

ITUC Frontlines Poll

Special Topic: Workers' security crisis

Prepared for the OECD Ministerial Council Meeting, Paris

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Foreword

Inequality is squeezing families and choking growth.

Uncertainty rules for working people - low income, insecure jobs with little or no social protection are the reality for too many families.

The global economy is stagnating, workers and their families are struggling and inequality is rising, yet world leaders and international institutions continue to ignore a large slice of the solution - wages and social protection.

In 2014, the ITUC Global Poll found that for over half (53%) of the world's population family income had fallen behind the cost of living.

Coupled with those that reported their income had 'stayed the same' (29%), an overwhelming 82% of the world's population reported that their income was stagnating or falling behind.

For 2015 the ITUC conducted further research with people from nine countries that make up 50% of the world's GDP.

Again more than half (55%) of the respondents reported that in terms of their finances, they would describe their life as getting worse (18%) or staying the same (37%).

The question on all our lips at the 2015 OECD Ministerial is will we hear the "I" words?

The first is income.

Income generates demand. Income enables economic participation and protects and increases jobs in all sectors, and income creates social cohesion.

It is a six letter word that is code for wages and social protection - minimum living wages, collective bargaining, pensions and unemployment benefits. When combined with education, health care, child, maternity and other social protection elements these are the factors that actually create economic activity for people and global trade.

So why don't we hear the shouts from the rooftops for an increase in wages and the guarantee of the social protection floor for all people?

Why do we see governments and international institutions ignoring the corporate greed that drives profits up but won't pay a minimum living wage of \$177 a month in Cambodia or \$120 in Bangladesh?

In producer economies, where millions of workers could be the drivers of growth, low incomes and insecure jobs in supply chains dominated by multi-national companies are failing the global economy.

In three main producer countries, Indonesia, the Philippines and Turkey which together export more than \$400 bn of products to the global economy, 66 % of people reported in terms of their personal financial situation they are struggling or just getting by.

Almost half (49%) agree their jobs have become more irregular in the past 12 months. Over half (58%) are concerned that themselves or someone in their family could lose their job in the coming 12 months.

Why is there no call to formalise the jobs in the informal economy, reaching highs of 90% in some countries, where a minimum living wage,

social protection and labour rights should ensure decent work, increased demand and a healthy tax base for sustainable economies?

These are the questions to ponder. What we do know is that the trust in governments and institutions to make a difference for working people and their families has disintegrated. 78 % think the economic system favours the wealthy (ITUC Global Poll 2014).

This loss of trust has a negative effect on economic participation and increases the drag on demand and economic growth.

Wages, social protection and investment in the jobs-rich sectors of infrastructure and the care economy; this is what will push inequality off the stage.

We are listening for the “I” words - income, investment, inclusiveness. Will we hear them?

Sharan Burrow, General Secretary, International Trade Union Confederation

Commentary

In 2014, the ITUC Global Poll of 14 countries found that 53% of the world's population family income had fallen behind the cost of living.

Coupled with those that reported their income had 'stayed the same' (29%), an overwhelming 82% of the world's population reported that their income was stagnating or fallen behind.

58% of people in this same poll reported that they could not save – a figure that was replicated over the previous two years, with 61% reporting that they couldn't save in 2013, and 60% in 2012.

In 2014, 10% of these same respondents reported that they did not have enough for basic essentials.

Within this context, the ITUC conducted further research in the form of a short poll with people from nine developed and developing countries, China, France, Germany, India, Indonesia, Philippines, Turkey, the UK and the USA.

In addition, the ITUC commissioned further questions focussed on people in three countries; Indonesia, Turkey and the Philippines.

The findings of this 2015 study represent the opinions of people from countries who make up 50% of the world's GDP.

The finances of the countries which represent 50 percent of GDP are stagnating, or getting worse

Overall, over half (55%) of the respondents in the nine country poll reported that in terms of their finances, they would describe their life as getting worse (18%) or staying the same (37%). In line with the overall results, more than half (51%) of working people also describes their finances as getting worse (16%) or stagnating (35%).

