



FUTURE RISKS SURVEY 2022 MEXICO

Ipsos Public Affairs
June 2022



GAME CHANGERS



METHODOLOGY AND PROFILE

A

METHODOLOGY



TARGET

4449 **experts** interviewed
in **58 countries**
- **93 in Mexico**



EXPERTS



GENERAL
POPULATION

Survey conducted in **15 countries** among representative samples of the population aged 18 y.o. and more in each country.
- **1000 in Mexico**



COLLECTION DATES

May 10th to June 9th 2022

May 13th to June 9th 2022



METHODOLOGY

Online interviews

Survey link was sent by Axa to their community of Experts (internal and external).

Online interviews via Ipsos Access Panel.

Quota method applied to gender, age, occupation, region and market size.

READING NOTE

- for Global results and sub-totals by clusters, each country weighs the same.

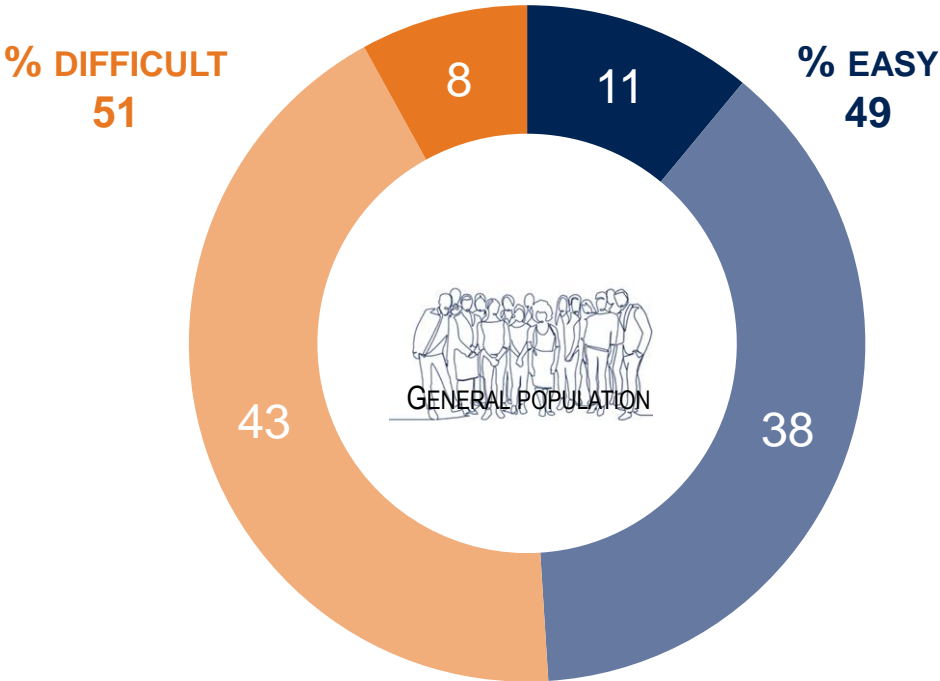
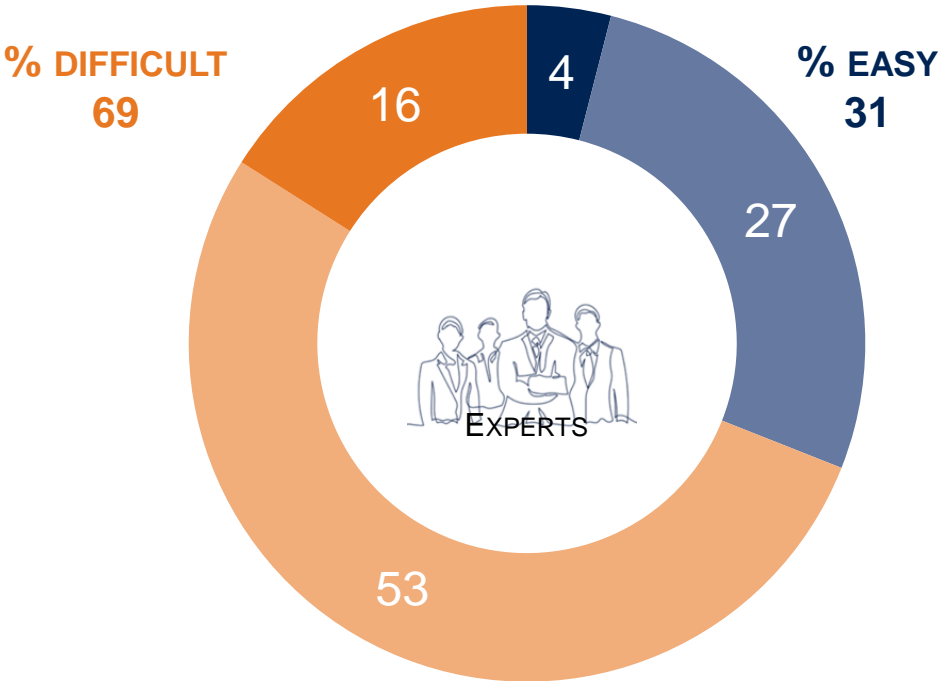
FUTURE RISKS TOP 10 RANKING

B

ARE FUTURE RISKS EASY TO PREDICT?

ALL COUNTRIES

Very easy to predict Somewhat easy to predict Somewhat difficult to predict Very difficult to predict



 New question

Regarding future risks overall, would you say they are getting...

ARE FUTURE RISKS EASY TO PREDICT? – PER CLUSTER

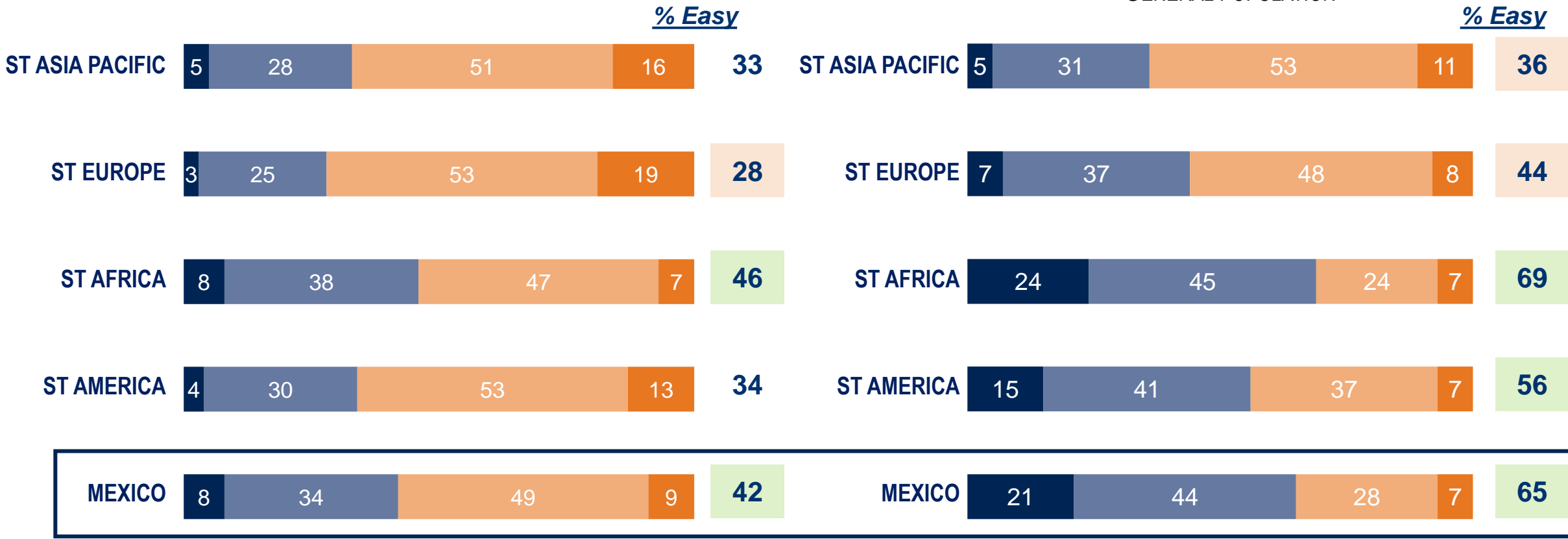
Very easy to predict
 Somewhat easy to predict
 Somewhat difficult to predict
 Very difficult to predict



EXPERTS



GENERAL POPULATION





EXPERTS



GENERAL POPULATION

TOP 10 FUTURE RISKS

Please rank the top 5 future risks that you selected, based on their potential impact on society at large in the next 5 to 10 years.

