



GLOBAL STATES OF MIND

NEW METRICS FOR WORLD LEADERS

OCTOBER 2014

GALLUP®

Well-meaning economists and political scientists use indicators such as GDP, household income, and unemployment data to make all kinds of predictions about countries. They apply classical, rational economics. But in doing so, they miss the most important dimension: how people are *feeling*. Not just how they're feeling about their lives, but also whether they feel safe, can afford the food their families need, and even whether they plan to move away from their communities.

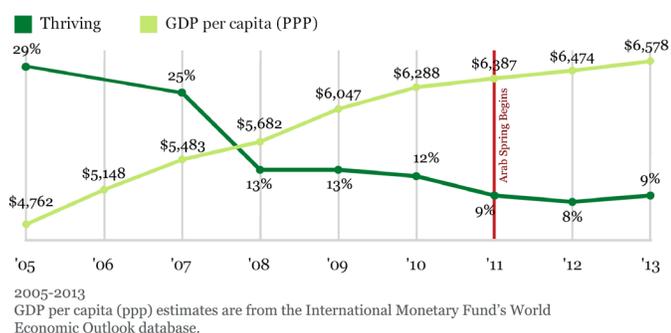
Over nearly 10 years, Gallup has built a database on how people's lives are going by engaging the best experts in the world on that missing dimension.

Our process for quantifying what people are feeling is similar to labor force surveys that report unemployment. But instead of asking people, "Do you have a job?", we ask them to rate their lives on a scale of 0 to 10, with 0 being the worst possible life and 10 being the best possible life. We then roll up the results and give each country an overall score.

You've undoubtedly heard many of these results: Denmark typically has the highest life evaluations in the world, for example; Syria has among the worst. But there are others that you might not have heard about. One of the richest countries in the world also has reported some of the lowest positive emotions on Earth. That country? Singapore.

Over the past decade, attitudes toward this type of research have admittedly been mixed. Some international organizations, such as the OECD, UNDP, and the World Bank, have incorporated well-being data into their research, while others see it as soft "happiness" surveys that shouldn't be used for policy. But one graph, which plots GDP per capita and life evaluations in Egypt before the Arab Spring, has become a leading example of why leaders should take this information — how people are feeling — more seriously.

Egypt: Recent Trends in Percentage "Thriving" and GDP per Capita (PPP)



No economic models, nor think tanks, nor billions of dollars in U.S. intelligence successfully predicted the world-changing Arab Spring. While those well-intended models knew exactly what the people were spending and transacting, they didn't know what they were thinking or feeling.

In 2005, Gallup set out to systematically track how people were feeling in every country in the world. This report, *Global States of Mind 2014*, provides a high-level overview of the countries that scored the best and the worst for life evaluations, safety, food access, institutions, jobs, and whether residents are planning to leave their communities. It's our attempt to fill in the gap on how people all over the world are feeling.

Regards,

Jon Clifton
Managing Director, Gallup World Poll
Gallup, Inc.

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

ABOUT THE GALLUP WORLD POLL

Gallup conducts surveys in more than 160 countries, providing a scientific window into the well-being, attitudes, and behaviors of most of the world's residents through randomly selected, nationally representative samples. Between 2005 and 2013, Gallup completed more than 1 million interviews worldwide.