The two countries most likely to report that their finances were getting worse or stagnating were those in France (87%, with 39% of those reporting things were getting worse) and the United Kingdom (72%, with 24% of those reporting that things were getting worse).

This contrasts against China, where 74% reported that in terms of their finances, their life was getting better – by far the most positive result of any country, with India second at 61%.

In the three producer economies (Indonesia, the Philippines and Turkey) many people are struggling, or just getting by.

In the question focused on people in the producer countries (Indonesia, the Philippines and Turkey) 66% reported that in terms of their personal financial situation they were struggling (16%) or just getting by (50%).

Just 6% would describe themselves as thriving, while 27% thought themselves to be financially secure.

However, financial security does vary from country to country, with 26% of those in Turkey and 17% of those in the Philippines describing themselves as struggling, compared to just 6% in Indonesia.

Unsurprisingly a very large majority (75%) of respondents who were not currently working described themselves as struggling (24%) or just getting by (51%).

However, even a majority (64%) of those respondents who currently working reported that they were struggling (14%) or just getting by (50%).

Just 36% of working people in these countries reported that they were at least financially secure.

Financial insecurity is compounded by a pervading sense of insecurity about their jobs

Almost half (49%) of people in the producer economies agree that their job has become more irregular and insecure in the past 12 months.

Over half (58%) are concerned that themselves or someone in their family could lose their job in the coming 12 months.

Unsurprisingly in this context, a large majority (63%) reported that they are more stressed about their job and wage security than they were 12 months ago.

All these issues related to job insecurity were heightened in Turkey, where:

- 58% reported that their job was more irregular and insecure than 12 months ago
- 64% are concerned that they or someone in their family may lose their job in the coming 12 months
- 71% said that they were more stressed about their job and wage security than they were 12 months ago

At a time when they are struggling, many are going without access to social protection

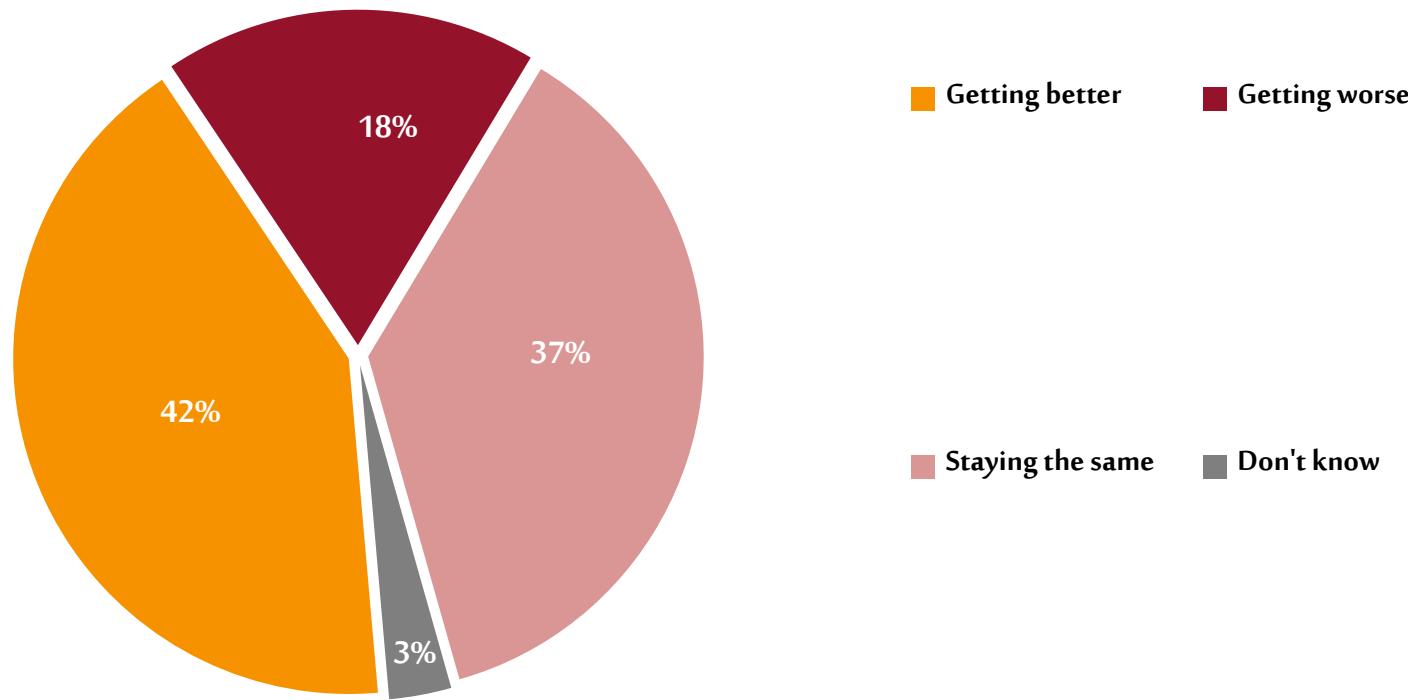
At least one third of respondents in these economies stated that their family did not have access to basic social protection, such as:

