

Economic optimism and critical perspective on politics among global thinking leaders

Global Perspectives Barometer 2013



Global Perspectives Barometer 2013

Design and data collection: St. Gallen Symposium

non-representative
evaluation and reporting: gfs.bern

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Summary of key points

Brief and method

The St. Gallen Symposium Global Perspectives Barometer was conducted for the first time in 2010. The study involved an online survey of the "Leaders of Tomorrow". These were students from all the continents who were approached specifically by the St. Gallen Symposium.

The concept, the selection criteria and the survey itself were the responsibility of the St. Gallen Symposium. The study is not representative.

gfs.bern had some input on the survey. The questionnaire was originally based on the concerns barometer. Last year, elements of the youth barometer were also added to allow comparisons with young people in Switzerland.

The online questionnaire was carried out on the gfs.bern platform for the second time in February/March 2013.

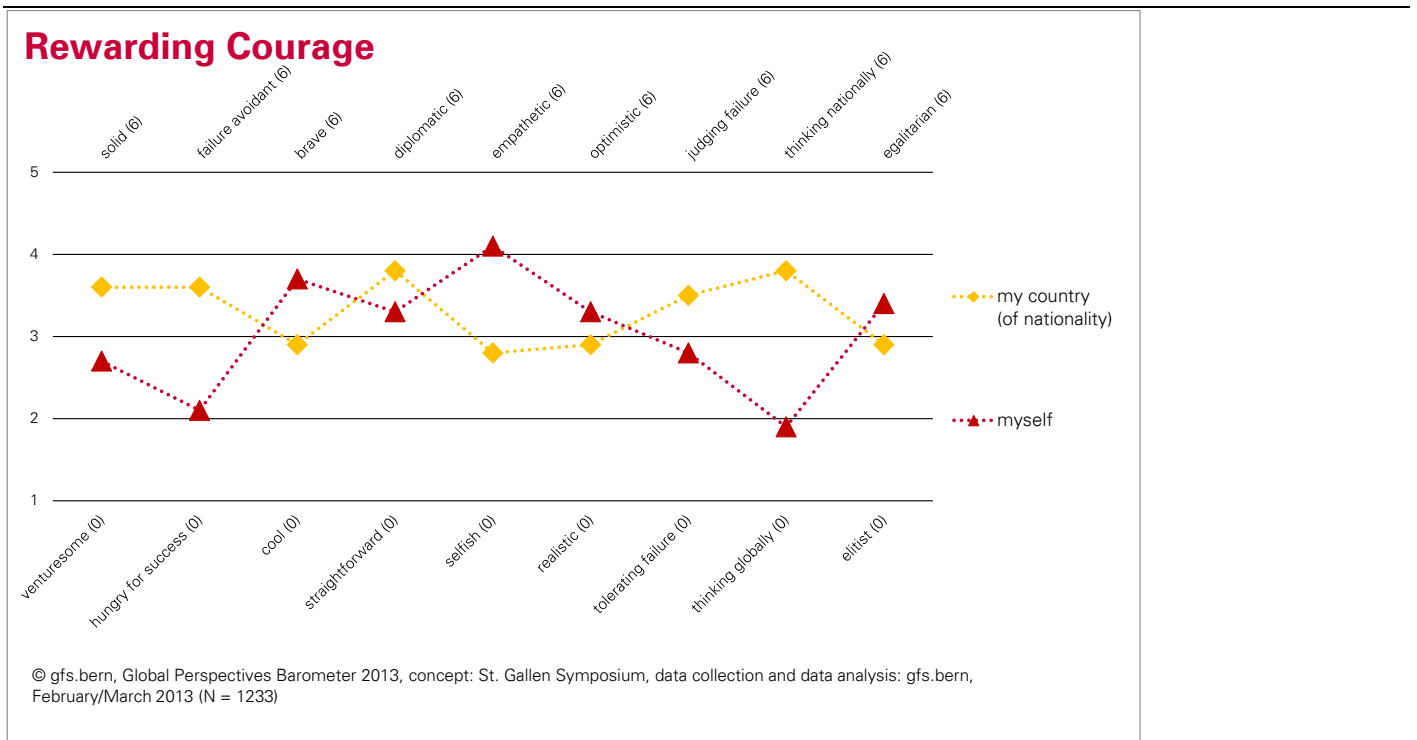
gfs.bern's evaluation covered 1233 (+357 compared to the previous year) responses from the selection of "Leaders of Tomorrow". The data cannot be seen as representative, but it does provide a view of young students from different countries with an interest in global affairs. As the survey procedure for 2013 was very similar to the previous year's survey and the questions were, in part, identical, statements on developments over time are possible to a degree. In 2013 however, slightly more people who would describe themselves as right-wing took part than in 2012, primarily at the cost of those who would consider themselves left-wing. The distribution of the sexes has become more even compared to the previous year, although at 60 percent there were significantly more women taking part again this year. In terms of the country comparison, it should be taken into consideration that we have an N of 47 for the South and Central America category. Caution is required when interpreting if the N is below 50.

Profile of the Leaders of Tomorrow

The Leaders of Tomorrow perceive themselves as global thinkers and risk takers who are hungry for success, brave and empathetic. On the scale between direct and diplomatic, they see themselves as slightly more on the diplomatic side, with the same applying to the optimistic side on the scale between realistic and optimistic. When it comes to judging or tolerating failures, they tend more towards the latter and would describe themselves more as egalitarian and less as elitist.

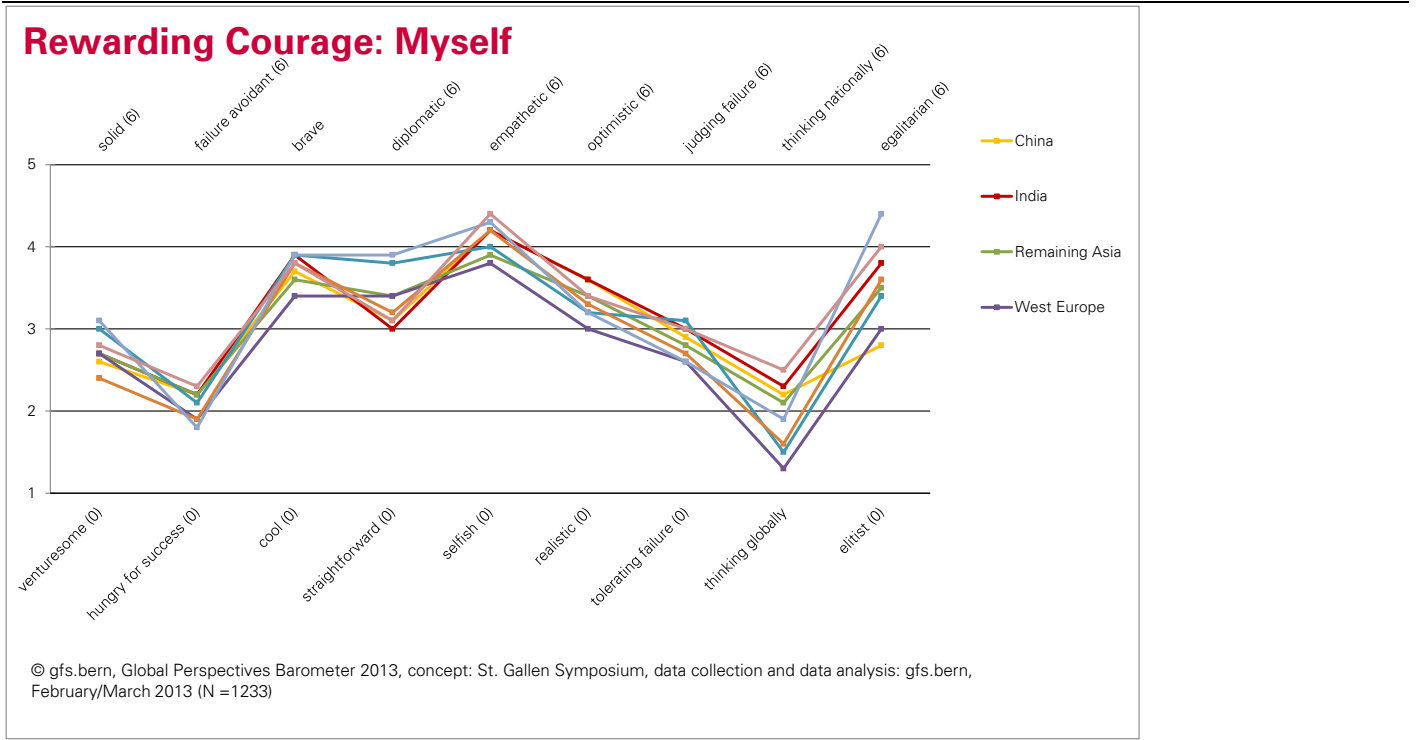
They describe the countries of their nationality as relatively solid, avoiding failure, brave and level-headed at once, relatively diplomatic, veering towards selfishness, optimistic yet realistic, egalitarian yet elitist, judgemental of failure and with a national ethos. In the last two areas, the leaders' perception diverges most from that of their countries.