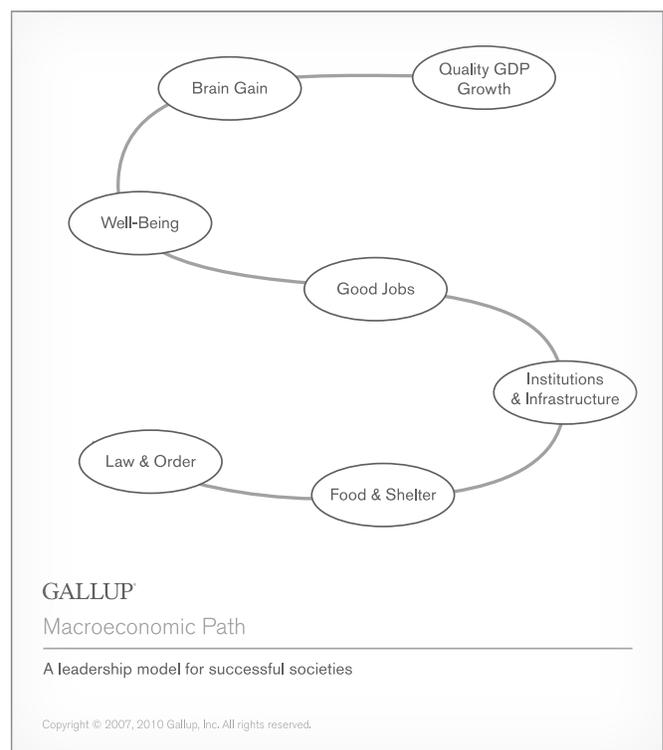
Gallup research shows that factors beyond classical economic measures affect people's attitudes and behaviors. The World Poll was created with input from renowned economists, psychologists, sociologists, and political scientists and provides leaders with better tools to examine the future of economies,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

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

The data presented in this report come from Gallup surveys in 137 countries and areas surveyed in 2013. A few countries featured in earlier *Global States of Mind* reports were not surveyed in 2013, such as Swaziland and Lesotho, but new countries and regions such as Bhutan, the Nagorno-Karabakh region, and Northern Cyprus are included in the report for the first time. In some countries, government restrictions prevented interviewers from asking select questions, particularly sensitive questions related to government performance.

A MACROECONOMIC MODEL FOR SUCCESSFUL SOCIETIES

The **Gallup Macroeconomic Path** provides the framework Gallup researchers believe societies must follow to thrive. The model highlights the link between every resident's individual contribution and the overall success of a community or country. Gallup's global network of researchers and analysts employ their knowledge of this path to construct surveys, collect data, and provide strategic advice based on the results.



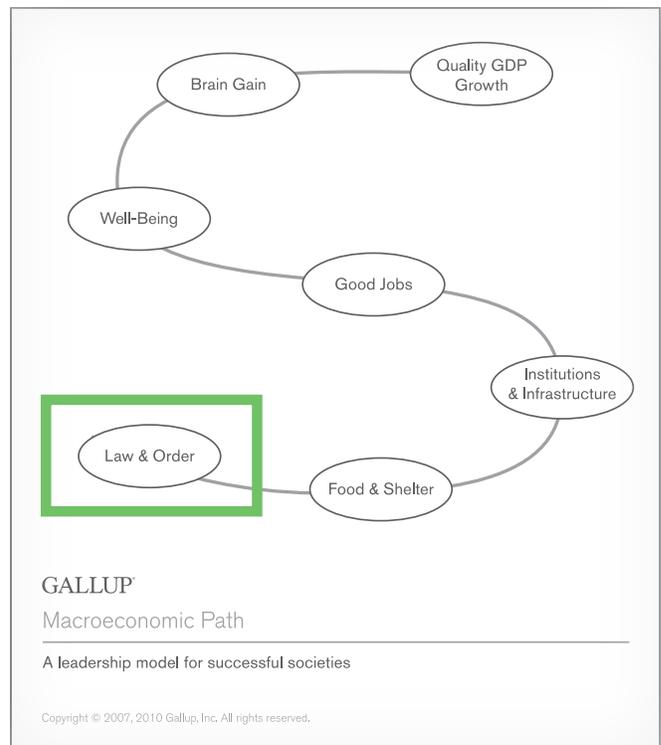
Do you feel safe walking alone at night in the city or area where you live?