EXPERTS		GENERAL POPULATION
Climate change	1	Climate change
Geopolitical instability	2	Pandemics and infectious diseases
Cyber security risks	3	Geopolitical instability
Energy risks	4	Cyber security risks
Pandemics and infectious diseases	5	Energy risks
Social tensions and movements	6	New security threats and terrorism
Natural resources and biodiversity risks	7	Social tensions and movements
Financial stability risks	8	Pollution
Macro-economic risks	9	Natural resources and biodiversity risks
Monetary and fiscal policies risks	10	Financial stability risks

EVOLUTION OF THE TOP 10 FUTURE RISKS



2018	2019	2020	2021	2022
1 CLIMATE CHANGE	CLIMATE CHANGE	PANDEMICS AND INFECTIOUS DISEASES	CLIMATE CHANGE	CLIMATE CHANGE
2 CYBERSECURITY RISKS	CYBERSECURITY RISKS	CLIMATE CHANGE	CYBER SECURITY RISKS	GEOPOLITICAL INSTABILITY
3 GEOPOLITICAL INSTABILITY	GEOPOLITICAL INSTABILITY	CYBERSECURITY RISKS	PANDEMICS AND INFECTIOUS DISEASES	CYBER SECURITY RISKS
4 NATURAL RESOURCES MANAGEMENT	SOCIAL DISCONTENT AND LOCAL CONFLICTS	GEOPOLITICAL INSTABILITY	GEOPOLITICAL INSTABILITY	ENERGY RISKS
5 SOCIAL DISCONTENT AND LOCAL CONFLICTS	NATURAL RESOURCES MANAGEMENT	SOCIAL DISCONTENT AND LOCAL CONFLICTS	SOCIAL DISCONTENT AND LOCAL CONFLICTS	PANDEMICS AND INFECTIOUS DISEASES
6 ARTIFICIAL INTELLIGENCE AND BIG DATA	ARTIFICIAL INTELLIGENCE AND BIG DATA	NEW THREATS TO SECURITY	NATURAL RESOURCES AND BIODIVERSITY RISKS	SOCIAL TENSIONS AND MOVEMENTS
7 NEW THREATS TO SECURITY	POLLUTION	MACROECONOMIC RISKS	NEW SECURITY THREATS AND TERRORISM	NATURAL RESOURCES AND BIODIVERSITY RISKS
8 POLLUTION	PANDEMICS AND INFECTIOUS DISEASES	NATURAL RESOURCES AND BIODIVERSITY RISKS	FINANCIAL STABILITY RISKS	FINANCIAL STABILITY RISKS
9 MEDICAL ADVANCES AND INNOVATIONS	NEW THREATS TO SECURITY	FINANCIAL RISKS	MACRO-ECONOMIC RISKS	MACRO-ECONOMIC RISKS
10 PANDEMICS AND INFECTIOUS DISEASES	MACROECONOMIC RISKS	POLLUTION	RISKS RELATED TO ARTIFICIAL INTELLIGENCE AND BIG DATA	MONETARY AND FISCAL POLICIES RISKS

■ ENVIRONMENT & ENERGY
 ■ TECH & DATE
 ■ SOCIETY, POLITICS & REGULATION
 ■ MEDICINE & HEALTH
 ■ ECONOMY, FINANCE & BUSINESS ENVIRONMENT

Please rank the top 5 future risks that you selected, based on their potential impact on society at large in the next 5 to 10 years.



TOP 10 FUTURE RISKS PER CLUSTER - EXPERTS



AMERICA		AFRICA	
1	CLIMATE CHANGE	1	CLIMATE CHANGE
2	CYBER SECURITY RISKS	2	CYBER SECURITY RISKS
3	GEOPOLITICAL INSTABILITY	3	PANDEMICS AND INFECTIOUS DISEASES
4	SOCIAL TENSIONS AND MOVEMENTS	4	GEOPOLITICAL INSTABILITY
5	PANDEMICS AND INFECTIOUS DISEASES	5	FINANCIAL STABILITY RISKS
6	ENERGY RISKS	6	MONETARY AND FISCAL POLICIES RISKS
7	NATURAL RESOURCES AND BIODIVERSITY RISKS	7	SOCIAL TENSIONS AND MOVEMENTS
8	FINANCIAL STABILITY RISKS	8	MACRO-ECONOMIC RISKS
9	NEW SECURITY THREATS AND TERRORISM	9	NEW SECURITY THREATS AND TERRORISM
10	MONETARY AND FISCAL POLICIES RISKS	10	ENERGY RISKS

MEXICO	
1	CLIMATE CHANGE
2	CYBER SECURITY RISKS
3	PANDEMICS AND INFECTIOUS DISEASES
4	GEOPOLITICAL INSTABILITY
5	SOCIAL TENSIONS AND MOVEMENTS
6	NATURAL RESOURCES AND BIODIVERSITY RISKS
7	FINANCIAL STABILITY RISKS
8	MACRO-ECONOMIC RISKS
9	ENERGY RISKS
10	MONETARY AND FISCAL POLICIES RISKS

EUROPE		ASIA PACIFIC AND MIDDLE EAST	
1	CLIMATE CHANGE	1	CLIMATE CHANGE
2	GEOPOLITICAL INSTABILITY	2	PANDEMICS AND INFECTIOUS DISEASES
3	CYBER SECURITY RISKS	3	CYBER SECURITY RISKS
4	ENERGY RISKS	4	GEOPOLITICAL INSTABILITY
5	NATURAL RESOURCES AND BIODIVERSITY RISKS	5	ENERGY RISKS
6	SOCIAL TENSIONS AND MOVEMENTS	6	FINANCIAL STABILITY RISKS
7	PANDEMICS AND INFECTIOUS DISEASES	7	POLLUTION
8	MACRO-ECONOMIC RISKS	8	NATURAL RESOURCES AND BIODIVERSITY RISKS
9	FINANCIAL STABILITY RISKS	9	MACRO-ECONOMIC RISKS
10	MONETARY AND FISCAL POLICIES RISKS	10	NEW SECURITY THREATS AND TERRORISM

*This top 10 is a ranking of all risks; it has been calculated the same way since 2018. When a risk is ranked first, it gives it 5 points, 2nd 4 points, etc. up to 5th 1 point. The ranking is based on the total numbers of points per risk.

TOP 10 FUTURE RISKS PER CLUSTER – GENERAL POPULATION



AMERICA

- 1 CLIMATE CHANGE
- 2 PANDEMICS AND INFECTIOUS DISEASES
- 3 CYBER SECURITY RISKS
- 4 NEW SECURITY THREATS AND TERRORISM
- 5 SOCIAL TENSIONS AND MOVEMENTS
- 6 FINANCIAL STABILITY RISKS
- 7 ENERGY RISKS
- 8 GEOPOLITICAL INSTABILITY
- 9 NATURAL RESOURCES AND BIODIVERSITY RISKS
- 10 CHRONIC ILLNESSES

AFRICA

- 1 PANDEMICS AND INFECTIOUS DISEASES
- 2 CLIMATE CHANGE
- 3 NEW SECURITY THREATS AND TERRORISM
- 4 POLLUTION
- 5 CYBER SECURITY RISKS
- 6 FINANCIAL STABILITY RISKS
- 7 CHRONIC ILLNESSES
- 8 ENERGY RISKS
- 9 NATURAL RESOURCES AND BIODIVERSITY RISKS
- 10 LONG-TERM EXPOSURE TO HARMFUL SUBSTANCES

MEXICO

- 1 CLIMATE CHANGE
- 2 PANDEMICS AND INFECTIOUS DISEASES
- 3 NATURAL RESOURCES AND BIODIVERSITY RISKS
- 4 CHRONIC ILLNESSES
- 5 SOCIAL TENSIONS AND MOVEMENTS
- 6 CYBER SECURITY RISKS
- 7 FINANCIAL STABILITY RISKS
- 8 NEW SECURITY THREATS AND TERRORISM
- 9 ENERGY RISKS
- 10 MONETARY AND FISCAL POLICIES RISKS

EUROPE

- 1 CLIMATE CHANGE
- 2 PANDEMICS AND INFECTIOUS DISEASES
- 3 ENERGY RISKS
- 4 GEOPOLITICAL INSTABILITY
- 5 POLLUTION
- 6 NATURAL RESOURCES AND BIODIVERSITY RISKS
- 7 SOCIAL TENSIONS AND MOVEMENTS
- 8 NEW SECURITY THREATS AND TERRORISM
- 9 CYBER SECURITY RISKS
- 10 FINANCIAL STABILITY RISKS

ASIA PACIFIC AND MIDDLE EAST

- 1 PANDEMICS AND INFECTIOUS DISEASES
- 2 CLIMATE CHANGE
- 3 GEOPOLITICAL INSTABILITY
- 4 CYBER SECURITY RISKS
- 5 ENERGY RISKS
- 6 NATURAL RESOURCES AND BIODIVERSITY RISKS
- 7 SOCIAL TENSIONS AND MOVEMENTS
- 8 FINANCIAL STABILITY RISKS
- 9 POLLUTION
- 10 NEW SECURITY THREATS AND TERRORISM

**This top 10 is a ranking of all risks; it has been calculated the same way as in 2021. When a risk is ranked first, it gives it 5 points, 2nd 4 points, etc. up to 5th 1 point. The ranking is based on the total numbers of points per risk.*

