%	Somaliland region	77%
Moldova	23%	Bangladesh	70%
Pakistan	19%	Malaysia	70%
Serbia	18%	Botswana	67%
Romania	16%	Burkina Faso	66%
Bosnia and Herzegovina	15%	Indonesia	63%
Greece	15%	Zambia	63%

*According to Freedom House 2013 Media Freedom Status

Lowest and Highest Approval of Leadership in Not Free Press Countries*			
	Approve of country's leadership		Approve of country's leadership
Russia	47%	Rwanda	94%
Palestinian Territories	45%	Myanmar	91%
Paraguay	42%	Tajikistan	90%
Zimbabwe	41%	Cambodia	88%
Mexico	40%	Azerbaijan	82%
Gabon	40%	Singapore	79%
Afghanistan	35%	Kazakhstan	73%
Chad	33%	Ecuador	69%
Honduras	32%	Vietnam	63%
Iraq	27%	Venezuela	57%

*According to Freedom House 2013 Media Freedom Status



Gallup provides strategic consulting and advisory services to governments around the world.
For more information on Gallup Analytics or any of our services, please email us at gallupanalytics@gallup.com or call Stephanie Holgado at 202-715-3030.



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