GfK Verein

Challenges of Nations 2017 – a GfK Verein study

From inflation and unemployment to poverty
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Challenges of Nations 2017 – a GfK Verein study

GfK Consumer Experiences:
Birgit Müller, Susanne Siegert

GfK Verein:
Ronald Frank
This latest 2017 edition of the Challenges of Nations now also includes the East African country of Kenya. An important tourist destination, this country, along with Nigeria, with on average more than four responses per person, tops the global list in terms of the number of problems mentioned by the citizens surveyed. Kenyans are particularly concerned about the widespread corruption in their country – and about tribalism as the root of many conflicts. With Mexico, which is included in the survey for the second time, crime in all its facets – from theft and kidnappings through to contract killings – continues to be a matter of global concern. One in seven Mexicans now states explicitly that they no longer feel safe on their streets.

While the issue of immigration and integration was far and away the most frequently mentioned concern in many European countries last year against the background of the refugee crisis, the people in most countries appear to feel somewhat calmer in this respect in 2017 – with one exception: In Italy, the EU country that has been hardest hit by the incoming stream of refugees across the Mediterranean, immigration is viewed significantly more critically than in 2016. Italy is likely to have to deal with around 250,000 refugees in 2017, which makes that fear highly understandable. In Germany, Austria, Sweden and Switzerland, immigration is still seen as the number one challenge, but the level of concern has dropped noticeably. And in the UK, one year after it voted to leave the EU, worries about too many people wishing to come to the British Isles have halved.
Meanwhile in Asia, the current focus is on a completely different set of challenges: In Japan, the fastest ageing society in the world, the low birth rate has become a concern that is specifically mentioned by its citizens in surveys such as this one. Drought and water shortages, partly as a consequence of climate change, are a major worry for people on the Indian subcontinent. And in Indonesia, citizens are worried about the consequences of flooding and earthquakes.

Fears surrounding the labour market, price trends and therefore the purchasing power of consumers – as well as corruption in all its guises – remain globally dominant in 2017, led by countries such as India and Indonesia.

The responses to this survey highlight again this year how much the significance and urgency of the individual topics visibly and empirically change over time in the public – and published – perception, especially in an age of widespread "post-truth" opinions. The next edition of Challenges of Nations will be published in summer 2018.

Ronald Frank /// GfK Verein
1 Challenges of nations
Nations at a glance /// Challenges 2017
Top 10 – summary of all countries*

Weighted by population; (unaided responses; in %; rounded; multiple responses possible)

- **Unemployment**: 24 24
- **Price/purchasing power development**: 23 24
- **Corruption**: 16 15
- **Crime**: 14 18
- **Politics/government**: 10 08
- **Education policy**: 10 09
- **Economic stability**: 10 10
- **Health service**: 09 09
- **Environmental issues**: 09 04
- **Poverty**: 08 07

Base 2017: 27,517 resp. *Restricted comparability of 2016 and 2017 due to Kenya (newly added) and Philippines (excluded)
Nations at a glance /// Challenges 2017 (1)
Top 2 of each country
(unaided responses; in %; rounded; multiple responses possible)

### EUROPE

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Base: 27,517 resp.
Nations at a glance /// Challenges 2017 (2)
Top 2 of each country
(unaided responses; in %; rounded; multiple responses possible)

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Base: 27,517 resp.
### Nations at a glance /// Challenges 2017 (1)

**Top 10 of all nations – number of responses**

(unaided responses; in %; rounded; multiple responses possible)

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#### All nations

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Base: 27,517 resp.
## Nations at a glance /// Challenges 2017 (2)
Top 10 of all nations – number of responses

(unaided responses; in %; rounded; multiple responses possible)

<table>
<thead>
<tr>
<th></th>
<th>All nations</th>
<th>NORTH AND SOUTH AMERICA</th>
<th>ASIA AND PACIFIC</th>
<th>AFRICA</th>
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<tr>
<td></td>
<td>Avg.</td>
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Base: 27,517 resp.
Nations at a glance /// Comparison of concerns about unemployment with the actual unemployment rate* in %

(Concerns about unemployment: unaided responses; in %; rounded; multiple responses possible)

Size of dots represents size of population
*Source: World Bank (2016, as of June 2017), **Average = unweighted mean value
Nations at a glance /// Comparison of concerns about price and purchasing power development with the actual rate of price increases* in %

(Concerns about price and purchasing power development: unaided responses; in %; rounded; multiple responses possible)

Concerns about price and purchasing power development: unaided responses; in %; rounded; multiple responses possible

Nations at a glance /// Comparison of concerns about price and purchasing power development with the actual rate of price increases* in %

(Concerns about price and purchasing power development: unaided responses; in %; rounded; multiple responses possible)

Size of dots represents size of population

*Source: OECD (2016, as of April 2017); Source Iran, Kenya, Nigeria: World Bank (2016, as of June 2016), **Average = unweighted mean value
Nations at a glance /// Comparison of concerns about corruption with the Corruption Perceptions Index*

(Concerns about corruption: unaided responses; in %; rounded; multiple responses possible)

Size of dots represents size of population

*Source: Transparency International (2016, as of March 2017), Values between 0 and 100; 0-49 = clearly perceived corruption, 50-69 = perceived corruption, 70-100 = hardly perceived corruption
Nations at a glance /// Comparison of concerns about immigration/integration with requests for political asylum* in EU and Switzerland

(Concerns about immigration/integration: unaided responses; in %; rounded; multiple responses possible)

Size of dots represents size of population; Spain and Poland not shown because of low level of concern

*Source: Eurostat (as of April 2017)
### Nations at a glance ///
**Number of responses 2017**

Number of problems mentioned per person and country in %

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<tr>
<th>Region</th>
<th>All nations</th>
<th>Avg.</th>
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<th>Austria</th>
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Base: 27,517 resp.
Overview of nations ///
Annual comparison of number of responses

Average number of mentioned problems per person and per country

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The 2017 Challenges of Nations study covers 24 countries worldwide. A new addition this year is the East African state of Kenya. Asia is currently represented by India, Indonesia, Japan, South Korea and Iran. Three countries from the African continent take part in this study: Kenya, Nigeria and South Africa. In America, Brazil, Mexico and the United States are once again included in the survey. In Europe, too, the list of countries remains unchanged from last year. A representative sample of around 27,500 people were surveyed in these countries. In order to make it possible to draw global comparisons, this study weights the results from individual countries according to their population. The responses therefore represent the social, economic and political challenges as currently seen from the perspective of more than two billion people worldwide.

In the 2017 global comparison, people saw unemployment (24%) as the biggest challenge, especially the Spanish with 61%. The Kenyans (51%), French (48%) and Italians (46%) were also very concerned about this issue. The official unemployment statistics from the World Bank show that unemployment is comparatively high in these countries. It is therefore possible to speak of a "proportionately strong concern" here. The only country with a higher rate of unemployment than Spain is South Africa. The level of concern there, however, is only 30% – in the country at the southern tip of Africa, crime dominates the national list of preoccupations.

With similar levels of concern as that shown about unemployment, people are also worried about price and purchasing power development (23%), which just edged into first place last year. Top of the leader board here in the global comparison is Nigeria (67%), which is having to deal in particular with the drop in the price of crude oil. Another country hard hit by rising prices and living costs is Kenya, where half the people expressed discontent on this subject. Around one third of people in Indonesia, Mexico, Russia and Iran are critical of the reduction in purchasing power. In all those countries, this challenge is ranked among the top three problems.

In third place on the international list of concerns, with 16%, is corruption. The highest value by some margin is recorded in Kenya, where more than half the population are worried about this issue. This makes Kenya the only country in this study in which corruption – alongside unemployment – is explicitly mentioned as the greatest challenge.
The challenge of corruption takes second place in India (29%) and Spain (25%). In contrast, there is no cause for concern on this issue in Sweden, the Netherlands and Switzerland, where not one single citizen mentioned corruption as a problem. According to the Corruption Perceptions Index (CPI) published by Transparency International, corruption is often highly apparent in those countries with the greatest level of fear about it, and frequently hardly noticeable in those with very few concerns. There are, however, some exceptions. The populations in Turkey and Russia express very little criticism on this front, despite the fact that the CPI suggests that corruption is clearly perceptible in both these countries.

With levels of 14%, crime is currently ranked fourth in the international listings, which means that global concern over this issue has fallen by 4 percentage points. In Mexico (43%) and South Africa (39%), the level of concern is particularly high, occupying first place in each case. In Mexico, however, it is decreasing. With 30%, this challenge is ranked third in the national rankings in Brazil, and the same applies to Germany (16%), France (16%) and Austria (15%).

Globally, one in ten people is worried about politics and government, education policy and economic stability. Last year, concerns over politics and government did not make it into first or second place in any of the 24 countries. This has changed in 2017: In Iran (40%), Belgium (24%) and Turkey (22%), concern about this issue is paramount, while in South Korea (46%) and the USA (15%) it comes in as a close second. There are many reasons for this sometimes noticeably growing scepticism, with different situations in each country. These issues can come into the spotlight very quickly and momentously as a result of election campaigns or election results as well as far-reaching political decisions.

At 10%, the issue of education policy is again ranked sixth this year. The countries that stand out in this respect in the international comparison are once more Brazil (32%) and Nigeria (27%), although the levels of dissatisfaction have decreased significantly in Nigeria and slightly in Brazil.
Economic stability lies in seventh place on the international list of preoccupations. In South Korea, this issue is once again at the top with 46%, but criticism is loudly voiced in other Asiatic countries too: In Iran (36%) and Indonesia (34%), dissatisfaction is on the rise considerably and in both cases this topic takes second place in the national rankings. The European countries are less concerned about this topic in 2017, with the exceptions of Italy (15%) and Turkey (14%).

Close behind in eighth place lies the issue of the health service, which is a cause for concern for close to one in every ten, as it was in 2016. In four countries, this issue is in pole position in the national comparison. These are, with the exception of Brazil (56%), exclusively European countries: Great Britain (31%), the Netherlands (25%) and Poland (22%). In Africa, it is mainly the Kenyans who are worried in this respect, with 24%.

Environmental issues have experienced an international surge in urgency. With a rise of 5 percentage points to 9%, the issue is in ninth place, which puts it into the top 10 of global challenges for the first time. Environmental issues are particularly relevant for Kenyans (29%) and Indonesians (26%). However, the topic is also gaining ground in Switzerland (16%), India (13%) and Sweden (7%). There are a number of different reasons for this. In European countries, the issue of power generation through renewable energy plays a major role, while in Indonesia the focus is on flooding. Kenya and India, in contrast, are worried about water shortages and severe droughts.

A slightly rising trend to 8% puts poverty into tenth place. Europeans with above-average concerns on this front are mainly found in Germany (17%). In the global comparison, Germany is even the country with the most mentions of this concern, ahead of the African countries of Nigeria (16%) and Kenya (12%). Mexico also appears highly troubled by this issue (14%), as do India and Belgium, with 12% each.

The top two slots in the global comparison, namely unemployment and price and purchasing power development, are also key challenges in the national rankings of most of the 24 countries. Only four European countries view immigration and integration as the most important topic, which with a global rating of 6% is seen as less pressing overall. In Japan, family policy and care of the aged traditionally play an important role, while in Great Britain, Poland, the Netherlands and Brazil, the health service is the greatest cause for concern.
The Challenges of Nations study not only makes it possible to interpret differences between the importance of individual topics in the countries surveyed, but also enables us to make statements about the range of problems in the individual countries. We can also draw conclusions about the number of problems mentioned. Cultural and political differences definitely play a role here – for example, the willingness and opportunity to want or to be able to express criticism relatively openly. The range of the average number of responses per person is between 1.0 and 4.4. In the global average, respondents mentioned 2.0 challenges, which is the same number as last year.

Countries in Africa mentioned the highest number of problems, with the people in Nigeria and Kenya, with 4.4 and 4.3 responses per person respectively, seeing by far the most problems in their countries. In Europe, one nation proved to be particularly critical. Germany, with 2.9 responses per person, was again in first place in the European comparison, which represents a visible increase on last year. In Mexico, on the other hand, there was a slight decrease in the average number of responses to 3.1. However, this still means that Mexico remains one of the countries that appears to be confronted with a comparatively large number of problems, similar to Brazil and Iran, where the citizens mentioned 3.1 and 2.9 issues per person.

The most concerned nations contrast starkly with those where very few problems are perceived, especially Sweden, where each person only mentioned a single problem on average, and Turkey, with 1.1 issues per person. In Japan, too, with 1.4 responses per respondent, a low range of problems is voiced, despite the finding that the number of perceived problems is currently increasing there. A clear rise in the number of problems mentioned is also apparent in the Netherlands and Brazil.

There are many different triggers for these changes. In some countries, people are more strongly focussed on a particular problem that they see as especially important, while in other countries new or several different topics have become relevant. The following chapters present in more detail the challenges perceived to be most important by the citizens of each country and describe how people’s views have changed over time.
2 Europe
... % of respondents mentioned the following as the most urgent issues to be solved in Austria (unaided responses in %; rounded; multiple responses possible)

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Worries about immigration and integration again lead the rankings in Austria in 2017, although at 53% the topic has lost some of its urgency compared to last year. Austria nevertheless remains, along with Germany, the only country in this study in which more than half the respondents are concerned about immigration. In 2016, Austria changed its policy on refugees. In January, the country decided on an upper limit and plans to accept a maximum of 127,500 asylum seekers by 2019. The conservative governing party, the ÖVP, however, is already calling for this upper limit to be halved – even though it was not quite reached in 2016. In the middle of 2016, the government also tightened up its asylum laws, which included a cut in the minimum benefit offered to refugees.

Refugees and integration were also a key topic during the extremely controversial election campaign for the office of President. It proved a key topic of interest for the candidate of the right-wing populist FPÖ in particular. When the country voted in spring 2016, none of the candidates from the ruling parties made it through to the second round – which was a way for the population to express its displeasure with the grand coalition, consisting of the SPÖ and ÖVP. Although the FPÖ candidate Norbert Hofer lay ahead in the polls, it was the former head of the Green party, Alexander Van der Bellen, who eventually won the election with a narrow majority. Due to mishaps and irregularities, in particular with the postal vote, the defeated candidate contested the result. The repeated election in December 2016 was again won by Van der Bellen, this time with 54% of the votes. As a result of the poor performance of his party, the SPÖ, the Austrian Chancellor stepped down in May 2016. He was succeeded by the former CEO of Austrian Federal Railways, Christian Kern. In May 2017, after this survey was conducted, the Vice Chancellor and leader of the ÖVP also resigned from his positions. Foreign Minister Sebastian Kurz took over as party leader. However, quarrels and disputes continue to dog the government. All fractions have therefore agreed to hold new elections, scheduled for October 2017. In political terms, Austria has therefore had a turbulent year and looks set to endure another one. This is one reason why concerns about politics and government have risen to 12%, causing the issue to enter the top five of the ranking.
The issue of unemployment, which has remained consistently high at 35% since 2015, is still in second place. According to the OECD, unemployment has been steadily rising in recent years, reaching a peak of 6.0% in 2016. The government has reacted with a new programme and hopes to create 160,000 new jobs by 2020. For a certain period of time, companies will only have to pay half the social security contributions for new employees.

Concerns about crime have more than doubled in this Alpine republic, currently lying at 15%. This may be due to the fact that the crime statistics for 2016 were published at the beginning of March, during the period of this survey. These showed a rise of around 4% over the previous year, which is primarily driven by an increase in cyber and violent crime. In addition, the percentage of asylum seekers among suspects is growing, which may also be linked to their higher overall numbers. At the same time, Minister of the Interior Wolfgang Sobotka proposed a security strategy, which sets out the political approach of the Ministry of the Interior until 2020. The planned measures include the establishment of a security cabinet and an increase in the number of police officers. At the beginning of 2016, a State Protection Act was passed, which gives the state far-reaching surveillance rights without a warrant from the courts. Society and some politicians have strongly criticised this move. The armed forces were also reformed in the middle of 2016 to enable them to respond more quickly to situations such as terrorist threats.

Concerns about the education policy again sit in fourth place with 14%. The governing parties agreed on an educational reform, which was approved by the National Council in June 2017. The aims of the reform include greater autonomy for headteachers and the option of forming school clusters, in which up to eight schools can join forces for administrative purposes.

Concerns about pensions and old age provision have fallen considerably in comparison to 2016 to 11%. The reforms agreed in the pension summit at the beginning of 2016 are now coming into effect. For example, there is a significant rise in the minimum pension for people who have been contributing for at least 30 years. Due to its ageing population, Austria, like many other countries, will need to spend more on its pension system in future – according to the Ageing Report published by the European Commission, however, this will remain within comparatively manageable limits.
... % of respondents mentioned the following as the most urgent issues to be solved in Belgium (unaided responses in %; rounded; multiple responses possible)

Politics/government
- 2017
- 2016
- 2015
- 2014
- 2013
- 2012
- 2011
- 2010

Base 2017: 1,003 resp.

Price/purchasing power development

Crime

Environmental issues

Working conditions

Education policy

For information only:

Health service: 6% (2016: 5%)

Tax policy: 6% (2016: 10%)
After levels of concern about the issue of politics and government had reduced slightly in 2016, this topic has now shown a strong resurgence. With a jump to 24%, the problem is back in top position in 2017 for the first time since 2011. The reason for the criticism is primarily the fact that there are too many parties and elected officials in Belgium. The problems caused by the heavily fragmented political landscape came to the fore in 2016 and 2017, in particular in the tedious wrangling about the Wallonia region’s consent to the CETA agreement between the EU and Canada. A lack of trust in politics and a lack of credibility among politicians is also expressed in this context.

