

Radar Report – Key Trends

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Introduction



Radar is a global public opinion research program of evidence and insights that is a vital part of GlobeScan's contribution to helping influential organizations understand material issues, societal trends and the expectations people have of them. In uncertain times, leadership organizations need to build trust with their stakeholders and society and better engage with their external context.

Since 1997, GlobeScan *Radar* has explored questions such as how concerns about several economic, environmental and social issues are changing, how people's preferences and behaviors are evolving over time, and how well different sectors are seen to be fulfilling their responsibilities to society.

Based on representative surveys of 1,000 people in each of 25 countries, *Radar* draws upon GlobeScan's unique database of over two decades of polling public opinion about their outlook toward societal actors and the issues affecting them.

We hope these insights help us all to better understand and navigate the present, and to collectively build a more sustainable and equitable future.



Methodology and Research Design

Methodology Summary

Participating Countries 2019



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- Representative online samples of approximately 1,000 adults per country in each of 25 countries
- Samples representative of online population, weighted to reflect general population census data
- Online surveying in April and May 2019
- Where historical data are shown, questions were previously asked using an in-person and telephone methodology.



Key Trends

Key Trends in 2019



1. Declining legitimacy of established power
2. Erosion of business' social license to operate
3. A growing wave of environmental concern
4. Growing faith in science and technology
5. The Global South: engaged and optimistic