- affordable healthcare (35% do not have)
- affordable education (42% do not have)
- a decent retirement income (44% do not have)
- paid maternity leave (59% do not have)
- unemployment benefits (69% do not have)

Those in Indonesia appear to have the most limited access to social protection, where an overwhelming 91% of people in Indonesia said that their family did not have access to unemployment benefits, 69% had no access to paid maternity leave and 63% had no access to a decent retirement income.

Chart 1: Direction of Life in terms of Finances (9 Country Average)

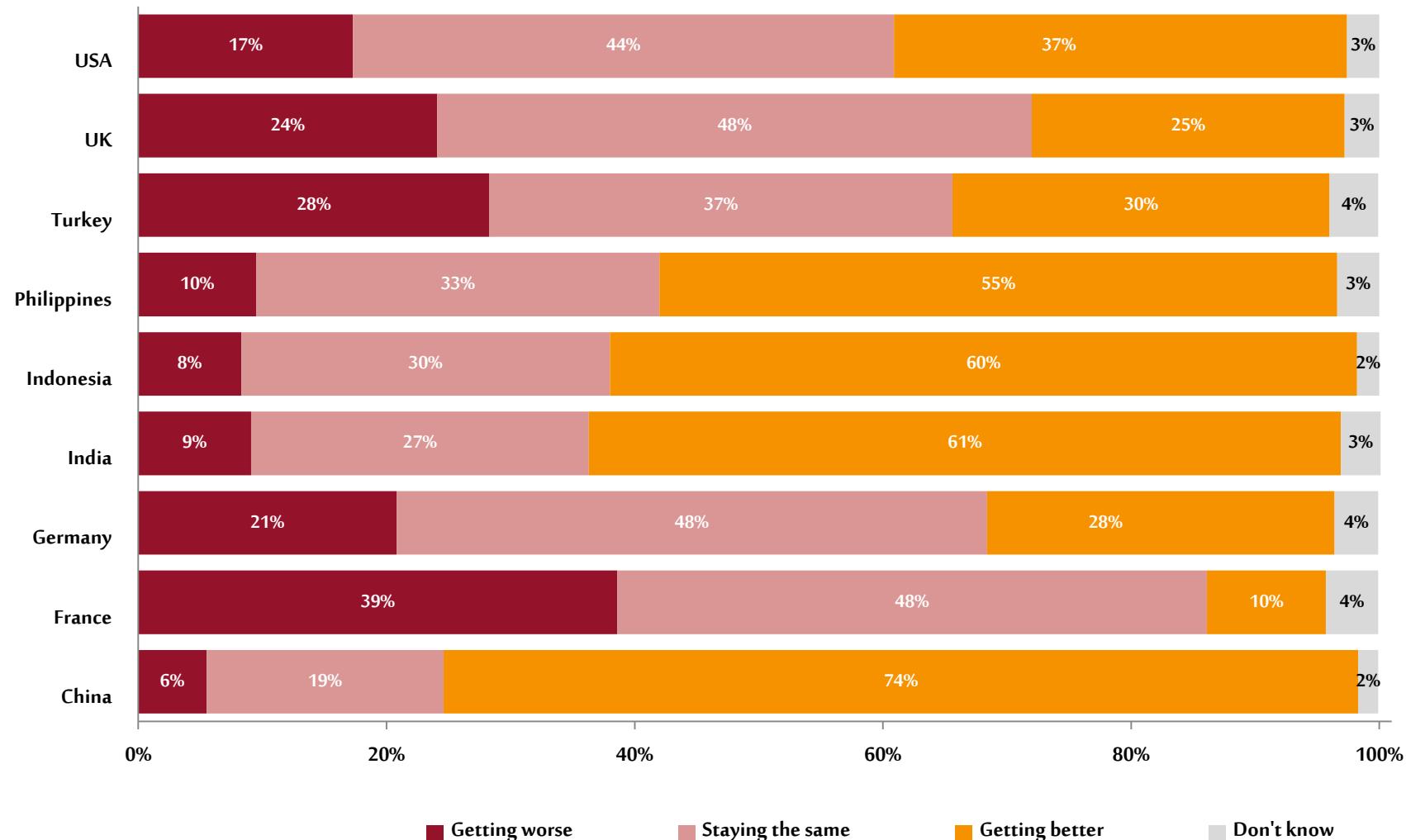
9 COUNTRY AVERAGE



Notes: Sample size for each country is listed in the methodology.

Question: In terms of your finances, would you describe your life as: Getting better OR Getting worse OR Staying the same OR Don't know

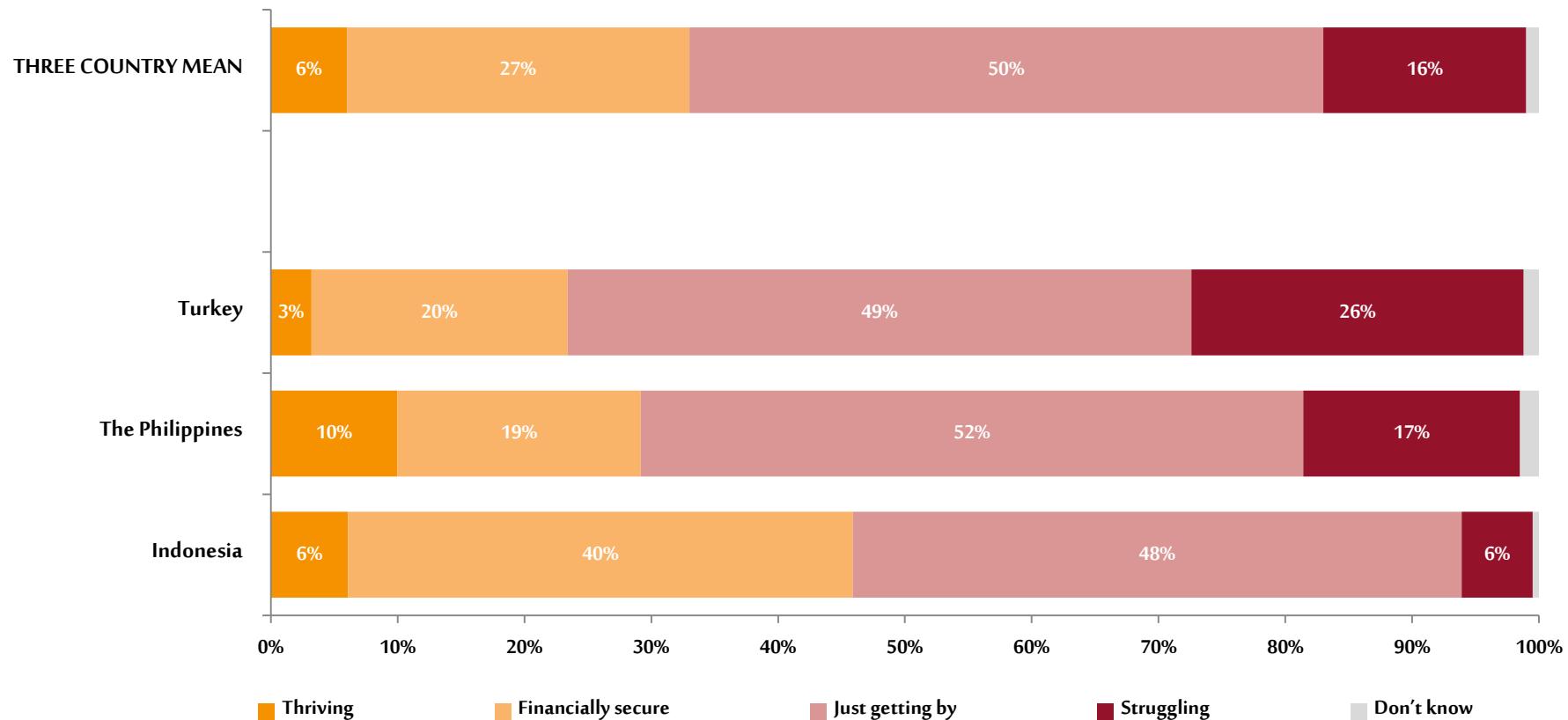
Chart 2: Direction of Life in terms of Finances (All Countries)



