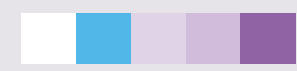




# Munich Security Index 2024

KEKST CNC EXECUTIVE SUMMARY





# Kekst CNC

## Executive Summary

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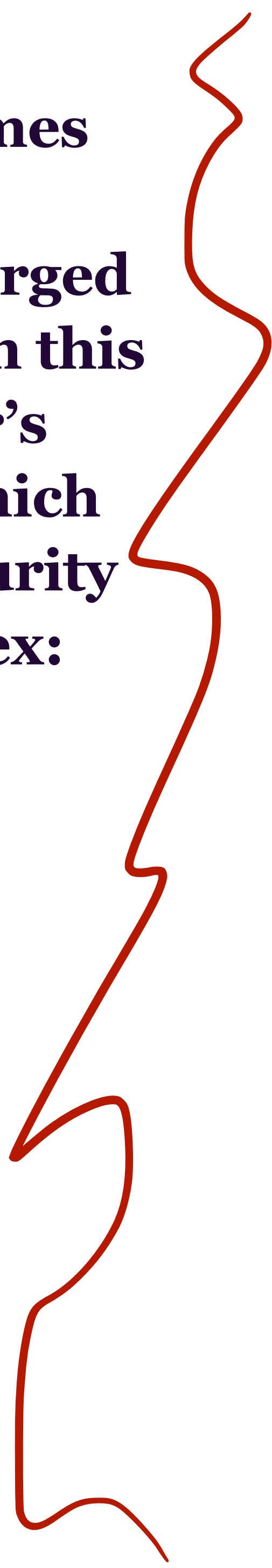
Since 2021, the Munich Security Conference and Kekst CNC have partnered to produce the Munich Security Index (MSI), a survey aimed at answering core questions to help understand global risk perceptions. Do people think the world is becoming a riskier place? Is there a consensus on some of the grave risks that humanity is facing today? And how prepared do societies feel to tackle these threats?

Based on a global survey of 12,000 people, the MSI's in-depth view of G7 and BRICS nations, with the exception of Russia ("BICS"), was conducted between October 24 and November 16, 2023, using industry-leading online panels. A survey with selected questions was also conducted in Ukraine. The local surveys were carried out by trusted and reputable fieldwork partners in compliance with the European Society for Opinion and Market Research code.

In an increasingly volatile world, it is important to understand attitudes and perceptions of critical issues from country-specific perspectives. The MSI's findings serve to benefit businesses by promoting a greater understanding of customers, clients, employees, and other relevant stakeholders in some of the largest markets in the world.

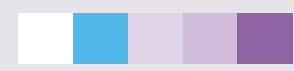


**Key themes that emerged from this year's Munich Security Index:**



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## 1



# Global emergency

Climate change returns to the top of global perceived risks

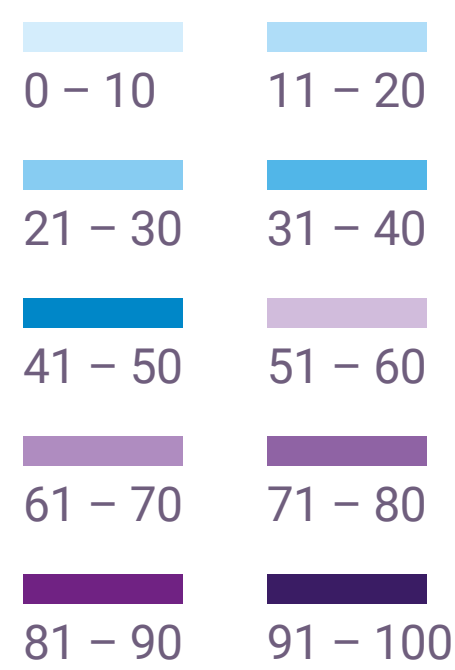
- With the perceived threat from Russia's invasion of Ukraine receding, the risks from climate change return to near the top of the risk index, with concerns about extreme weather and forest fires close behind. The climate emergency is a transnational risk, with high concern across BICS and G7 countries.
- Brazil, Italy, and South Africa are the most concerned about climate change.
- India perceives climate as less of a risk than other countries, although its population still places it above everything else.
- The US ranks climate change relatively low (21st). **Around the world those who describe themselves as leftists are more likely to see climate change as a risk than those viewing themselves as conservatives, and in the United States there is greater readiness to describe 'extreme weather and forest fires' as a risk than 'climate change generally.'**
- Conservative voters in Canada are significantly less likely than their liberal/left-wing peers to view climate change as a risk, and this discrepancy is even more stark between Democrat and Republican voters in the US.
- Older generations are considerably more concerned about the risks posed by climate change.