1. Declining legitimacy of established power

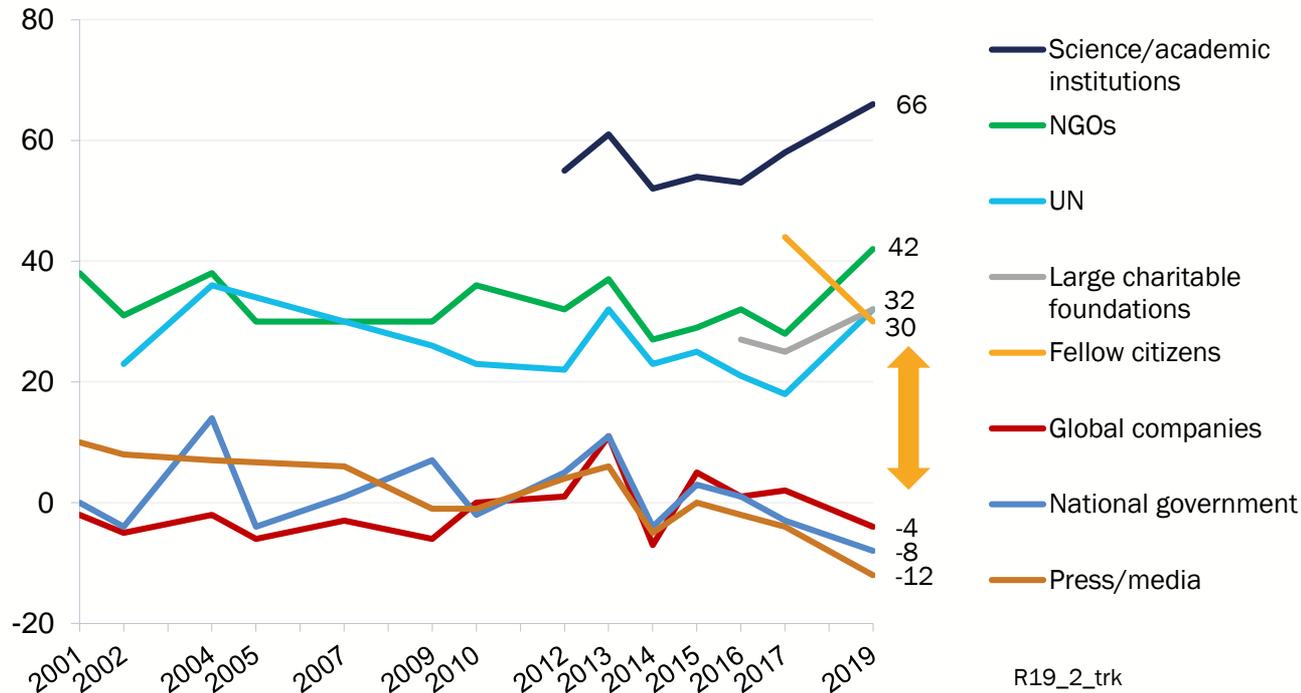


- Popular trust in institutions has become more differentiated. National governments, global companies, and the press are all losing credibility, while NGOs, the UN, and the scientific/academic community are gaining it.
- People in OECD countries tend to be less trusting of all institutions, including national governments.
- In many countries, particularly in North America and Europe, there is a growing sense that government lacks legitimacy. Although opinion varies by country, on average, respondents do not believe that their countries are governed by the will of the people, nor that their elections are free and fair.
- Declining confidence in established power, particularly in the global North, is a potent potential force for destabilization. With governments increasingly viewed as incapable of solving big challenges like climate change and social inequality, there is an opening for new citizen movements — or, more dangerously, new manifestations of localism and populism.

Least-trusted institutions see further decreases in trust, while those most-trusted have increased ratings



Trust in Institutions, Net Trust,* Average of 17 Countries,** 2001–2019



Global companies, national governments, and the press/media remain the worst-performing institutions in terms of public trust, all with declining ratings compared to 2017. Press/media has reached its lowest net trust level since tracking began in 2001.

The most trusted institutions – science/academic institutions, NGOs, and large charitable organizations – all show an increase in net trust from 2017 levels.

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*“A lot of trust” and “Some trust” minus “Not much trust” and “No trust at all”

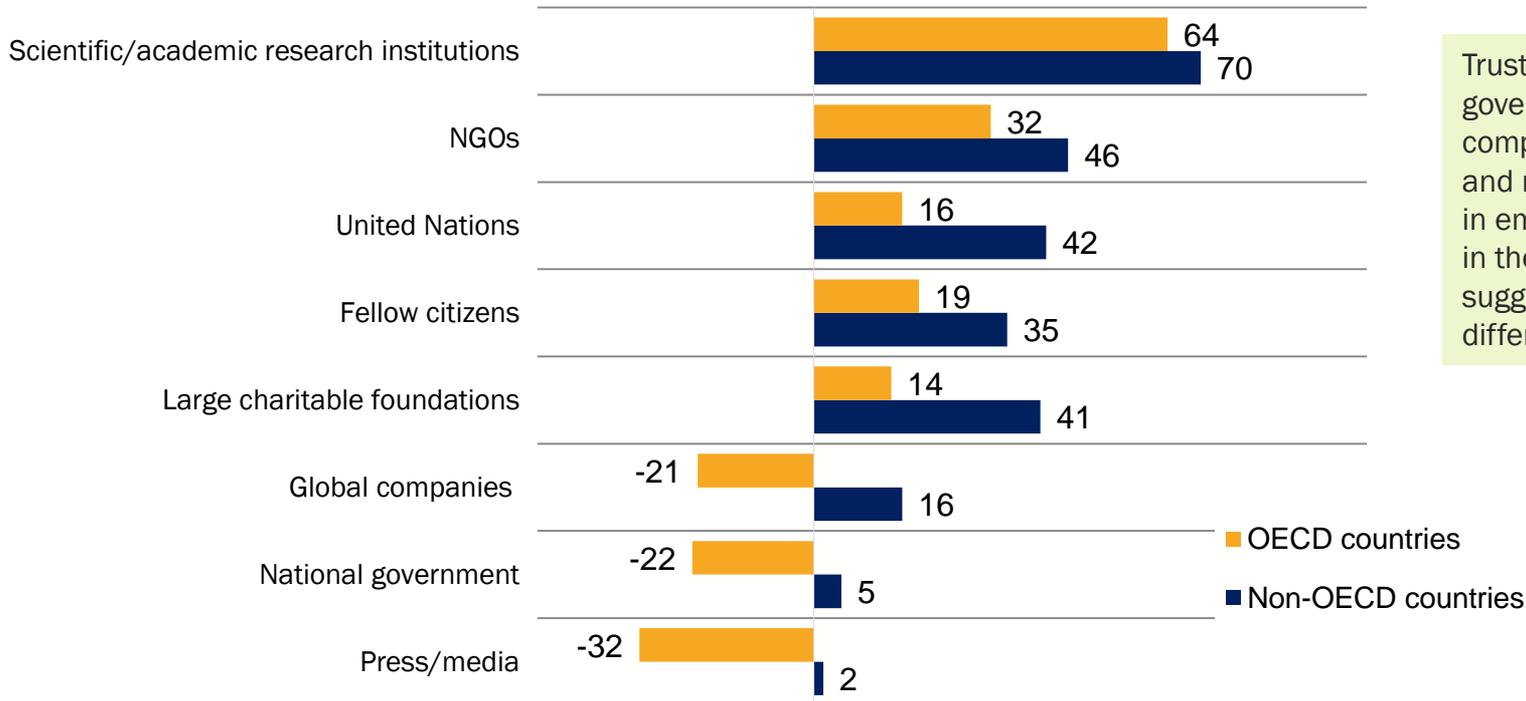
**Includes Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Kenya, Mexico, Nigeria, Russia, South Korea, Spain, Turkey, UK, and USA. These estimates are therefore slightly different from those of net trust for all 25 countries in 2019.