In previous years, the reform policies of the central-right government of Prime Minister Charles Michel were aimed at reducing the high national debt. In 2016, this led to protests and general strikes, called by the trade unions, among others. In May 2016, tens of thousands of people demonstrated in Brussels against reforms seen as socially unbalanced. These included an increase in the pension age, cuts to public services and a loosening of the restrictions on weekly working hours.

A rather negative assessment of the economic situation is also apparent when it comes to the topic of price and purchasing power. Concern in this area has grown to 11%, moving the topic from eighth to sixth place. At 12%, citizens show a similar degree of concern about poverty in the country. According to the European Trade Union Confederation, Belgium is the only EU country in which employees have lost purchasing power. Wages have barely risen and have not kept pace with inflation, which – according to the OECD – at 2.0% was far higher in 2016 than the EU average of 0.3%.

The Belgians also see a need for action with regard to unemployment, which is still in second place with 20%. The unemployment rate has dropped slightly compared to 2015, but on average in 2016 it still stood at 7.9%. It is far higher among young people below the age of 25, where one in five is without a job – significantly more than in the neighbouring countries of the Netherlands and Germany. The announcement of the US construction equipment manufacturer Caterpillar in September 2016 that it was going to close its factory in Gosselies, near Charleroi, also caused great consternation in Belgium. This will lead to a loss of around 2,000 jobs in the already economically weak region of Wallonia.
A related topic, which entered the top 10 for the first time this year, is **working conditions**. Since 2013, this issue has come in for increasing criticism in Belgium from both employees and employers. In the current survey, this topic can be viewed in connection with the labour market reforms passed by Parliament in 2015 and now coming into effect. These allow for a longer working week and longer working life.

With 19%, the country’s **transport policy** remains in third place in the 2017 ranking. The population continues to feel dissatisfied, above all with the strong increase in traffic (6%) and the resulting congestion and delays (6%). With citizens on average spending 41 hours a year in traffic jams in Brussels, in 2016 the city lay 14th in the ranking of the most congested cities in Europe, according to the transport research institute INRIX. That year, the introduction of a road toll for trucks led to vigorous protests and street blockades in Wallonia.

Last year’s leader on the list of preoccupations, **immigration** and **integration**, is currently rapidly losing momentum: While in 2016, 43% mentioned this topic as a challenge, that figure has now dropped to 17%, which puts it in fourth place. Tension has certainly eased due to the sharp fall in refugee numbers through the closure of the Balkan route for refugees and the EU-Turkey agreement, which has resulted in a halving of the numbers of asylum seekers. The tightening of the asylum laws in April 2016 also means that the right to stay has been reduced to five years.

Worries about **crime** have increased this year to 9% – compared with 5% in 2016 – keeping it in the top 10. One key worry for Belgians is that they no longer feel safe everywhere (6%). This sense of insecurity is expressed more strongly by those over the age of 70, with 12%, and inhabitants of the Brussels region, with 11%. It seems likely that the major terrorist attacks of March 2016 are playing a role here. These saw suicide bombers with close connections to the Paris attackers carry out attacks on Brussels airport and the Maelbeek Metro station, killing numerous people. As in the wake of the terrorist attacks in Paris, the trail led to Molenbeek, a socially deprived area in the Belgian capital. The ensuing raids carried out by the Belgian security forces brought public life in Brussels to a standstill for weeks. Some of the errors during the investigations were reported across Europe.
France /// Challenges 2017

...% of respondents mentioned the following as the most urgent issues to be solved in France (unaided responses in %; rounded; multiple responses possible)

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Base 2017: 1,002 resp.

For information only:
- Economic stability: 6% (2016: 5%)
- Terrorism: 4% (2016: 4%), place 15
As has been the case almost since the beginning of this study, in 2017 unemployment once again tops the French list of preoccupations. However, this worry is far less pronounced than the previous year, dropping 13 percentage points to 51%. The former President François Hollande had made the fight against unemployment one of the central themes of his policy. He initiated measures such as an employment and growth programme and introduced far-reaching labour market reforms. Although the unemployment rate at the end of 2016 was still at around 10%, it showed a slight drop since the beginning of 2016. The aforementioned measures led to protests in the population and the displeasure of the citizens was reflected in low approval ratings for the President. For this reason, and also to prevent the fragmentation of his party, the Socialists, Hollande decided not to seek another term as President.

The election for a new head of state in May 2017 saw former Economy Minister Emmanuel Macron emerge victorious. He is seen as an economic and social liberal – and is the youngest President in the history of the Fifth Republic. Seeing as Macron only formed his own political movement, La République en Marche, at the end of 2016, his election was a bitter blow for the establishment parties in France. His party now belongs to the centre ground. For a long time during the presidential election, polls showed that the leader of the Front National, Marine Le Pen, was ahead. However, Macron was finally able to win through with around 66% of the votes. Critics, however, are of the opinion that not all voters chose Macron for his manifesto, but instead many voted for him due to a lack of alternatives or to prevent Le Pen from winning. In a clear sign of disaffection for the run-off voting system, more citizens than ever invalidated their ballot papers. France has therefore been though a very turbulent political phase. The level of concern about politics and government has therefore increased by 5 percentage points to 15%. The dissatisfaction with the current political situation means that Macron faces huge challenges. However, since he won the absolute majority in the National Assembly in the parliamentary elections in June 2017 – in an electoral alliance with the democratic movement MoDem – he now has a stable foundation from which to implement his plans for reform.
Despite a moderate rate of price increase of just 0.2% and economic growth of 1.2% in 2016, 16% of French people mentioned price and purchasing power development as an urgent task to be solved in their country. The degree of concern varies from region to region. While citizens in rural areas exhibit the greatest concern, in the Paris metropolitan region very few people see any need for action. The differences in perception are also determined by the variations in purchasing power. Residents of the capital region have, on average, a greater disposable income than those in the rest of the country.

Concerns over crime are escalating – rising by 6 percentage points to 16%. 13% of French people specifically admitted that they no longer feel safe everywhere. Several terrorist attacks may well have contributed to this rise, even though concerns about terrorism itself have stagnated at 4%. Following the serious terrorist attacks in November 2015, a state of emergency was declared in the country and has since been extended for the fifth time. Even so, there have been further successful and attempted terrorist attacks in France.

With 10% and an increase of 6 percentage points, concerns about the health service put this topic in the top 5 of French challenges in 2017. A study by the Scientific Institute of Private Health Insurance suggests that the additional private payments for medical care in France are particularly high compared to the rest of Europe. According to the study, this is a significant hurdle when it comes to accessing health care. President Macron wants to modernise the health service and make it more efficient in order to reduce costs.

The topic of immigration and integration takes more of a back seat in 2017. With 8%, the level of concern about this topic is noticeably lower than last year – as is the case in other European countries. The background for this is primarily the slowdown in the stream of refugees caused by the closure of the Balkan route and the EU-Turkey agreement of 2016. The clearing of an illegal refugee camp in Calais near the English Channel in October 2016 attracted a lot of attention. President Macron intends to stick to France's current policy in this matter and set up further integration programmes. A self-confessed pro-European, he is also looking for enhanced European cooperation with regard to refugees.
... % of respondents mentioned the following as the most urgent issues to be solved in Germany (unaided responses in %; rounded; multiple responses possible)

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Base 2017: 2,018 resp.

*multiple responses

thereof*:
- 18% contra immigration (2016: 23%)
- 37% neutral responses (2016: 65%)
- 11% pro integration (2016: 14%)

additionally: 5% Problems with Erdoğan/Turkey (2016: -)

For information only:
- Politics/government: 9% (2016: 10%)
... % of respondents mentioned the following as the most urgent issues to be solved in Germany (unaided responses in %; rounded; multiple responses possible)

Germany /// Immigration/integration 1992-2017
Comparison between concern and migration balance/requests for political asylum

*Source: Statistisches Bundesamt (Deutsche und Ausländer) (Federal Statistical Office of Germany (Germans and Foreigners)); ** Source : Bundesamt für Migration und Flüchtlinge (German Federal Office for Migration and Refugees);
***Estimated migration balance for 2016 according to a press release published by the Statistisches Bundesamt on 27 January 17
Germany /// Unemployment 1992-2017
Comparison between concern and unemployment rate

...% of respondents mentioned the following as the most urgent issues to be solved in Germany (unaided responses in %; rounded; multiple responses possible)

*Source: OECD, value for 2017: Q1/2017; as of April/May 2017

*Concern about unemployment

*Unemployment rate ILO, in %*

© GfK Verein /// 2017
The topic of immigration and integration is still at the top of the German list of preoccupations in 2017, but has lost a lot of its urgency compared to last year – and is less dominant, as other concerns in the top 10 rise up through the ranks. Accordingly, the overall number of problems mentioned has also risen again slightly, from 2.6 to 2.9 responses per person.

Concern about immigration and integration soared last year, but in 2017 it has dropped again to 56%. This still means that more than one in two German citizens is concerned about this issue. In 2015, around 890,000 refugees came to Germany. Since the Balkan route closed and the EU-Turkey agreement came into effect in March 2016, however, the number of incoming refugees has reduced considerably. In 2016, only around 300,000 asylum seekers arrived in Germany. However, at around 745,000, the number of asylum seekers has risen sharply, mostly due to the fact that many applications could only be submitted and processed several months after the refugees entered the country. Although the brakes have been put on a further influx, the social task of integrating the migrants within Germany is still very much present.

To this end, the first Integration Act was passed in 2016. Among other things, it aims to make it easier for asylum seekers to access the German labour market. In addition, refugees with training places should be granted secure right of residence for the duration of their training. The law also makes it easier to access integration courses – and obliges the refugees to participate in such courses.

One important factor in regard to immigration is the refugee agreement between the EU and Turkey. Critics see this as leaving the EU open to blackmail. The Turkish President Recep Tayyip Erdoğan has threatened to suspend the agreement several times. The Turkish constitutional referendum of April, which gave a significant boost to the President's power, is highly controversial in Germany. Further events leading to yet more negative headlines included reports of Erdoğan comparing the German government to the Nazis, after Turkish politicians were prohibited from appearing in Germany during the Turkish election campaign, as well as the imprisonment of the German-Turkish journalist Deniz Yücel. In 2017, 5% of Germans explicitly mentioned problems with Turkey.
There are topics relating to the issue of immigration that pose challenges to German foreign policy – and thus currently worry 10% of Germans (ninth place). This includes European policy. Last year, the European Union came under increased criticism, not least due to the abandonment of the so-called Dublin Regulation. This states that asylum seekers need to be processed where they first enter European territory – which means primarily in Italy or Greece. What's more, some member states are unwilling to support the distribution of refugees. On top of this, in 2016, the British people voted with a slim majority for Brexit, which is also putting the EU to the test.

The concerns in places 2 to 4 are at a similar level, with poverty, with 17% and an increase of 7 percentage points, rising to second place for the first time. Here, respondents mention poverty in old age as the most serious problem, with a level of concern that has grown from 4% to 10%. The number of people on a basic income in old age is increasing and the future development of the pay-as-you-earn state pension scheme is proving a subject of controversial debate due to demographic trends and changes in our working patterns. The worry expressed about old age provision is currently increasing and this year has reached fifth place with 14%. A pension reform is underway, initiated by Federal Minister of Labour Andrea Nahles in February 2017. This initiative comprises the alignment of pension levels in East and West Germany and an increase in the reduced-earning-capacity pension.

Concerns about the related topic of social security are also higher in 2017, running at 11%. This is partly due to the fact that the Germans are more conscious of social justice, which forms the central election campaign issue of the SPD, above all since the nomination of the former President of the European Parliament Martin Schulz at the beginning of 2017 as a candidate for Chancellor in the forthcoming parliamentary elections. Schulz demands, among other things, greater pay equity, restrictions on managers’ salaries and free childcare. The candidate struck a raw nerve here – but this only resulted in short-term gains in the opinion poll ratings for the SPD. In three regional elections in spring 2017, the SPD lost the favour of the electorate.
For the first time in 15 years, concerns about crime are now back in the top 3 with an increase from 10% to 16%. According to crime statistics, the number of registered crimes in Germany rose by less than 1% from 2015 to 2016. When looking at the statistics more closely, however, major changes can be seen in several areas. For example, home burglaries reduced by around 10%, and shoplifting and economic crime also decreased. The situation is different, in contrast, when it comes to violent crime and violations of gun laws. One particularly shocking act was the killing spree of an 18-year-old student, which left nine people dead in a Munich shopping centre in July 2016. Politically motivated crimes also reached a new high, primarily through extreme right-wing criminal activity. In light of this trend, Minister of the Interior Thomas de Maizière demanded that society had to come down hard against any form of hate and violent crime.

For the first time, terrorism appeared among the ten most important concerns in Germany, rising from 4% to 9%. Since the attacks in Paris in November 2015, other European countries have become targets for terrorist activities. This included Germany in July 2016, when an assailant attacked several people with an axe on a regional train. Just a few days later, another attacker triggered an explosion in Ansbach. Twelve people died in the truck attack on a Christmas market in Berlin in winter 2016, with many more injured. Intelligence has since shown that the attack could well have been prevented if the police had arrested the attacker sooner on drugs offences.

Concerns about unemployment, which was pushed out of first place three years ago, are currently at 16%, putting the topic in fourth place. In 2016, the unemployment rate according to the OECD stood at 4.1%, the lowest level since reunification. The government assumes, however, that unemployment will rise again in the years ahead due to the high immigration figures. Above all, there is a shortage of educational opportunities for refugees, such as language courses, school places and apprenticeships. Without vocational training and German languages skills, they have very little chance of finding a job. It could be that this is why there is a slight increase in the level of concern about education policy, which is currently in seventh place with 12%.
After a backwards trend in recent years, 2017 saw renewed concern about price and purchasing power development, which now stands at 12%, despite purchasing power increasing in 2016 for the third time in a row. This is first and foremost due to low inflation rates, which lay at an annual average of 0.5% in 2016. In the same period, wages and salaries saw a real increase of 1.8% – which means that all in all people have money to spare. Experts do not expect purchasing power to rise any further, however, as inflation has risen again over the course of the year as a result of higher energy prices, reaching 1.1% in the fourth quarter of 2016. Overall, first and foremost Germans want higher wages and a fairer distribution of income. Here, it is particularly interesting to draw a comparison between the east and the west. In West Germany, only 10% are concerned about price and purchasing power development, while that figure is 18% in the east, putting the issue in the top 5. The gulf between the two parts of the country could continue to grow. The annual report of the Federal Government on the state of German unity in 2016 indicates that social standards in the new and old federal states are growing further apart instead of coming together. The nationwide purchasing power measurement carried out by GfK Geomarketing also confirms these major differences between the new and old federal states.
Increase by x
percentage points
in comparison with 2016
(only significant changes >1%)

For easier orientation
important topics are
highlighted in orange.
This study once again uses a cluster analysis to evaluate the semantic network of the results collected in Germany. The chart reveals the four pieces of information described on the left.

Respondents mentioned significantly more individual topics than last year (please note, only topics which are of concern to at least 1.5% of citizens are shown in the chart). This increase can be put down to the fact that the topic of immigration and integration lost a lot of relevance this year, which left more space for other issues. The main clusters are structured as follows:

In the heterogeneous and large cluster in the middle on the right, the main focus is on integration of immigrants, internal security and social justice, the latter showing increasing importance. Alongside these issues, respondents most frequently mentioned worries about extreme right-wing radicalism and the fight against terrorism. Other topics were also addressed here, including renewable energy, environmental issues and transportation and tax policies.

Just below this is immigration in general, which is viewed with less concern in 2017. On the same line are similar topics as in the aforementioned list of worries, namely a stable economy, peace policy and protection against terror attacks.

Below in the middle is an area of concern that contains demands for the refusal and expulsion of asylum seekers. Furthermore, an increase in wages and pensions is on the list of tasks, as well as a focus on the respondents' own country in general. The shift to the right in society is the subject of a small cluster on the left-hand side, in connection with the expulsion of foreign criminals.

The cluster on the bottom left focuses on the solution of the refugee problem, but to a far lesser extent than before. Further mentions in this context are unemployment, crime, poverty among the elderly and house building.

Near the middle at the top are concerns about problems with Turkey and its president, which was mentioned for the first time during this survey. A further cluster – one of the few not related to immigration – is on the top right. This is primarily about internal problems, such as education, health and the state of the roads.
... % of respondents mentioned the following as the most urgent issues to be solved in Germany (unaided responses in %; rounded; multiple responses possible)

**West Germany**

- **Immigration/integration:** 36, 43, 41, 44, 43
- **Poverty:** 16, 13, 12, 11, 11
- **Unemployment:** 16, 11, 12, 13, 14
- **Crime:** 21, 14, 11, 11, 12
- **Pensions/old age provision:** 14, 13, 16, 14, 14

*thereof*:
- 17% contra immigration (2016: 22%)
- 38% neutral responses (2016: 66%)
- 10% pro integration (2016: 15%)

* multiple responses

**East Germany**

- **Immigration/integration:** 56, 35, 07, 08, 08
- **Crime:** 26, 13, 11, 08, 08
- **Poverty:** 09, 16, 12, 08, 07
- **Unemployment:** 15, 21, 14, 11, 06
- **Price/purchasing power development:** 17, 06, 07, 12, 06

*thereof*:
- 26% contra immigration (2016: 24%)
- 34% neutral responses (2016: 61%)
- 12% pro integration (2016: 13%)

* multiple responses

Base 2017: 2,018 resp.
Once again, there are similarities and differences between the perception of problems in 2017 in the old and new federal states. In the east, there is more widespread concern about almost all issues, which is reflected in a greater number of problems mentioned, namely 3.3 responses per person in the east compared to 2.8 problems mentioned in the west.