Notes: Sample size for each country is listed in the methodology.

Question: In terms of your finances, would you describe your life as: Getting better OR Getting worse OR Staying the same OR Don't know

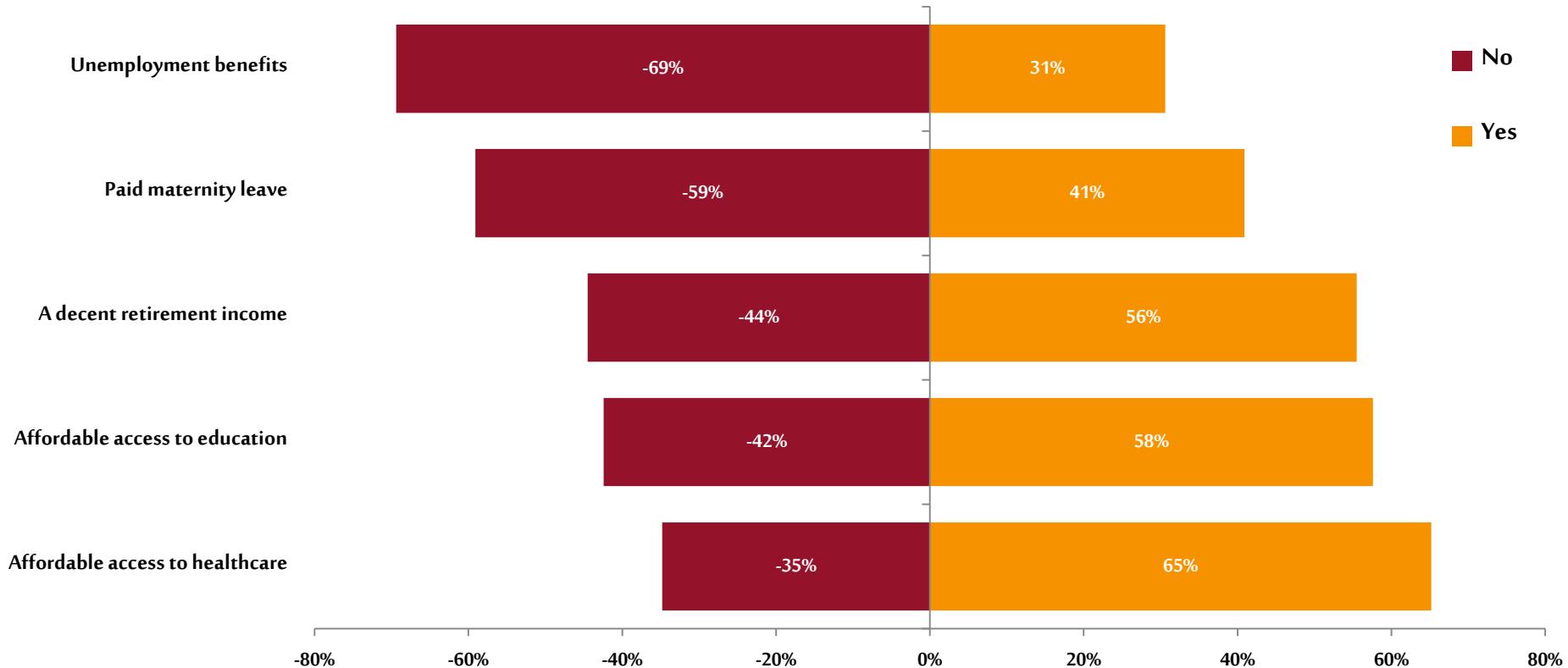
Chart 3: Personal Financial Situation



Notes: Sample size for each country is listed in the methodology.

Question: When thinking about your current personal financial situation, would you