Fig. 1



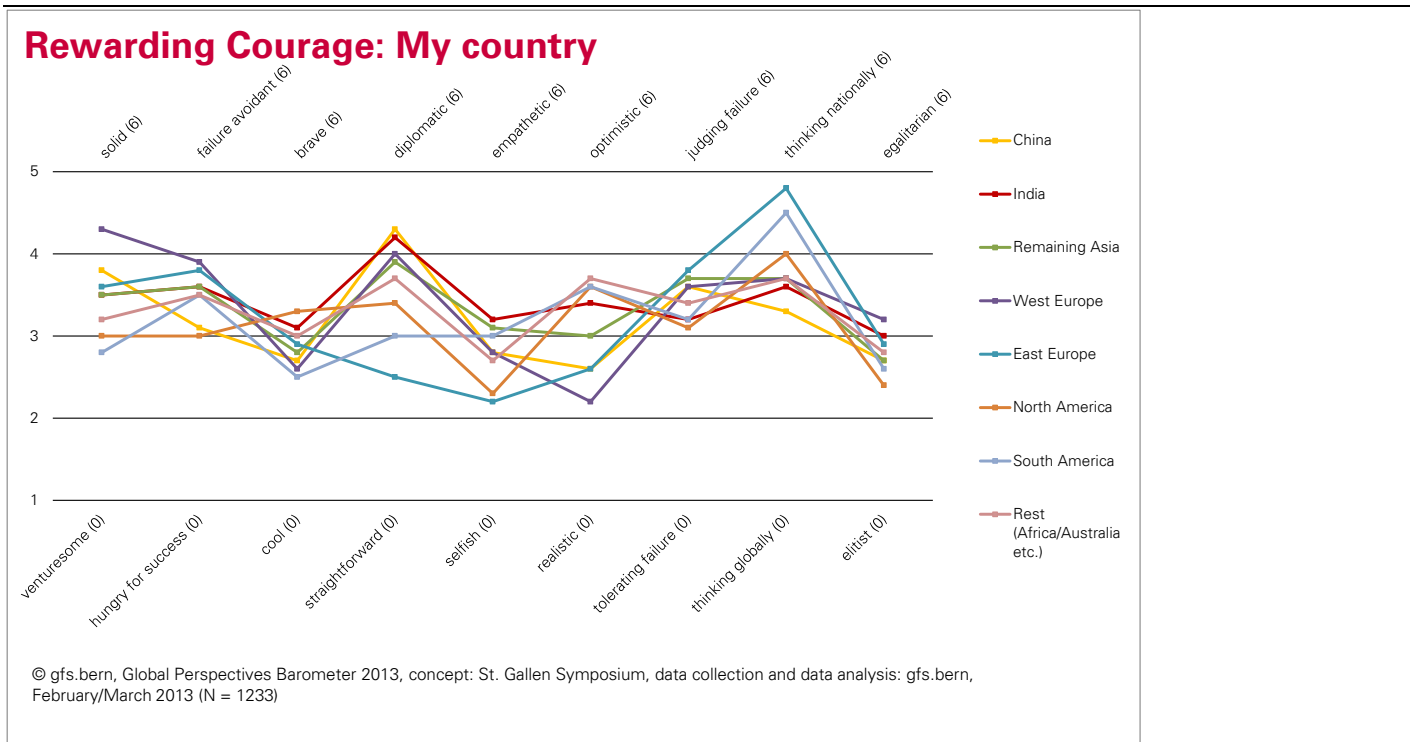
If we break down the individual positioning based on origin, we see that behaviour is similar across all national borders. Although they all appear to come down on the side of global thinkers, the biggest discrepancies are here and on the elitist vs. egalitarian scale. With average scores of 1.3 and 1.5, Western and Eastern Europeans are most likely to consider themselves global thinkers, followed by leaders from the USA with 1.6 and Central America with an average of 1.9. The Asian leaders also described themselves as global thinkers, although to a slightly lesser degree than in the west. On the egalitarian vs. elitist scale, it is noticeable that it is only the Leaders of Tomorrow from China who lean towards the elitist, albeit only slightly.

Fig. 2



There are already more differences when it comes to the positioning of their countries. South and Central American leaders perceive their countries as greater risk takers and those surveyed in the USA put their country bang in the middle between risk-taking and solid, while the rest, led by the Western European leaders, would describe their countries as solid. Even when it comes to the question as to whether the country of their nationality is hungry for success or avoids failure, the US leaders cannot give a clear opinion. For the remaining Leaders of Tomorrow, it is clear that their countries strive more to avoid failure. In terms of courage, the North American leaders and their contemporaries from India perceive their countries as being on the courageous side. Essentially, their own countries are considered diplomatic, with South and Central American Leaders of Tomorrow positioning their countries between diplomatic and direct and Eastern European leaders opting for direct. The latter also consider their countries to be the most selfish, followed by the US leaders and the Western Europeans. On the scale between realistic and optimistic, India and the American continent are on the more optimistic side. China and Europe are considered realistic. In general, the countries are deemed to be judgemental of failure and nationally-oriented, with only Western Europe classified as slightly egalitarian.

Fig. 3



The positioning characteristics for the leaders themselves have been summarised in a braveness index. This is made up of four areas:

1. those who are brave in the sense of success-driven, bold, striving to progress (audacious) and those who are brave in the sense of confident,
2. those who are more "audacious" and less "confident",
3. those who are more "confident" and less "audacious",
4. those for whom neither is a strong characteristic.

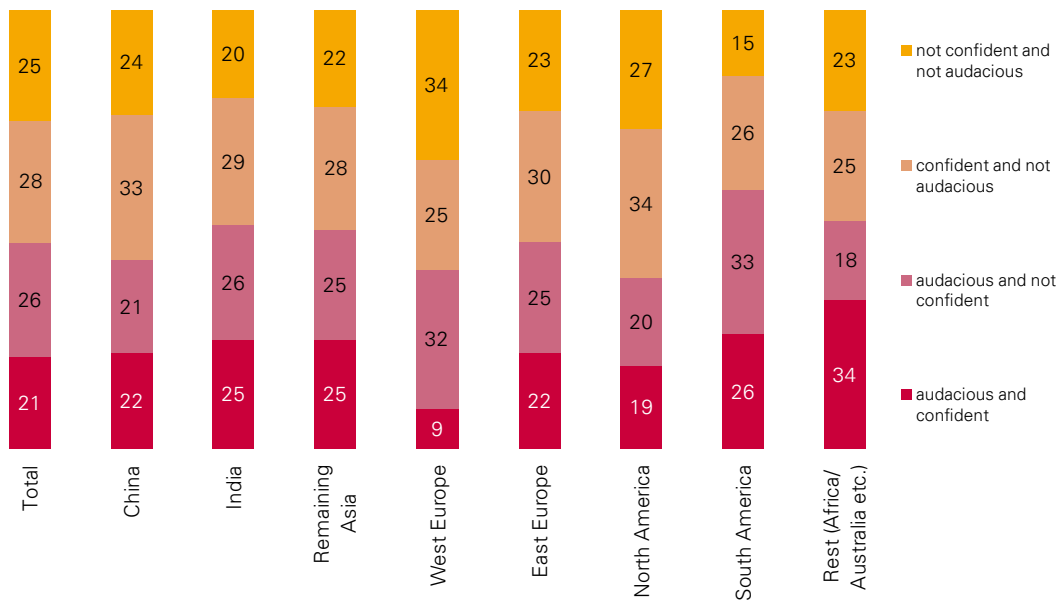
In order to investigate the groups, a factor analysis was carried out. The outcome was two groups. The "audacious" group was full of "risk takers", "those hungry for success", "global thinkers" and "direct people". This could be described as an economic, forward-thinking factor. The second factor covers "brave" and "optimistic", which we describe as "confident".