Least Likely to Feel Safe	
	Feel safe
Dominican Republic	38%
Gabon	36%
Paraguay	35%
Brazil	34%
Zambia	34%
Syria	33%
Botswana	32%
South Africa	30%
Congo (Kinshasa)	27%
Venezuela	19%

Most Likely to Feel Safe	
	Feel safe
Indonesia	86%
Austria	85%
Bangladesh	84%
Georgia	83%
Rwanda	83%
Finland	81%
Jordan	81%
Myanmar	81%
Slovenia	81%
Armenia	80%

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

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



FOOD & SHELTER

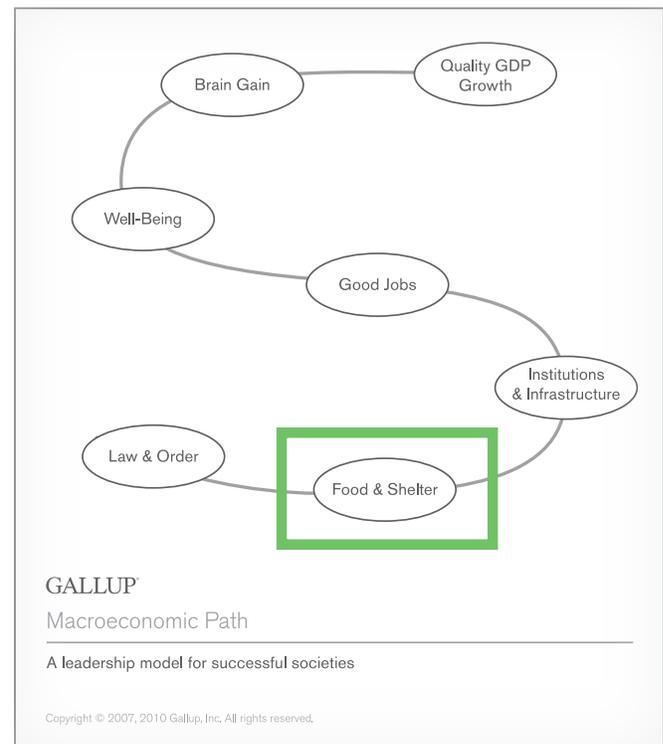
Have there been times in the past 12 months when you did not have enough money to buy food that you or your family needed?

Struggling Most to Afford Food	
	Not enough money for food
Niger	78%
Angola	77%
Guinea	76%
Haiti	74%
Liberia	73%
Cambodia	72%
Sierra Leone	69%
Zambia	69%
Malawi	67%
Chad	66%

Struggling Least to Afford Food	
	Not enough money for food
Italy	9%
China	8%
Belgium	7%
Denmark	6%
Germany	6%
Japan	6%
Sweden	6%
Turkmenistan	6%
Austria	5%
Luxembourg	5%

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

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



INSTITUTIONS & INFRASTRUCTURE

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

Highest and Lowest Perceptions of Government Corruption in Free Countries*			
	Yes, corruption is widespread in government		Yes, corruption is widespread in government
Lithuania	90%	Netherlands	43%
Spain	89%	Uruguay	43%
Czech Republic	87%	Australia	41%
Jamaica	86%	Canada	41%
Portugal	86%	Malta	40%
Trinidad and Tobago	86%	Finland	28%
Costa Rica	84%	New Zealand	28%
Slovenia	83%	Luxembourg	23%
Cyprus	82%	Sweden	18%
Ghana	82%	Denmark	14%