When it comes to this year’s main challenge, at first glance there appears to be no difference in viewpoint at all, as in both parts of the country, concerns about immigration and integration are in pole position once again. With 56% in the west and 57% in the east, a clear decline in concern about this issue compared to 2016 can be seen in both halves of Germany. In the east, however, far more people continue to express their objections to (more) immigration, while in the west this hostility has decreased. In the former West German states, however, fewer citizens than last year are demanding the better integration of immigrants than in 2016, while this demand remains stable in the east in 2017.

From second place onwards, there is less and less unity between West and East Germany. In the west, poverty takes second place with 16%, while in the east it is in third place with 20%. Instead, the east puts concerns about crime in second place, with the figure rising to 26%. In the west, in contrast, only one in seven citizens wants to see an increased fight against crime. With levels of concern at around 30%, the cities of Berlin and Hamburg are far above the national average, as are the East German states of Saxony and Brandenburg.

Concern about unemployment appears similar to that expressed about poverty: In the west, it ranks in third place at 15% and is therefore positioned higher than in the east (fourth place), even though the level of concern in East Germany is higher at 20%. This corresponds with the official unemployment rate, which is still significantly higher in the new federal states than it is in the west of the country.

Ranked fifth are topics that in each case are much further down in the list in the other part of the country. Fifth in the west, with 14%, is the issue of pensions and old age provision, which in the east only occupies ninth place with 12%. In the east, on the other hand, concern about price and purchasing power development is in fifth place with 18%, but only makes it into ninth place in the west with 10%.
...% of respondents mentioned the following as the most urgent issues to be solved in Germany (unaided responses in %; rounded; multiple responses possible)

- Immigration/integration: 56%
- Poverty: 17%
- Crime: 14%
- Unemployment: 16%
- Pensions/old age provision: 14%
- Price/purchasing power development: 12%
- Education policy: 12%
- Social security: 11%
- International/European policy: 10%
- Terrorism: 9%

Base 2017: 2,018 resp.
Depending on the living environment of the respondents, there are differences in the way certain issues are perceived – but there is also consensus in some places. The key factor here is often the social class of the population group. This year, citizens are especially in agreement on one point, namely the issue of immigration and integration, which is still regarded as the most urgent problem facing the country. With just under 50%, the only people who are slightly less concerned about it are those who are still in training or education.

When it comes to poverty in second place, people from different living environments are broadly similar in terms of their concern. Only young people and students are rather less worried about this, while pensioners express an above-average level of concern. The issue of pensions and old age provision is judged in a more heterogeneous way. Here – again certainly age-related – students and apprentices show the least degree of concern with 5%. People in lower social classes and pensioners, on the other hand, at around one fifth are the most concerned.

Those in upper or middle social classes demand greater efforts to fight crime, while the topic of crime is mentioned least often by citizens in lower social classes. In contrast, this population group is more concerned about unemployment.

When it comes to concerns about price and purchasing power development or social security, there is a similar distribution: These issues preoccupy first and foremost citizens in lower social classes, whose weaker economic situation makes them more vulnerable to price rises or deficiencies in the social benefit system. Young people and students are the least concerned about both these issues.

However, there is one issue that proves of burning importance to young people – hardly surprisingly – and that is education policy. Here, their concern is more than twice as great as the average of all citizens.

Young people and students are least concerned overall, with 2.6 responses per person. With 3.1 responses per person, respondents in both the upper and lower social classes have the greatest concerns about the problems facing Germany.
...% of respondents mentioned the following as the most urgent issues to be solved in Italy (unaided responses in %; rounded; multiple responses possible)

### Italy /// Challenges 2017

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For information only:
Poverty: 8% (2016: 2%)

Base 2017: 1,040 resp.
Growing concern about immigration and a slight reduction in priority when it comes to unemployment are the main features shaping the Italian ranking. Although unemployment is once again seen as Italy's greatest challenge in 2017, after a clear decline in 2016, the importance of this topic decreased again slightly this year. The unemployment rate has shown a similar positive trend. According to the OECD, in 2014, it reached its highest level of the past eight years, 12.7%. It then dropped to 11.9% in 2015, before remaining virtually stable in 2016 at 11.7%. The development of youth unemployment was similar, as it initially dropped among the under-25 age group from 42.7% in 2014 to 40.3% in 2015, before falling again in 2016 to 37.8%. This is still very high in comparison with other European countries, which is why it remains in the top 10 in 2017.

The new Prime Minister Paolo Gentiloni has announced economic reforms, which aim to create new jobs in Italy. He is thus continuing on the same course introduced by his predecessor Matteo Renzi, who stepped down in December 2016. While an early election was still on the cards at the beginning of 2017, after this survey was completed it was announced that Gentiloni will stay in office until the end of the legislative period in spring 2018. The level of concern about politics and government remains correspondingly virulent, with the topic occupying third place in 2017 with 16%.

Economic stability still gives cause for concern. 15% of Italians expressed concern in 2017 about the economic situation, which means that following a noticeable drop in 2016 the issue is moving back up the agenda (fourth place). Although the country has no longer been in recession since 2014, GDP has only achieved modest growth. The Italian economy recorded 0.8% growth in 2015, compared with 0.9% in 2016. This slight upswing should reduce the high national deficit, which is expected to be more than 130% of GDP in 2017. Italy remains the EU country with the second highest debt after Greece. At the beginning of 2017, the government announced that it wanted to reduce new borrowing in order to avoid sanctions from Brussels. However, this could be difficult to put into practice, partly because there are fears of a new banking crisis due to bad loans. Moreover, at the beginning of 2017, a major series of earthquakes continued to cause destruction, including in Amatrice, where 300 people died last year. Both events are placing an additional burden on the state budget.
The public purse is also being hit by immigration and integration. This is certainly just one reason why the Italians are increasingly worried about this problem. With an increase of 7 percentage points to 28%, this issue is in second place. This means that not only does it exceed the previous highest level of 2011 during the Arab Spring, but Italy is also the only EU country in which levels of concern are currently rising. At 23,000 people, the number of refugees registered in Italy at the beginning of 2017 was less than last year. However, in contrast, the number of refugees who want to come from Libya to Italy is increasing. As a result of the agreement between the EU and Turkey, refugees have resorted to the far more dangerous Mediterranean route. An agreement between Italy and Libya is due to be signed in the future. In the meantime, the refugees are being registered in line with the Dublin Regulation, and are applying for asylum in Italy, which means that the numbers of asylum seekers in the country is climbing. This costs the state money. To date, there has been no clear approach in terms of integration policy. However, Italy now wants to ensure that recognised refugees are better integrated, while at the same time introducing harsher deportation regulations for asylum seekers whose application is denied. Concepts for integration based on the German process were already being developed under Renzi.

In contrast, concern about tax policy has relaxed somewhat. After a rise in 2016, complaints about excessive taxes have reduced by 7 percentage points this year, putting the issue in fifth place on the list of preoccupations. There has also been a lessening in the level of concern about crime and corruption, which are at the lower end of the top 10 in 2017. In recent years, the police and judicial system have made greater efforts to combat the Mafia and some major trials have begun, which have been reported in great detail in the press. In February 2017, the police also managed to strike a blow against a notorious Mafia clan when 45 alleged members were arrested in raids in the Campania region. Many years of experience in the fight against the Mafia has helped the country and the legislation for tracking organised crime, which includes a leniency programme and rules about phone tapping, is unique in Europe. This has also proved beneficial during the fight against corruption, as is evident from the current CPI, which from 2014 to 2016 showed a slight improvement of 4 points to 47 points. This score nevertheless indicates that corruption is still very present in Italy.
Netherlands /// Challenges 2017

... % of respondents mentioned the following as the most urgent issues to be solved in the Netherlands (unaided responses in %; rounded; multiple responses possible)

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Crime

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Education policy

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Working conditions

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For information only:
Transport policy: 4% (2016: 2%)
Youth unemployment: 4% (2016: 2%)

Additionally:
2% Geert Wilders (2016: -)
In 2017, the number of problems mentioned in the Netherlands rose from 1.2 to 1.7 responses per person. As a consequence of the decrease in concern about immigration and integration, which is similar to that shown in other European countries, familiar problems are back in the limelight. The level of concern about the health service has doubled compared to 2016 to 25%, which puts it back in first place. That being said, the Netherlands once again finds itself at the top of the Euro Health Consumer Index (EHCI), which means that it has a very good health care system. The easy access to the system comes in for particular praise here, with only waiting times showing room for improvement, according to the study.

Patients may, however, also be dissatisfied about the fact that they cannot choose their family doctor or specialists. What's more, the personal contribution has risen steadily over recent years and is now running at almost 400 euros a year. In addition to obligatory basic insurance contributions, citizens of the Netherlands also have to insure themselves for additional services such as dental treatment. As part of the election campaign for the parliamentary elections in March 2017, candidate Geert Wilders promised to eliminate this personal contribution and increase state expenditure on pensions, health care and social services. The election campaign that was running before and during this survey may well have brought the issues of health care and old age provision back into the spotlight. Dissatisfaction with old age provision has risen noticeably to 20% and is currently in second place.

Concern about politics and government, on the other hand, remains stable at 4%, putting it ninth in the ranking. As in France and Austria, the issues of refugees, terrorism and the future of Europe dominated the heated election campaign. This is why the whole of Europe was watching the Netherlands closely and with bated breath during the elections in March 2017. Wilders, the candidate of the right-wing populist party PVV, which was ahead in many polls, had announced some controversial measures in the event of his victory. Among other things, he was demanding the exit of the Netherlands from the EU, the closing of its borders and a ban on the Koran. The grand coalition currently in power may have managed to breathe new life into the economy and the labour market, but in order to achieve this goal it was necessary to make a number of cuts, which mainly hit poorer citizens.
Wilders was able to score particularly highly among these voters with his promises. In the end, however, the PVV fell far behind its poll results, even though it ended up as the second most powerful force in parliament. The victorious party was that of Prime Minister Mark Rutte, who has been in power since 2010. His right-wing liberal VVD needs to find a coalition partner in order to form a majority government. However, all coalition talks so far have come to naught and Rutte is currently (June 2017) ruling out any collaboration with the PVV.

One important election topic was that of immigration and integration. The citizens' worries about this issue fell by 25 percentage points compared to last year, however, and at 15% this topic is now in third place on the list of preoccupations. The topic certainly lost some of its urgency due to the decrease in the number of asylum seekers. While almost 45,000 asylum applications were granted in 2015, this number had dropped by more than half in 2016 to around 21,000. Two key factors in the drop in numbers are the closing of the Balkan route and the EU-Turkey agreement that came into force in March 2016.

Following a slight reduction in 2016, concern about values and morals grew again by 6 percentage points to 12%. 7% of respondents specifically stated that their country should go back to exhibiting greater tolerance. It is possible that this wish came in response to the polarising statements of the right-wing populist Wilders during the parliamentary election campaign in spring 2017.

Unemployment represents a major challenge for 8% of people in the Netherlands. Since the unemployment rate hit 7.4% in 2014, it has dropped further and in 2016 recorded an average value of 6.0%. A similar trend can be seen in terms of the concern of citizens about this issue, which has decreased since its peak in 2014. A related concern, which has grown in importance this year, is a sense of dissatisfaction with working conditions (4%). According to Eurostat, in 2014, more than one fifth of employees in the Netherlands only had a fixed-term employment contract. The EU average is 14%. Less favourable employment contracts for young people and immigrants also come in for criticism, as well as a lack of jobs for older people looking for work.
...% of respondents mentioned the following as the most urgent issues to be solved in Poland (unaided responses in %; rounded; multiple responses possible)

Health service

Unemployment

Price/purchasing power development

Politics/government

Pensions/old age provision

Youth unemployment

Education policy

Poverty

Tax policy

Housing/rents

Base 2017: 1,000 resp.

For information only:
Corruption: 3% (2016: 2%)
Environmental issues: 3% (2016: 1%)
Immigration/integration: 3% (2016: 7%)
This year, the four main causes of concern for Poles are all at a similar level with around 20% each. However, this result stems from very different trends. For example, concern about unemployment again shows a clear decline and, at its current level of 20%, has dropped from first place for the first time since this study began. In fact, the unemployment rate as cited by the OECD has fallen significantly since 2013 from 10.3%, before falling again in 2016 from 7.5% to 6.2%. Even youth unemployment has reduced according to the OECD, but was still higher than unemployment in general in 2016 at 17.6%. Concern about youth unemployment is currently static at 5%.

For the first time this year the health service leads the ranking of Polish preoccupations, replacing the long-term frontrunner of unemployment. A growth of 3 percentage points to 22% puts the level of concern about the health service almost back up to that of 2015. Medical training is good and the National Health Fund NFZ means that the country has a solidly funded health care system. Despite this and even though there have been several attempts at reform in the past few years, problems persist. There is a lack of digitalisation, financing and medical personnel, who – partly as a result of the poor working conditions and pay – continue to emigrate to Western Europe. The consequences are long waiting times for an appointment to see a doctor. No wonder, then, that in 2017 5% of citizens expressly mentioned a shortage of specialists as a problem for the first time. The overall situation in the health service means that, according to the Euro Health Consumer Index, in 2016, 30 out of the 35 countries in Europe fared better than Poland.

In third place on the list of preoccupations with 19% is price and purchasing power development, following a further slight reduction compared to the previous year. This could be due to the negative inflation rate of -0.7% in 2016. Even so, as in the previous year, 18% of Poles demand a fairer distribution of income. The official statistics suggest an average increase in wages of around 4% in 2016, which would mean a growth in the real income of the population. However, in the eyes of many Poles this is seemingly not enough to minimise the income imbalance.
With a rise of 7 percentage points to its current level of 18%, concern in 2017 has grown most sharply about the issue of politics and government. The government, which has been in office since autumn 2015, faces both national and international criticism. A change in the law from December 2015 risks jeopardising the independence of the constitutional court – and has been ruled by the court itself to be unconstitutional. The EU took action against Poland to test the rule of law, but received no response from the Polish government. Instead, it demanded a change in the EU contracts. New laws were also put in place to turn the public service television and radio broadcasters into purely state-run institutions – thus making them the mouthpiece of the government. And in July 2017 a controversial judicial reform was passed, which will hand over the appointment of all judges to the government and the Minister of Justice. The full agreement of President Andrzej Duda is not yet certain.

Following new police laws at the beginning of 2016, the powers of the law enforcement authorities have also been greatly extended. The legislation repeals the protection of the professional secrecy of doctors, lawyers and journalists. This is one reason why this year for the first time 3% of Poles explicitly mentioned the preservation of basic democratic rights, which did not feature at all in the responses made in 2016. The measures taken by the new government are meeting increasing resistance from society. In autumn 2016, there were massive protests against the planned change to the abortion law, which intends in future to prohibit abortions even in the very rare exceptional circumstances under which they are currently permitted. This was seen as an attack on women’s rights. This draft law was withdrawn by the government. It reacted to the opposition of the population but with the announcement that it would formulate a support programme for families who are prepared to bring up a severely disabled child.

Fifth place in the ranking, with 9%, is still occupied by worries about pensions and old age provision. As announced in the election campaign, the pension age was dropped in November 2016 from 67 years to 60 years for women and to 65 years for men. Due to the increased life expectancy and the rising average age, experts now expect to see a tangible rise in the national debt if the contribution and pension levels do not change. Some elements of the opposition also warn of a poorer old age provision and poverty among the elderly as a consequence of this reform.
Russia /// Challenges 2017

... % of respondents mentioned the following as the most urgent issues to be solved in Russia (unaided responses in %; rounded; multiple responses possible)

Price/purchasing power development

- 2017: 31%
- 2016: 37%
- 2015: 24%
- 2014: 33%
- 2013: 31%
- 2012: 30%
- 2011: 42%
- 2010: 37%

Housing/rents

- 2017: 16%
- 2016: 13%
- 2015: 16%
- 2014: 19%
- 2013: 25%
- 2012: 22%
- 2011: 19%
- 2010: 07%

Pensions/old age provision

- 2017: 15%
- 2016: 15%
- 2015: 13%
- 2014: 14%
- 2013: 15%
- 2012: 14%
- 2011: 09%
- 2010: 03%

Unemployment

- 2017: 14%
- 2016: 14%
- 2015: 16%
- 2014: 17%
- 2013: 27%
- 2012: 17%
- 2011: 11%
- 2010: 07%

Transport policy

- 2017: 12%
- 2016: 05%
- 2015: 04%
- 2014: 07%
- 2013: 07%
- 2012: 07%
- 2011: 03%
- 2010: 03%

Health service

- 2017: 12%
- 2016: 09%
- 2015: 08%
- 2014: 10%
- 2013: 09%
- 2012: 07%
- 2011: 07%
- 2010: 07%

Economic stability

- 2017: 09%
- 2016: 19%
- 2015: 24%
- 2014: 04%
- 2013: 04%
- 2012: 11%
- 2011: 11%
- 2010: 07%

Education policy

- 2017: 07%
- 2016: 05%
- 2015: 04%
- 2014: 07%
- 2013: 08%
- 2012: 08%
- 2011: 07%
- 2010: 07%

Securing peace

- 2017: 05%
- 2016: 05%
- 2015: 02%
- 2014: 00%
- 2013: 11%
- 2012: 00%
- 2011: 00%
- 2010: 00%

Corruption

- 2017: 05%
- 2016: 07%
- 2015: 04%
- 2014: 06%
- 2013: 11%
- 2012: 09%
- 2011: 08%
- 2010: 08%

Base 2017: 2,106 resp.
Concerns about **price and purchasing power development** remain the most urgent problem in 2017 from the point of view of the Russian people – even though a slight decrease to 31% is recorded. The inflation rate was still running at 15.5% in 2015, which in combination with the strong devaluation of the rouble led to a drop in real earnings for the first time in 15 years. In 2016, the inflation rate more than halved, falling to 7.0%. This positive development alongside a drop in interest rates for consumer credit meant that in 2017 private consumption was able to pick up overall. However, private demand continues to be very modest at present. This is reflected in the downward trend in retail sales, which in 2016 were around 5% below the level of the previous year. Since the crisis and the imposition of EU sanctions, Russians are saving in greater numbers. The most important single topic, mentioned explicitly by 20% of respondents, is therefore wage increases.