## The risk heatmap

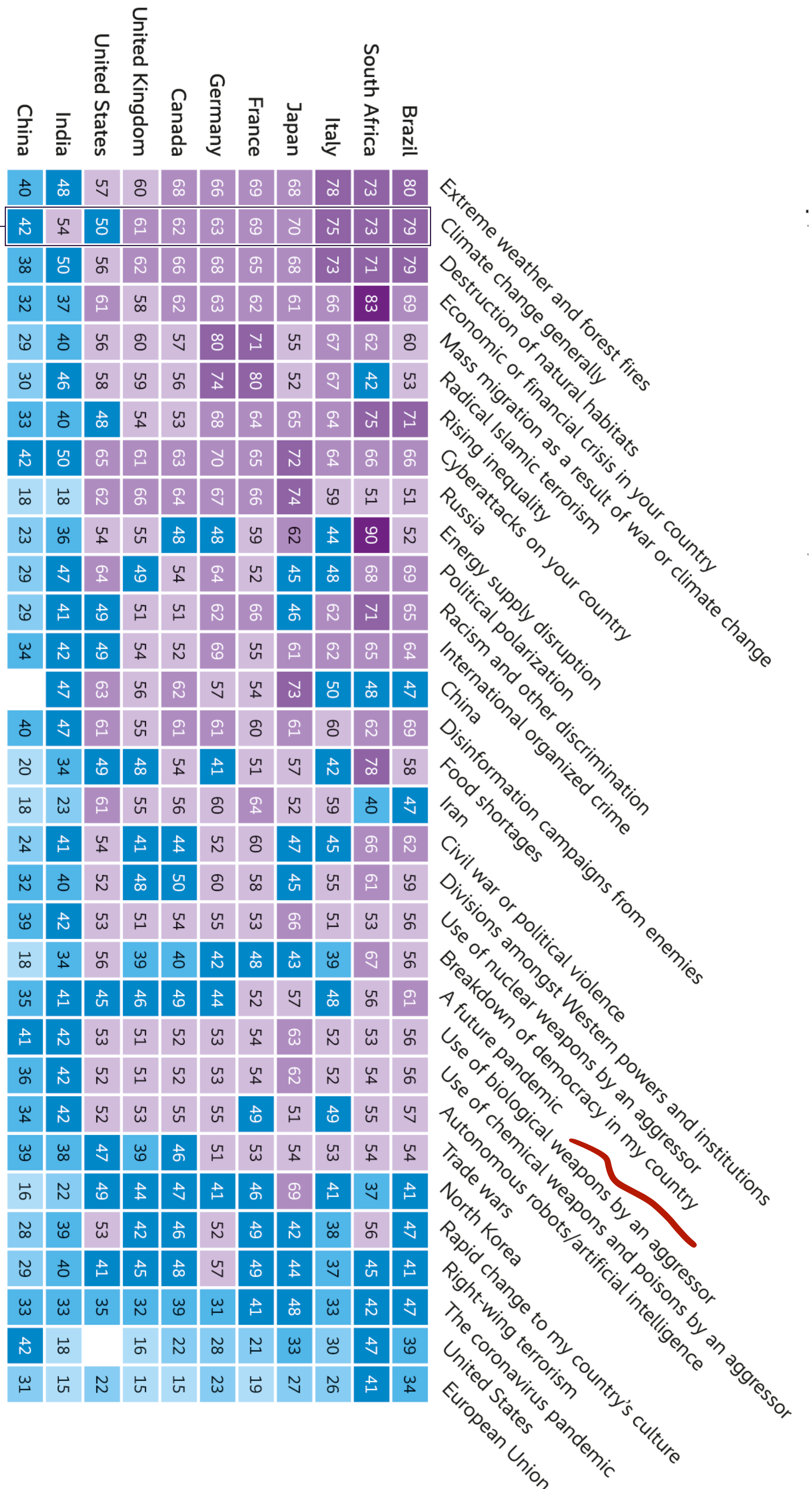
October–November 2023, score

Risk score for climate change: 70 amongst over-65s, compared to 56 for 18-24s

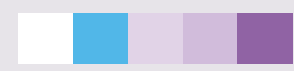


In the United States and China, citizens were not asked to assess the risk from their own country