It is clear that there are fewest Leaders of Tomorrow in South and Central America and in India who can be categorised in the last group. In the USA, the percentage assessed as not "audacious" or "confident" is as high as 27 percent in the USA and over one third in Western Europe. In both Asia and Eastern Europe and the USA, there are more Leaders of Tomorrow who can be assigned to the confident group than to the group of success-oriented, bold and forward-thinking people. The picture is exactly the opposite in Western Europe and South and Central America. Western Europe has the fewest brave leaders at 9 percent, followed by the USA with 19 percent.

Fig. 4

"Braveness"-Index: Myself

in % leaders of tomorrow



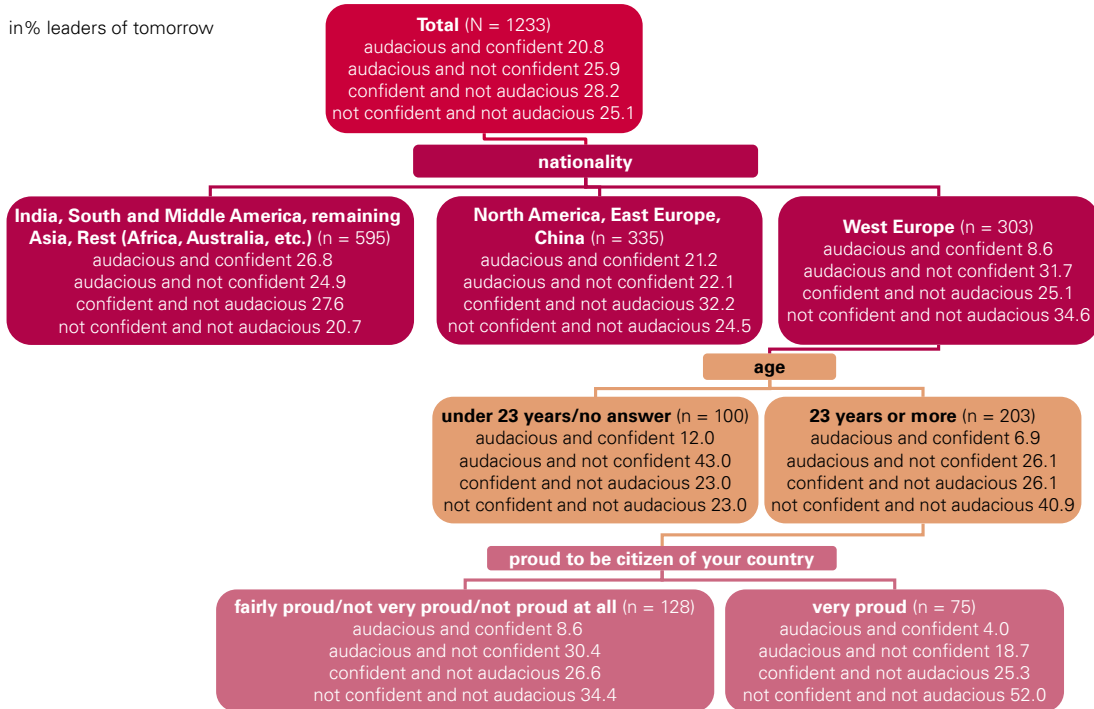
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Based on the answer tree method, a tree-like classification system which uses a dependent variable known as the target variable (for example, the braveness index) and a series of independent variables (for example, various demographic factors such as age, sex, level of education and income), we investigated whether there was a significant difference in the independent variables relative to the target variable. It shows that the most important influence on the braveness index is nationality. It transpires that Leaders of Tomorrow from South and Central America, India and the rest of Asia (not including China) are the bravest, while Western European leaders are least brave. Leaders from the USA, China and Eastern Europe are somewhere in between. The ramifications increase for the Western European leaders, who are essentially less brave. Those under 23 are considerably braver than those older than 23. In this group, a further distinction can be made based on pride in their own country. The least brave group consists of Western European of over 23 who are particularly proud of their country.

Fig. 5

Answer tree "individuale braveness-index"

in% leaders of tomorrow



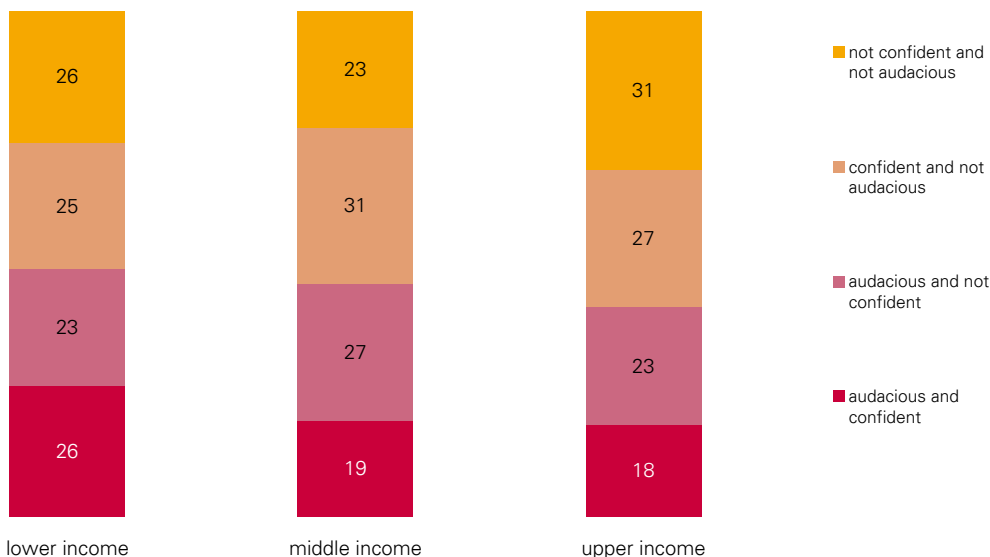
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There are also differences if we consider the monthly household income of the Leaders of Tomorrow. Those in the lowest household income bracket are most often in the bravest group, while the leaders with the highest household income can mostly be classified into the least brave group.

Fig. 6

"Braveness"-Index: Income

in % leaders of tomorrow



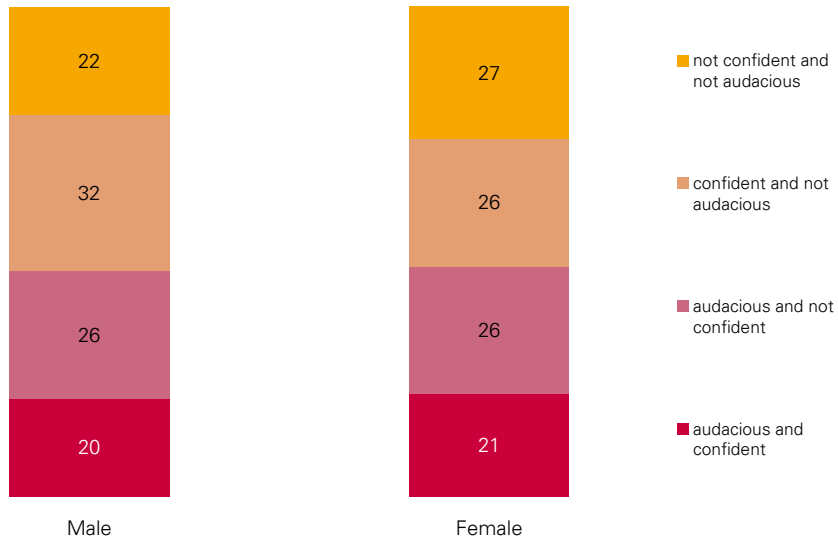
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If we consider the differences by sex, there are more women in the bravest group at 27 percent. However, in the group we define as more "confident" and less "audacious", there are more men at 32 percent.