*According to Freedom House 2013 Press Freedom Status

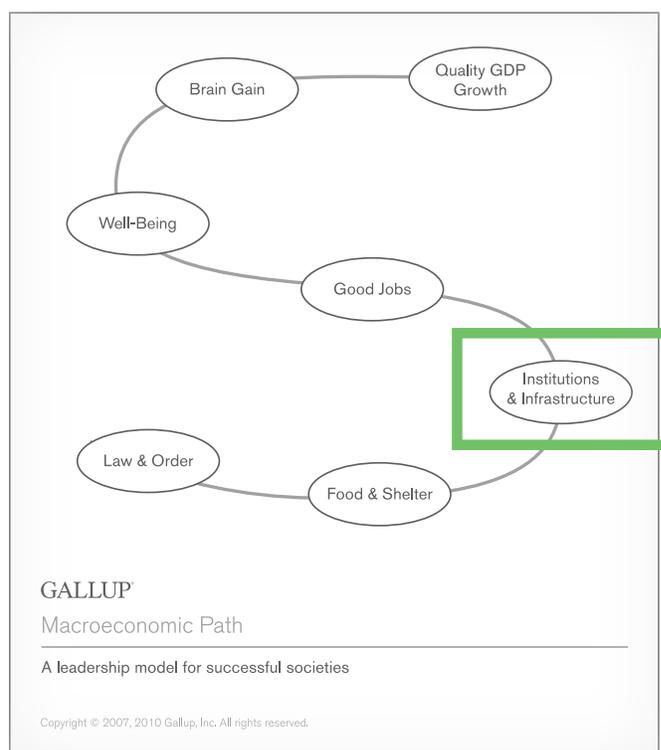
Institutions & Infrastructure measures confidence in key institutions — including the military, the judicial system, the national government, and the honesty of elections — and evaluates infrastructure, such as roads, education, environment, healthcare, and housing.

Highest and Lowest Perceptions of Government Corruption in Partly Free Countries*			
	Yes, corruption is widespread in government		Yes, corruption is widespread in government
Lebanon	93%	Mauritania	64%
Bosnia and Herzegovina	91%	Chile	63%
Greece	91%	Bangladesh	62%
Indonesia	91%	Haiti	58%
Italy	91%	Macedonia	57%
Nigeria	91%	Cote d'Ivoire	55%
Paraguay	89%	Nicaragua	52%
Tanzania	88%	Bhutan	50%
Uganda	88%	Montenegro	46%
Colombia	87%	Georgia	24%

*According to Freedom House 2013 Press Freedom Status

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

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



Highest and Lowest Perceptions of Government Corruption in Not Free Countries*			
	Yes, corruption is widespread in government		Yes, corruption is widespread in government
Honduras	89%	Syria	62%
Chad	88%	Ecuador	61%
Egypt	88%	Cambodia	60%
Cameroon	84%	Sri Lanka	59%
Ukraine	83%	Azerbaijan	51%
Afghanistan	82%	Turkey	50%
Russia	82%	Tajikistan	48%
Pakistan	81%	Belarus	39%
Guinea	80%	Vietnam	38%
Thailand	80%	Rwanda	9%

*According to Freedom House 2013 Press Freedom Status

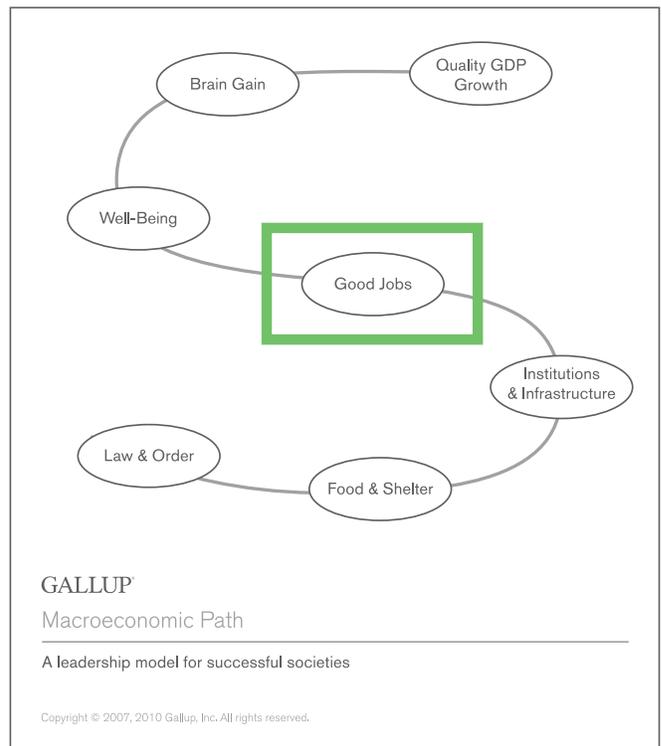
The Payroll to Population rate is the percentage of the population that is employed full time for an employer for at least 30 hours per week.