The oil price has risen significantly again, from around 30 US dollars in January 2016 to more than 50 US dollars per barrel at the start of 2017. This trend shores up the Russian economy and ensures a strong rally for the rouble, which has been able to rise by around 20% in value compared to the US dollar. On the one hand, a large part of the country’s tax income depends on oil and gas exports, but on the other hand a strong rouble makes exported goods more expensive – which runs counter to the current efforts to diversify the economy and reduce its dependence on oil and gas. The economic sanctions imposed by the EU, linked to the Russian incursion in Ukraine and the non-implementation of the Minsk agreements, were extended by a further six months in spring 2017. This year, however, they are expected to have a less severe impact on the Russian economy than before. In addition, the EU embargo has also contributed to an upswing in Russian agriculture, since the country can no longer import agricultural products from the West.

The Russian economy is gradually recovering. After a minus of 2.8% in 2015, GDP in 2016 only fell by 0.2% – less than generally feared. And for 2017 experts expect a stagnation or even a slight increase in GDP. This more optimistic trend in the general conditions may well be a factor in the fact that the population rated the **economic situation far less critically than in 2016**, with current levels of concern at just 9%.
Concerns over the issues of **housing, rents** and **property prices** have risen to second place with 16%. Here it is less about the financing of residential property, which was a problem before the most recent revaluation of the rouble, especially in the case of loans taken out in foreign currency. Instead, citizens are especially critical of the high cost of communal utilities such as water, electricity and gas. These high utility costs affect the poorest Russians most of all – which includes pensioners. An increase in pensions planned for 2016 to compensate for price increases was initially suspended and finally replaced by a one-off payment. The situation for pensioners has thus worsened considerably, especially in rural areas. At the beginning of February 2017, pensions were then increased after all. Even so, with 15%, more citizens are currently concerned about **pensions** and **old age provision** than in the previous year.

**Unemployment** continues to worry 14% of citizens, putting the issue in fourth place. The unemployment rate in Russia has traditionally been low. According to Ilostat, it has been stable since 2012 at between 5 and 6%. This stability is, however, due most of all to the fact that Russian companies reduce wages and salaries at times of crisis rather than letting staff go. In addition, there may well be huge, hidden unemployment, as many unemployed people do not register with the authorities. The bureaucratic registration process requires considerable effort, while the resulting support is relatively meagre.

Due to the tight public purse, planned investments for the expansion and transformation of infrastructure have been cut and it also proved impossible to compensate for the shortcomings by increasing the involvement of private investors. As result, the very high number of traffic accidents remains an ongoing problem in Russia. Both these factors are reflected in the sharp rise in concern about Russia’s **transport policy**, which at 12% is far higher than in previous years and stands at fifth place in 2017. The scarce public funding is certainly also a reason for discontent about the **health service**, which has also risen slightly to 12% (sixth place).

The protests of “Generation Putin” against the corruption of the political elite and in favour of greater democracy, justice and transparency only began after the survey had been completed. **Corruption** was an explicit concern in 2017 for 5% of Russians, which puts this issue tenth in this year’s ranking.
Spain /// Challenges 2017

...% of respondents mentioned the following as the most urgent issues to be solved in Spain (unaided responses in %; rounded; multiple responses possible)

- Unemployment: 61, 65, 74, 72, 78, 74
- Corruption: 25, 31, 29, 27, 04, 01
- Health service: 17, 13, 13, 14, 04, 01
- Education policy: 12, 11, 10, 10, 04, 02
- Politics/government: 09, 16, 11, 16, 05, 08

Base 2017: 1,020 resp.
The level of concern about both unemployment and economic stability is continuing to fall in Spain in 2017. While the labour market is still the main priority for Spanish citizens, the level of preoccupation in this area has fallen below the low recorded in 2009. In parallel with this, the unemployment rate according to the OECD has reduced from 22.1% in 2015 to 19.7% in 2016, and the economy has been picking up since 2015. Compared to other European countries, the unemployment rate is still high, but it is far lower than the negative record of 26.1% reached in 2013. In the same vein, the trend for youth unemployment shows that while the unemployment rate for young people under the age of 25 was still 55.5% in 2013, according to the OECD, by 2016 it had dropped to 44.5%. This is still very high. At 4%, the specific problem of youth unemployment is currently in ninth place, equal with the issue of social security.

Working conditions are increasingly being seen as a problem in this context. This worry was mentioned by 7% of Spanish people this year, putting it in seventh place. The fight against low pay represents the largest individual issue here with 2%. One indicator is the annual national income per capita, which according to the World Bank dropped by around 4,200 euros between 2009 and 2015.

As in previous years, in 2017 the issue of corruption is still second in the Spanish ranking. Although concern here has dropped for the second time in a row, at 25% it remains a serious matter. Transparency International gives a Corruption Perceptions Index value of 58 points for 2016, which points to perceived corruption in the country.

The scandals of recent years are still making themselves felt. However, two major trials got underway in 2016, which may have increased the belief among the population that an effective fight against corruption is taking place. October 2016 marked the start of the trial of more than 30 defendants, including members of the ruling conservative People’s Party, PP. They stand accused of having paid bribes during the awarding of public contracts. The judgement in another trial that has been running since 2016 against the sister of the Spanish King and her husband was announced a few days after this survey had ended. The Infanta was cleared of aiding and abetting tax fraud but she was obliged to pay damages. Her husband, on the other hand, was sentenced to more than six years in prison and fined to the tune of half a million euros.
As a result of the various corruption scandals, some new political players have entered the scene. During the parliamentary elections in December 2015, the parties Podemos and Ciudadanos won enough votes to take seats in parliament. This brought to an end the prevailing two party system comprising the conservative Partido Popular (PP) and the socialists (PSOE). The PP emerged from the ballot as the strongest power, but struggled to form a government as they could not find a coalition partner. New elections in June 2016 brought a similar result. At the time of the 2016 survey there was no viable government. Despite all their differences, the Socialists decided in October 2016 to put the former Prime Minister Mariano Rajoy (PP) into office by abstaining.

In 2017, it would appear that the Spanish have come to terms with the current government. Dissatisfaction with politics and government has fallen from 16% last year to its current value of 9%, which means the issue is still in fifth place and therefore remains relevant. In addition, the Regional President announced a referendum in 2017 on the independence of Catalunya, which could lead to further political conflicts.

Concern is growing about the issues in third and fourth place, namely health service and education policy. 17% of Spaniards are now concerned about health care provision. The Euro Health Consumer Index indicates that there has been an improvement compared to previous years, but clearly there are still regional differences in health care provision. The quality of the treatment is also dependent on whether the patient is prepared to pay for additional private services beyond those financed publicly.

The concern of the population about education policy (fourth place) has climbed back up to the levels recorded in previous years after showing a slight decrease in 2016. This may be due to the protest of many parents against the high workload of pupils of up to 60 hours per week. As part of these protests, in November 2016, there were calls for a homework strike. Despite the extensive homework, Spain still only ranks average in the OECD's PISA study.
% of respondents mentioned the following as the most urgent issues to be solved in Sweden (unaided responses in %; rounded; multiple responses possible)

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For information only:
Care of the aged: 2% (2016: 3%)
Pensions/old age provision: 2% (2016: - )
The issue of immigration and integration is still far and away the most serious cause for concern among the population in Sweden in 2017. After the flood of refugees peaked in 2015, the government under Prime Minister Stefan Löfven felt forced to react. The popularity of the right-wing populist Sweden Democrats was steadily rising in the polls. In order to counteract the success of this party, the government tightened up the right to asylum. Measures included restricting the length of visas and introducing far-reaching border controls. This meant turning away from what had always been a very liberal asylum policy – now the country works more in line with the minimum standards of the European Union. These measures – along with the refugee agreement between the EU and Turkey – led to the fact that fewer refugees came to Sweden in 2016. This is one possible explanation for the reduction in concern in this area by 15 percentage points to 35%. The level of concern is still significantly higher than in 2015, when around 25% of people expressed their unease about the matter.

Against this background, 2% of Swedes explicitly mentioned right-wing radicalism as a problem. This is possibly also related to the right-wing populist Sweden Democrats, but, in addition to this, radical Neo-Nazis are also taking more aggressive action in Sweden. Concerns about politics and government, in contrast, have not moved at 2%, keeping this matter tenth in the ranking.

The criticism voiced about the health service is growing again in 2017, after a decline in the level of preoccupation here in the past two years. At 12%, the issue is now in second place. The higher expenditure on health care has clearly not yet reached the citizens, and nor is it reflected in the Euro Health Consumer Index 2016. The position of Sweden's health care system here has worsened slightly compared to the previous year, and by being ranked 12 out of 35, is no longer one of the best in Europe. One reason given for this is the long waiting times for examinations and treatments.

Concern over unemployment at 8% in 2017 is at its lowest level since the survey began in 2010. At the same time, the unemployment rate has been steadily sinking over the last few years, and according to the OECD was relatively low in 2016 at 7.0%. This means that the Swedish government was slowly edging closer to its goal of being able to demonstrate the lowest unemployment rate in Europe by 2020.
In keeping with the improvements in the labour market, fewer Swedes at 2% are now complaining about economic stability. With GDP growth at 3.2% according to the OECD, the Swedish economy developed almost as well in 2016 as it had done the previous year. In the current year, GDP growth is set to slacken to 2.7%, according to the OECD.

Worries about crime have taken a major leap, putting the topic in the top 10 for the first time in 2017 with a value of 8%. One trigger for this could be the widespread media coverage of a rising crime rate, which is often spoken of in connection with immigration. The number of homicides and shootings has increased, according to official statistics – but this actually happened in 2014, before the huge jump in the numbers of refugees. Numerous large cities such as Malmö are facing growing violence. Since the start of 2017, there have already once again been several fatal shootings.

Environmental issues once again occupy fifth place in the ranking with 7%. According to Eurostat, in 2015, Sweden was already generating 54% of its energy from renewable sources, which makes it a leader in this field in Europe. However, the government has again postponed its election promise of phasing out nuclear energy and is replacing some old reactors with new ones. That being said, the government is still holding fast to its goal of changing the country's entire energy supply to renewable energy by 2040.

Concerns among Swedes over the issue of housing have risen to 5% and the issue currently finds itself in seventh place. Over the past two decades, property prices in Sweden have been rising steadily, particularly in the Stockholm region. This is due to a lack of affordable rental accommodation, with ever more people competing for housing as a result of immigration. In addition, the currently very low interest rates are fueling the demand for houses and apartments to such an extent that there is already talk of a possible housing bubble. In order to counteract this, the government has put together an economic package for housing construction, which has been designed with the aim of building more than 200,000 new homes by 2020. Some experts are of the opinion, however, that this will not be enough.
...% of respondents mentioned the following as the most urgent issues to be solved in Switzerland (unaided responses in %; rounded; multiple responses possible)

- **Immigration/integration**
  - 2017: 36%
  - 2016: 50%
  - 2015: 29%
  - 2014: 25%

- **Unemployment**
  - 2017: 10%
  - 2016: 12%
  - 2015: 11%
  - 2014: 11%

- **Pensions/old age provision**
  - 2017: 23%
  - 2016: 06%
  - 2015: 05%
  - 2014: 04%

- **Education policy**
  - 2017: 08%
  - 2016: 06%
  - 2015: 08%
  - 2014: 08%

- **Health service**
  - 2017: 17%
  - 2016: 09%
  - 2015: 07%
  - 2014: 11%

- **Social security**
  - 2017: 07%
  - 2016: 03%
  - 2015: 07%
  - 2014: 07%

- **Environmental issues**
  - 2017: 16%
  - 2016: 16%
  - 2015: 11%
  - 2014: 11%

- **Politics/government**
  - 2017: 05%
  - 2016: 03%
  - 2015: 04%
  - 2014: 05%

- **Transport policy**
  - 2017: 10%
  - 2016: 11%
  - 2015: 06%
  - 2014: 12%

- **Price/purchasing power development**
  - 2017: 05%
  - 2016: 05%
  - 2015: 07%
  - 2014: 05%

For information only:
- Tax policy: 5% (2016: 2%)
- Housing/rents: 5% (2016: 2%)
- Economic stability: 5% (2016: 9%)
The number of problems mentioned per respondent in Switzerland has increased from 1.8 issues per person in 2016 to an average of 2.2 problems in 2017. This is probably a result of the strong reduction in concern about the topic that dominated the ranking last year, namely immigration and integration. From the point of view of the Swiss people, the issue still represents the greatest challenge facing their country. However, the score has dropped by 14 percentage points to 36%. In 2016, around 15% fewer people migrated to Switzerland than in the previous year. Most immigrants were once again from the EU. The number of new asylum applications also dropped in 2016 by around one third. In addition, in a referendum held in February 2014, the Swiss voted in favour of controlling immigration of foreign workers by creating an annual cap. In order to keep to the self-imposed deadline of February 2017, the government passed the relevant laws in December 2016. Since the original concept violated the freedom of movement agreement with the EU and therefore endangered the bilateral treaties, the Swiss ultimately decided to take a more moderate approach. Instead of imposing a cap, the employment offices will regulate immigration indirectly. In future, registered unemployed people will be preferred when recruiting for vacancies in Switzerland, regardless of whether they are Swiss or EU citizens. The national conservative SVP considers the law to be a misrepresentation of the will of the people and is already planning a new referendum for autumn 2017.

Worries about old age provision, in contrast, have increased almost fourfold. Mentioned by 23% of Swiss citizens, this issue represents the second most common criticism. A referendum is due to be held on "Pension reform 2020" in autumn 2017. The aim is for savings and additional payments to be used to safeguard pensions and make it possible to adapt old age provision in line with social trends. The reform will include a raising of the pension age to 65 for women, while it will remain at 67 for men. However, the reforms are meeting increased resistance in business circles, among trade unions and also among some political parties, which do not see the new concept as sustainable. The public discussion about it is probably the reason for the sudden rise in concern. At the same time, worries about social security have risen by 4 percentage points to 7%.
Preoccupation with the **health service** has also risen sharply. The level of concern has doubled to 17%, which represents the highest value recorded in Switzerland since 2014. It is likely that this is due to an average rise of 4.5% in health insurance premiums in 2017. This is a comparatively high cost increase for citizens, as the premiums have only risen by an annual average of 3.6% since obligatory health insurance was introduced in 1996. The Federal Office of Public Health justified this change by pointing to the rising health costs associated with the ageing population as well as new, more expensive treatment options. Residents of Basel and Geneva have to pay the highest premiums.

In autumn 2016, the Swiss Federal Assembly passed the first package of measures for the "Energy Strategy 2050". Among other things, this sets out to reduce energy and electricity consumption and to increase the percentage of electricity generated using renewable energy, such as new wind turbines. In order to finance this, plans are afoot, for instance, to increase both the grid supplement for every kilowatt hour of electricity consumed and the CO2 levy on the production and import of fossil fuels. Opponents of the move fear that wind turbines could cause more harm than good. Critics claim they will destroy the landscape and pose a risk to the biodiversity of the country. The discussion shows that **environmental issues**, with 16%, are still an important topic for Swiss people, occupying fourth place in the 2017 ranking.

Concerns about **transport policy** are currently in fifth place with 10%. Traffic has been increasing over the years, leading to a chronic overloading of both the road and rail networks. According to the Federal Statistical Office, between 2000 and 2016 the number of registered vehicles rose by almost one third. The necessary improvements and the expansion of the infrastructure are to be financed by a new fund set to follow on from the infrastructure fund that has been in place since 2008. After Swiss citizens voted in February 2017 in favour of the corresponding federal decision to set up the National Road and Agglomeration Transport Fund (NAF), it will come into effect in 2018 for an indeterminate period. The new fund will be financed in part through a surtax on petroleum. This may be increased in 2019, which could lead to higher prices for petrol and diesel.
% of respondents mentioned the following as the most urgent issues to be solved in Turkey (unaided responses in %; rounded; multiple responses possible)

<table>
<thead>
<tr>
<th>Issue</th>
<th>2017</th>
<th>2016</th>
<th>2015</th>
<th>2014</th>
</tr>
</thead>
<tbody>
<tr>
<td>Politics/government</td>
<td></td>
<td></td>
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<tr>
<td>Terrorism</td>
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<tr>
<td>Economic stability</td>
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<td></td>
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<tr>
<td>Unemployment</td>
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<tr>
<td>Education policy</td>
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<td></td>
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<tr>
<td>Crime</td>
<td>05</td>
<td>07</td>
<td>05</td>
<td>04</td>
</tr>
<tr>
<td>Price/purchasing power development</td>
<td>05</td>
<td>01</td>
<td>07</td>
<td>12</td>
</tr>
<tr>
<td>Immigration/integration</td>
<td>04</td>
<td>02</td>
<td></td>
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</tr>
<tr>
<td>International/European policy</td>
<td>04</td>
<td>01</td>
<td>00</td>
<td>00</td>
</tr>
<tr>
<td>Constitutional law</td>
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</tbody>
</table>

For information only:
- Parallel state: 1% (2016: -)
- Pensions/old age provision: 1% (2016: -)
- Transport policy: 1% (2016: 1%)
- Corruption: 1% (2016: -)
Turkey has experienced twelve eventful months since summer 2016. Numerous terrorist attacks have shaken the country, parts of the military appeared to mount an attempted coup against President Recep Tayyip Erdoğan, and the population voted in spring 2017 – after this survey was completed – in a controversial constitutional referendum. Despite these turbulent events, the number of problems mentioned, with 1.1 responses per person, remains low.