Fig. 7

"Braveness"-Index: Myself

in % leaders of tomorrow



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Economic situation

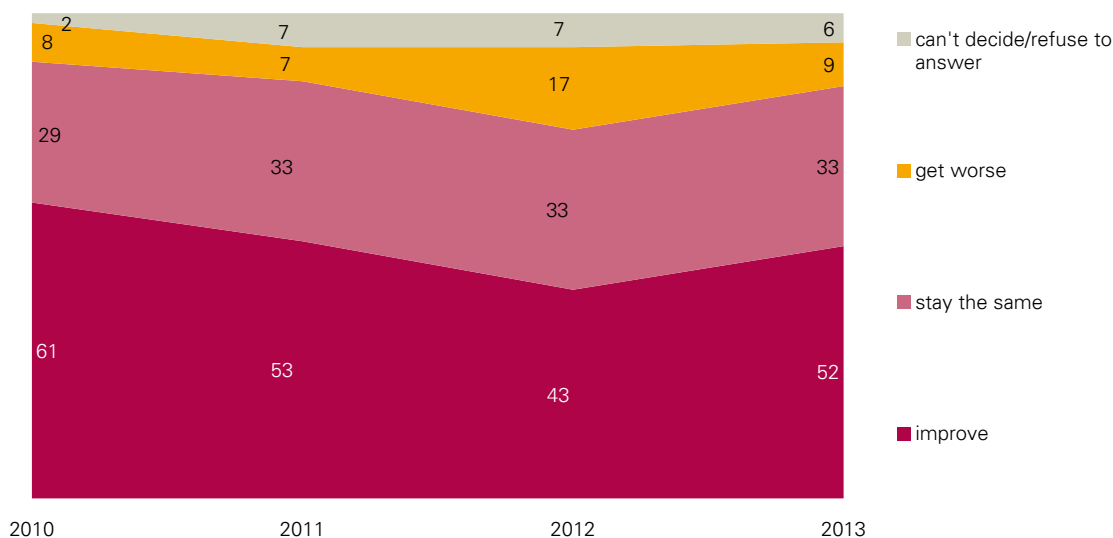
Until 2012, there was a clear trend towards a critical perception of their own future financial situation, and in 2012, 43 percent still believed that their situation would improve over the coming 12 months. This trend has now been broken, with a 52 percent majority now believing that their personal financial situation will improve.

Fig. 8

Trend upcoming individual financial situation

"Thinking about the next 12 months, would you say that in financial terms, compared with now things are going to improve, stay the same, get worse?"

in % leaders of tomorrow



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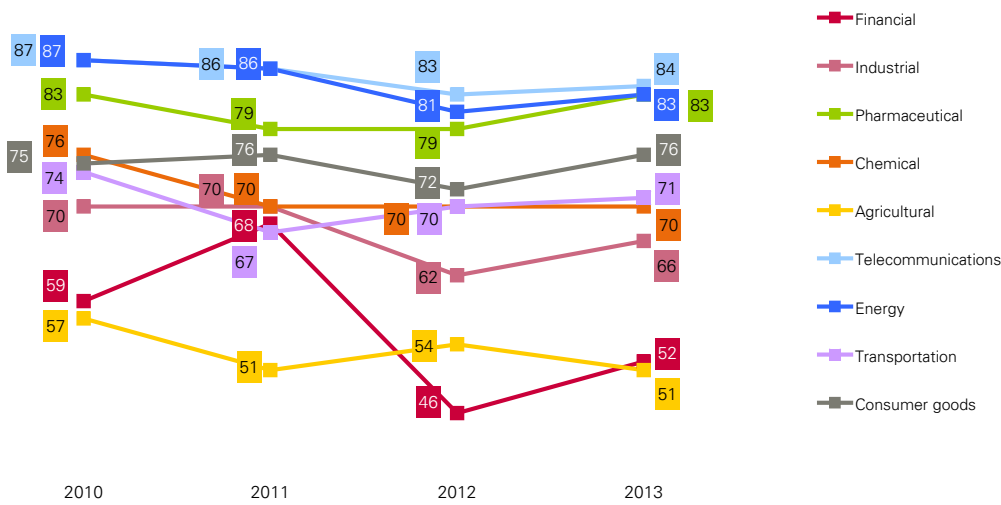
These assessments of personal financial situation also tie in with the fact that the financial sector, which was assessed as less promising than the agricultural sector for the first time the previous year, now has 52 percent compared to 46 percent, rating it as relatively to very positive. The industrial and consumption sectors are also viewed positively again, with the trend upwards for the transport, energy and telecommunications sectors. The view that the pharmaceutical sector is a relatively to very promising sector has also increased in popularity, at 83 percent it shares second place with the energy sector behind the telecommunications sector in the rankings for most promising sector.

Fig. 9

Trend promising sector

"How promising do you believe the current business situation is in the following sectors?"

in % leaders of tomorrow, very promising, fairly promising



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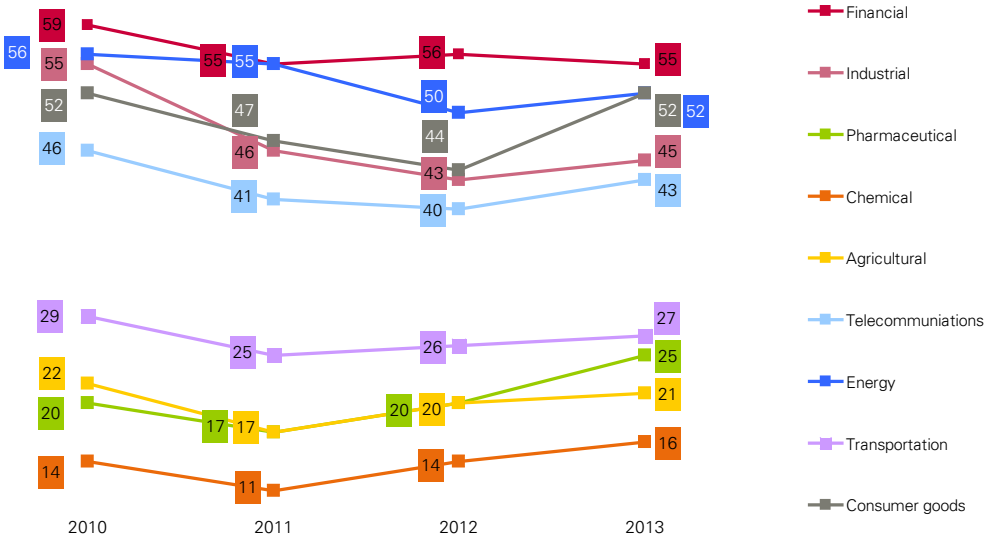
This is also reflected in where the Leaders of Tomorrow see their future workplaces to be. In the less preferred sectors, pharmaceuticals was up the most from 20 percent the previous year to 25 percent. In the more popular sectors, the consumer goods sector in particular has become more attractive to the leaders. While 44 percent wanted to work in this sector the previous year, this year the figure is up to 52 percent. As we have seen, confidence in the financial sector has increased again slightly, although it is still considered one of the least promising sectors for the leaders. Despite this, they are still most likely to work in the financial sector. However, it is worth noting that the desire to work in this sector was the only one in the sample error to drop slightly, while the other sectors are enjoying increased interest. Whether the trend will continue is definitely worth looking into next year.