ATTITUDES TOWARDS RISK AND GLOBAL LEVEL OF VULNERABILITY

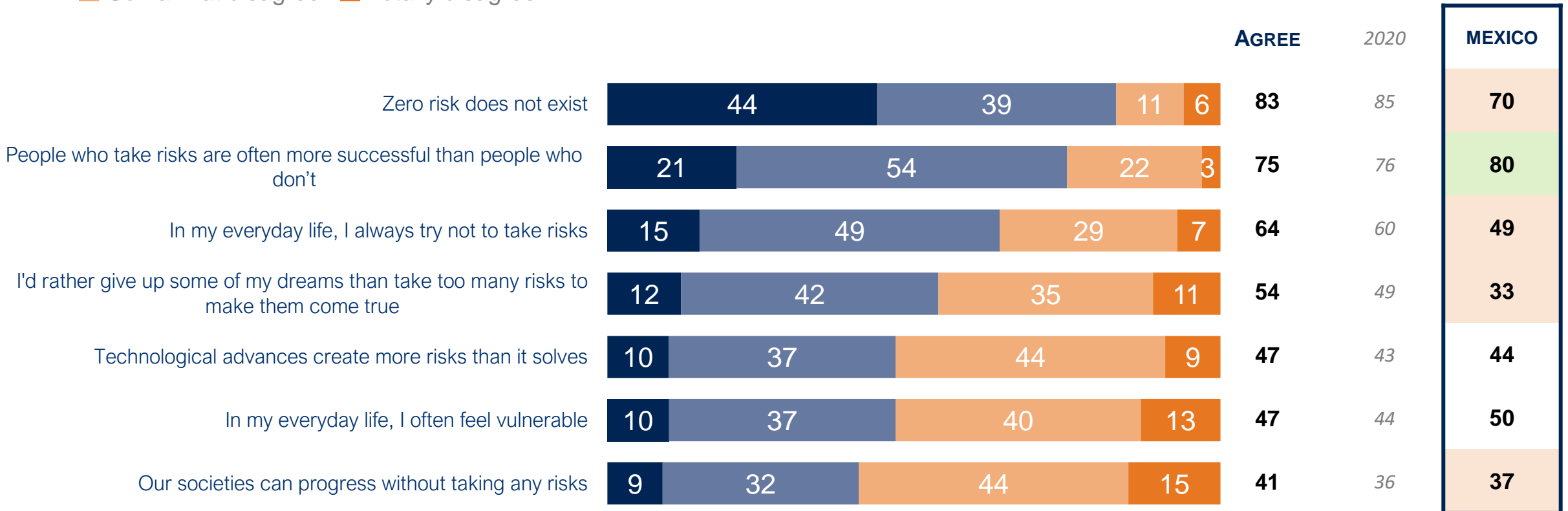
C

OPINION TOWARDS VARIOUS IDEAS ON RISK



ALL COUNTRIES

■ Totally agree ■ Somewhat agree
■ Somewhat disagree ■ Totally disagree

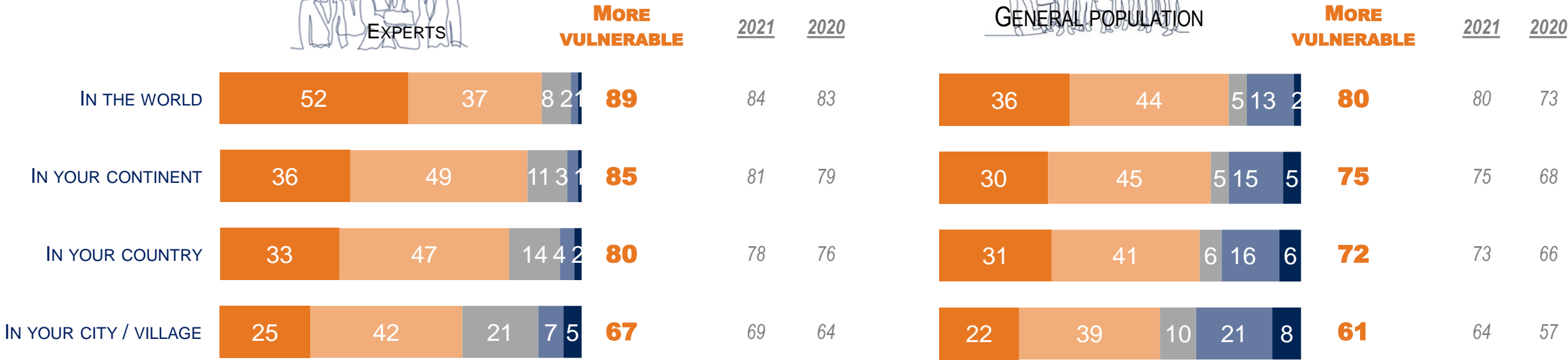


Do you agree or disagree with the following statements?

LEVEL OF VULNERABILITY OF POPULATIONS COMPARED TO 5 YEARS AGO

ALL COUNTRIES

■ MUCH MORE VULNERABLE
 ■ A LITTLE MORE VULNERABLE
 ■ NEITHER MORE NOR LESS VULNERABLE
■ A LITTLE LESS VULNERABLE
 ■ MUCH LESS VULNERABLE



When you think about the way in which things have been evolving in the past 5 years, would you say that people are...



LEVEL OF VULNERABILITY OF POPULATIONS – PER CLUSTER AND COUNTRY



% MORE VULNERABLE

		AMERICA	UNITED STATES OF AMERICA	MEXICO	COLOMBIA
IN THE WORLD	89	91	94	78	92
IN YOUR CONTINENT	85	87	88	82	94
IN YOUR COUNTRY	80	85	85	80	94
IN YOUR CITY / VILLAGE	67	72	67	73	92



% MORE VULNERABLE

		AMERICA	UNITED STATES OF AMERICA	MEXICO
IN THE WORLD	80	83	83	81
IN YOUR CONTINENT	75	78	77	81
IN YOUR COUNTRY	72	78	78	78
IN YOUR CITY / VILLAGE	61	66	65	75

When you think about the way in which things have been evolving in the past 5 years, would you say that people are...

GEOPOLITICAL TENSIONS AND GLOBALIZATION

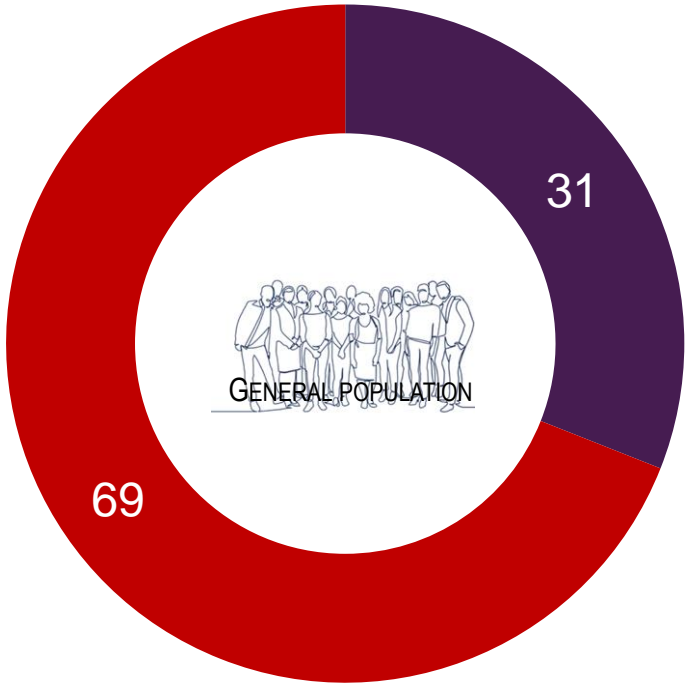
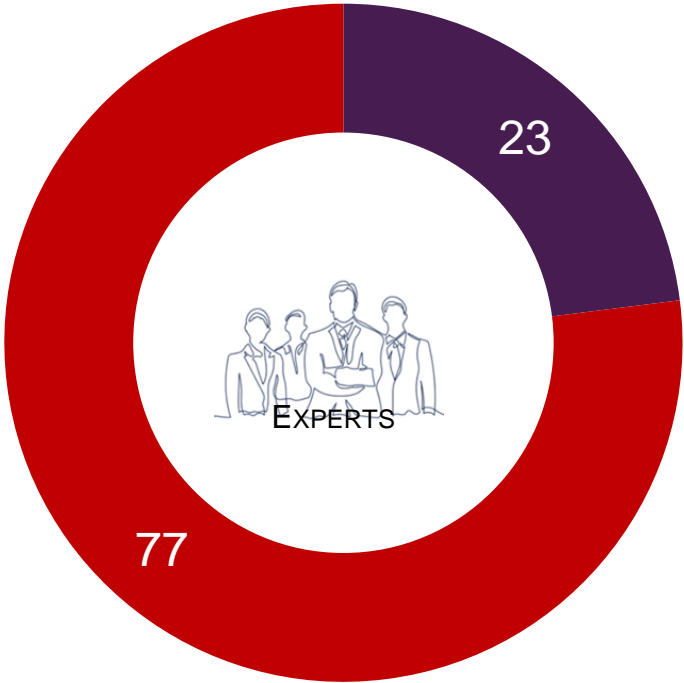
D

OPINION TOWARDS GEOPOLITICAL TENSIONS

ALL COUNTRIES

■ Geopolitical tensions have always existed and the risk is very low that actual tensions escalate into global wars

■ Geopolitical tensions are getting more and more serious and could lead to a new era of global wars



! New question

Regarding geopolitical tensions, to which of the following opinions do you feel closer?