say you are: Thriving OR Financially secure OR Just getting by OR Struggling OR Don't know

Chart 4: Access to Social Protection (Country Average)

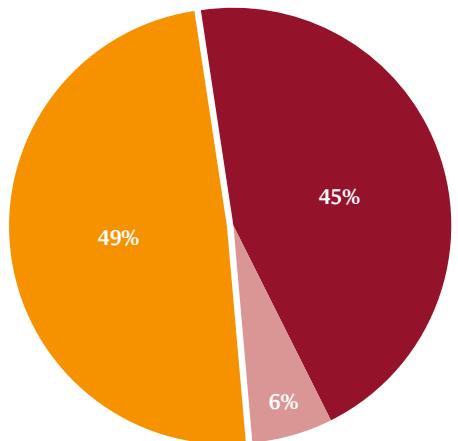


Notes: Chart 5 demonstrates the average across the three producer countries; Indonesia, the Philippines and Turkey

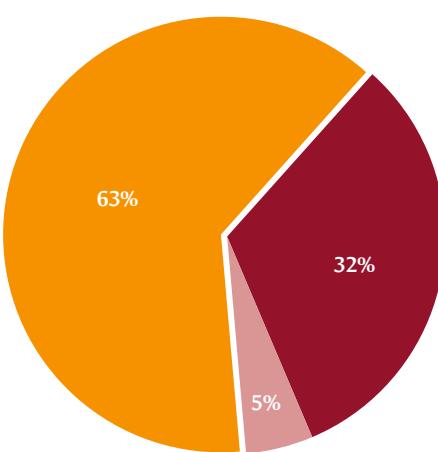
Question: *If you needed it, would you and your family have access to the following?*