Not all countries were asked in all years. This question was previously asked using an in-person and telephone methodology. T2. Please indicate how much you trust each of following institutions to operate in the best interest of society. Would you say you have a lot of trust, some trust, not much trust, or no trust at all in...?

For all institutions, trust is higher in emerging economies than in OECD countries



Trust in Institutions, Net Trust,* by Economic Development, 2019



Trust in institutions like government, global companies, and the press and media is **much higher** in emerging markets than in the OECD countries, suggesting a significantly different outlook.

*"A lot of trust" and "Some trust" minus "Not much trust" and "No trust at all"

OECD countries include Australia, Canada, France, Germany, Italy, Japan, Mexico, South Korea, Spain, Sweden, Turkey, UK, and USA.

Non-OECD countries include Argentina, Brazil, China, Hong Kong, India, Indonesia, Philippines, Kenya, Nigeria, Russia, Saudi Arabia, and South Africa.

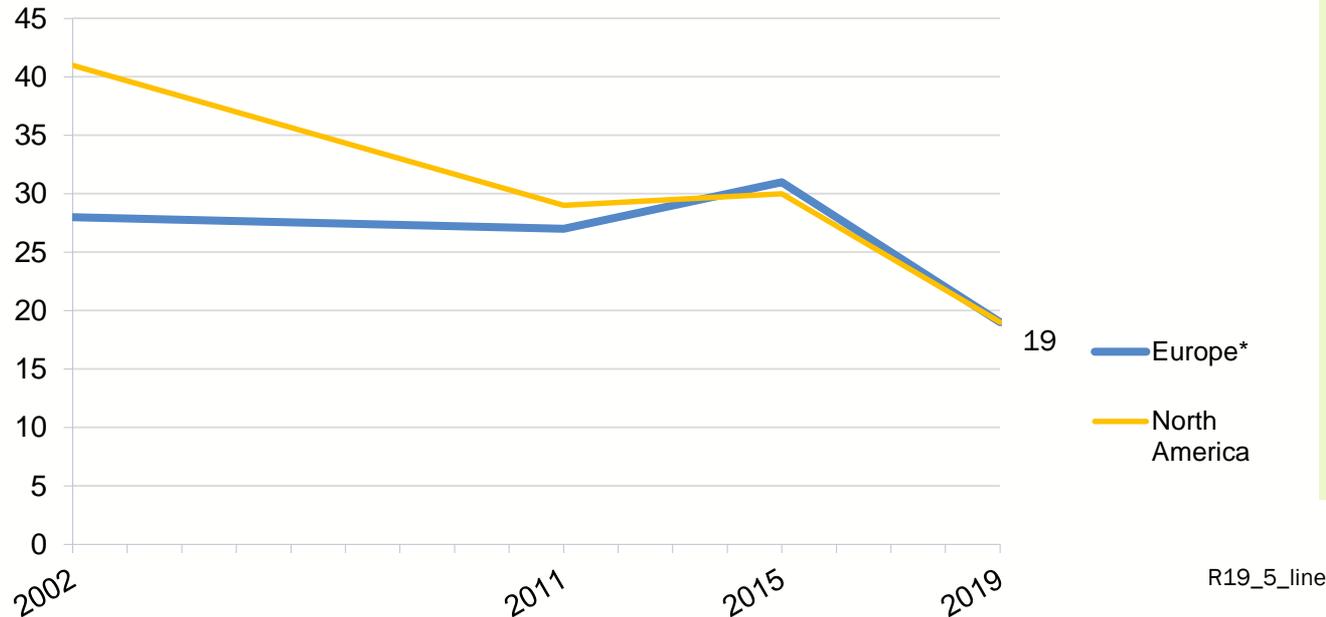
T2. Please indicate how much you trust each of the following institutions to operate in the best interest of our society. Would you say you have a lot of trust, some trust, not much trust, or no trust at all in...?