OPINION TOWARDS GEOPOLITICAL TENSIONS – PER CLUSTER

■ Geopolitical tensions have always existed and the risk is very low that actual tensions escalate into global wars

■ Geopolitical tensions are getting more and more serious and could lead to a new era of global wars



THE RISK THAT GEOPOLITICAL TENSIONS LEAD TO CERTAIN CONSEQUENCES

ALL COUNTRIES

■ VERY IMPORTANT
 ■ SOMEWHAT IMPORTANT
 ■ SOMEWHAT NOT IMPORTANT
 ■ NOT IMPORTANT AT ALL



EXPERTS

IMPORTANT

MEXICO



GENERAL POPULATION

IMPORTANT

MEXICO

... become persistent in the future?



95

87



87

90

... spread around the globe?



94

82



87

88

... threaten your country's food and energy supply?



91

78



85

90

... lead to a global war?



84

75



82

87



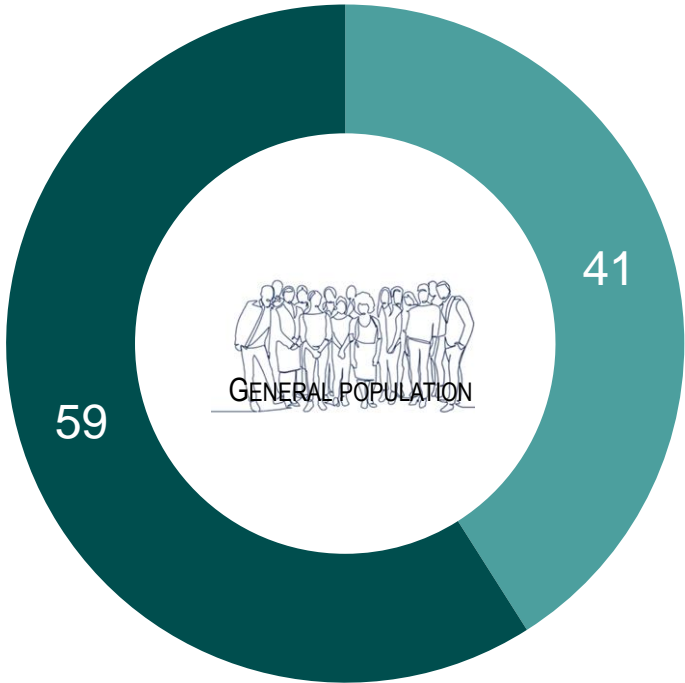
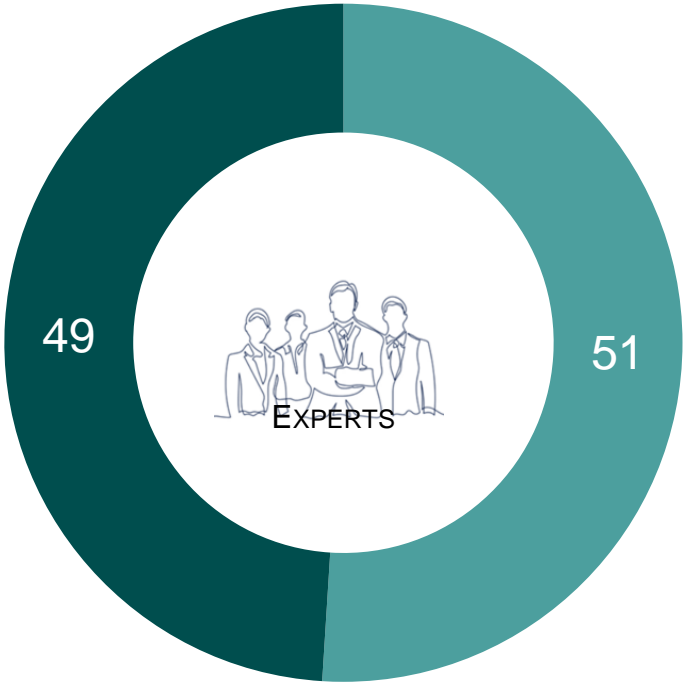
New question

OPINION TOWARDS GLOBALIZATION

ALL COUNTRIES

■ Globalization will slow down overtime, as most countries in the world will try to protect themselves from global risks

■ Globalization will increase overtime, as most countries will try to find collective solutions to global risks



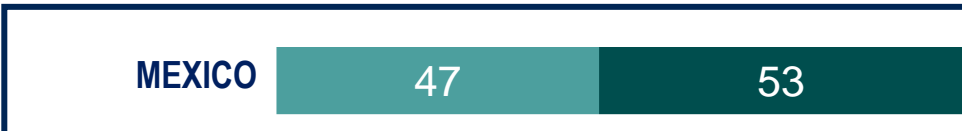
 New question

Regarding risks that may happen at the global level in the future, to which of the following opinions do you feel closer?

OPINION TOWARDS GLOBALIZATION – PER CLUSTER

■ Globalization will slow down overtime, as most countries in the world will try to protect themselves from global risks

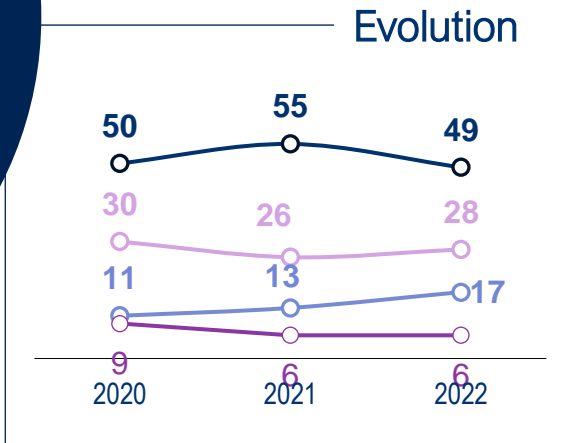
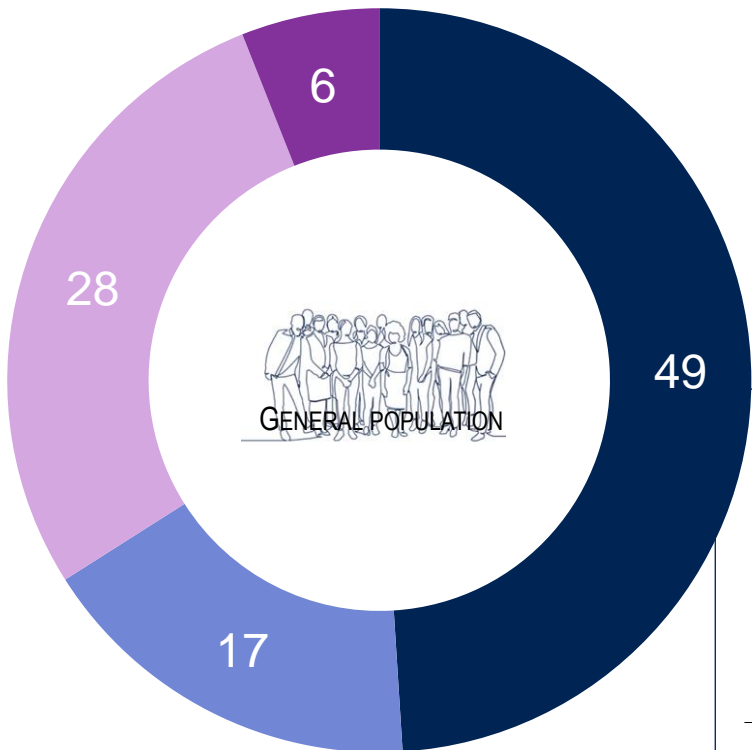
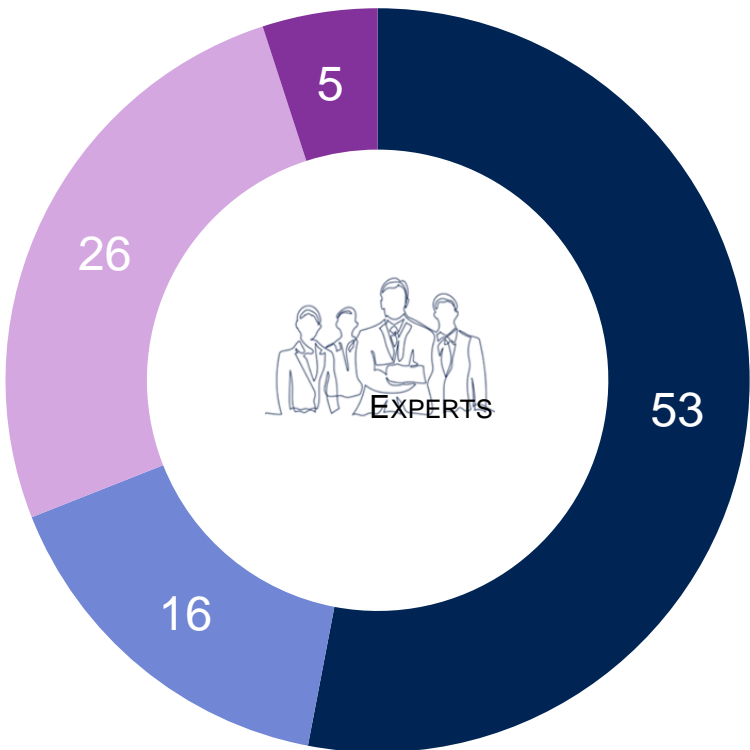
■ Globalization will increase overtime, as most countries will try to find collective solutions to global risks