Fig. 10

Trend preferred sector

"In which sector are you most likely to work in the next 5 years?"

in % leaders of tomorrow, yes, possibly



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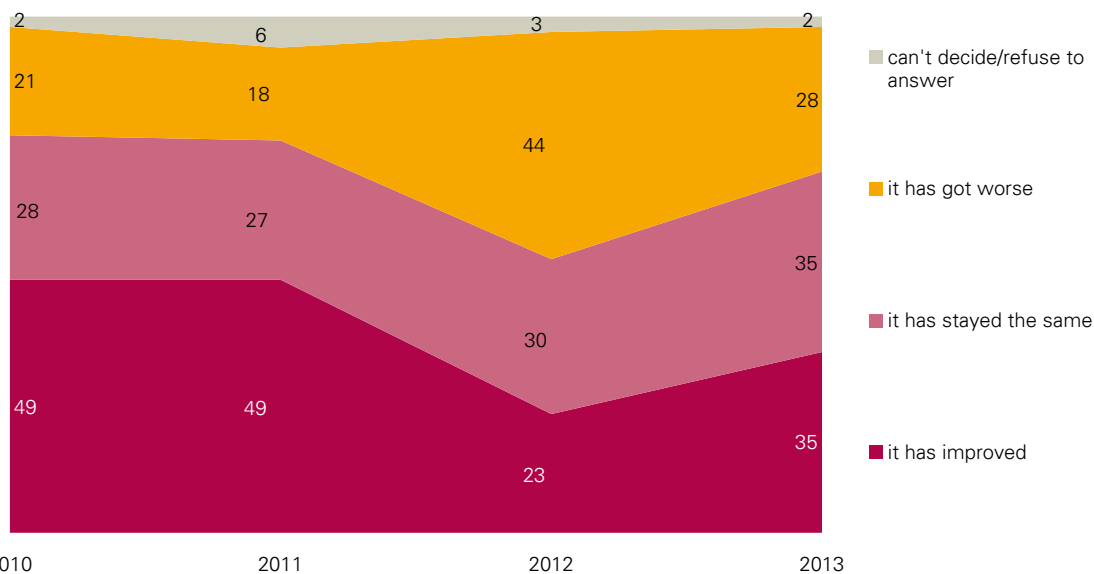
Perception of the economic situation is somewhat more positive after a dip the previous year. Currently, 35 percent believe that the general economic situation has improved over the last 12 months, another 35 percent feel it has not changed and the 28 percent are of the opinion it has worsened. Although the picture is a little more positive again, the figures from 2010 and 2011, where nearly half of respondents considered the development of the economic situation to be positive, have not yet been reached.

Fig. 11

Trend overall economic situation

"In your opinion, how has the overall economic situation developed over the last 12 months?"

in % leaders of tomorrow



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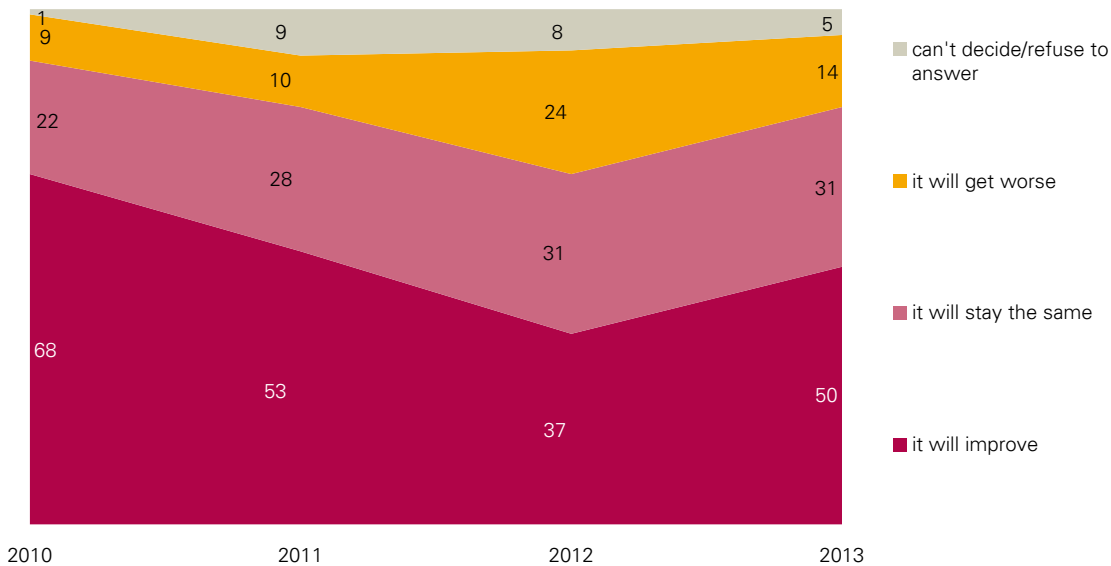
The Leaders of Tomorrow are slightly more confident when it comes to the next 12 months. Half of them believe that things will improve over the next year. 14 percent believe things will get worse.

Fig. 12

Trend upcoming overall economic situation

"In your opinion, how do you think the overall economic situation will develop over the next 12 months?"

in % leaders of tomorrow



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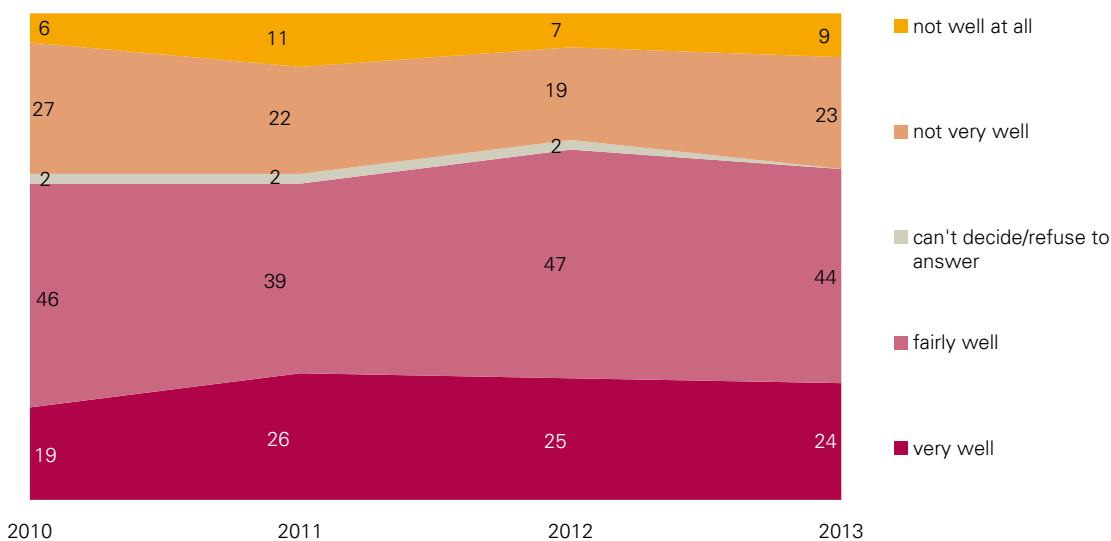
Perceptions of the general economic situation are clearly more positive than last year. Amazingly, however, the proportion of those considering the economic situation in their own country as relatively good is falling slightly and the proportion of those considering the economy in their own country as negative has grown again to almost one third.