Lowest Payroll to Population Employment Rates	
Among all national adults	
	Payroll to Population rate
Tanzania	9%
Guinea	8%
Liberia	8%
Mali	8%
Ethiopia	7%
Sierra Leone	7%
Haiti	6%
Malawi	6%
Niger	6%
Burkina Faso	5%

Highest Payroll to Population Employment Rates	
Among all national adults	
	Payroll to Population rate
United Arab Emirates	59%
Iceland	54%
Bahrain	53%
Sweden	53%
Russia	51%
Kuwait	49%
Belarus	47%
Israel	47%
Latvia	44%
United States	43%

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

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





WELL-BEING

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

Just your best guess, on which step do you think you will stand in the future, say about five years from now?

Highest Thriving Worldwide	
	Thriving
Denmark	70%
Iceland	70%
Sweden	68%
Canada	66%
Australia	63%
Finland	62%
Austria	61%
Brazil	61%
Mexico	61%
Netherlands	61%

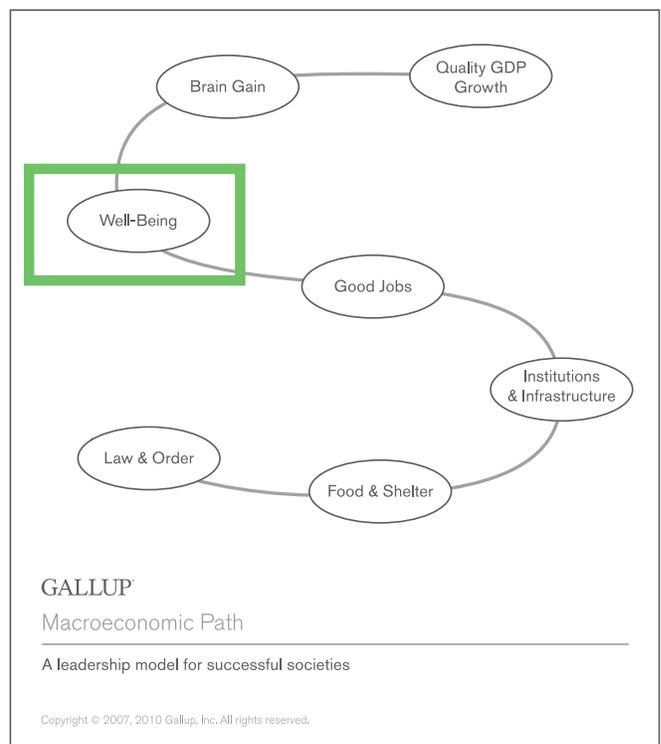
Lowest Thriving Worldwide	
	Thriving
Kenya	5%
Madagascar	5%
Niger	4%
Benin	3%
Burkina Faso	3%
Chad	3%
Rwanda	2%
Senegal	2%
Syria	2%
Afghanistan	*

* = Less than 0.5%

Well-Being measures the interconnected elements that contribute to health, quality of life, and productivity, including work, social networks, personal economics, personal health, and citizen engagement. Life evaluation measures help leaders better understand the current state of their constituents.

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

Across countries, life evaluations correlate highly with income, education level, and reported disease conditions.



Individuals who are thriving have fewer disease conditions, fewer sick days, and higher incomes. They are more highly educated and have better work environments. Countries with higher percentages of thriving respondents also report that their areas are good places to live for people of different ethnicities, races, and cultures.