At the top of the leader board of worries in 2017 is the issue of politics and government, which occupies pole position for the first time, having increased from 5% to 22%. The coup, apparently instigated by parts of the military in July 2016, failed thanks to the combined resistance of the government and the population. As a result, the Turkish regime imposed a state of emergency. It was thus able to rule by decree, to limit or suspend basic rights such as freedom of assembly and to control media reporting. The government used the failed coup as an excuse to dismiss or imprison thousands of judges, police officers, teachers and members of the armed forces. President Erdoğan also announced a referendum on the reintroduction of the death penalty. The successful constitutional referendum of April 2017 turned Turkey into a presidential system. The new rights granted to the President give him as much power on a permanent basis as during a state of emergency. The citizens voted in favour of reform during the referendum with a narrow majority of around 51%. Those entitled to vote overseas, in particular those in some Western European countries, were significantly more in favour of the amendments, with 59% voting in agreement.

The constitutional referendum was and remains controversial across Europe. This is probably one reason why concerns about foreign, international and European policy have risen to 4%. This puts the topic into the top 10 for the first time. The relationship with many Western countries remains tense. The EU criticised, in particular, the harsh approach taken in the aftermath of the attempted coup, the discussion about the reintroduction of the death penalty and the imprisonment of the German-Turkish journalist Deniz Yücel. Turkey, for its part, threatened to suspend the refugee agreement with the EU. Furthermore, politicians in Turkey accused Germany and the Netherlands of Nazi practices in the run up to the referendum. The reason for this was that several election campaign appearances of Turkish politicians in these countries were cancelled by the authorities due to security concerns.
A clear reduction in concern, in contrast, can be seen with the issue of terrorism, which has dropped by a whole 50 percentage points and currently lies in second place with 21%. The majority of the attacks that have shaken Turkey in the past year were claimed by the terrorist organisation Islamic State or Kurdish groups such as the PKK. The attacks were directed against both the Turkish population and tourists and security forces.

Turks are viewing economic stability (14%) and price and purchasing power development (5%) with increasing concern. The Turkish economy collapsed in 2016 due to the political situation and the terrorist attacks and the lira was devalued considerably, which fuelled inflation as a result of more expensive imports. The rate of price increases according to the OECD jumped from 7.6% in the fourth quarter of 2016 to 10.2% in the first quarter of 2017. Due to the attacks, many tourists are also avoiding Turkey as a holiday destination and investors are being cautious too. However, at the end of March 2017 – at the end of the survey – the figures published by the Statistical Office showed that matters were once more moving in a positive direction. They indicated that the economy had improved considerably in the last quarter of 2016, so that a growth rate of 2.9% could be recorded for the whole of 2016. Whether this will turn out to be a sustainable recovery for the Turkish economy remains to be seen. An expansive financial and credit policy is currently stimulating growth, but the recovery is not yet self-sustaining.

Concern about unemployment is closely linked to fears about the economic situation, with both issues causing concern among 14% of citizens. In terms of unemployment, this figure represents an increase of 4 percentage points in comparison with 2016, but is considerably less than in previous years. The official unemployment rate has also risen and in 2016 reached its highest level for seven years with 10.9%.

The last place in the current top 5 goes to education policy, with concern rising to 7%. This increase could partly be associated with the attempted coup and the ensuing dismissals. Since many teachers lost their jobs, in the current school year at least a million pupils may be left without a teacher, according to various sources. The increased Islamisation of lessons is also provoking discussions. Back in 2012, Erdoğan announced that he wanted to create a "new, religious generation".
### UK /// Challenges 2017

... % of respondents mentioned the following as the most urgent issues to be solved in the UK (unaided responses in %; rounded; multiple responses possible)

#### Base 2017: 1,013 resp.

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<td>International/European policy</td>
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<td>(2016: 2%)</td>
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<td>07</td>
<td>07</td>
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<tr>
<td>Transport policy</td>
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<tr>
<td>Unemployment</td>
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<td>08</td>
<td>09</td>
<td>09</td>
<td>10</td>
<td>12</td>
<td>14</td>
<td>19</td>
</tr>
<tr>
<td>Crime</td>
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<td>Price/purchasing power development</td>
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<tr>
<td>Politics/government</td>
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For information only: Social security: 7% (2016: 6%)
With 18% naming it as a chief cause for concern, one topic dominated British fears in 2017, even though it did not make it to the top of the list of preoccupations as an individual issue: Brexit. Indirectly it has influenced numerous other issues – and is the main worry when it comes to foreign, international and European policy, which is in second place with 20% overall. In June 2016, the population voted in a referendum with a narrow majority of 52% to leave the EU. The decision sent the stock markets and the value of the British pound into a tailspin. As a reaction to the unexpected vote for Brexit, Prime Minister and Leader of the Conservative Party David Cameron resigned.

His successor Theresa May made it clear upon taking office that she would only accept a so-called hard Brexit, and would therefore not wish to retain elements of EU membership. At the end of March 2017, the government submitted its official application to leave the EU. In the hope of building on the Conservative majority in Parliament, May called an early election in June 2017. However, the Prime Minister had to stomach a clear defeat, which meant that the ruling party could only achieve an absolute majority by joining forces with the Northern Irish DUP. Even so, the Brexit negotiations were able to begin as planned on 19 June under May’s leadership. Now the EU and Great Britain need to negotiate the terms of the withdrawal over the coming two years.

However, Brexit has not made an obvious negative impact in terms of the perception of politics and government. With 7%, this topic remains at the same level as last year, putting it tenth in the ranking. It seems that the respondents are no less dissatisfied with the government than they were in 2016.

After concerns about the health service were perhaps overshadowed in 2016 by the more pressing worries about immigration, the public’s doubts about this issue are currently increasing once more, with almost one third naming it as problematic. This means that the health service is currently the main cause for concern in Great Britain. After some restructuring, long waiting times are still one of the greatest challenges facing the British health care system. This is exacerbated by concerns that Brexit could have a negative impact on the health service. Experts are warning about a lack of doctors, since the British health service is heavily dependent on doctors and nursing staff from overseas, both of whom could now stay away.
Following the decision to leave the EU, concern about immigration has halved to 16%. It currently resides in third place, after being ranked top last year. Immigration from other EU countries was for many years the major sticking point during discussions on migration – and a key campaign issue for Brexit supporters. In December 2016, a good 40% of immigrants came from EU member states. Leaving the EU could lead to severe restrictions on the free movement of workers in Great Britain, as it would allow the country to limit immigration by EU citizens.

Fourth place in the 2017 ranking is occupied by the issue of housing and rents, which is a cause for concern for 11% of people. This puts the level of anxiety at a similar rate to last year, although there has been a continual upward trend since 2013. Average house prices have risen sharply, showing an increase of 80% between 2009 and 2016, especially in the capital London, while Great Britain overall saw a rise of 40%. At almost one third, concern about this topic in London is far higher than the national average. However, media coverage suggests that property prices may fall in 2017 – partly as a result of the planned Brexit. Experts fear that many companies in the financial sector that have long been based in London may have to move elements of their business to EU countries. The resulting drop in demand could lead to falling prices for property and rents.

Concern about education policy continues to rise slightly by 2 percentage points to 10%, putting it fifth in the ranking. This slight increase in concern could be related to the discussion about state-financed free schools run by independent governing bodies. These schools are open to all pupils. However, experts worry that these establishments will be in direct competition with regular schools, which could lead to a two-tier system. The government has announced that it will support these schools with more than 300 million pounds and will promote the building of more establishments of this kind. The move is viewed with scepticism above all by the teaching unions, because it reduces still further the already tight budget for state-run schools.
3 North and South America
... % of respondents mentioned the following as the most urgent issues to be solved in Brazil (unaided responses in %; rounded; multiple responses possible)

- Health service: 56, 56, 44, 55
- Education policy: 32, 34, 25, 32
- Crime: 30, 18, 23, 32
- Price/purchasing power development: 21, 12, 21, 12
- Politics/government: 21, 27, 23, 15
- Corruption: 19, 24, 20, 13
- Unemployment: 15, 09, 04, 04
- Tax policy: 05, 03, 05, 02
- Economic stability: 04, 05, 02, 02
- Values/morals: 02, 01, 01, 03

For information only:
- Youth unemployment: 2% (2016: 0%)
- Working conditions: 2% (2016: 1%)
- Pensions/old age provision: 2% (2016: 0%)
- Transport policy: 2% (2016: 3%)

Base 2017: 1,000 resp.
The Brazilians are currently primarily worried about the health service and education policy as well as internal security. These concerns are a result of the cuts imposed due to the continued problems with the country's economy, which are squeezing the budget of the state and its institutions.

The health service continues to occupy first place by some margin, with 56% of the population expressing its concern here as was also the case last year. In recent years, Brazil has had to battle increased problems with numerous mosquito-borne diseases, such as Zika, dengue and yellow fever. At the beginning of 2016, the government deployed around 220,000 soldiers to distribute information on these diseases to households. This proved successful, and in May 2017 the state of emergency declared as a result of the Zika virus was brought to an end. Nevertheless, many Brazilian hospitals continue to suffer from insufficient facilities. The death of the German canoe coach Stefan Henze during the 2016 Olympic Games was headline news in the German media. The hospital, to which he was brought following a taxi accident, did not have the necessary equipment to operate on him. The badly injured patient therefore had to be transported to another hospital, which meant a considerable delay in his treatment.

In second place this year is once again the concern about education policy (32%). Planned cuts by new President Michel Temer led to widespread protests by young Brazilians at the end of 2016. A new constitutional amendment aims to freeze public spending for the next 20 years. Alongside the health service, it would be the education system that will be worst affected, and it is already ailing and chronically underfunded as it is. This is also made clear by the PISA study, in which Brazil regularly performs well below the OECD average.

In 2017, the issue of crime has leapt up the ranking, climbing by 12 percentage points to 30%. In February 2017 – shortly before this survey was conducted – police in the state of Espírito Santo went on strike for higher pay. Chaos ensued for days. The news portal Folha De S.Paulo reported 42 killings on one day during the strike. By comparison, an average of four murders were committed per day in the whole of January.
The population is also increasingly concerned about price and purchasing power development, with fears about this issue rising by 9 percentage points to 21%. Here it appears to be above all the low pay of state officials that is causing anxiety, as this was explicitly mentioned by 17% of citizens (2016: 6%). This problem, too, could be put down to the difficult financial state of the public purse. Teachers, police officers and doctors are all affected. The previously mentioned police strike at the beginning of the year, which was primarily about higher pay, was one of the consequences of these cuts.

The overall average inflation rate in 2016 stood at 8.7% and experienced a slight decline in the last quarter. The Ministry of Finance expects further consolidation of price developments in 2017. Worries about economic stability are currently unchanged at 4%. However, unemployment rose to 11.5% in 2016 and among 15 to 24-year-olds it was even greater than 27%. Deficiencies in vocational training and the poor economic situation are the main reasons for this. It is therefore not surprising that concern about this issue has risen to 15%.

The poor economic situation is being exacerbated by political developments. In 2017, around one in five Brazilians expressed dissatisfaction with politics and government, which actually represents a slight decrease over the previous year. Since the Petrobas corruption affair came to light in 2014, events have moved fast and President Dilma Rousseff was removed from office in 2016. She was succeeded by Vice President Michel Temer. It is possible that this development gave the population hope that things would improve, as concern about the issue of corruption has fallen from 24% in 2016 to 19%. The Corruption Perceptions Index (CPI) has also improved slightly, from 38 to 40 points. This means, however, that corruption is still clearly apparent in Brazil.

The political situation has recently come to a head once again. After this survey, in May 2017, it was announced that the new President Temer is also alleged to have been involved in a string of bribery scandals. It remains to be seen how the investigations will turn out. And, in July 2017, the former – and still hugely popular – President Luiz Inácio Lula da Silva, pending confirmation by the appeals court, may also be convicted of corruption.
Mexico /// Challenges 2017

... % of respondents mentioned the following as the most urgent issues to be solved in Mexico (unaided responses in %; rounded; multiple responses possible)

<table>
<thead>
<tr>
<th>Issue</th>
<th>2017</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Crime</td>
<td>43</td>
<td>57</td>
</tr>
<tr>
<td>Price/purchasing power development</td>
<td>34</td>
<td>22</td>
</tr>
<tr>
<td>Politics/government</td>
<td>19</td>
<td>10</td>
</tr>
<tr>
<td>Corruption</td>
<td>16</td>
<td>21</td>
</tr>
<tr>
<td>Economic stability</td>
<td>15</td>
<td>13</td>
</tr>
<tr>
<td>Poverty</td>
<td>14</td>
<td>11</td>
</tr>
<tr>
<td>Unemployment</td>
<td>14</td>
<td>20</td>
</tr>
<tr>
<td>Education policy</td>
<td>09</td>
<td>13</td>
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<tr>
<td>Tax policy</td>
<td>03</td>
<td>04</td>
</tr>
<tr>
<td>International/European policy</td>
<td>03</td>
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</tbody>
</table>

For information only:
Country is upside down: 3% (2016: -)
Working conditions: 3% (2016: 8%)
Values/morals: 3% (2016: 1%)

thereof:
29% Combating crime (2016: 42%)
14% Not feeling safe on the streets (2016: 10%)
9% Violence (2016: 11%)
4% Hijacking (2016: 8%)

Base 2017: 1,000 resp.
Mexico is taking part in the Challenges of Nations study for the second time in 2017. Once again the level of concern expressed in Mexico is above average, but shows a slight reduction over last year, falling from 3.6 issues mentioned per person in 2016 to 3.1 concerns this year. This is particularly evident from the former and current main concern of Mexicans, crime: The responses here may have fallen by 14 percentage points to 43%, but the issue remains the number one concern on the list of preoccupations. According to the Crime and Safety Report 2017, robberies, kidnappings and street crime are just part of everyday life in Mexico City.

The case of 43 disappeared students has preoccupied the country since 2014. This was especially true in spring 2016, when it turned out that even an international commission of experts was unable to explain their fate. The close interweaving of organised crime, police and politicians is particularly evident in this case. In total, there were more than 20,000 killings in the country in 2016, and in January 2017 alone the authorities recorded more than 1,900 murders. The government assumes that at least half of these cases are related to organised crime and the ongoing drug wars. The Sinaloa Cartel, in particular, continues to control large parts of the drug business in Mexico with enormous brutality. After his escape from a high-security prison in June 2015, the cartel's boss "El Chapo" was recaptured some six months later and deported to the USA.

Mexicans have been watching the development of prices and purchasing power with mounting concern. Currently 34% of citizens are worried about this issue, which is a rise of 12 percentage points. The demand for price reductions in general and lower fuel prices in particular is especially acute. At the beginning of the year, petrol prices rose by 20% and diesel prices by 15%, which oil companies justified by citing the poor economic situation, repeated attacks on pipelines and fuel thefts. Powerful demonstrations and protests followed. In addition, according to the OECD, inflation is rising, from 2.8% in 2016 to 5.0% in the first quarter of 2017. In this context, concern about poverty has increased by 3 percentage points, and at 14% is currently sixth in the ranking.
Forecasts predict that the higher inflation rates will also have a negative impact on private consumption and therefore on the economy as a whole. In 2016, GDP only grew by 2.3%, compared to 2.6% in the previous year. For that reason, 15% of Mexicans are currently concerned about the economic stability of their country, with this topic at present residing in fifth place in the ranking. In contrast, the related topic of unemployment is losing relevance. According to the OECD, the unemployment rate fell from 4.4% in 2015 to 3.9% in 2016. This reduction is reflected in a drop in concern to its current level of 14%.

On the other hand, criticism of politics and government has become more relevant. At 19%, concern about this issue has almost doubled compared to last year, putting it in third place. The level of dissatisfaction with the present government under President Enrique Peña Nieto was also demonstrated during the regional elections in June 2016, in which the governing party PRI only managed to win five of the twelve Governor positions, meaning they now rule fewer than half the states in the country. For the first time, legal violations by politicians are a general source of anxiety for the population, mentioned specifically this year by 6% of Mexican respondents.

Concerns about corruption, in contrast, have fallen by 5 percentage points to 16%, which still puts this topic fourth in the ranking. According to Transparency International, the Corruption Perceptions Index (CPI) actually worsened from 35 points last year to 30 points in 2016, which corresponds to a higher perceived level of corruption. Officials and politicians at all levels are still involved in organised crime. The slight fall in the level of concern felt by Mexicans could be linked to a reform known as the "National Anti-Corruption System", which was passed by the government in July 2016. Welcomed by the OECD, it is aimed at optimising the collaboration of various anti-corruption institutions and creating greater transparency. The state hopes to use this in close cooperation with civil society to intensify its fight against corruption.