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Perceived governance by the will of the people is trending down in Europe and North America

Country Governed by Will of the People, “Yes,” Europe and North America, 2002–2019



In Europe and North America, fewer people say that their countries are governed by the will of the people in 2019 than in previous years.

In India and China, the proportion agreeing that they are governed by the will of the people has been trending up since 2002.

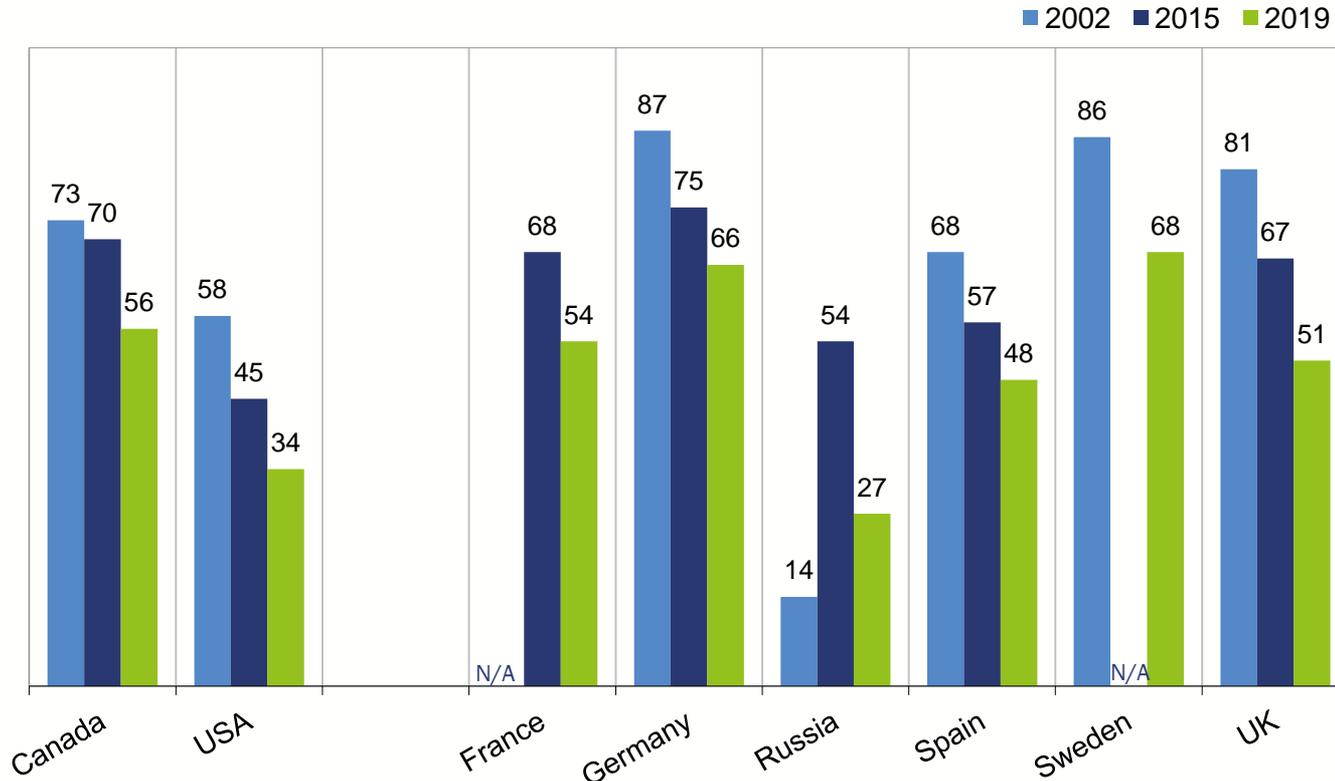
*Europe includes France, Germany, Italy, Russia, Spain, Sweden, Turkey, and UK. Not all countries were asked in all years. This question was previously asked using an in-person and telephone methodology.