THE MOST EFFECTIVE LEVEL OF DECISIONS WHEN FACING FUTURE RISKS

ALL COUNTRIES

- At global level
- At the continents' level
- At the countries' level
- At the cities' level

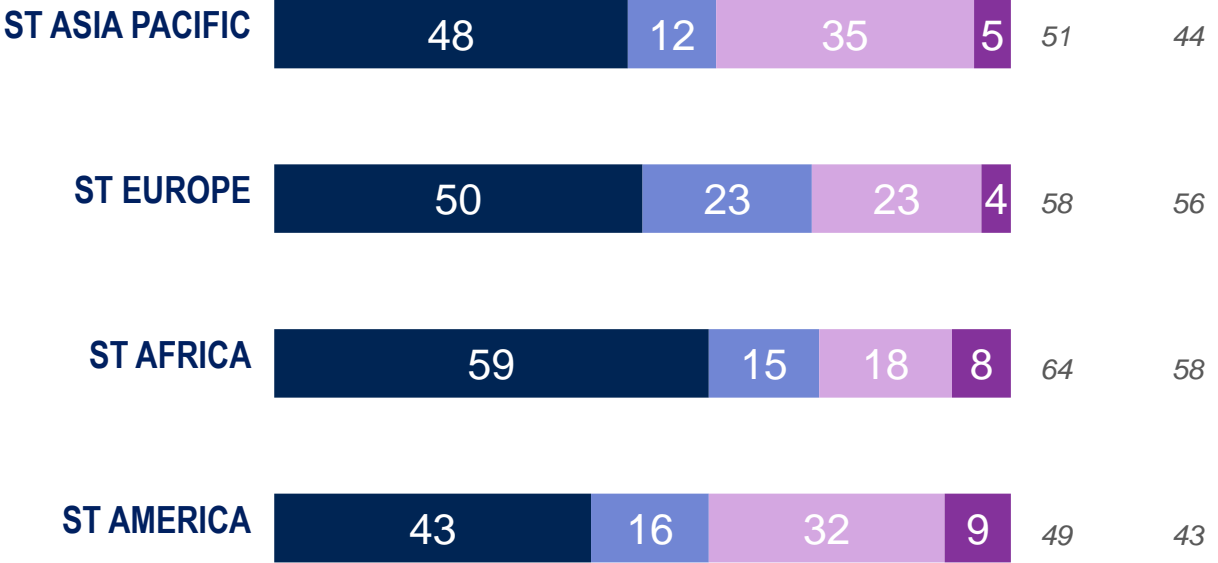
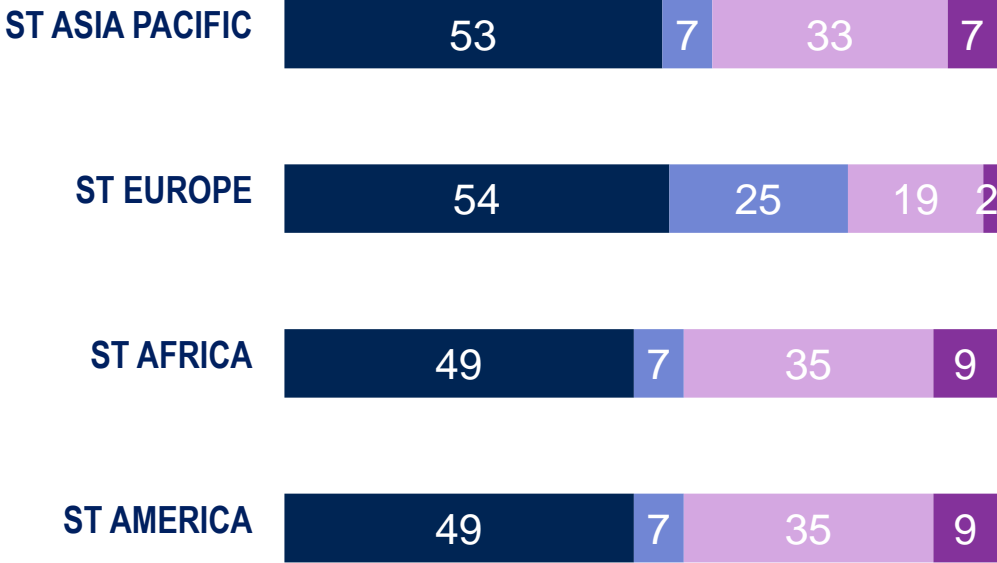


When you think of these future risks, at what level should decisions be made to be most effective?



THE MOST EFFECTIVE LEVEL OF DECISIONS WHEN FACING FUTURE RISKS – PER CLUSTER

■ At global level ■ At the continents' level
■ At the countries' level ■ At the cities' level



When you think of these future risks, at what level should decisions be made to be most effective?



LEVEL OF TRUST TOWARD DIFFERENT ACTORS IN RELATION WITH FUTURE RISKS

E

LEVEL OF TRUST TOWARD DIFFERENT ACTORS TO LIMIT FUTURE CRISIS

ALL COUNTRIES

Yes, totally
 Yes, somehow
 No, somehow
 No, not at all



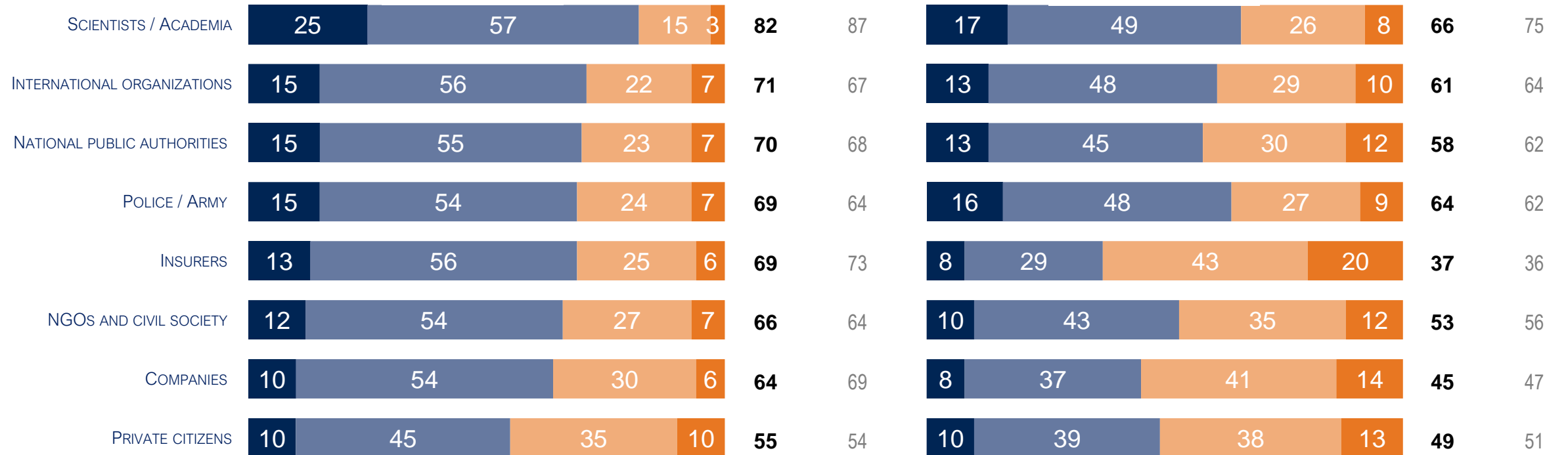
EXPERTS

YES 2021



GENERAL POPULATION

YES 2021



If a new global crisis happens in the next 12 months, would you trust the following actors to limit the consequences of this new crisis in the world?