Data and illustration: Kekst CNC, commissioned by the Munich Security Conference



## 2



## Robots on the rise

Global anxiety about artificial intelligence on the upswing

- The world is increasingly worried about the risk posed by autonomous robots and artificial intelligence (AI). This is particularly so in the United Kingdom, with a spike in concern about the risks posed by the developing technologies. There has also been a rise in concern about cyberattacks.
- Cyberattacks are now perceived to be the third-biggest risk facing the country, while AI surges to 15th place (+15).
- Cybersecurity is also seen to be the fourth-biggest risk globally, with autonomous robots/AI up eight spots, to 19th.
- G7 countries are more concerned about the potential for cyberattacks than BICS countries.



## United Kingdom

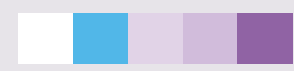
	Index score	Change in index score	Share thinking risk is imminent	Share feeling unprepared
Russia	66	-11	68	27
Destruction of natural habitats	62	-3	62	25
Cyberattacks on your country	61	+0	67	16
Climate change generally	61	-4	59	25
Extreme weather and forest fires	60	-1	63	25
Mass migration as a result of war or climate change	60	+3	59	29
Radical Islamic terrorism	59	+8	59	16
Economic or financial crisis in your country	58	-18	73	33
China	56	-3	57	28
Disinformation campaigns from enemies	55	+1	65	18
Energy supply disruption	55	-25	78	34
Iran	55	+2	56	23
International organized crime	54	+0	63	16
Rising inequality	54	-5	64	28
<b>Autonomous robots/artificial intelligence</b>	<b>53</b>	<b>+15</b>	<b>43</b>	<b>20</b>
Use of nuclear weapons by an aggressor	51	-11	54	24
Use of biological weapons by an aggressor	51	-7	53	25
Use of chemical weapons and poisons by an aggressor	51	-7	54	26
Racism and other discrimination	51	+2	62	16
Political polarization	49	-4	60	21
Division amongst Western powers and institutions	48	-3	53	21
Food shortages	48	-21	72	32
A future pandemic	46	-4	56	18
Right-wing terrorism	45	+0	56	17
North Korea	44	+0	43	22
Rapid change to my country's culture	42	-2	46	25
Civil war or political violence	41	-4	48	23
Breakdown of democracy in my country	39	-10	47	29
Trade wars	39	-9	57	20
The coronavirus pandemic	32	-9	64	14
United States	16	+0	26	24
European Union	15	-1	28	19

**+15**

Increase of perceived risk posed by autonomous robots and artificial intelligence in the UK

Data and illustration: Kekst CNC, commissioned by the Munich Security Conference

## 3



## Disinformation Wars

There is high concern about disinformation campaigns and the propaganda of hostile states, as we start a bumper year of general elections around the world

- The perceived risk from disinformation campaigns from hostile forces has climbed higher in the global rankings from a year ago. As it gears up for a historic election, the United States is particularly concerned, with the threat from disinformation campaigns now seen to be the fifth-biggest risk facing the country. There is growing concern in the United Kingdom about cyber-security and AI, with the potential risks from cyberattacks now seen to be the third-biggest threat facing the country.
- Disinformation is now ranked as the sixth-greatest risk globally, up six spots from last year.
- Cyberattacks are perceived to be the third-biggest risk facing the United States, and AI now ranks 15th (+15).
- Cybersecurity is also seen to be the fourth-biggest risk globally, with autonomous robots/AI up eight spots, to 19.
- G7 countries are more concerned about the potential for cyberattacks than BICS countries.