A new challenge to enter the top 10 of the ranking, with 3%, is foreign policy, and in particular the poor relationship with the new US President Donald Trump. During his election campaign, Trump described Mexicans in general as criminals and announced his intention to build a wall along the US border with its southern neighbour.
USA /// Challenges 2017

... % of respondents mentioned the following as the most urgent issues to be solved in the USA (unaided responses in %; rounded; multiple responses possible)

<table>
<thead>
<tr>
<th>Issue</th>
<th>2017</th>
<th>2016</th>
<th>2015</th>
<th>2014</th>
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<tbody>
<tr>
<td>Immigration/integration</td>
<td>17</td>
<td>16</td>
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<tr>
<td>additionally:</td>
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<tr>
<td>2% repeal Muslim immigration ban</td>
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<td>(2016: -)</td>
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<tr>
<td>Politics/government</td>
<td>15</td>
<td>12</td>
<td>13</td>
<td>15</td>
</tr>
<tr>
<td>additionally:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2% Stop protesting against new government</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(2016: -)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Economic stability</td>
<td>12</td>
<td>19</td>
<td>15</td>
<td>18</td>
</tr>
<tr>
<td>Health service</td>
<td>11</td>
<td>17</td>
<td>15</td>
<td>13</td>
</tr>
<tr>
<td>additionally:</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>2% Obamacare</td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>(2016: 2%)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unemployment</td>
<td>08</td>
<td>09</td>
<td>11</td>
<td>23</td>
</tr>
<tr>
<td>Crime</td>
<td>07</td>
<td>10</td>
<td>05</td>
<td>03</td>
</tr>
<tr>
<td>Terrorism</td>
<td>07</td>
<td>11</td>
<td>08</td>
<td>-</td>
</tr>
<tr>
<td>Values/morals</td>
<td>06</td>
<td>02</td>
<td>02</td>
<td>02</td>
</tr>
<tr>
<td>International/European policy</td>
<td>06</td>
<td>07</td>
<td>03</td>
<td>03</td>
</tr>
</tbody>
</table>

Donald Trump – issues/incidents (i.a. during the presidential campaign)

- 09
- 01
- -
- -

Base 2017: 1,000 resp.
USA /// Challenges 2017 by the three largest ethnic groups

...% of respondents mentioned the following as the most urgent issues to be solved in the USA (unaided responses in %; rounded; multiple responses possible)

<table>
<thead>
<tr>
<th>Issue</th>
<th>Overall (all Americans)</th>
<th>White</th>
<th>African Americans</th>
<th>Hispanic Americans</th>
</tr>
</thead>
<tbody>
<tr>
<td>Immigration/integration</td>
<td>17</td>
<td>17</td>
<td>11</td>
<td>23</td>
</tr>
<tr>
<td>Politics/government</td>
<td>15</td>
<td>14</td>
<td>23</td>
<td>11</td>
</tr>
<tr>
<td>Economic stability</td>
<td>12</td>
<td>12</td>
<td>13</td>
<td></td>
</tr>
<tr>
<td>Health service</td>
<td>11</td>
<td>11</td>
<td>10</td>
<td>08</td>
</tr>
<tr>
<td>Donald Trump – issues/incidents (i.a. during the presidential campaign)</td>
<td>09</td>
<td>08</td>
<td>07</td>
<td>13</td>
</tr>
<tr>
<td>Unemployment</td>
<td>08</td>
<td>08</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>Crime</td>
<td>07</td>
<td>09</td>
<td>08</td>
<td>04</td>
</tr>
<tr>
<td>Terrorism</td>
<td>07</td>
<td>10</td>
<td>04</td>
<td></td>
</tr>
<tr>
<td>Values/morals</td>
<td>06</td>
<td>06</td>
<td>10</td>
<td>02</td>
</tr>
<tr>
<td>International/European policy</td>
<td>06</td>
<td>06</td>
<td>02</td>
<td>06</td>
</tr>
</tbody>
</table>

thereof: Change of the president
3% White
10% African Americans
4% Hispanic Americans

Base 2017: 1,000 resp.
The highly controversial presidential election campaign and the ensuing choice of Donald Trump as President in November 2016 led to a polarisation of the political and social debates in the USA. As a result of this polarisation, considerably more worries were expressed during this survey about specific decisions – and people – than in previous years.

The most important challenge from the point of view of the American people in 2017 is immigration and integration. However, with 17%, worry about this has broadly stagnated compared to 2016. Former President Barack Obama planned to offer illegal immigrants living in the USA permanent right of residence, and was also prepared to take in additional refugees. Trump took a strong opposing position to this during the election campaign, and after the election tried to put countermeasures in place straight away. At the end of January 2017, he issued a decree that Muslims from Iraq, Syria, Iran, Sudan, Libya, Somalia and Yemen would not be allowed to travel to the USA for 90 days. Tens of thousands of people protested against these measures – which were annulled shortly afterwards by various courts. Even in this survey, 2% of citizens specifically demanded the revocation of this ban on inward travel.

The decision for a travel ban was justified by President Trump on the grounds that it was a matter of national security. Even during the election campaign, he was accused of equating Muslims with terrorists. Although the travel ban was suspended, concern about terrorism has reduced from 11% to 7% and is now only in eighth place. This puts it at a similar level to concerns about crime at 7%. Mexicans, above all, were described in general by Trump as drug dealers and criminals. The proposed construction of a wall along the border with Mexico with the aim of stopping illegal immigration and the drug trade has come in for national and international criticism. With 23%, an above-average number of Hispanic Americans expressed concerns about immigration.

Besides sexist remarks, racism and Islamophobia were both claims levelled at Trump during the election campaign. This year, as a result, 9% of US Americans expressed worries about Trump and the issues and events of the election campaign. In 2016, before his nomination as presidential candidate, that figure was just 1%.
Seldom has a President had such controversial ratings in the media and in polls as Trump so soon after taking office. This is one of the reasons why the press, in particular, is being targeted by the new government, which has accused even the reputable media of lying and banned them from press conferences in the White House. It is not just political opponents who have described these attacks on press freedom, and – owing to the suspended travel ban – on the judiciary as well, as dangerous and damaging to US democracy.

2% of US Americans demanded the acceptance of the new – democratically elected – government and a stop to the protests. In contrast, 15% of citizens claimed to be generally dissatisfied with politics and the government. With a rise of 3 percentage points, the issue is now in second place (as of February 2017). Above all, African Americans are far more worried about this topic, at 10%. The many difficulties in filling key roles only became a matter of public knowledge after this survey. The National Security Advisor Michael Flynn was forced to resign in mid-February 2017 because he is alleged to have made promises to Russia before taking office. At almost the same time, Employment Minister nominee Andrew Puzder withdrew his candidacy, because as a businessman he had campaigned against the minimum wage and apparently employed a housekeeper who was living in the country illegally. Moreover, Trump's controversial advisor Steve Bannon was removed from the National Security Council in April 2017.

In contrast, last year’s number one concern has lost ground, as concerns about economic development fell from 19% to 12%. This is still enough, however, to put the issue in third place. The largest economy of the world has been on a solid growth course since the crisis year of 2009, with a constantly growing GDP. According to the OECD, this has also led to a halving of the unemployment rate in this period (2016: 4.9%). It is a similar story for concerns about the health service, which is now in fourth place having dropped back to 11%. Here it will be interesting to see what will happen if the new President sticks to his promise of reversing the “Obamacare” health insurance programme set up by his predecessor. Critics believe that these plans, announced in March 2017, would lead to a great many people losing their insurance provision once more.
4 Asia and Pacific
India /// Challenges 2017

% of respondents mentioned the following as the most urgent issues to be solved in India (unaided responses in %; rounded; multiple responses possible)

- Poverty: 12% (2017), 08% (2016), 06% (2015)
- Transport policy: 08% (2017), 06% (2016), 15% (2015)
- Price/purchasing power development: 29% (2017), 33% (2016), 56% (2015)
- Education policy: 07% (2017), 05% (2016), 11% (2015)
- Politics/government: 04% (2017), 03% (2016), 02% (2015)
- Environmental issues: 13% (2017), 03% (2016), 04% (2015)
- Economic stability: 02% (2017), 07% (2016), 06% (2015)

For information only: International/European policy: 2% (2016: 2%)

Base 2017: 1,078 resp.
India is one of the fastest expanding economies in the world, with economic growth in 2016 hitting 7.9% in 2016, according to the OECD, and similar growth expected in 2017. Foreign direct investment is also increasing at present. The weak international demand may have had a dampening effect on exports, but this is now picking up again. The rate of inflation fell to 4.9% in 2016, according to the OECD, while last year it still stood at 5.9%.

In 2017, three issues dominate the top places in the ranking with around 30% apiece. However, concern about these topics is developing in different ways. As in previous years, Indians still see price and purchasing power development as one of the greatest challenges, but concerns on that front – and actual inflation – are dropping back slightly. However, Indians again set great store by price stabilisation.

India is a country with a very young population. This favourable generation ratio known as the demographic bonus is also a reason for the optimistic long-term growth prognosis. The percentage of people of working age among the population is expected to rise to almost 70% by 2026, with up to twelve million young people entering the labour market each year. These young people need to obtain appropriate education and training qualifications, but so far the level of professional qualifications tends to be relatively low. The "Skill India" initiative has been set up to help with this, but it seems that it is not yet seen as effective by Indian citizens. This could be one reason why concern about education policy has grown again slightly to 7%.

Closely associated with this, fears about the topic of unemployment are currently stagnating, but the issue still occupies pole position in the list of preoccupations. The official unemployment rate is also stable, and according to the World Bank stood at 3.5% in 2016. However, it is possible that Indians are worried about what the future will bring as many young people are going to need jobs. Currently only about 10% of employees are in contractually regulated employment, and one in every two jobs is still based around agriculture. In the eyes of the government led by Prime Minister Narendra Modi, the industry sector must first and foremost be strengthened for low-qualified workers. It is therefore pursuing the goal of increasing the share of industrial production in GDP from its current rate of 17% to 25% by 2025, including through the "Make in India" campaign.
Concerns about jobs were also stirred up by the "demonetisation" in November 2016, in which 86% of banknotes were declared invalid, such as the 500 rupee note. This was devised as a strict intervention against the black market economy and illicit earnings. India also wants to position itself in the long term as a global leader in the field of cash-free and digital forms of payment. However, the effects were so chaotic that the economy was heavily burdened and had to lower its growth forecasts. Citizens had the opportunity to exchange the notes for new, more forgery-proof notes by March 2017 or to pay them into an account. People without bank accounts, however, could no longer be paid, and the cash they had kept in their homes became worthless. As a result, the measure hit those employed in the informal sector the hardest. It seems as if the desired effect in the fight against corruption has not come to the fore (yet), at least from the point of view of citizens: With a jump to 29%, they still see the containment of corruption as an important issue to resolve.

In contrast, concern about crime has almost halved in comparison with previous years and the issue is currently in fourth place with 16%. The Indian population continues to be particularly unhappy about the ongoing violence against women, even if this has reduced considerably since 2016.

In 2017, the topic to have gained the most importance and to be seen as a key challenge is environmental protection. With a plus of 10 percentage points, environmental issues have climbed up to fifth place in the ranking. 13% of the Indian population sees the matter as requiring urgent resolution. Alongside environmental issues in general, drought and water shortages are particularly troublesome issues for Indians. In 2016, more than 300 million inhabitants were affected by one of the most severe droughts in the last 20 years, with large parts of the country having insufficient water. A lot of people died as a result. On the one hand, the lack of build-up of reserves is one reason for the water shortages, which are made worse on the other hand by the over-intensive use of ground water. The government is aware of the urgency of this problem and, in addition to making ambitious national plans, is using the Paris Climate Accord, signed in 2016, to improve the water supply.
...% of respondents mentioned the following as the most urgent issues to be solved in Indonesia (unaided responses in %; rounded; multiple responses possible)

<table>
<thead>
<tr>
<th>Issue</th>
<th>2017</th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Price/purchasing power development</td>
<td>34</td>
<td>43</td>
<td>33</td>
</tr>
<tr>
<td>Economic stability</td>
<td>34</td>
<td>11</td>
<td>17</td>
</tr>
<tr>
<td>Unemployment</td>
<td>31</td>
<td>33</td>
<td>14</td>
</tr>
<tr>
<td>Environmental issues</td>
<td>26</td>
<td>16</td>
<td>18</td>
</tr>
<tr>
<td>Education policy</td>
<td>15</td>
<td>10</td>
<td>10</td>
</tr>
<tr>
<td>Corruption</td>
<td>14</td>
<td>15</td>
<td>31</td>
</tr>
<tr>
<td>Transport policy</td>
<td>12</td>
<td>13</td>
<td>08</td>
</tr>
<tr>
<td>Poverty</td>
<td>09</td>
<td>09</td>
<td>08</td>
</tr>
<tr>
<td>Crime</td>
<td>09</td>
<td>14</td>
<td>12</td>
</tr>
<tr>
<td>Politics/government</td>
<td>09</td>
<td>02</td>
<td>05</td>
</tr>
</tbody>
</table>

Base 2017: 1,040 resp.

thereof:
- 24% Floods (2016: 13%)
- 20% Economic crisis (2016: 2%)
Even though the country is rich in natural resources, Indonesia – like other so-called natural resource economies – is suffering from low world market prices. However, in 2016, the economy was able to demonstrate positive growth after a number of difficult years. GDP is picking up more strongly again, exports are increasing and more foreign companies are investing in the country. In addition, the Central Bank was able to reduce its basic rate of interest several times since the beginning of 2016, as the price increases tailed off.

According to the OECD, consumer prices only rose by 3.5% in 2016, while in previous years the inflation rate had been at over 6%. This might be why the level of concern about the price and purchasing power development reduced significantly in 2017 by 9 percentage points. Even so, the issue is still at the top of the list of preoccupations, as has been the case in the past two years. Now, however, it is sharing this position with concern about the economy. At least one in three Indonesians sees a need for action here. As in 2016, the increased cost of living and food prices came in for particular criticism, as a large part of the budgets of private households is still spent on food and drink. Here it is noticeable that Indonesia is reliant on imports of basic foodstuffs such as rice, maize, soya and sugar. Food prices in Indonesia rose by more than 7% in 2015 and 2016, according to the OECD. This could also be the reason why, as in 2016, 9% of Indonesians see the fight against poverty as an urgent challenge. The continued large gap in prosperity between individual regions likely fans the flames of this worry, even though the middle class is growing by several million people each year. The improved standard of living is also indicated by the fact that since the middle of 2016 there has been a renewed upwards trend in new registrations of motor vehicles.

The reforms introduced by President Joko Widodo to boost the economy should also improve the purchasing power of Indonesia's citizens. There are also plans in place to improve the infrastructure, remove protectionist measures and make it easier for investors to invest in companies. GDP again improved rather more strongly in real terms in 2016 than in 2015, according to the OECD, with 5.0% growth, but it is still below the 6% mark of previous years. Despite positive signs and forecasts, Indonesians still apparently view the growth as not sustainable in the long term. At 34%, concerns about economic stability are shooting upwards, with the percentage of respondents anxious about their country's economy having more than tripled in comparison with the previous year.
There has been a corresponding increase in dissatisfaction with politics and government in general, with fears rising by 7 percentage points compared with the previous year. With 9%, the topic has entered the top 10 for the first time. At 14% in 2017, the issue of corruption is still at the comparatively low level recorded in the previous year, putting it in sixth place. The government’s fight against corruption appears to be gradually having an effect, but according to the German Federal Ministry for Economic Cooperation and Development (BMZ) it keeps coming up against institutional resistance. However, the CPI of Transparency International has again improved slightly to 37 points.

Indonesia has the third-largest working-age population in Asia – which is both an opportunity and a risk. The cultivation of raw materials and their export in an unprocessed state does not, however, require a large workforce. According to BMZ, half of the economic output is produced by the informal sector. The unemployment rate is fairly constant at 5.6%, according to the World Bank. Worry about unemployment is also static, even if it is still at a high level with 31%. A development plan announced by the government for 2015 to 2019 hopes to process more products in the domestic arena in order to create additional jobs.

When taking office, President Widodo set himself the objective of improving education opportunities and access to education for the country’s poorer population. At least 20% of the national budget has since been invested in education each year. Despite this, the proportion of respondents concerned about education policy currently stands at 15%, putting the issue in the top 5 of the most important challenges facing the country in 2017.

The island state of Indonesia is frequently afflicted by natural disasters such as floods, earthquakes and tsunamis. People living in coastal regions are also under general threat from rising sea levels. In December 2016, an earthquake measuring 6.4 hit the north of the island of Sumatra, making almost 45,000 people homeless and costing the lives of around 100 people. At the beginning of 2017, torrential rain triggered landslides on Bali. The capital, Jakarta, was also affected. The drains here were no longer able to cope with the quantity of water, which led to severe flooding. It is hardly surprising then that environmental issues – and in particular the threat of flooding – have grown significantly in importance. While 16% of Indonesians saw a need for action here in 2016, the figure has grown to 26% this year.
% of respondents mentioned the following as the most urgent issues to be solved in Iran (unaided responses in %; rounded; multiple responses possible)

Base 2017: 1,000 resp.

Politics/government
- 2017: 40%
- 2016: 26%
- 2015: 05%

Economic stability
- 2017: 36%
- 2016: 12%
- 2015: 04%

Price/purchasing power development
- 2017: 31%
- 2016: 55%
- 2015: 52%

Unemployment
- 2017: 23%
- 2016: 29%
- 2015: 37%

Housing/rents
- 2017: 14%
- 2016: 10%
- 2015: 40%

Well-being/standards of living
- 2017: 11%
- 2016: 09%
- 2015: 02%

Environmental issues
- 2017: 09%
- 2016: 00%
- 2015: 09%

Working conditions
- 2017: 08%
- 2016: 18%
- 2015: 11%

Youth unemployment
- 2017: 08%
- 2016: 07%
- 2015: 04%

Poverty
- 2017: 07%
- 2016: 03%
- 2015: 07%

For information only:
- Corruption: 7% (2016: 13%)
- Concentrate on own country: 7% (2016: -)
- Freedom/self-determination: 7% (2016: 2%)
In the period before the presidential elections in May 2017, the issues of politics and government and economic stability were the most important challenges from the point of view of Iranians, pushing concerns about price and purchasing power development from the top of the ranking. Significantly more Iranians are now worried about economic stability, with unrest having grown threefold to 36%. After the nuclear dispute was resolved and some of the sanctions lifted, there were high hopes of a noticeable upswing in the economy. However, income from oil and gas exports have remained lower than expected due to the low global market price of crude oil, so these hopes have not yet been fulfilled. Although GDP has actually risen since the nuclear agreement was signed due to growing oil exports, the Iranian oil industry has not generated the hoped-for revenues. The lack of financial elbow room has made investment more difficult in other sectors and has had a negative effect on overall growth. The World Bank estimates 6.4% economic growth for 2016, up from -1.8% in 2015. However, the increase is less than expected. A large percentage of the population hold President Hassan Rohani and his government responsible for the lack of a boom, which means that levels of dissatisfaction about politics have also intensified.