Chart 5: Attitudes towards Job Security

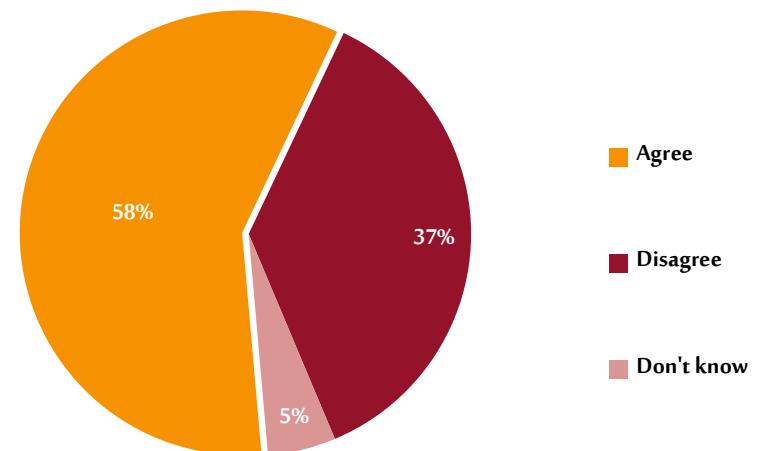
My job has become more irregular and insecure



I am more stressed about job and wage security



I am concerned that myself or someone in my family may lose my/their job in the coming 12 months



Legend:

- Agree (Orange)
- Disagree (Dark Red)
- Don't know (Light Pink)

Notes: Chart 6 demonstrates the average across the three producer countries; Indonesia, the Philippines and Turkey

Question: Would you say you (totally agree, tend to agree, tend to disagree, totally disagree); My job has become more irregular and insecure in the past 12 months, I am more stressed about job and wage security today than I was 12 months ago, I am concerned that myself or someone in my family may lose my/their job in the coming 12 months.

Tables

Table 1: Direction of Life in terms of Finances

Question: In terms of your finances, would you describe your life as:

	TOTAL	China	France	Germany	India	Indonesia	Philippines	Turkey	UK	USA
Getting better	42%	74%	10%	28%	61%	60%	55%	30%	25%	37%
Getting worse	18%	6%	39%	21%	9%	8%	10%	28%	24%	17%
Staying the same	37%	19%	48%	48%	27%	30%	33%	37%	48%	44%
Don't know	3%	2%	4%	4%	3%	2%	3%	4%	3%	3%

	TOTAL	Working	Not Working
Getting better	42%	47%	28%
Getting worse	18%	16%	24%
Staying the same	37%	35%	42%
Don't know	3%	2%	5%

Tables 2: Personal Financial Situation

Question: When thinking about your current personal financial situation, would you say you are:

	TOTAL	China	France	Germany	India	Indonesia	Philippines	Turkey	UK	USA
Thriving	6%	-	-	-	-	6%	10%	3%	-	-
Financially secure	27%	-	-	-	-	40%	19%	20%	-	-
Just getting by	50%	-	-	-	-	48%	52%	49%	-	-
Struggling	16%	-	-	-	-	6%	17%	26%	-	-
Don't know	1%	-	-	-	-	1%	2%	1%	-	-

	TOTAL	Working	Not Working
Thriving	6%	7%	4%
Financially secure	27%	29%	18%
Just getting by	50%	50%	51%
Struggling	16%	14%	24%
Don't know	1%	<1%	3%

Tables 3: Attitudes towards Job Security

Question: Would you say you....?

My job has become more irregular and insecure in the past 12 months	TOTAL	China	France	Germany	India	Indonesia	Philippines	Turkey	UK	USA
TOTAL Agree	49%	-	-	-	-	42%	47%	58%	-	-
TOTAL Disagree	45%	-	-	-	-	52%	47%	35%	-	-
Totally agree	20%	-	-	-	-	11%	19%	30%	-	-
Tend to agree	29%	-	-	-	-	31%	28%	28%	-	-
Tend to disagree	28%	-	-	-	-	36%	26%	20%	-	-
Totally disagree	17%	-	-	-	-	16%	21%	15%	-	-
Don't know	6%	-	-	-	-	6%	6%	7%	-	-