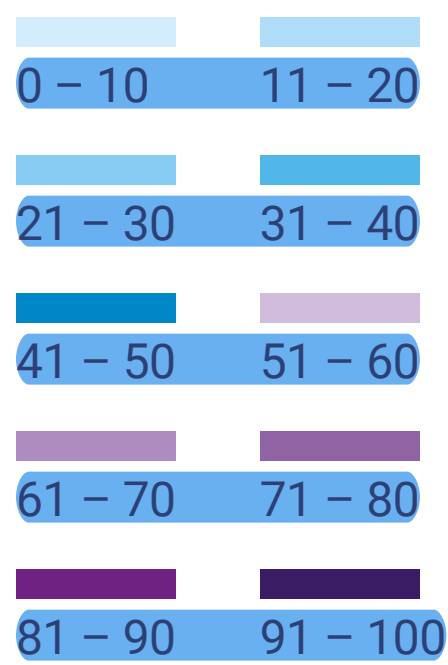


## United States

October–November 2023, score

Country	Extreme weather and forest fires	Climate change generally	Destruction of natural habitats	Economic or financial crisis in your country	Mass migration as a result of war or climate change	Radical Islamic terrorism	Rising inequality	Cyberattacks on your country	Russia	Energy supply disruption	Political polarization	Racism and other discrimination	International organized crime	China	Disinformation campaigns from enemies	Iran	Civil war or political violence	Divisions amongst Western powers and institutions	Use of nuclear weapons by an aggressor	Breakdown of democracy in my country	A future pandemic	Use of biological weapons	Use of chemical weapons	Autonomous robots/artificial intelligence	Trade wars	North Korea	Rapid change to my country's culture	Right-wing terrorism	The coronavirus pandemic	United States	European Union	
Brazil	80	79	79	69	60	53	71	66	51	52	69	65	64	47	69	58	47	59	56	61	56	56	57	54	41	47	41	47	39	34		
South Africa	73	73	71	83	62	42	75	66	51	90	68	71	65	48	62	78	40	66	61	53	67	56	53	54	55	54	56	42	47	41		
Italy	78	75	73	66	67	67	64	64	59	44	48	62	62	50	60	42	59	45	55	51	39	48	52	52	49	53	41	38	37	33	30	26
Japan	68	70	68	61	55	52	65	72	74	62	45	46	61	73	61	57	52	47	66	63	57	63	62	51	54	69	54	41	48	33	27	
France	69	69	65	62	71	80	64	65	66	59	52	66	55	54	60	51	64	60	58	53	48	52	54	54	49	53	46	49	41	21	19	
Germany	66	63	68	63	80	74	68	70	67	48	64	62	69	57	61	41	60	52	44	53	54	54	55	51	51	41	52	57	31	28	23	
Canada	68	62	66	62	57	56	53	63	64	48	54	51	52	62	61	54	56	44	50	49	49	52	52	55	46	47	46	48	39	22	15	
United Kingdom	60	61	62	58	60	59	54	61	66	55	49	51	54	56	55	48	55	40	49	46	51	51	53	39	44	42	45	32	16	15		
United States	57	50	56	61	56	58	48	65	62	54	64	49	49	63	61	49	61	52	53	52	52	52	47	49	49	53	41	35	22	15		
India	48	54	50	37	40	46	40	50	18	36	47	41	42	47	47	34	23	41	40	42	42	42	38	22	39	40	33	18	15			
China	40	42	38	32	29	30	33	42	18	23	29	29	34	40	20	18	24	32	39	18	35	41	36	34	39	16	28	29	33	42	31	

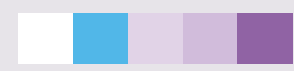
The United States seeing disinformation campaigns as the 5th biggest risk facing the country (+3)



In the United States and China, citizens were not asked to assess the risk from their own country

Data and illustration: Kekst CNC, commissioned by the Munich Security Conference

## 4



## Elections 2024

Immigration set to be a critical issue at the polls around the world

- With EU, UK, and US elections just around the corner, concerns about mass migration as a result of war or climate change and radical Islamic terrorism have surged.
- Mass migration prompted by war or climate change is now ranked seventh globally, up from 16th last year.
- Mass migration is the biggest perceived risk in Germany, and in France is second only to radical Islamic terrorism.
- There is more concern about rapid change to their country's culture in Italy, France, and Germany.



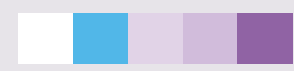
**Germany**

Germany now has the highest level of concern about mass migration among the countries surveyed

	Index score	Change in index score	Share thinking risk is imminent	Share feeling unprepared
Mass migration as a result of war or climate change	80	+5	70	39
Radical Islamic terrorism	74	+13	67	31
Cyberattacks on your country	70	-4	74	36
International organized crime	69	+2	72	31
Destruction of natural habitats	68	-5	68	37
Rising inequality	68	-6	71	39
Russia	67	-11	67	45
Extreme weather and forest fires	66	-7	71	37
Political polarization	64	+2	68	27
Climate change generally	63	-7	64	35
Economic or financial crisis in your country	63	-12	72	36
Racism and other discrimination	62	+3	68	27
Disinformation campaigns from enemies	61	+0	69	29
Divisions amongst Western powers and institutions	60	+2	56	33
Iran	60	+4	54	38
Right-wing terrorism	57	+5	64	25
China	57	-6	57	45
Use of nuclear weapons by an aggressor	55	-10	51	54
Autonomous robots/artificial intelligence	55	+10	51	31
Use of biological weapons by an aggressor	53	-9	50	54
Use of chemical weapons and poisons by an aggressor	53	-9	51	53
Civil war or political violence	52	+1	53	37
Rapid change to my country's culture	52	+5	50	33
Trade wars	51	-9	59	37
Energy supply disruption	48	-20	67	39
A future pandemic	44	-6	62	27
Breakdown of democracy in my country	42	-1	36	40
Food shortages	41	-15	59	34
North Korea	41	-1	43	37
The coronavirus pandemic	31	-11	67	20
United States	28	-3	34	34
European Union	23	-1	35	31