Fig. 13

Trend my country's economy

"How is your country's economy faring on an international scale compared to other countries? Very well, fairly well, not very well, not well at all?"

in % leaders of tomorrow



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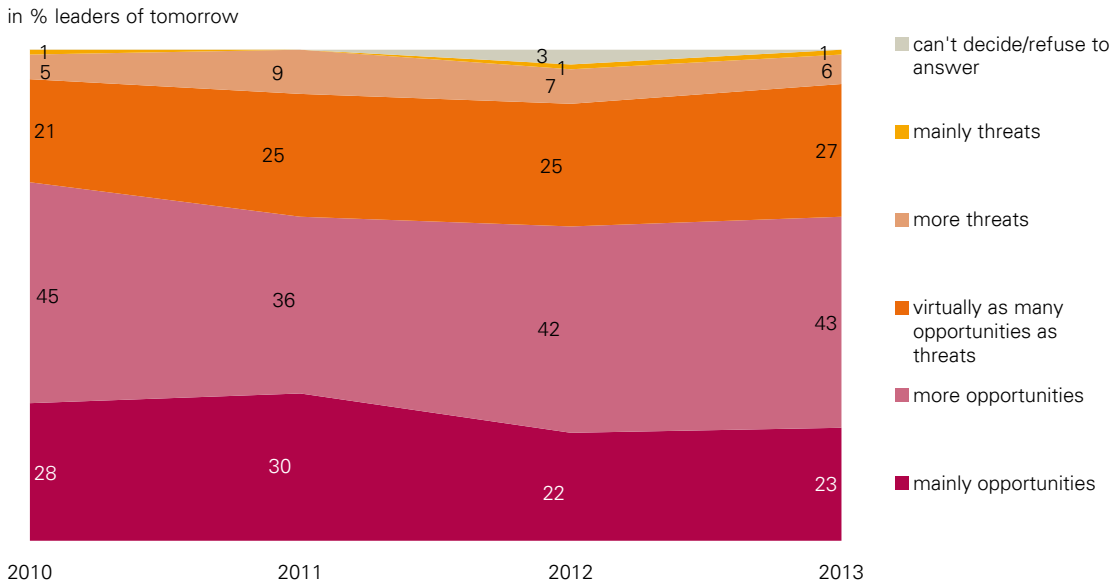
Globalisation

However, there has been a slight increase within the sample error in the view that globalisation offers more opportunities or primarily offers opportunities for their own country. Overall, 66 percent assess that globalisation has had a positive effect. 7 percent feel globalisation holds a risk for their own country.

Fig. 14

Trend globalization concerning country

"Do you think that the processes of globalization as they currently unfold, on balance bring more opportunities or more threats for future development? For the country you are currently studying in, globalization brings...."



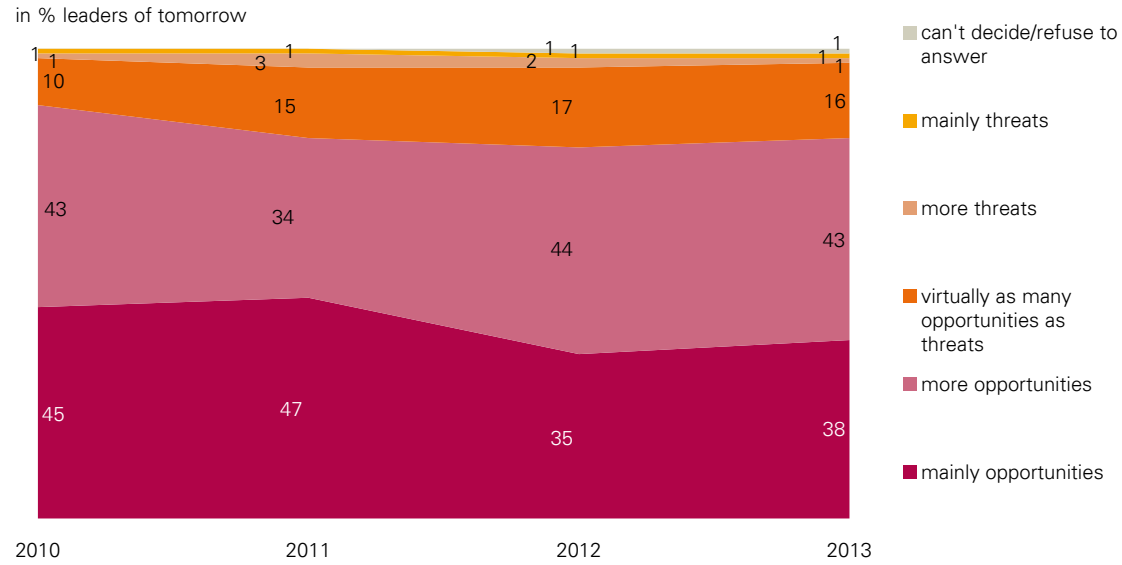
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The number of Leaders of Tomorrow surveyed who primarily saw opportunities for themselves arising from globalisation has increased slightly compared to the previous year, although currently a greater proportion believe that globalisation offers more advantages than disadvantages for them personally. Overall, globalisation is seen as a positive by 81 percent, 16 percent believe that it affords just as many opportunities as risks for them personally and two percent believe the risks are greater or believe that globalisation essentially only brings risks. This also ties in with the profile of the Leaders of Tomorrow.

Fig. 15

Trend globalization concerning individuals

"Do you think that the processes of globalization as they currently unfold, on balance bring more opportunities or more threats for future development? For you personally, globalization brings...."



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Politics

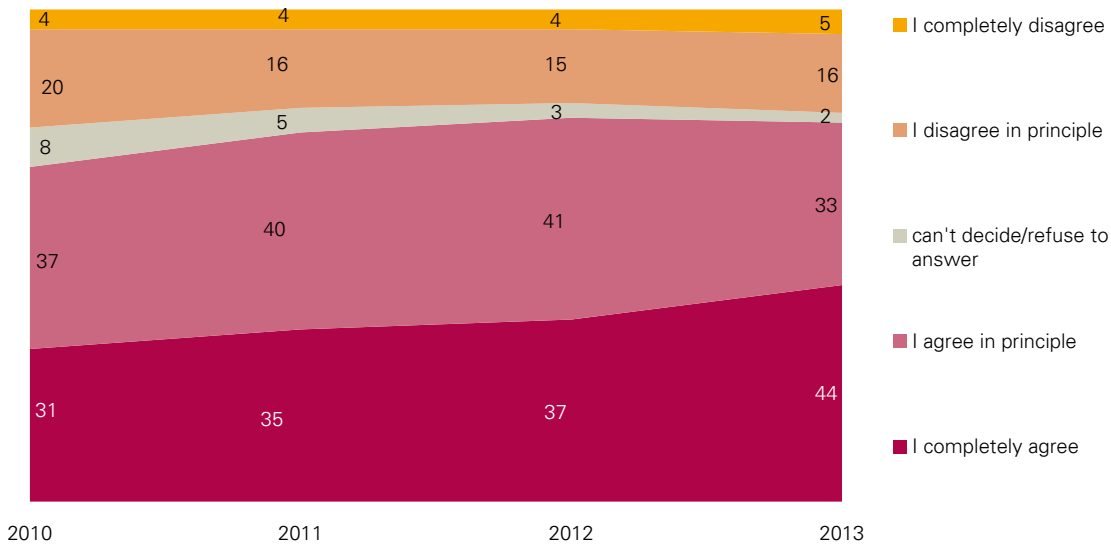
When it comes to the political questions, there is a greater sense of disillusionment than in the previous year. This is evident on the one hand in the fact that the view that politics often fails on decisive issues, which is shared across all countries (except those in Western Europe), is much more prevalent than the view that the business world often fails on decisive issues. And on the other hand in the fact that the proportion of those who see a clear necessity for political reform within their own country has increased to 44 percent. One third more would also agree to this necessity, but in less vehement terms.