LEVEL OF TRUST TOWARD DIFFERENT ACTORS TO LIMIT FUTURE CRISIS – PER CLUSTER AND COUNTRY



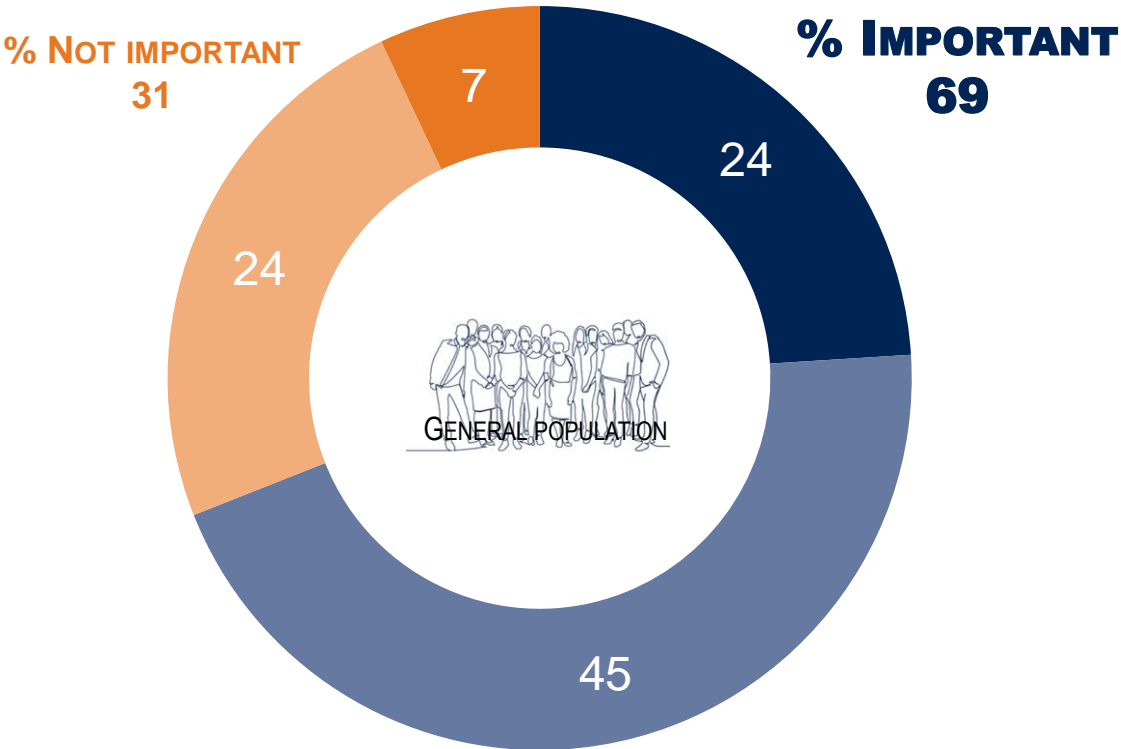
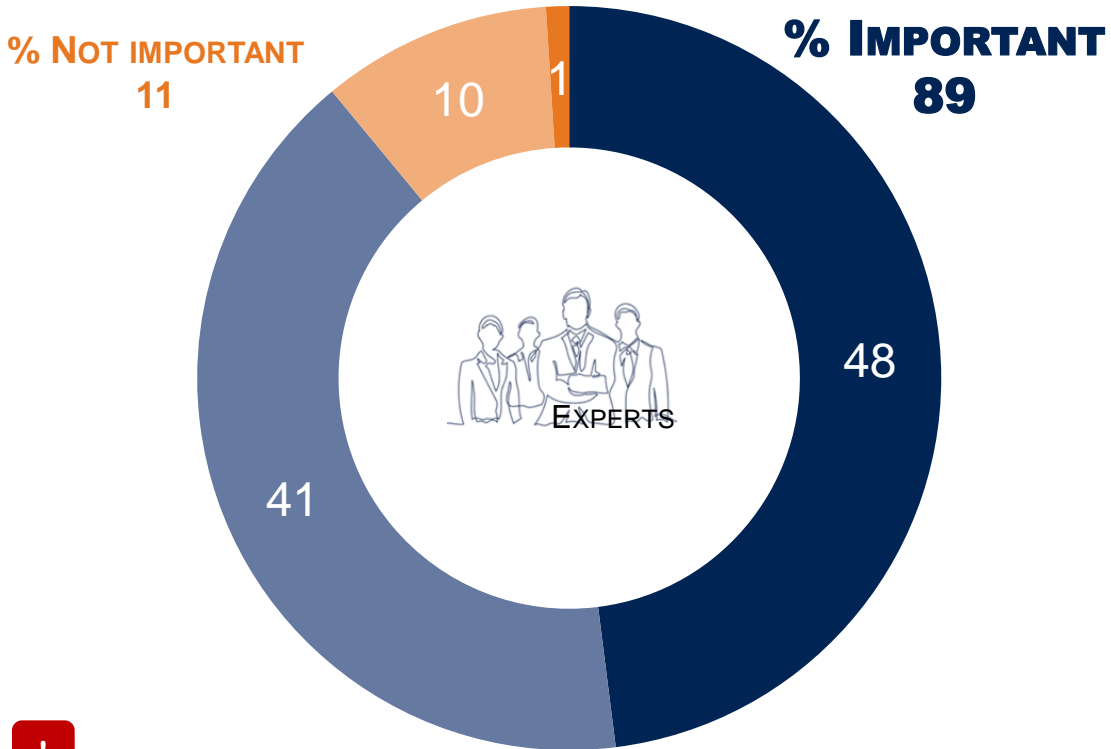
% YES	EXPERTS					GENERAL POPULATION				
	EUROPE	ASIA PACIFIC	AMERICA	MEXICO	AFRICA	EUROPE	ASIA PACIFIC	AMERICA	MEXICO	AFRICA
Scientists / Academia	82	85	75	76	78	66	59	69	73	78
International organizations	71	79	68	77	66	61	60	60	73	77
National public authorities	70	77	63	50	59	58	63	56	60	73
Police / Army	69	74	65	39	62	64	61	65	60	75
Insurers	69	80	68	76	81	37	36	40	41	55
NGOs and civil society	66	72	60	53	71	53	45	52	68	74
Companies	64	75	63	73	66	45	40	47	54	55
Private citizens	55	66	53	54	67	49	39	54	54	65

If a new global crisis happens in the next 12 months, would you trust the following actors to limit the consequences of this new crisis in the world?

THE ROLE OF INSURERS TO LIMIT THE IMPACT OF FUTURE RISKS

ALL COUNTRIES

Very important Somewhat important Not very important Not important at all



New question

Do you think that in the future the role of insurers in the protection against these future risks will be...