Data and illustration: Kekst CNC, commissioned by the Munich Security Conference

## 5



## Terror threat

Concern about Islamic extremism on the rise in Western countries

In the wake of the Hamas attacks of October 7th, there has been a dramatic spike in anxiety about radical Islamic terrorism in the West, and in France it is now seen to be the biggest perceived risk. The threat is perceived to be an imminent one, especially in France, Germany, and Italy.

- It is seen to be the fourth-biggest risk in Italy (+18), and second biggest in Germany (+14) behind only mass migration.
- Islamic terrorism is not just a concern amongst European countries: It is up 16 places in Canada and the United States.
- There is a generational divide over the perception of the threat: In France it has a risk score of 94 for those over 65 compared to 57 for those under 25.
- The threat is perceived to be imminent. Some 36% say it is currently a major risk in France, a 19% increase on last year, with more than 1 in 5 in Germany (23%) and Italy (21%) agreeing.



France

**+16** is the increase in the perceived risk of radical Islamic terrorism in France

	Index score	Change in index score	Share thinking risk is imminent	Share feeling unprepared
Radical Islamic terrorism	80	+16	65	19
Mass migration as a result of war or climate change	71	+8	57	27
Climate change generally	69	+1	59	25
Extreme weather and forest fires	69	+0	62	24
Racism and other discrimination	66	+9	62	18
Russia	66	-4	59	28
Cyberattacks on your country	65	+3	59	20
Destruction of natural habitats	65	-1	63	24
Rising inequality	64	+0	62	23
Iran	64	+7	52	25
Economic or financial crisis in your country	62	-3	63	24
Disinformation campaigns from enemies	60	+5	58	16
Civil war or political violence	60	+4	49	24
Energy supply disruption	59	-9	66	25
Divisions amongst Western powers and institutions	58	+5	51	21
International organized crime	55	+2	52	19
Use of biological weapons by an aggressor	54	-2	49	27
Use of chemical weapons and poisons by an aggressor	54	-2	49	26
China	54	+1	47	29
Use of nuclear weapons by an aggressor	53	-6	49	23
Trade wars	53	-2	56	19
A future pandemic	52	-2	58	19
Political polarization	52	+4	52	17
Food shortages	51	-11	60	23
Right-wing terrorism	49	+4	52	19
Autonomous robots/artificial intelligence	49	+7	44	20
Rapid change to my country's culture	49	+2	41	27
Breakdown of democracy in my country	48	+0	42	28
North Korea	46	+0	39	25
The coronavirus pandemic	41	-7	66	14
United States	21	-1	32	23
European Union	19	+0	33	20