T5 - Would you say that this country is governed by the will of the people? - “Yes”

North Americans and Europeans have become less likely to think that elections are free and fair



Country Elections Are Free and Fair, by Country, 2002–2019



In the USA and Canada, and in European countries, the proportion who believe their elections are free and fair has sharply declined.

In India, Mexico, and South Korea, the reverse is true, with a higher proportion believing this in 2019 than in prior years.

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2. Erosion of business' social license to operate

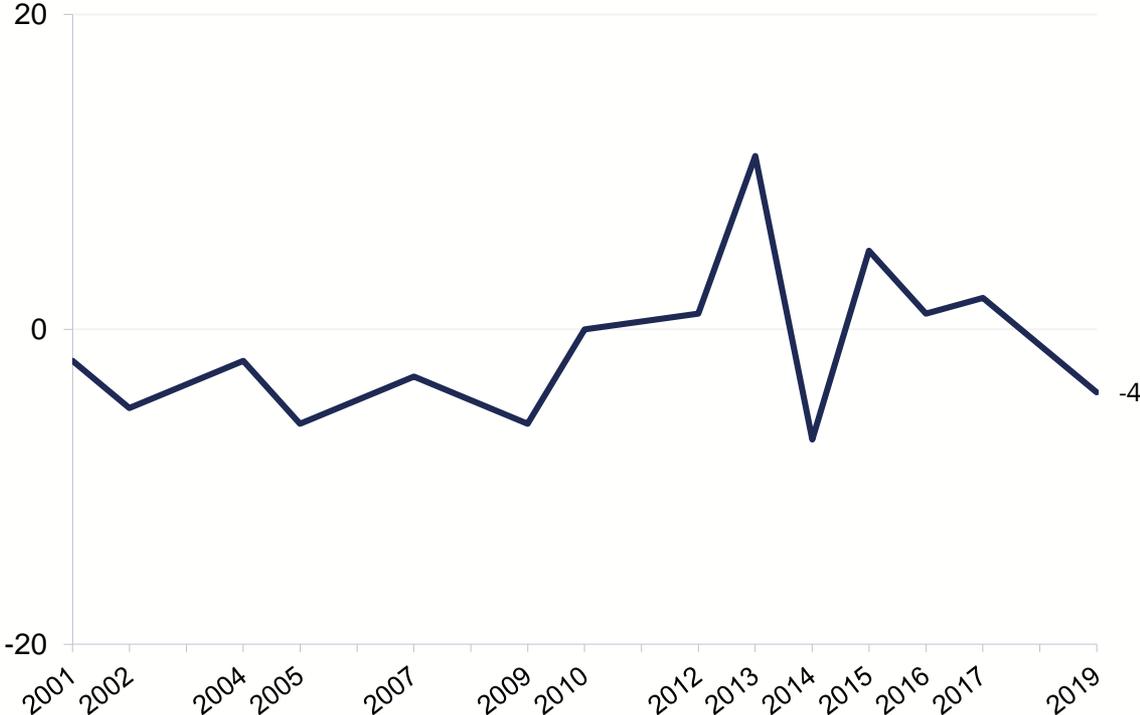


- In parallel with their loss of trust in government, people are also losing trust in large global companies. Trust in big business has dropped particularly sharply in recent years in North America and Europe.
- Other results show that business is not viewed as having the best interest of society in mind. Further, fewer than half of the global public believe that large companies, and the rich, pay their fair share of taxes.
- Most people agree that governments should require large companies to work toward a better society, even if it may lead to negative economic impacts. This contrasts with our result that business is slightly better trusted than government on average. People's distrust for government, however strong, does not mean they want business to have a free hand.
- These results suggest that big business will face ongoing challenges to its social license, with people being receptive to regulation, tax reform, and increased minimum wages.
- Consumers in Europe and North America are likely to be cynical towards attempts by large companies to appear responsible and/or purpose-driven.