I am more stressed about job and wage security today than I was 12 months ago	TOTAL	China	France	Germany	India	Indonesia	Philippines	Turkey	UK	USA
TOTAL Agree	63%	-	-	-	-	53%	66%	71%	-	-
TOTAL Disagree	32%	-	-	-	-	40%	30%	25%	-	-
Totally agree	27%	-	-	-	-	13%	25%	42%	-	-
Tend to agree	36%	-	-	-	-	40%	41%	29%	-	-
Tend to disagree	22%	-	-	-	-	30%	20%	15%	-	-
Totally disagree	10%	-	-	-	-	10%	10%	10%	-	-
Don't know	5%	-	-	-	-	7%	5%	4%	-	-

I am concerned that myself or someone in my family may lose my/their job in the coming 12 months	TOTAL	China	France	Germany	India	Indonesia	Philippines	Turkey	UK	USA
TOTAL Agree	59%	-	-	-	-	50%	60%	64%	-	-
TOTAL Disagree	37%	-	-	-	-	42%	35%	32%	-	-
Totally agree	28%	-	-	-	-	18%	27%	38%	-	-
Tend to agree	31%	-	-	-	-	32%	33%	26%	-	-
Tend to disagree	22%	-	-	-	-	27%	20%	20%	-	-
Totally disagree	14%	-	-	-	-	15%	15%	12%	-	-
Don't know	5%	-	-	-	-	7%	4%	4%	-	-

Tables 4: Access to Social Protection

Question: If you needed it, would you and your family have access to the following?

'Yes'	TOTAL	China	France	Germany	India	Indonesia	Philippines	Turkey	UK	USA
Affordable access to healthcare	65%	-	-	-	-	69%	70%	57%	-	-
Affordable access to education	58%	-	-	-	-	47%	67%	59%	-	-
A decent retirement income	56%	-	-	-	-	37%	56%	75%	-	-
Paid maternity leave	41%	-	-	-	-	31%	47%	45%	-	-
Unemployment benefits	31%	-	-	-	-	9%	35%	48%	-	-

'No'	TOTAL	China	France	Germany	India	Indonesia	Philippines	Turkey	UK	USA
Affordable access to healthcare	35%	-	-	-	-	31%	30%	43%	-	-
Affordable access to education	42%	-	-	-	-	53%	33%	41%	-	-
A decent retirement income	44%	-	-	-	-	63%	44%	25%	-	-
Paid maternity leave	59%	-	-	-	-	69%	53%	55%	-	-
Unemployment benefits	69%	-	-	-	-	91%	65%	52%	-	-

Methodology

These conclusions are based on the 2015 International Trade Union Confederation Frontlines Poll.

The results in document relate to four of nine questions asked in the Frontlines Poll 2015.

Of these nine questions, three were asked in nine countries, including China, France, Germany, India, Indonesia, the Philippines, Turkey, the United Kingdom and the United States.

The remaining six questions were asked only of people in Indonesia, Turkey and the Philippines.

The results to the questions not included in this report will be released separately.

In each of the nine countries, approximately n=1000 respondents were interviewed. Exact sample sizes are listed below.

Country	Sample Size
China	1024
France	1038
Germany	1047
India	1017
Indonesia	1027
Philippines	1001
Turkey	1011
UK	1047
USA	1046

The sample in each country has been selected by quotas to reflect national proportions in regards to age, gender and region.

SPSS Software and Microsoft Excel were used to analyse the results.

This project was conducted in line with AS: ISO 20252 guidelines.

The findings of this study represent the opinions of people from countries who make up 50% of the world's GDP.

Essential Media Communications were responsible for questionnaire design, data analysis and reporting.

TNS Opinion carried out the fieldwork between 23rd and the 29th April 2015.

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Postscript: Netherlands Data

In May 2015 the ITUC conducted a short poll independent of the one that constitutes this report.

This poll was conducted with 1010 adult residents of the Netherlands (aged 16-70).

Just 21% of these respondents agreed that the financial position of their household was improving.

33% disagreed with this statement, while 41% selected ‘neither agree nor disagree’.

Although structured and worded differently, these results are in line with the questions presented in the rest of this report, whereby those in the developed world are less likely to think that they are getting ahead financially.