Fig. 16

Trend need of fundamental reform

"Please state to what extent you agree with this statement: The political system in my country is in need of fundamental reform."

in % leaders of tomorrow



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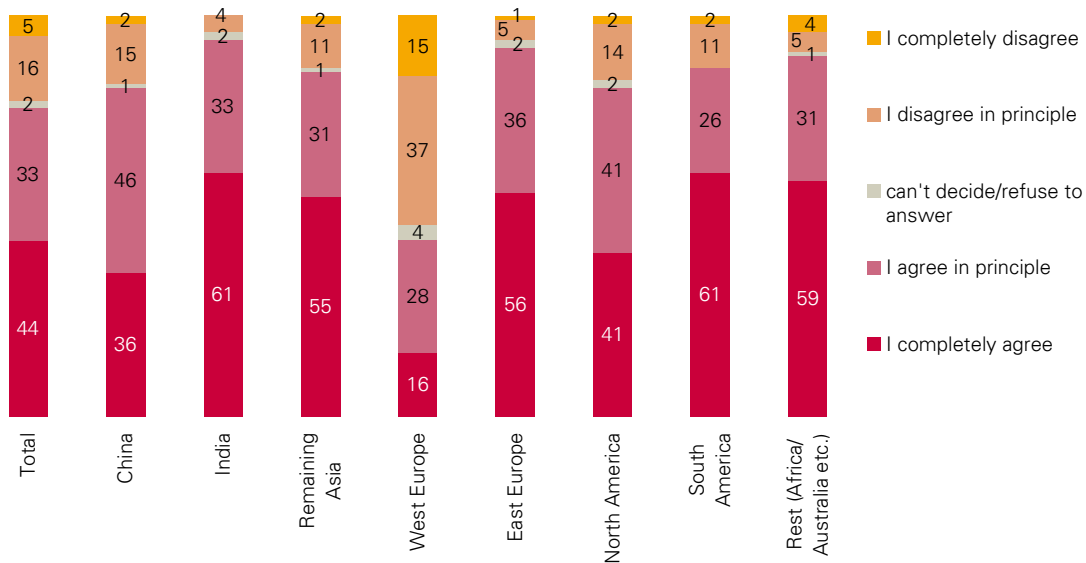
The clear desire for fundamental reform of the political system in their own country has increased across all countries and country groups. Only in Western Europe has the attitude towards reform changed, with 52 percent currently disagreeing with the statement that the political system in their country requires fundamental reform. In the previous year, only 36 percent held this view. Western Europeans also have the greatest trust in state institutions such as the courts, the police, the government and parliament.

Fig. 17

Need of fundamental reform

"Please state to what extent you agree with this statement: The political system in my country is in need of fundamental reform."

in % leaders of tomorrow



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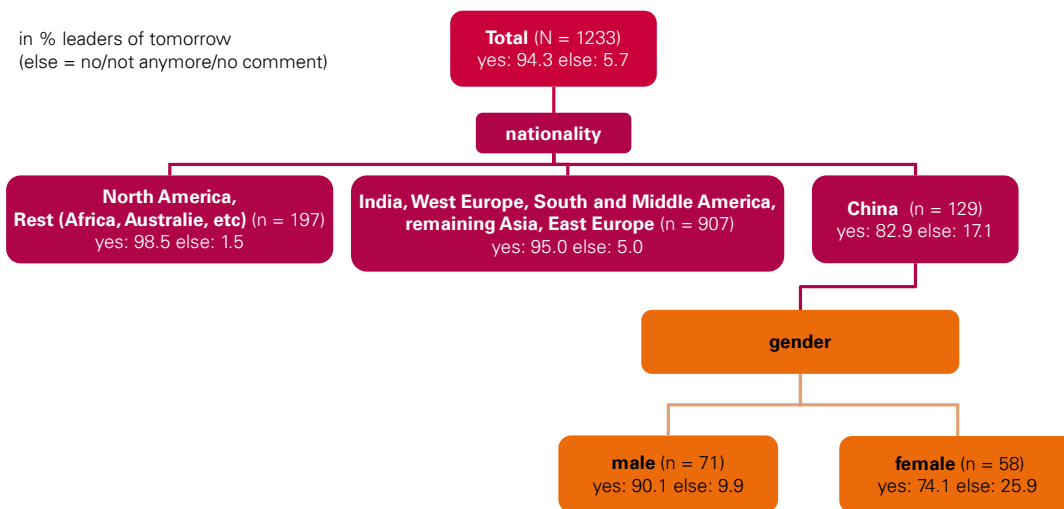
Communication revolution

Distribution of social media among the leaders remains at a very high level. 94% (previous year: 91%) are members of Twitter/Facebook or MySpace. However, the distribution profile is most dependent on whether a respondent hails from China or from one of the other countries, with social media the most widespread in the USA and all other countries. In China, where social media is least widespread, a distinction can also be made on the basis of gender. The use of social media among female Leaders of Tomorrow is much less widespread than among male leaders from China.

Fig. 18

Answer tree of social media membership

in % leaders of tomorrow
(else = no/not anymore/no comment)



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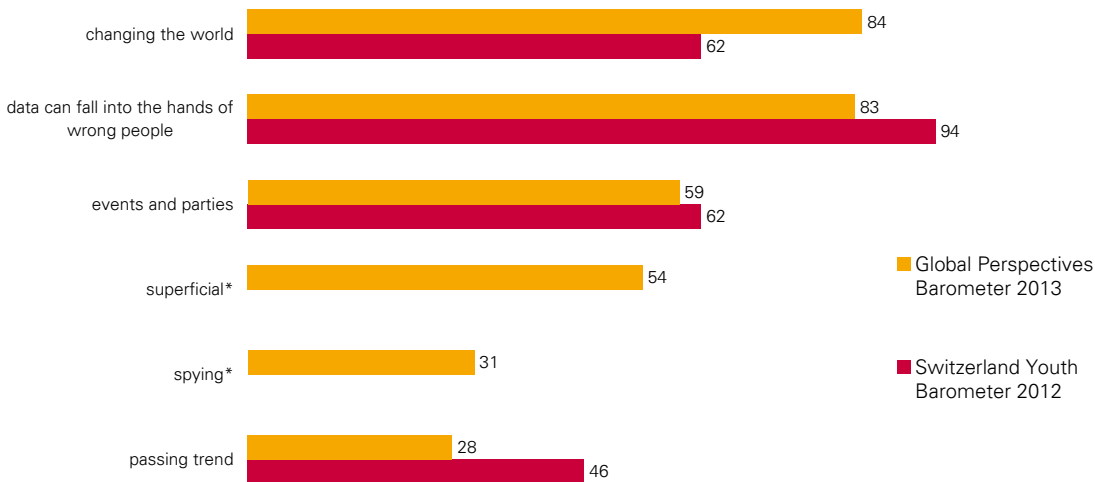
The statements on social media were viewed similarly to last year by the leaders. A slightly increased majority of 84% still believes social media has the potential to change the world. By comparison, only 62 percent shared the same view in the Swiss Youth Barometer 2012. Young people in Switzerland are more convinced that the data could get into the wrong hands (94%) and 83 percent of the Leaders of Tomorrow share this view. However, only 28 percent of them believe that social media is a passing trend, compared to the 46 percent figure recorded in Switzerland. Thus the major difference between young people in Switzerland and the leaders is their perception of the importance of social networks. However, it should be taken into consideration that the young people in Switzerland were asked specifically about Facebook only.