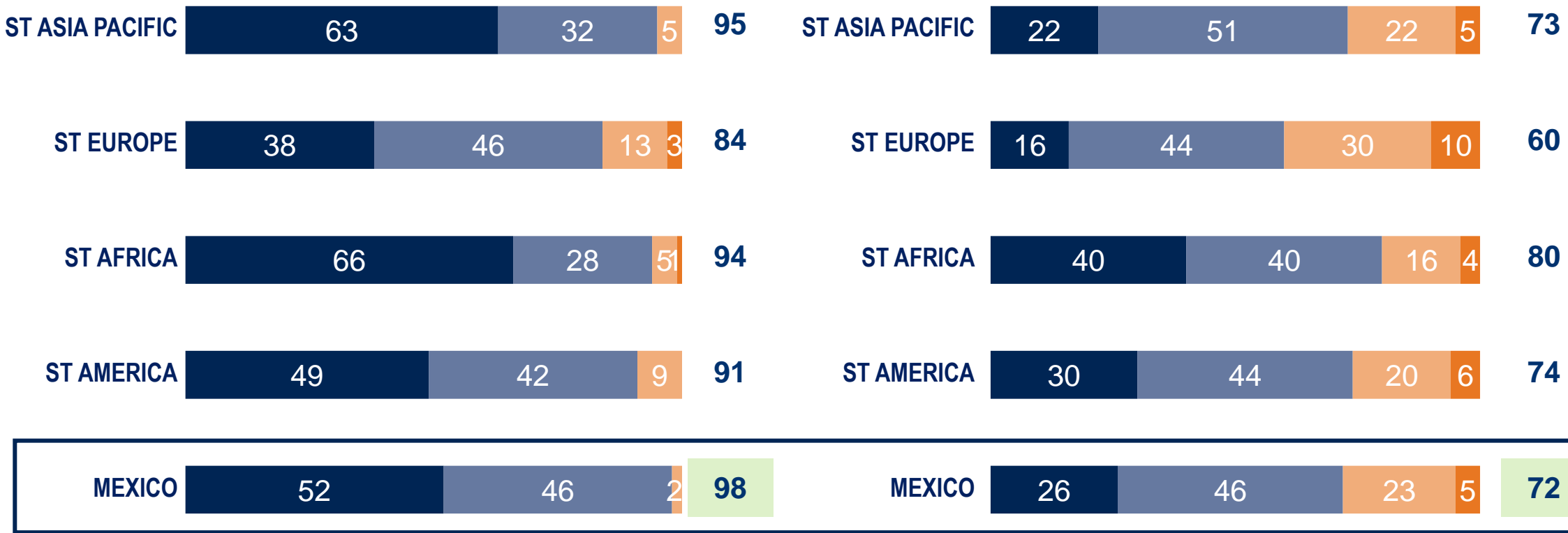
THE ROLE OF INSURERS TO LIMIT THE IMPACT OF FUTURE RISKS – PER CLUSTER

Very important
 Somewhat important
 Not very important
 Not important at all



% Important

% Important



LEVEL OF VULNERABILITY PER RISKS

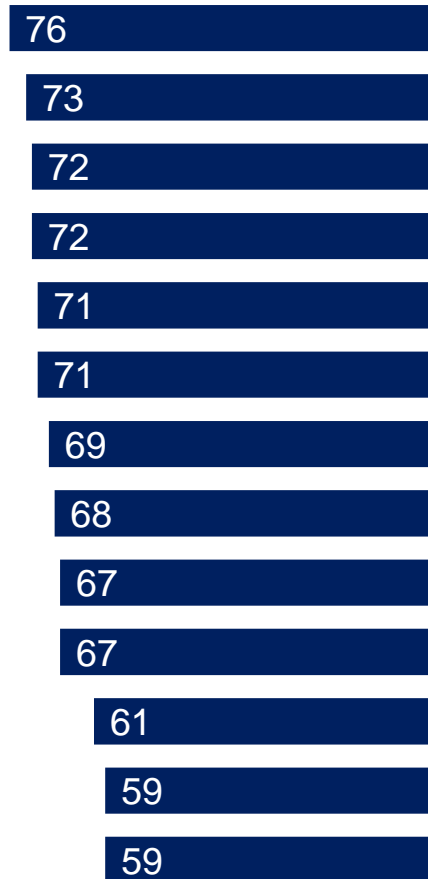
F

LEVEL OF VULNERABILITY PER RISKS

ALL COUNTRIES



■ YES



Pollution

Energy risks

Pandemics and infectious diseases

Monetary and fiscal policies risks

Cyber security risks

Ethical risks regarding the use of technology

Long-term exposure to harmful substances

Natural resources and biodiversity risks

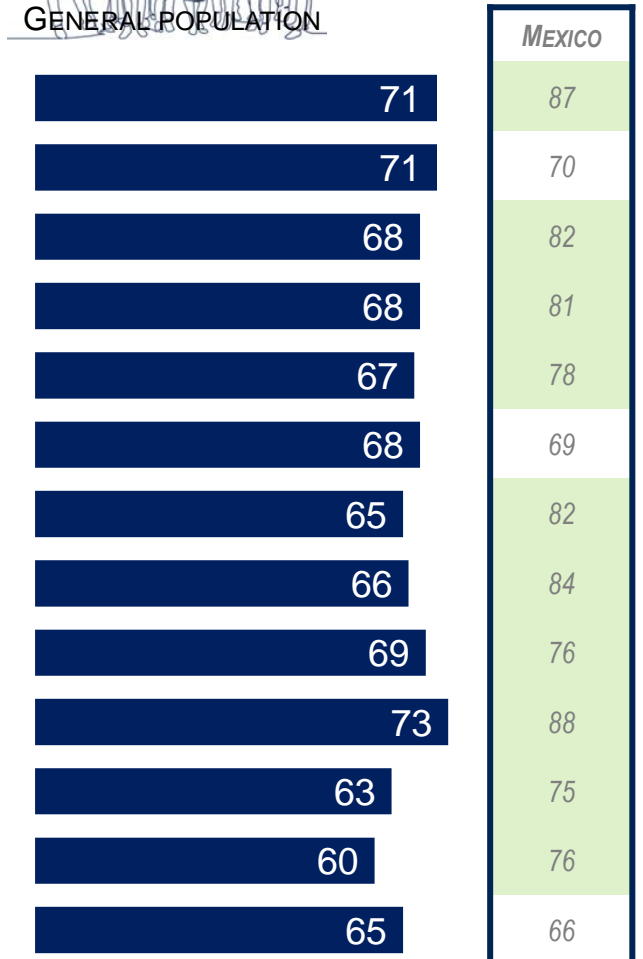
Chronic illnesses

Climate change

Risks related to the future of Work

Geopolitical instability

Risks related to changing demographics



LEVEL OF VULNERABILITY PER RISKS

ALL COUNTRIES



■ YES



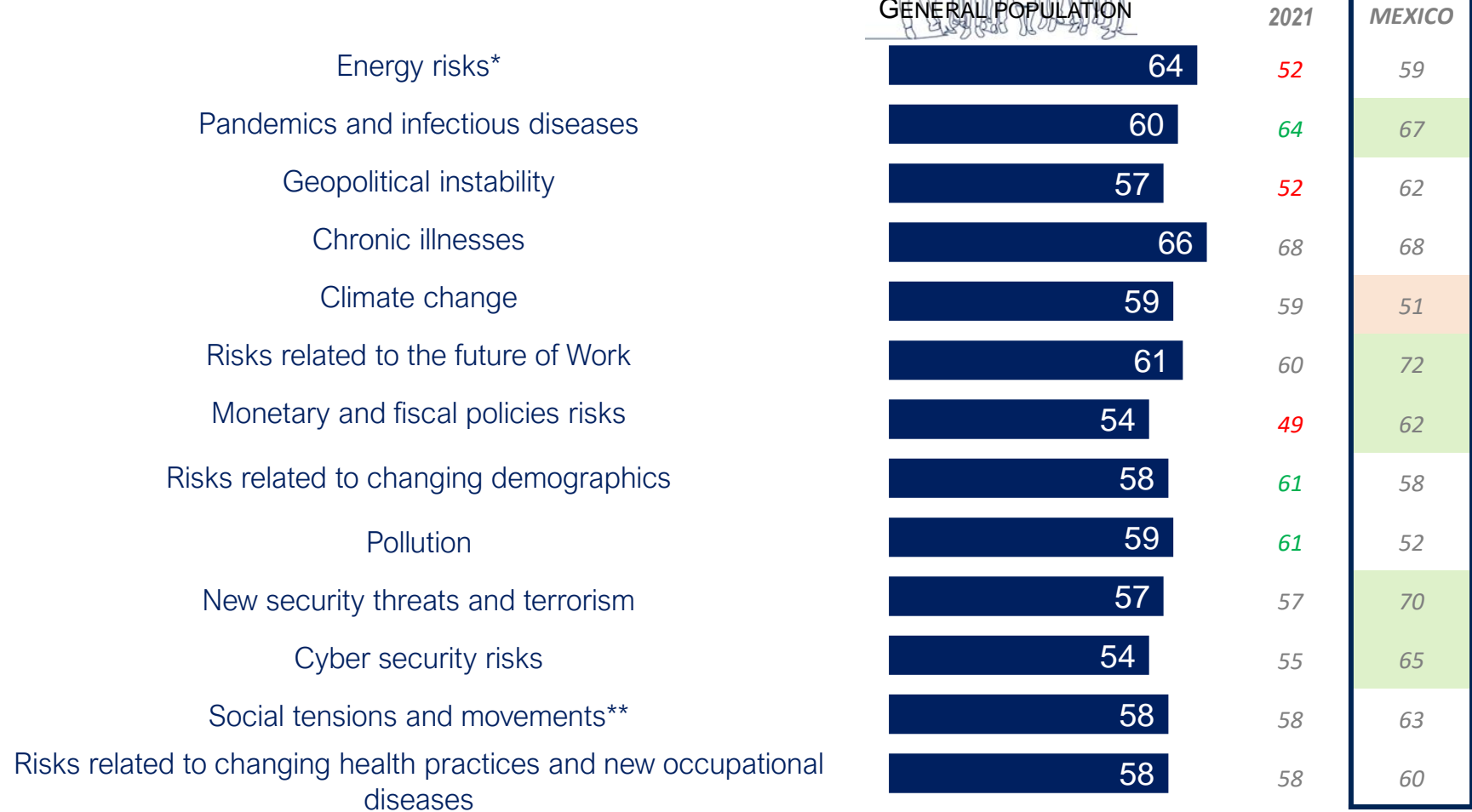
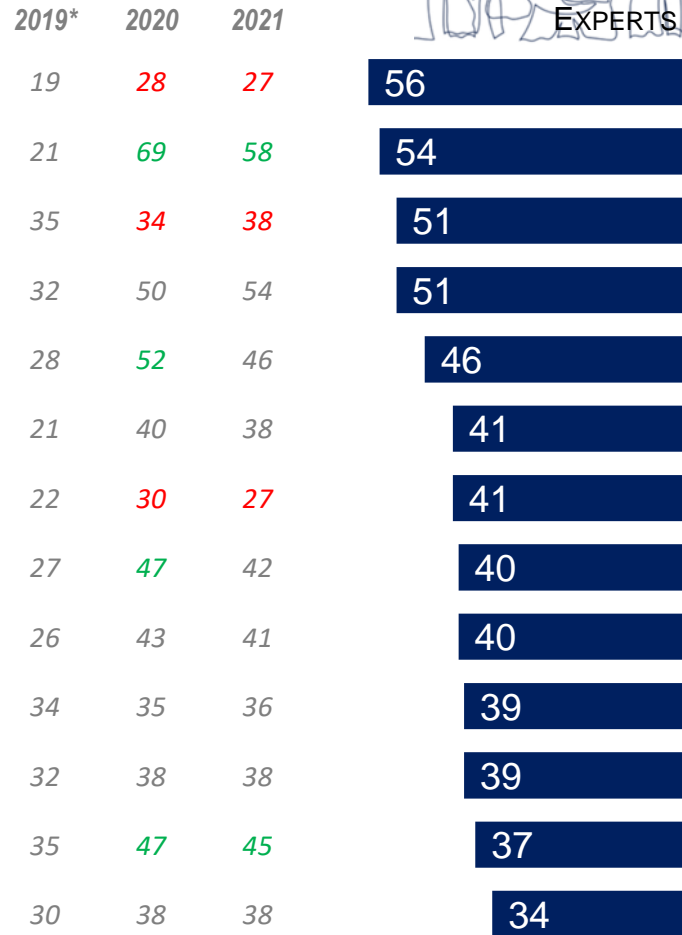
AWARENESS OF THE GENERAL POPULATION ON FUTURE RISKS