Data and illustration: Kekst CNC, commissioned by the Munich Security Conference

## 6

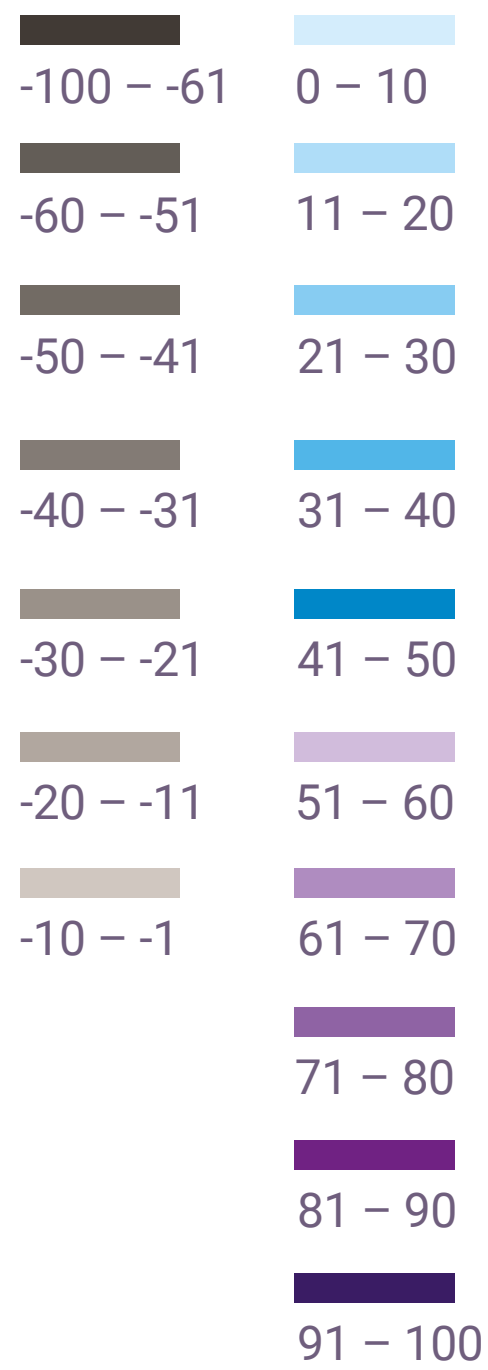
## Russia remains a prominent risk,

although concerns in many countries have fallen since last year, and China sees rising threats

- The threat of Russian aggression and related risks still rank considerably higher than in 2021, but compared to last year, those risks have dropped in the MSI. After global perceptions of Russia plummeted last year, they have modestly recovered in all countries except Japan but still remains very low. China, India, and South Africa consider Russia more an ally than a threat, with Brazil undecided, which stands in marked contrast to views among citizens in the G7 countries. Five of the G7 countries have a more favourable view of China than last year, with Canada and Japan being the exceptions. Strikingly, China sees all countries except Russia and Belarus as more threatening than last year.
- Russia has come down from the seventh-biggest perceived risk to the 14th globally and is now ranked behind China (11th).
- Russia is down in Germany, from biggest perceived risk to seventh, in Italy it has fallen to 12th spot, and in France to sixth (from first).
- However, Russia is perceived to be the biggest risk by people in the United Kingdom and is ranked fourth (-2) in the United States.
- Across the world there is less concern about use of nuclear weapons (-4), biological weapons (-6), energy supply disruption (-10), and food shortages (-11) than in 2022, when Russian invaded Ukraine.

### Citizens' perceptions of other countries, share saying country is an ally minus share saying country is a threat

October–November 2023, percent



	Ukraine	83	85	80	89	72	87	80	78	87	28	45		70	57	82	36	90	62	-1	56	19	-14	39	-33	-62	-76	-96
	United States	49	44	49	51	51	49	45	47	42	26	40	41	40	20	20	34	15	25	25	41	26	28	13	-34	-35	2	-37
	United Kingdom	55	55	56	63	63		57	58	52	28	33	56	36	27	38	30	24	24	34	20	35	35	17	-36	-39	-6	-48
	India	40	38	32	23	37	37	31	32	31	36	27	22	39	26	19	35	41	26	37	28		26	19	-9	8	24	34
	Japan	48	48	46	50	53	50	42	45	35	27	58	32		24	17	4	57	11	12	-6	28	31	30	-58	-22	-12	-61
	China	27	24	30	19	17	14	30	31	22	43		19	-2	28	33	14	-1	33	40	14	12	34	32		38	49	59
	France		59	58	57	50	56	56	58	42	22	23	43	37	16	32	23	56	21	18	22	13	31	-10	-23	-42	-20	-39
	Canada	51	43	48		54	53	46	47	37	21	33	46	39	15	18	29	53	13	22	18	-4	25	8	-40	-41	-10	-43
	Italy	44	41		41	38	41	40	43	34	22	15	32	35	16	26	14	43	19	14	13	9	21	-4	-17	-36	-10	-33
	Germany	50		46	42	37	40	46	48	30	7	15	27	29	11	34	16	40	16	8	14	2	15	-9	-31	-42	-31	-45
	Brazil	26	25	27	26	25	28	18	12	15		10	13	28	7	9	18	38	4	24	21	13	11	7	-12	-3	-1	-1
	South Africa	20	18	16	22	24	25	18	20	13	29	11	8	28	6	8	15	6		7	27	11	15	27	-2	6	16	16

After Russia's standings plummeted last year, it has modestly recovered in all countries except Japan but remains very low overall

Data and illustration: Kekst CNC, commissioned by the Munich Security Conference

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