Fig. 19

Comparison statements about Facebook

"Please tell me if the following statements about Facebook* (FB) apply to you personally or are true in your opinion."

in % residents between 16 and 25 years / in % leaders of tomorrow,
definitely the case, generally the case



* GPB Twitter / Facebook / MySpace, statements only in GPB

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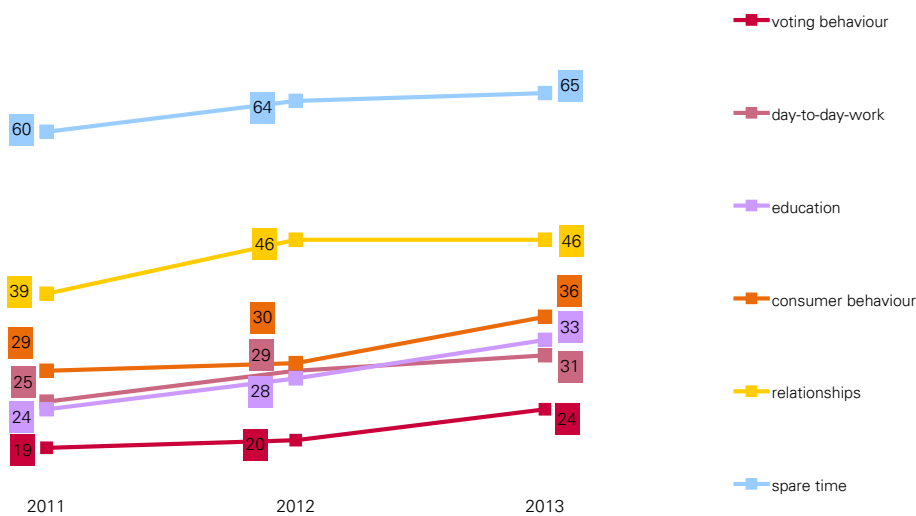
However, for the majority of the Leaders of Tomorrow, many areas of their lives are still untouched by social media. Although its influence has increased to a greater or lesser extent in all areas apart from relationships. A clear majority is still influenced by social media when it comes to planning free time. Almost half feel there is at least a clear influence on relationships. The influence on consumer behaviour has also increased, which is certainly an interesting aspect for the advertising industry.

Fig. 20

Trend influence of social media

"To what extent do social media such as Facebook influence your decision making in the following fields?"

in % leaders of tomorrow, shares strong and rather strong influence (3-4)



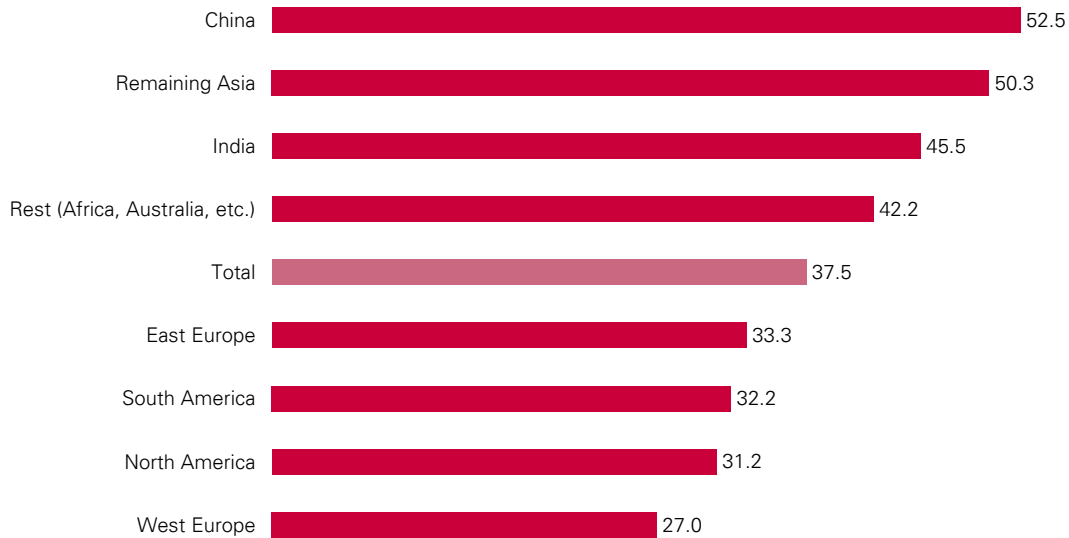
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It is striking that respondents from Western Europe ascribe less influence to social media across the board than other respondents. The influence scores are highest in Asia.

Fig. 21

Index: Influence of social media on different areas of life

in % leaders of tomorrow, who on average attest a strong (4) oder rather strong (3) influence of social media on different areas of life



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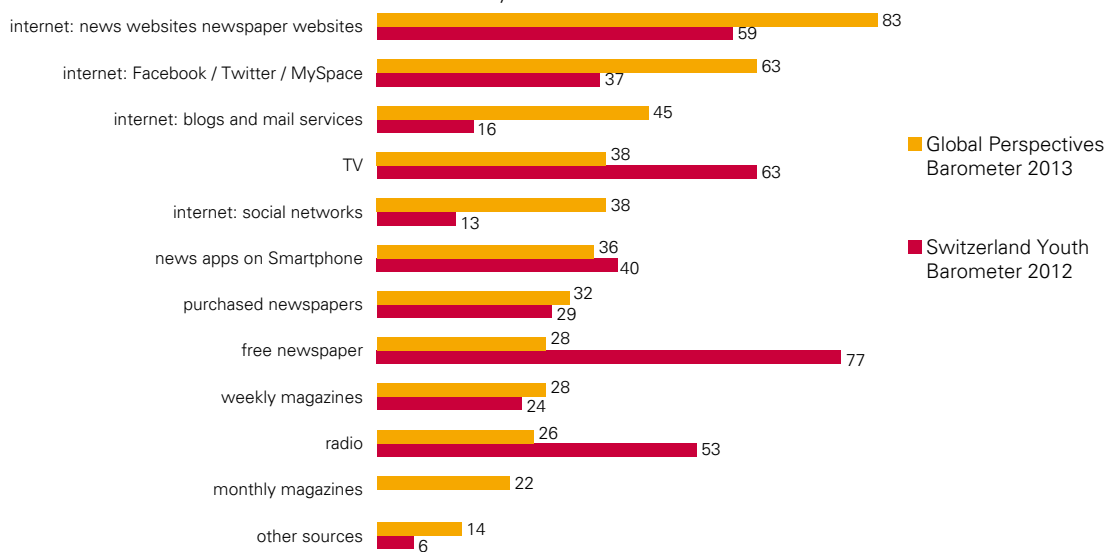
Social media plays an important role in accessing information for the Leaders of Tomorrow, with the proportion of those informing themselves about everyday happenings via Facebook/Twitter and MySpace slightly up on the previous year (previous year: 61%). Other social networks are also being used slightly more as a source of information than in the previous year (previous year: 36%). The significance of news apps on smartphones has also increased (previous year: 32%). However, the most important source of information at 83% remains online news sites, although the figure is slightly down (previous year: 87%). The other information sources have all slipped slightly in terms of relevance. If we consider the results of the Swiss Youth Barometer 2012, it becomes clear that information procurement processes differ between Swiss young people and the leaders, as was the case the previous year. The former are more likely to use traditional media. They are, however, most likely to read free newspapers when it comes to print media.

Fig. 22

Filter: Comparison source of information on current events

"How do you keep informed about daily events?"

in % residents between 16 and 25 years / in % leaders of tomorrow,
who inform themselves at least occasionally



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Initial results

Based on these results, we have formulated findings which we will use as a basis for discussion and for analysis of how the research should continue.

Finding 1

The profile of the Leaders of Tomorrow clearly shows that they are global thinkers who are hungry for success and empathetic. They can essentially be described as brave, with Western European leaders emerging as the least brave.

Finding 2

Optimism about their own financial situation and the general economic one is becoming more widespread. The Leaders of Tomorrow are less critical of the economy than they are of politics.

Finding 3

The communication revolution continues apace among the global-thinking elite. The internet is way ahead of television or newspapers as the most important source of information for the Leaders of Tomorrow. Social media is still on the rise and takes on a very important position in terms of other aspects of life and decision-making. News apps and smartphones are slowly but surely on the rise.

We have also formulated the following working hypotheses.

Working hypothesis 1

The crisis-bound economic situation in parts of Western Europe has left its mark on the Leaders of Tomorrow. This is also reflected in their reduced bravery. However, they are optimistic with respect to the future economic situation.

Working hypothesis 2

Leaders of tomorrow are different from the mainstream in terms of their media consumption. They have an affinity with the internet, which they use as their primary source of information, and their decision-making is also influenced by social media. They are in favour of the moves towards an electronic world and show how important it will be to rely increasingly on new media, whether in political campaigns or in advertising. It can be assumed that the leaders will as multipliers have a not insignificant influence on the development towards a digitalised world. For example, in pushing forward areas such as eGovernment and eHealth, even at a political level.

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