H

AWARENESS OF THE GENERAL PUBLIC ON FUTURE RISKS

■ AWARE

ALL COUNTRIES



To those who selected the risk in their top 5: Given the current knowledge of this future risk, how would you rate the awareness of the general public? *In 2019, scale was: very satisfactory / quite satisfactory / quite unsatisfactory / very unsatisfactory

*Previously the item was “Energy transition risks”

**Previously the item was “Social discontents and local conflicts”

AWARENESS OF THE GENERAL PUBLIC ON FUTURE RISKS

■ AWARE

ALL COUNTRIES



To those who selected the risk in their top 5: Given the current knowledge of this future risk, how would you rate the awareness of the general public? *In 2019, scale was: very satisfactory / quite satisfactory / quite unsatisfactory / very unsatisfactory

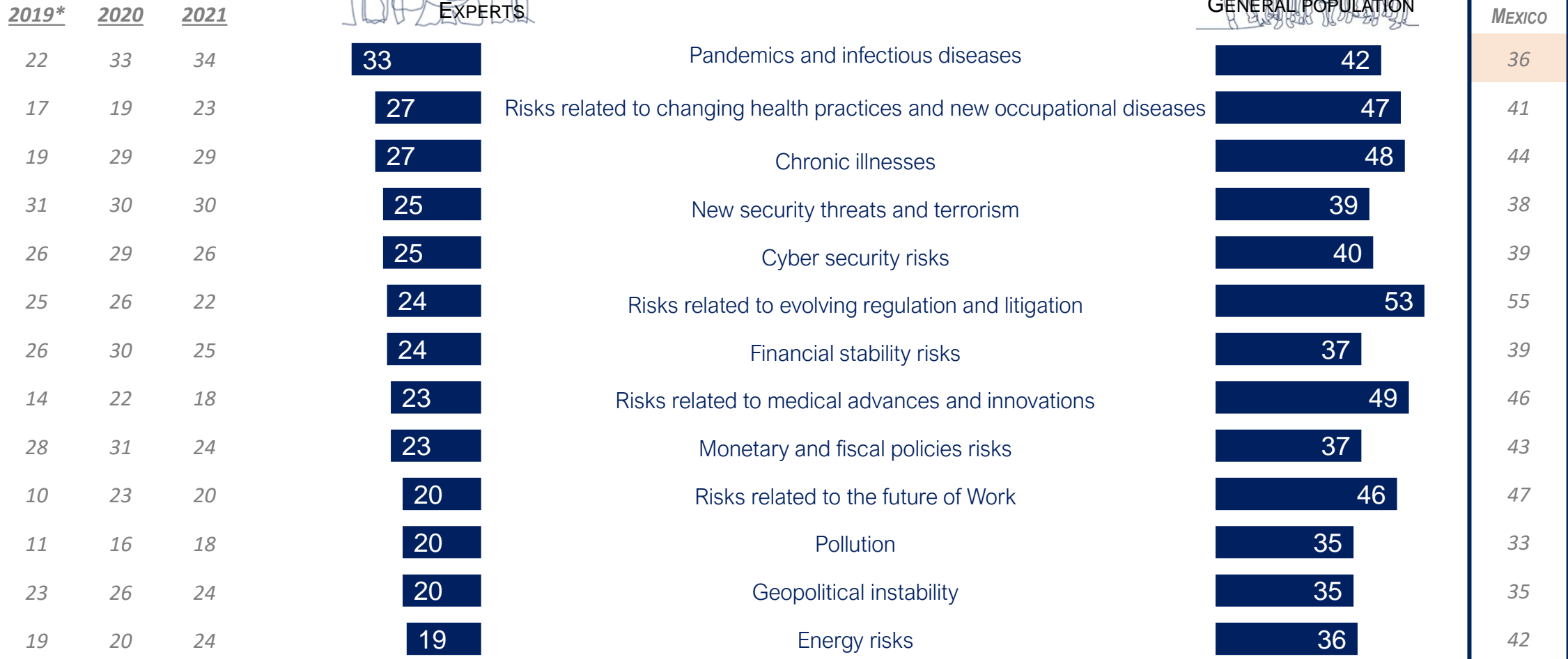
PREPAREDNESS OF PUBLIC AUTHORITIES FOR FUTURE RISKS



PREPAREDNESS OF PUBLIC AUTHORITIES FOR FUTURE RISKS

■ YES

ALL COUNTRIES



PREPAREDNESS OF PUBLIC AUTHORITIES FOR FUTURE RISKS

ALL COUNTRIES



EXPERTS

<u>2019*</u>	<u>2020</u>	<u>2021</u>
13	22	17
12	16	14
26	26	24
12	17	17
19	15	14
10	14	11
11	16	19
-	19	19
7	9	18
18	15	20
12	13	16
17	22	12



Ethical risks regarding the use of technology

Tech-related economic risks

Macro-economic risks

Disruptive technologies

Risks related to smart and autonomous systems

Risks related to Artificial Intelligence and big data

Climate change

Risks related to changing demographics

Long-term exposure to harmful substances

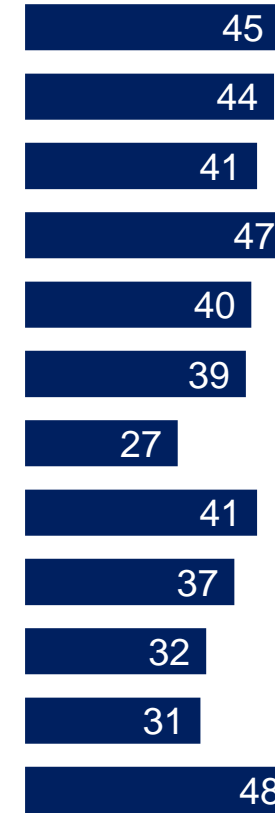
Social tensions and movements

Natural resources and biodiversity risks

Space and planetary risks



GENERAL POPULATION



MEXICO
39
35
40
50
38
43
22
37
42
32
25
49

■ YES

PREPAREDNESS OF THE PRIVATE SECTOR FOR FUTURE RISKS

J

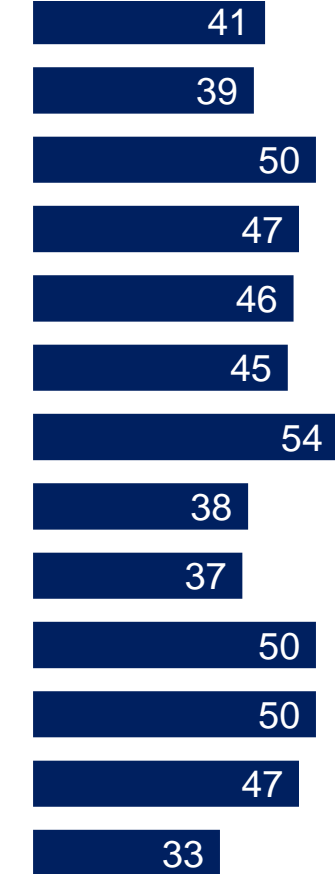
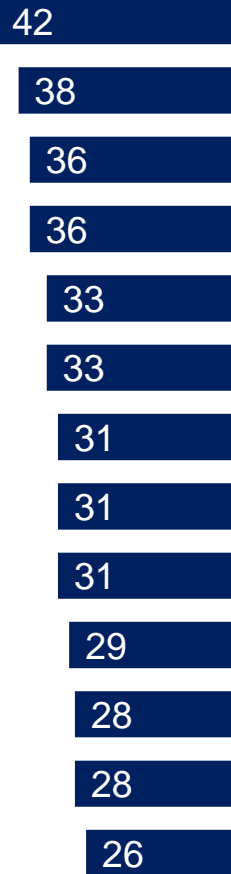


PREPAREDNESS OF THE PRIVATE SECTOR FOR FUTURE RISKS

■ No, not at all
 ■ No, not really
 ■ Yes, somewhat
 ■ Yes, absolutely

■ YES

ALL COUNTRIES



MEXICO
48
44
56
57
49
41
58
47
51
46
52
44
37

PREPAREDNESS OF THE PRIVATE SECTOR FOR FUTURE RISKS

■ No, not at all
 ■ No, not really
 ■ Yes, somewhat
 ■ Yes, absolutely

■ YES

ALL COUNTRIES



26

25

24

22

22

22

20

18

16

15

15

14

Macro-economic risks

Energy risks

Risks related to changing demographics

Risks related to Artificial Intelligence and big data

Risks related to smart and autonomous systems

New security threats and terrorism

Climate change

Long-term exposure to harmful substances

Space and planetary risks

Geopolitical instability

Social tensions and movements

Natural resources and biodiversity risks



GENERAL POPULATION

42

36

40

40

42

35

26

36

48

30

32

29

MEXICO
50
44
37
55
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30
46
51
41
40
28

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GAME CHANGERS

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