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



BRAIN GAIN

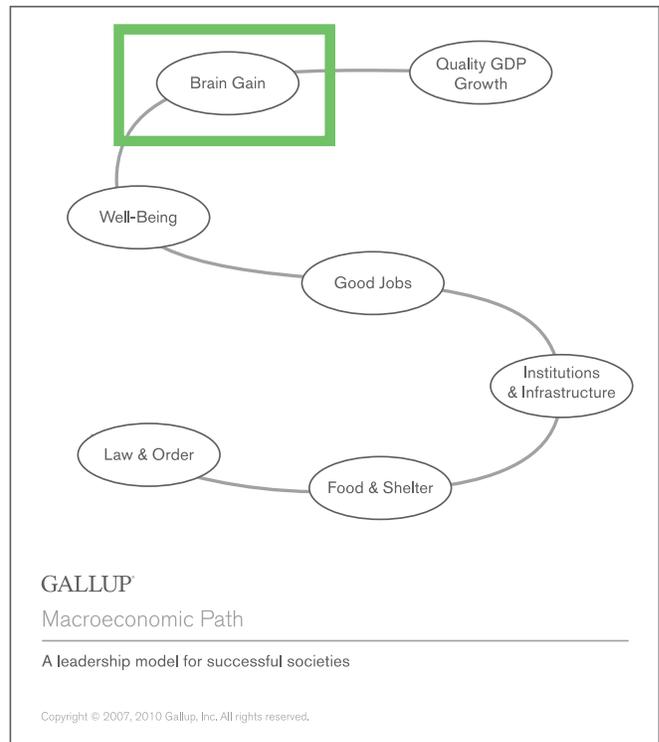
In the next 12 months, are you likely or unlikely to move away from the city or area where you live?

Highest Likelihood to Move Away in Next 12 Months	
	Likely to move
Sierra Leone	41%
Syria	41%
United Arab Emirates	35%
Botswana	32%
Cameroon	32%
Cote d'Ivoire	31%
Ghana	31%
Iran	31%
Senegal	31%
Dominican Republic	29%

Lowest Likelihood to Move Away in Next 12 Months	
	Likely to move
Taiwan	6%
Tajikistan	6%
Uzbekistan	6%
Belarus	5%
Kyrgyzstan	5%
Pakistan	5%
Slovakia	5%
Thailand	5%
Ukraine	4%
Bosnia and Herzegovina	3%

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

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



LEADERSHIP APPROVAL

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

Highest and Lowest Approval of Leadership in Free Countries*			
	Approve of country's leadership		Approve of country's leadership
Luxembourg	72%	Cyprus	31%
Germany	65%	Slovakia	25%
Malta	61%	Slovenia	25%
Belgium	59%	Estonia	24%
Canada	54%	Poland	21%
Denmark	54%	Costa Rica	20%
New Zealand	53%	Jamaica	20%
Uruguay	52%	Portugal	20%
Austria	51%	Spain	20%
Japan	51%	Czech Republic	15%

*According to Freedom House 2013 Press Freedom Status

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

In countries where citizens feel free to say what they think of their country's leadership, job approval ratings can be a useful barometer of how well the country and its residents are doing, and of residents' faith that leadership is moving their country in the right direction.

Highest and Lowest Approval of Leadership in Partly Free Countries*			
	Approve of country's leadership		Approve of country's leadership
Bhutan	94%	Colombia	25%
Philippines	80%	Italy	24%
Botswana	70%	Tunisia	23%
Indonesia	69%	Croatia	22%
Bangladesh	67%	Moldova	18%
Kenya	66%	Peru	18%
Mali	66%	Romania	18%
Nicaragua	64%	Greece	14%
Niger	64%	Bulgaria	13%
Burkina Faso	63%	Bosnia and Herzegovina	8%

*According to Freedom House 2013 Press Freedom Status

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

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

Highest and Lowest Approval of Leadership in Not Free Countries*			
	Approve of country's leadership		Approve of country's leadership
Azerbaijan	79%	Palestinian Territories	42%
Sri Lanka	78%	Russia	41%
Malaysia	73%	Venezuela	34%
Ethiopia	66%	Chad	30%
Kazakhstan	66%	Egypt	28%
Ecuador	65%	Honduras	26%
Vietnam	55%	Armenia	24%
Zimbabwe	55%	Congo (Kinshasa)	23%
Cameroon	53%	Ukraine	22%
Tanzania	51%	Pakistan	18%

*According to Freedom House 2013 Press Freedom Status

In more than a dozen countries, the question is too sensitive to ask, and in some countries, such as those with little media freedom, the responses may reflect residents' reluctance to criticize the government.



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