Risk perception survey
Media launch
Tuesday, 27 August 2013
What on earth is the risk?

People of all generations brace themselves for a riskier world and want their government to do more.
For 19 markets
more than 22 000 people
share their perception of the risks they face

#1
risk is the economy — with some notable exceptions
Economy leading concern – with notable exceptions

What do you think are the two most important risks facing your country at the moment?

Generations mostly aligned on risk perception – world view

What do you think are the two most important risks facing your country at the moment?
Generations sometimes see it differently – world view

What do you think are the two most important risks facing your country at the moment?

- Crime, terrorism and civil unrest
- The costs of ageing societies

Men and women seeing eye to eye on risk

What do you think are the two most important risks facing your country at the moment?
70% are prepared to take personal responsibility for their own retirement costs

70% would pay more privately, cut back on spending when retired or work longer for a financially secure retirement.

Which of the following actions are you MOST willing to take to ensure a financially secure retirement?

- Pay more contributions into a private / employer pension plan or other savings
- Retire later than planned
- Cut back on spending during your retirement
- Pay more tax to fund public / state pensions
- Rely on family members for financial support
- None of these / don’t know

% base: respondents who have not yet retired
Private and public provision support

Which action are you MOST willing to take to ensure a financially secure retirement?

Top countries for saving more

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<tr>
<th>Country</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>World view</td>
<td>29%</td>
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<tr>
<td>Switzerland</td>
<td>42%</td>
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<tr>
<td>Germany</td>
<td>40%</td>
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<td>South Africa</td>
<td>36%</td>
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Top countries for paying more tax

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% base: respondents who have not yet retired

43% expect their government to pay for the healthcare of all
43% expect their government to pay for the healthcare for all

43% say all healthcare should be publicly funded and a further 35% think it should be publicly funded only for the poor.

What amount of healthcare, if any, should be publicly funded?

- 43%: All healthcare
- 35%: Only for those who cannot afford it
- 13%: Only for very serious illnesses
- 4%: None
- 5%: No answer / don’t know

Top countries for universal healthcare support:
- World view: 43%
- China: 63%
- Canada: 58%
- Brazil: 58%

Bottom countries for universal healthcare support:
- US: 34%
- South Korea: 33%
- Switzerland: 28%

% base: all respondents

Universal healthcare support
84% think climate change will be responsible for more natural disasters in the future.

83% agree to different extents that climate change and global warming would mean more natural disasters in the future.

To what extent does climate change and global warming affect the risk that your neighbourhood will be hit by a major natural catastrophe?

- 20% To a great extent
- 38% To some extent
- 26% To a small extent
- 12% Not at all
- 1.2% No answer / don't know
Perceptions of climate change's link with natural catastrophes

How much does climate change and global warming affect the risk of natural catastrophe?

Top markets – climate change linked ‘to a great extent’

Top markets – climate change will have no effect at all

% base: all respondents

18

8 in 10

77% fear damage from a natural disaster within the next 20 years
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8 in 10 see a risk their neighbourhood will be damaged by a natural catastrophe within 3 or 20 years.

How large do you think the risk is that your neighbourhood will be damaged again / do you think your neighbourhood is at risk of being hit by a natural catastrophe, causing damage to homes and goods?

- A high risk - it could happen within the next 3 years
- A low risk - it could happen within the next 20 years
- A very low risk
- No answer / don't know

The risk of a natural catastrophe

How large do you think the risk is of being hit by a natural catastrophe which causes damage?

Top markets – natural catastrophe within 3 years
Top markets – very low risk of natural catastrophe

% base: all respondents
91% want governments to do more to promote energy efficiency

91% agree that governments should do more to encourage energy efficiency.

Agree / disagree: the government should encourage more efficient energy use?

- Strongly agree: 59%
- Somewhat agree: 33%
- Somewhat disagree: 23%
- Strongly disagree: 5%
- No answer / don't know: 3%

% base: all respondents
Willingness to use or already using renewable energy

If available, would you be willing to switch to renewable power?

Top countries for willingness to use renewable energy:
- South Africa: 90%
- China: 89%
- Indonesia: 82%

Bottom countries for willingness to use renewable energy:
- France: 67%
- Netherlands: 59%
- Japan: 56%

% base: all respondents
Food waste – the number one reason for food shortages

Do you think that food waste is a main cause of food shortages in your country?

Top countries selecting waste as main cause of food shortages:
- World view: 68%
- France: 83%
- Italy: 77%
- South Korea: 76%

Bottom countries selecting waste as main cause of food shortages:
- US: 58%
- South Africa: 56%
- Indonesia: 50%

% base: all respondents
66% think their country's food shortages are caused by high prices

Do you think that high food prices are a main cause of food shortages in your country?

Top 3 countries selecting high food prices

- South Africa: 86%
- France: 83%
- Canada: 76%

Bottom 3 countries selecting high food prices

- South Korea: 52%
- China: 48%
- Japan: 37%

% base: all respondents
Visit riskwindow.swissre.com to view the full results by country and generation.

Visit openminds.swissre.com to share your thoughts on the survey.
70% of respondents are prepared to take personal responsibility for their own retirement costs

84% think that climate change will be responsible for more natural disasters in the future

Nearly 8 in 10 fear damage from an earthquake, flood or other natural disaster within the next 20 years

75% would use renewable energy if it were made available

91% want governments to do more to promote energy efficiency

Hunger is a major concern, not just in the developing world

About the survey

Swiss Re's Risk perception survey was carried out in April and May 2013 by The Gallup Organisation – Europe.

Results are based on telephone and online interviews with more than 1 000 respondents per country, aged 15 and older, conducted in 19 markets. The samples are representative of the total population aged 15 and over in most countries; in five countries, interviews were only conducted in urban areas. The 19 markets selected for this study were:

Canada, the United States, Brazil (only urban areas) and Mexico

France, Germany, Italy, the Netherlands, Switzerland, the United Kingdom and South Africa (only urban areas)

Australia, China (only urban areas), Hong Kong, India (only urban areas), Indonesia (only urban areas), Japan, Singapore and South Korea
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