Criticism of politics and government has increased by 14 percentage points to 40%, putting it in the top slot. Along with the previously mentioned economic problems, this is certainly also a result of the presidential elections in May 2017, the results of which were still unclear when this survey was conducted. President Rohani, who is in favour of a cautious course of reforms, was able to defend his office against the conservative clerical forces. It is still hard to predict how the IS attacks in June 2017 will impact on the internal political situation in Iran.

Compared with politics and the economy, the set of issues around prices and purchasing power has lost some of its urgency. Dropping from 55% to 31%, the former chief concern is now only ranked in third place this year. One possible reason is the fact that inflation has fallen from 13.7% in 2015 to 8.6% in 2016. However, in August 2016, the rial suffered a devaluation of 12%, which means higher prices for imported goods and may in turn put renewed pressure on the current inflation rate.
Unemployment occupies fourth place in this year's ranking with 23%. Levels of concern here are lower than they were in 2015 (37%), but remain significant. This is added to by the particular worry about youth unemployment, which remains virtually stable in ninth place at 8%. The ILO estimates that average unemployment stood at 11% in 2015. In contrast, the unemployment rate among 15 to 24-year-olds exceeds 26%, with actual unemployment likely to be significantly higher. The critical employment situation can be ascribed in part to insufficient economic growth. However, it is also a result of the fact that most of the growth is in sectors that require a comparatively small workforce, such as oil or steel. In addition, many new job seekers enter the labour market each year, many of whom are university graduates. Both the creation of new jobs and a rise in the number of working women are therefore two of the key tasks facing the government.

A lack of jobs coupled with prolonged high inflation has caused 11% of Iranians to worry about their standard of living, or their overall well-being. Compared to 2016, this worry has only risen slightly by 2 percentage points, putting it sixth in the ranking.

It is important to highlight the explicit mention in 2017 of the desire for freedom and self-determination by 7% of Iranians, up from 2% the previous year. Many of them demand, for example, a relaxation of the strict dress codes.

The growing population of Iran not only needs jobs, but housing too. This is why Iranians feel that there is a housing problem, the relevance of which has risen by 4 percentage points over the previous year to 14% (fifth place). This still puts the level significantly below its value of 40% in 2015. The 2012/2013 recession also hit the Iranian construction industry very hard and even in the first quarter of 2017 it showed a slight decline in growth of 11%. Public construction projects are suffering from the fact that state revenues have turned out to be lower than expected. Banks are also keener to finance luxury and commercial projects instead of more affordable housing, which in turn is intensifying the housing shortage. The government is determined, however, to promote the construction of social housing more effectively in future.
...% of respondents mentioned the following as the most urgent issues to be solved in Japan (unaided responses in %; rounded; multiple responses possible)

<table>
<thead>
<tr>
<th>Issue</th>
<th>2017</th>
<th>2016</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family policy</td>
<td>22</td>
<td>14</td>
<td>11</td>
</tr>
<tr>
<td>Care of the aged</td>
<td>16</td>
<td>15</td>
<td>11</td>
</tr>
<tr>
<td>International/European policy</td>
<td>14</td>
<td>07</td>
<td>08</td>
</tr>
<tr>
<td>Pensions/old age provision</td>
<td>12</td>
<td>07</td>
<td>07</td>
</tr>
<tr>
<td>Economic stability</td>
<td>07</td>
<td>13</td>
<td>13</td>
</tr>
<tr>
<td>Working conditions</td>
<td>06</td>
<td>03</td>
<td>04</td>
</tr>
<tr>
<td>Environmental issues</td>
<td>05</td>
<td>04</td>
<td>05</td>
</tr>
<tr>
<td>Tax policy</td>
<td>04</td>
<td>05</td>
<td>07</td>
</tr>
<tr>
<td>Social security</td>
<td>04</td>
<td>04</td>
<td>04</td>
</tr>
<tr>
<td>Poverty</td>
<td>03</td>
<td>03</td>
<td>03</td>
</tr>
</tbody>
</table>

For information only:
- Price/purchasing power development: 3% (2016: 2%)
- Education policy: 3% (2016: 3%)
- Health service: 3% (2016: 2%)
- Politics/government: 3% (2016: 5%)

Thereof: 12% childlessness, more children, demographic change (2016: 12%)
In 2017, Japan again remains one of the countries in which respondents in general only mention a few problems. However, the number of problems mentioned has increased slightly from an average of 1.1 problems per respondent in 2016 to 1.4 responses in 2017. Therefore, although the willingness to express concern or criticism is still low due to cultural conditions, it appears as if it is increasing. The number of respondents who saw no problems or did not wish to provide any information has dropped from 39% to 31%.

The top five challenges are the same as those in the previous year, with slight variations in their rankings. The challenge that causes most concern among Japanese, at 22%, is currently family policy. This represents growth of 8 percentage points compared with 2016. 6% of citizens would like to see improved childcare, and 12% complained specifically about the low birth rate. In 2016, the number of newborns per year dropped to below one million for the first time. Currently each Japanese woman gives birth to 1.45 children on average, while a stable population would require that figure to be 2.1. The reason for the low birth rate is often the incompatibility of having a career and a family. Japan is a society which focuses on performance and working hours are long. There is a dearth of family-friendly work-time models.

Japan, moreover, has one of the lowest birth rates in the world coupled with one of the highest life expectancies. On average, women live to 86 and men to 80. In 2016, almost one quarter of the population was over 65 and therefore of pensionable age. Due to the lack of care personnel and affordable care home places, children, and primarily daughters, are often required to look after their parents. Like the lack of childcare provision, this also conflicts with the performance-based working environment. In second place with 16% is concern over care of the aged.

Japan’s demographic trend is also putting pension funds under immense pressure. There are now only 1.6 people of working age for each senior citizen. This means that fewer and fewer employees are responsible for funding more and more pensioners, which is why the potential payouts are getting smaller. This is also why 12% of Japanese view pensions and old age provision with alarm, which represents a rise of 5 percentage points and puts the issue fourth in the 2017 ranking.
The state pension fund, which administers the money for the pensions, is making huge losses in the wake of an instruction from the Japanese government to invest more heavily in domestic shares. This poses the risk of further cuts to the already modest pensions – which could lead to even more old people over the pensionable age of 65 having to continue working.

In third place, is the issue of foreign, international and European policy. Concern about this topic has doubled compared with last year to 14%, which may be a result of the increased desire for good relationships with the USA. Japan and the USA have traditionally been closely connected in terms of economics and security policy. Both countries offer each other mutual support, particularly due to the threat posed by North Korea's rocket and nuclear programme. However, the inauguration of US President Donald Trump at the beginning of 2017 may have contributed to the growing sense of unease. He criticised the fact that Japan devalued its currency in order to stimulate its export industry. Furthermore, the Japanese car manufacturer Toyota has come in for criticism in the USA for wishing to invest in Mexico. And, at the beginning of 2017, Trump issued a decree to withdraw from the TPP free trade agreement, which Japan in particular saw as an important building block of economic recovery. This combination of openly stated criticism and Trump's "America First" policy seems to have fuelled concerns about the bilateral relationship.

At 7%, economic stability, which was in the top 3 last year, is currently viewed with concern by only around half as many Japanese as in 2016. The government sees the economy as being on a moderate growth course. In the first quarter of 2017, GDP rose by 0.3% compared to the previous quarter, which represents an annual increase of 1.2% in real terms. At the same time, the economy grew for the fifth quarter in a row, which is a more sustained period of growth than has been seen for eleven years. The reason for the upswing can mainly be attributed to a rise in exports, partly due to the weak yen. Experts warn, however, that the economic trend should not be greeted with too much euphoria, as an over-dependence on exports brings its own risks. Domestic demand may have increased too, but not to a sufficient degree to stimulate the economy in the long term.
... % of respondents mentioned the following as the most urgent issues to be solved in South Korea (unaided responses in %; rounded; multiple responses possible)

South Korea /// Challenges 2017

Economic stability
- 46 (2017)
- 32 (2016)
- 42 (2015)

Politics/government
- 46 (2017)
- 12 (2016)
- 09 (2015)

Price/purchasing power development
- 20 (2017)
- 11 (2016)
- 19 (2015)

Youth unemployment
- 17 (2017)
- 27 (2016)
- 18 (2015)

Unemployment
- 12 (2017)
- 17 (2016)
- 21 (2015)

Choi Soon-sil affair
- 06 (2017)
- - (2016)
- - (2015)

Family policy
- 05 (2017)
- 13 (2016)
- 08 (2015)

Crime
- 05 (2017)
- 06 (2016)
- 20 (2015)

Social security
- 04 (2017)
- 07 (2016)
- 07 (2015)

Corruption
- 04 (2017)
- 02 (2016)
- 04 (2015)

For information only: Housing/rents: 4% (2016: 8%)

Base 2017: 1,501 resp.
The list of worries in South Korea is dominated by two issues in 2017, namely politics and government and economic stability. Above all, the topic of politics and government has gained enormous importance in 2017 – with concern leaping 34 percentage points to 46%. There are various explanations for this trend. In the parliamentary elections in April 2016, the Saenuri party of President Park Geun-hye lost its majority in the National Assembly after 16 years, and this is now held by a narrow margin by the left-wing liberal Minju party. The poor performance of the conservative party could be linked to the promises it failed to keep after the last election. Instead of improving, the economic situation has since worsened. Unemployment, too, in particular among young people, has risen since. By the end of 2015, thousands of people were protesting against President Park's policies, including the planned relaxation of the protection against dismissal for young employees. The Minju party was able to win votes in particular from young, well-educated Koreans.

More than anything else, the country's political sphere was rocked by the so-called Choi Soon-sil affair, which was mentioned specifically as a problem to be solved by 6% of respondents in 2017. In addition, 4% of Koreans pilloried corruption. Park is accused of enabling her close confidante Choi to influence matters of state. It is also claimed that she knew that Choi had blackmailed companies to gain money and benefits, including Samsung, one of South Korea's family-run conglomerates known as "chaebols". At the beginning of 2017, Samsung's Vice Chairman was arrested as part of the Choi scandal, which proved the close connection between the chaebols and politics. Park has so far denied all accusations, but in December 2016 parliament took the decision to suspend her. In March 2017, the constitutional court decided unanimously to remove her from office, which was also demanded by 14% of respondents in this survey. Since then (in May 2017), Park has been on remand and has been officially charged. The presidential elections held at the beginning of May 2017 saw the left-wing liberal Moon Jae-in emerge victorious. The change in politics that can now be expected could help to improve relationships with China and also with North Korea. North Korea keeps putting the relationship with its southern neighbour under pressure, including with its nuclear tests.
Another concern that has risen, namely by 14 percentage points, is worry over economic stability. The government has dropped its 2017 growth forecast for GDP from 3.0% to 2.6%, as private consumption and, since 2015, exports have shown a negative trend. This regression, triggered among other things by the falling demand in China, has hit this heavily export-dependent country hard. The problems experienced by the technology giant Samsung have certainly contributed to the level of concern among the population, since this important export-oriented corporation accounts for around a fifth of the country's economic output. The recall of the Samsung Galaxy Note 7 smartphone at the end of 2016 and the resulting halt in production proved tough for the country's exports – let alone the involvement of the company in the Choi affair.

After a decline in the previous year, concerns over price and purchasing power at 20% are back at the level of 2015. According to the OECD, inflation rose to 1.0% in 2016. One reason for this could be the cut in the basic rate of interest by the South Korean National Bank in the middle of June 2016, which led to a devaluation of the domestic currency and therefore made imports, including crude oil, more expensive. On the other hand, the devaluation has made exports more competitive at global level, which has strengthened the domestic economy overall.

Unemployment in general and youth unemployment in particular are still ranked among the top five most urgent issues to worry South Koreans. The level of concern has, however, reduced slightly in comparison to 2016, especially where youth unemployment is concerned. It would appear that people expect a future economic upturn to have a positive effect on the labour market, as the situation itself has not yet improved. According to the OECD, the overall unemployment rate in 2016 is slightly up at 3.7% and among those under 25 marginally up at 10.7%. In South Korea, where around two thirds of young people have a degree, a lot of money is invested in education, most of it financed through loans. This has led to very high private debt with a low per capita income. Despite good education, the employment prospects for graduates tend to be poor due to a lack of suitable jobs.
5 Africa
Kenya /// Challenges 2017
Top 15

... % of respondents mentioned the following as the most urgent issues to be solved in Kenya (unaided responses in %; rounded; multiple responses possible)

<table>
<thead>
<tr>
<th>Issue</th>
<th>% of Respondents</th>
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<tr>
<td>Corruption</td>
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<tr>
<td>Unemployment</td>
<td>51</td>
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<tr>
<td>Price/purchasing power development</td>
<td>50</td>
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<tr>
<td>Securing peace</td>
<td>32</td>
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<tr>
<td>Environmental issues</td>
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<tr>
<td>Lack of clean water</td>
<td>27</td>
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<td>Working conditions</td>
<td>26</td>
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<tr>
<td>Health service</td>
<td>24</td>
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<td>Tribalism</td>
<td>22</td>
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<tr>
<td>Transport policy</td>
<td>21</td>
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<tr>
<td>Education policy</td>
<td>18</td>
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<tr>
<td>Politics/government</td>
<td>15</td>
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<tr>
<td>Poverty</td>
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<tr>
<td>Housing/rents</td>
<td>07</td>
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<tr>
<td>Youth unemployment</td>
<td>06</td>
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</tbody>
</table>

Base 2017: 1,006 resp.

For information only: Power supply: 6%
The East African country of Kenya is represented in the Challenges of Nations study for the first time, and with an average of 4.3 responses per person mentions the second largest number of problems per citizen of all participating countries, close behind Nigeria. It is also noticeable that all the topics in the top 10 are each mentioned by more than one in five Kenyans. Corruption, unemployment and price and purchasing power development are even mentioned by every other person, meaning that these issues occupy the first three places in the ranking.

Corruption in general and in politics in particular is one of the main concerns for Kenyans. According to Transparency International, a Corruption Perceptions Index (CPI) score of 26 points (2016) indicates clearly noticeable corruption. The poorer members of society, in particular, often have to pay bribes for what should be free state services. The Ethics and Anti-Corruption Commission that has been active since 2011 estimates that one third of the annual state budget illegally ends up lining the pockets of state officials. The aim of the commission is to remove corrupt politicians and officials from public office. However, very few cases come to court because the investigating authorities do not have sufficient resources. According to the German Federal Ministry for Economic Cooperation and Development (BMZ), corruption often goes unpunished in political circles, in the police force and in the judiciary in particular. Even the current President Uhuru Kenyatta is alleged to be involved in corruption scandals. Small wonder, then, that 15% of Kenyans are expressly dissatisfied with politics and would like a more trustworthy government.

Equally, around every other Kenyan sees unemployment as a key challenge. On top of this, 6% of citizens are specifically concerned about youth unemployment. According to the World Bank, the unemployment rate has dropped since 2010 by a good percentage point to its current level of 11%, while youth unemployment has increased by almost 2 percentage points to around 22%, according to information provided by the Austrian Chamber of Commerce (WKO). Despite a slow reduction, the rate has stuck at a high level, even in comparison to other African countries. The creation of jobs cannot yet keep pace with the high population growth. Moreover, many school leavers do not have sufficient qualifications for the positions available. 18% of Kenyans are therefore worried about their country’s education policy.
Working conditions also come in for criticism, being mentioned as a problem by 26% of Kenyans. This worry is primarily the result of various strikes, such as that held by teachers in September 2015, when there was a demand for pay increases. And, in January 2017, a strike by doctors working in public hospitals crippled Kenya’s health service. The doctors were also demanding higher pay, as well as better working conditions and the implementation of a tariff agreement from the year 2013. The effects of these strikes on the health service is also a reason why 24% of the population are concerned about the health service, putting it in eighth place.

Kenyans are mainly demanding wage increases because the prices in the country keep rising sharply. In March 2017, the inflation rate was running at more than 10%, marking the highest rise since 2012. Half of all citizens are worried about price and purchasing power development. There are complaints about rising living costs in general, but in particular the sharp increases in the price of food. Foodstuff prices rose by almost 19% between March 2016 and March 2017, mainly due to the drought currently being experienced by the country. The consequences are massive crop failures and therefore famines. Concern about drought is also reflected in the worries about environmental issues, a topic which is mentioned by 29% of respondents, putting it in fifth place. The most frequent responses in that field, with 23%, are to do with water shortages and drought. According to WKO, in 2015, only about two thirds of the population had access to potable drinking water. Concerns about a lack of clean water therefore occupy sixth place with 27%.

The Kenyans also see a need for action with regard to securing peace, which is desired by 32% of citizens. According to the German Foreign Office, there is still an increased risk of attacks in Kenya by the Somalian terrorist organisation Al-Shabaab. In autumn 2016, a hotel in the north-east of the country was targeted by terrorists. Ethnic and religious differences – Kenya is home to more than 40 different ethnic groups – are also frequently the cause of violent conflicts. Against this background, tribalism and the tribal system as a trouble spot is mentioned explicitly by 22% of respondents.
... % of respondents mentioned the following as the most urgent issues to be solved in Nigeria (unaided responses in %; rounded; multiple responses possible)

**Base 2017: 1,000 resp.**

### Price/purchasing power development
- 2017: 67%
- 2016: 43%
- 2015: 30%
- 2014: 26%

### Power supply
- 2017: 65%
- 2016: 62%
- 2015: 56%
- 2014: 65%

### Unemployment
- 2017: 43%
- 2016: 30%
- 2015: 26%
- 2014: 52%

### Transport policy
- 2017: 33%
- 2016: 39%
- 2015: 27%
- 2014: 33%

### Education policy
- 2017: 27%
- 2016: 38%
- 2015: 25%
- 2014: 35%

### Securing peace
- 2017: 21%
- 2016: 15%
- 2015: 15%
- 2014: 04%

### Economic stability
- 2017: 18%
- 2016: 09%
- 2015: 07%
- 2014: 04%

### Corruption
- 2017: 17%
- 2016: 24%
- 2015: 26%
- 2014: 20%

### Stability of water supply
- 2017: 16%
- 2016: 17%
- 2015: 10%
- 2014: 26%

**Unemployment total (net*)**
- 2017: 50%
- 2016: 57%
- 2015: 53%

**Youth unemployment**
- 2017: 9%
- 2016: 36%
- 2015: 28%

**Health service**
- 2017: 16% (2016: 24%)
Price and purchasing power development was the main cause for concern for Nigerians in 2017 at 67%. This marks a huge increase in concern of 24 percentage points and knocks the issue of energy supply off the top spot. The general rise in living costs came in for the most criticism along with the high price of food. Sinking oil revenues due to the fall in the price of crude oil has put pressure on the local currency, the naira, which was devalued by 40% in June 2016. This made imports more expensive and the inflation rate rose, according to the Statistical Office, to around 18% at the turn of the year 2016/2017.

The low oil price has also led to a drop in the state income, since this is around 70% dependent on crude oil exports. Due to the tense financial situation facing the country, the subsidies for petrol were curbed, which increased the fuel price by 70%. Another aggravating factor was the fact that following acts of sabotage against oil pipelines and production platforms in the Niger Delta, the production quantity was restricted to 1.6 million barrels of oil per day. This puts it back at the level of the 1990s. The saboteurs also want to force the state to share more of the revenues from the oil business with the poorer members of society.

The low oil price is also having an effect on the economy as a whole. The Statistical Office expects a slight decline in GDP of 1.5% in 2016, while for 2017 the International Monetary Fund (IMF) forecasts a slight plus of 0.8%. The level of concern about economic stability has increased accordingly, doubling to 18% compared with last year. This brings it to seventh in the ranking.

Alongside the worry about the economy in general, there is also growing concern about unemployment. This issue climbed 13 percentage points to 43%, which ranks it third in the list of preoccupations. Information about the unemployment rate varies widely depending on the source. Figures issued by the Statistical Office suggest that unemployment reached 14% in the fourth quarter of 2016 following a steady climb.

The second most important issue is the energy supply – with concern here rising slightly once more to 65%. The privatised electricity network has been expanded over the last few years, but is still too slow compared to the capacity required. The electricity needs of the country’s rapidly growing population still cannot be met in anywhere near the right quantity.
Nigeria's education policy is far less of a focus in 2017 than in the previous year, and ranks in fifth place with 27%. It could be that this issue is seen as less urgent because economic matters such as worries about rising prices or the job market are overshadowing other problems. This is because the situation has not improved all that much since last year. Around 30% of men cannot read and write, and that figure rises to around 50% for women. Not much is likely to change in that respect in future as many children do not go to school – in the north of the country, this is partly because the terror group Boko Haram keeps carrying out attacks on educational establishments. Insufficient investment in the education sector has also led to shortages that are hindering economic development by having a negative effect on the job market.

Terrorism is no longer among the top 10 concerns but the desire for securing peace rose considerably to 21% in 2017. Since a change of power last year, the terror group Boko Haram has been experiencing internal conflicts and a degree of in-fighting. After a campaign lasting several months, at the end of 2016, the army was able to drive it out of its main stronghold, but the attacks have continued.

In contrast, citizens acknowledge that the government is putting up a more intense fight against corruption, as compared to 2016 this issue has dropped by 7 percentage points to its current level of 17%. The Corruption Perceptions Index that was published in 2016 noted a slight improvement from 26 to 28 points.

The associated issues of poverty and availability of transportable water are still giving cause for concern, with scores of 16% each. Prolonged dry spells and the increasing drying up of Lake Chad in the north of the country are stealing the livelihood of farmers and fishermen, which along with the many years of terror caused by Boko Haram has led to a humanitarian crisis. More than half a million children in the north of Nigeria are malnourished and in danger of dying of starvation.

There is also a huge backlog when it comes to the expansion of the transport network. This is why the country's transport policy is currently viewed critically by 33% of Nigerians. The declining oil revenues generated by the state are also having a deleterious effect on investments in road building. As part of its Africa strategy, however, China has been investing billions in the country's roads, airports and railways. One of the joint flagship projects is the "Blue Line" of the urban railway in Lagos.
...% of respondents mentioned the following as the most urgent issues to be solved in South Africa (unaided responses in %; rounded; multiple responses possible)

South Africa /// Challenges 2017

For information only:
Transport policy: 2% (2016: 3%)
Immigration/integration: 2% (2016: 3%)
Youth unemployment: 2% (2016: 2%)

Crime

- 2017: 39%
- 2016: 43%
- 2015: 45%
- 2014: 12%

Unemployment

- 2017: 30%
- 2016: 36%
- 2015: 36%
- 2014: 35%

Corruption

- 2017: 18%
- 2016: 12%
- 2015: 14%
- 2014: 42%

Addiction problems (alcohol, nicotine, drugs)

- 2017: 12%
- 2016: 13%
- 2015: 11%
- 2014: 08%

Education policy

- 2017: 10%
- 2016: 10%
- 2015: 06%
- 2014: 10%

Housing/rents

- 2017: 07%
- 2016: 11%
- 2015: 07%
- 2014: 11%

Politics/government

- 2017: 07%
- 2016: 07%
- 2015: 04%
- 2014: 03%

Water supply

- 2017: 04%
- 2016: 02%
- 2015: <0.5%
- 2014: 01%

Poverty

- 2017: 03%
- 2016: 06%
- 2015: 07%
- 2014: 05%

Health service

- 2017: 02%
- 2016: 02%
- 2015: 03%
- 2014: 03%

Base 2017: 1,200 resp.
Crime, unemployment and corruption are currently the triad of challenges facing South Africa. In 2017, 39% of the population see the fight against crime as an important problem to solve. Despite the efforts made by the government and the police, the country still has one of the highest crime rates of all countries with reliable statistics. There are many reasons for the high crime rate, including social inequality, poverty, unemployment and continuing racial segregation. Violence is also being directed more and more against immigrants from other African countries, especially Nigerians.

Statistics for 2015/16 show that the overall crime rate has dropped slightly, but that the number of attempted and successful murders rose by 4.9%, which works out at 34 homicides per 100,000 inhabitants. The highest murder rate is found in the provinces of the Eastern and Western Cape. The murders are often related to domestic violence and alcoholism. The number of recorded rapes, at more than 42,000 cases, is in decline, but experts assume that a high number of cases go unreported. An increasing problem is car-jacking, which has risen by 14.3% in comparison with 2016. On average, 40 cars per day are stolen under the threat of violence. The province of Gauteng, in which the cities of Johannesburg and Pretoria are located, is particularly badly hit.

Corruption as a cause for concern has gained ground compared to the previous year. With an increase of 6 percentage points, the issue is now third in the ranking. The focus here is likely on President Jacob Zuma, who has been investigated since the end of 2016 on suspicion of bribery and corruption. He came under pressure in part due to his close relationship with the influential Gupta family, of Indian origin, which is said to have infiltrated politics. He is also accused of misusing public money to renovate his private residence. Zuma has now been ordered by the courts to repay this money. During the local elections held in August 2016, his party, the African National Congress (ANC), achieved the worst result of the past 20 years. The ANC did win a clear majority, with 54% across the country, but lost 9 percentage points over the previous election figures. Parliament is also planning a vote of no confidence against the President. The issue of politics and government therefore still ranks among the most serious challenges, lying in seventh place with 7%.
In second place on the list of challenges, with 30%, is the issue of unemployment. Concerns over this have, however, fallen by 6 percentage points compared to last year’s survey. According to official statistics, the unemployment rate is largely stable, standing at 25.9% in 2016, according to the World Bank.

Education policy remains at 10%, placing it fifth in the ranking. The university sector is heavily under-financed in comparison with other countries, with just 0.75% of GDP being spent on further education. Student fees have also been rising by an average of 9% per year since 2009, which makes it impossible for many families to afford to fund a course of study. This affects the black population in particular, only 17% of whom have access to university. In contrast, around one in two white people still have access to further education. 2016 was therefore marked by young people protesting against the lack of equality in the education policy. Opposition was expressed most strongly by the actions of the "FeesMustFall" movement.

Addiction problems are a consequence, among other things, of a lack of education, a shortage of jobs and a high crime rate. At 12%, concern about this has remained virtually unchanged since 2015, putting it firmly in fourth place. According to the South African Central Drug Authority (CDA), around 15% of adult South Africans have a drug problem.

The issue of housing and rents, at 7%, is ranked sixth this year, but the level of concern about it has dropped compared to last year. Currently around one in five citizens live in homes with no indoor flushing toilet. On average, each South African currently only has 0.7 living rooms at their disposal. The removal of the segregating city structures dating back to apartheid and the practice of urban densification should relieve the pressure on housing in cities in future.

For the first time this year, water supply has made it into the top 10 problems. South Africa is one of the driest countries on earth. Climate change and the increasingly short cycle of the "El Niño" phenomenon caused the worst drought for 25 years in 2015 and 2016. Since the urban population will continue to grow, it is likely that even more water will be needed in the country in future. Strict consumption restrictions and better demand management should help to reduce the serious scarcity of this resource and limit the widespread wastage of water.
6 Appendix and methodology
Germany /// Challenges 2017 – 25 years at a glance

... % of respondents mentioned the following as the most urgent issues to be solved in Germany (unaided responses in %; rounded; multiple responses possible)

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... % of respondents mentioned the following as the most urgent issues to be solved in Germany (unaided responses in %; rounded; multiple responses possible)

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</table>

*Never among the most important challenges in previous years
Information about the study and report

Question

The respondents were asked the following single, open-ended question and were not given any possible answers to choose from; multiple responses were possible:

"In your opinion, what are the most urgent issues to be solved [in the respective country] today?"

Coverage

2017: 24 countries worldwide
(see methodology for the countries and their regional coverage)

Charts

- The values used in the data charts are rounded and – in the case of the "nations at a glance" charts – are projected figures
- The value "00" means that the challenge accounts for less than 0.5% of the responses made
- The value "-" means that the challenge was not mentioned at all

Change in methodology compared to 2016

- Austria: Change of institute and methodology
- Netherlands: Change of methodology
- Sweden: Change of age specifications
List of literature (1)

Offline research:


Online research on the following websites

- Africa Check. URL: https://africacheck.org/ (as of: Q1/2016).
- Deutsches Institut für Wirtschaftsforschung e.V. (DIW). URL: https://www.diw.de/ (as of: Q2/2017).
- Finanzen.net. URL: http://www.finanzen.net/ (as of: Q2/2017).
List of literature (2)

- Helaba Volkswirtschaft/Research.
  URL: https://www.helaba.de/ (as of: Q1/2017).

- INRIX.

- International Labour Organization (ILO).

- KfW Research.
  URL: https://www.kfw.de/ (as of: Q1/2016).

- Landeszentrale für politische Bildung Baden-Württemberg (lpb).

- Melbourne Mercer Global Pension Index.

- Migration Watch UK.
  URL: https://www.migrationwatchuk.org/ (as of: Q1/2017).


- Onvista.
  URL: https://www.onvista.de/ (as of: Q4/2016).

- Organisation for Economic Co-operation and Development (OECD).

- Pew Research Center.

- South African Police Service.

- Statista.

- Statistisches Bundesamt (Destatis).
  URL: https://www.destatis.de/ (as of: Q1/2017).

- TECSON.
  URL: http://www.tecson.de/oelweltmarkt.html (as of: Q2/2017).

- The World Bank.

- Trading Economics.
  URL: https://de.tradingeconomics.com/ (as of: Q2/2017).

- Transparency International.

- United States Department of State (OSAC).
  URL: https://www.osac.gov/ (as of: Q1/2017).

- Wirtschaftskammer Österreich (WKO).
  URL: https://www.wko.at/ (as of: Q1/2017).

- Wissenschaftliches Institut der PKV (WIP).
  URL: http://www.wip-pkv.de/ (as of: Q1/2017).

- Zukunftsinstitut.
  URL: https://www.zukunftsinstitut.de/ (as of: Q2/2016).
List of literature (3)

- Of several German-speaking newspapers and magazines, for example
  Ärzte Zeitung, Augsburger Allgemeine, Badische Zeitung, Bayern Kurier, Börsen-Zeitung, Der Spiegel, Deutsche Wirtschafts Nachrichten, Die Presse, Die Tageszeitung, Die Welt, Die Zeit, Focus, Frankfurter Allgemeine Zeitung, Frankfurter Rundschau, Hamburger Abendblatt, Handelsblatt, Manager Magazin, Münchner Merkur, Reuters, Rheinische Post, rp online, Stern, Süddeutsche Zeitung, Tagesspiegel, Wirtschaftswoche

- Various radio and television stations, for example
  ARD, Bayrischer Rundfunk, Deutsche Welle, Deutschlandfunk, n-tv, ZDF, MDR, Arte

- Of several international newspapers, magazines, radio and television stations, for example

Background information and explanations provided by GfK, for example GfK Kaufkraft Europa 2016.
## Methodology in Europe

<table>
<thead>
<tr>
<th>Europe</th>
<th>Proportion sample/total population in %</th>
<th>Proportion sample/total population in millions</th>
<th>Sample size</th>
<th>Methodology</th>
<th>Age</th>
<th>Regional coverage</th>
<th>Fieldwork</th>
<th>Surveyed since</th>
</tr>
</thead>
<tbody>
<tr>
<td>Austria</td>
<td>84.8%</td>
<td>7.2 m</td>
<td>1,029</td>
<td>CAPI</td>
<td>16+</td>
<td>Nationwide</td>
<td>Feb/March 17</td>
<td>2001</td>
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<tr>
<td>Belgium</td>
<td>83.0%</td>
<td>9.4 m</td>
<td>1,003</td>
<td>CATI</td>
<td>15+</td>
<td>Nationwide</td>
<td>Feb/March 17</td>
<td>2006</td>
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<tr>
<td>France</td>
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<td>52.5 m</td>
<td>1,002</td>
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<td>15+</td>
<td>Nationwide</td>
<td>Feb 17</td>
<td>2001</td>
</tr>
<tr>
<td>Germany</td>
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<td>71.0 m</td>
<td>2,018</td>
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<td>Nationwide</td>
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<tr>
<td>Italy</td>
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<td>Nationwide</td>
<td>Feb 17</td>
<td>2001</td>
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<td>CATI</td>
<td>18+</td>
<td>Nationwide</td>
<td>Feb 17</td>
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<td>Poland</td>
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<td>2,106</td>
<td>PAPI</td>
<td>16+</td>
<td>Nationwide except for regions in Northern Russia and North Caucasus</td>
<td>Feb 17</td>
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<td>Spain</td>
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<td>39.3 m</td>
<td>1,020</td>
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<td>15+</td>
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<tr>
<td>Sweden</td>
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<td>16-84</td>
<td>Nationwide</td>
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<tr>
<td>Switzerland</td>
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<td>15-74</td>
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<td>Urban population</td>
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<td>UK</td>
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<td>CAPI</td>
<td>16+</td>
<td>Nationwide</td>
<td>Feb 17</td>
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Fieldwork carried out with GfK GLOBO BUS®.
## Methodology in North and South America, Africa, Asia

<table>
<thead>
<tr>
<th>North and South America</th>
<th>Proportion sample/total population in %</th>
<th>Proportion sample/total population in millions</th>
<th>Sample size</th>
<th>Methodology</th>
<th>Age</th>
<th>Regional coverage</th>
<th>Fieldwork</th>
<th>Surveyed since</th>
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<tbody>
<tr>
<td>Brazil</td>
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<td>149.6 m</td>
<td>1,000</td>
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<td>Feb 17</td>
<td>2014</td>
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<td>Mexico</td>
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### Africa

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<th>Country</th>
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<td>Kenya</td>
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<td>18+</td>
<td>Nairobi, Mombasa, Kisumu</td>
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<td>Nigeria</td>
<td>14.4%</td>
<td>26.3 m</td>
<td>1,000</td>
<td>PAPI ad hoc</td>
<td>18+</td>
<td>Lagos, Port Harcourt, Kano</td>
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<td>South Africa</td>
<td>22.9%</td>
<td>12.5 m</td>
<td>1,200</td>
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<td>16+</td>
<td>Metropolitan area of Gauteng, Johannesburg, Durban, Cape Town</td>
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### Asia and Pacific

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<th>Coverage</th>
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<td>India</td>
<td>5.0%</td>
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<td>15-64</td>
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<td>Tehran, Mashhad, Esfahan, Tabrez, Shiraz</td>
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<td>Nationwide</td>
<td>Jan/Feb 17</td>
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Fieldwork carried out with GfK GLOBO BUS®.