Trust in business is down in Europe and North America



Trust in Global Companies, Net Trust,* Average of 17 Countries,* 2001-2019



Trust in large global companies to operate in the best interest of society has declined over the past four years, particularly in Europe and North America.

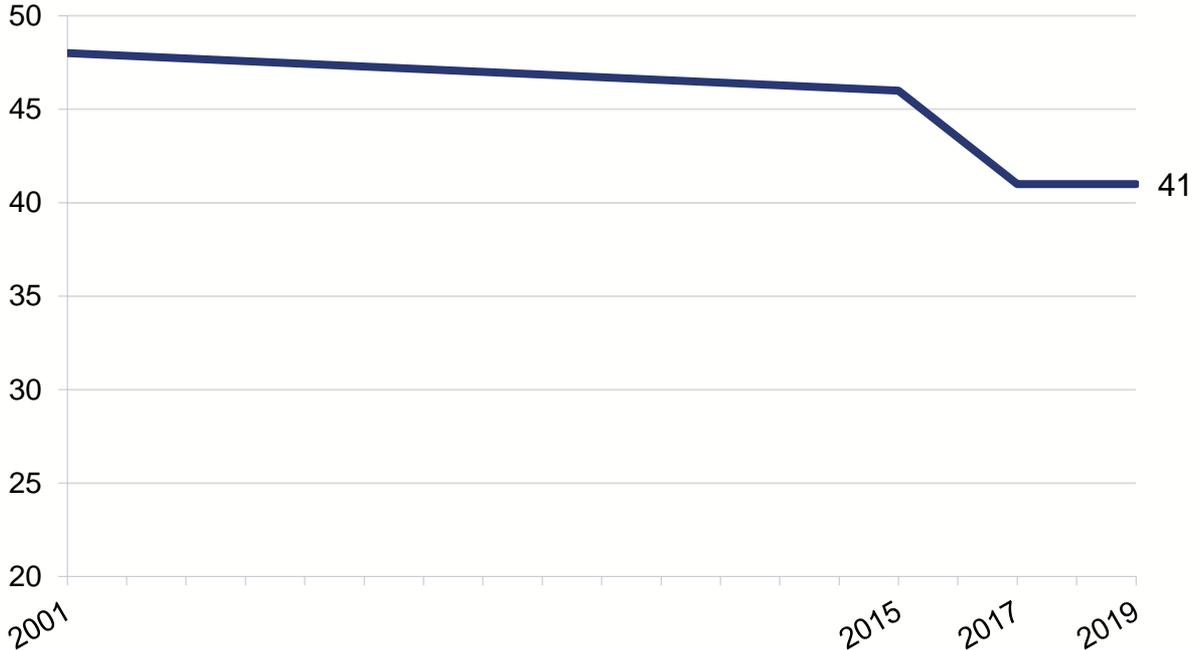
*Includes Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Kenya, Mexico, Nigeria, Russia, South Korea, Spain, Turkey, UK, and USA. These estimates are therefore slightly different from those of net trust for all 25 countries in 2019. Not all countries were asked in all years. This question was previously asked using an in-person and telephone methodology.

T2. Please indicate how much you trust each of following institutions to operate in the best interest of society. Would you say you have a lot of trust, some trust, not much trust, or no trust at all in...?

People across the world have become less likely to agree that companies pay their fair share of taxes



Companies Pay Fair Share of Taxes, “Strongly Agree” and “Somewhat Agree,” Average of 18 Countries,* 2001–2019



Respondents in emerging markets in Asia and Africa are more likely to agree that companies pay a fair share of taxes than in industrialized markets in Europe and North America.

*Includes Argentina, Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Kenya, Mexico, Nigeria, Russia, Spain, Sweden, Turkey, UK, and USA. Not all countries were asked in all years.

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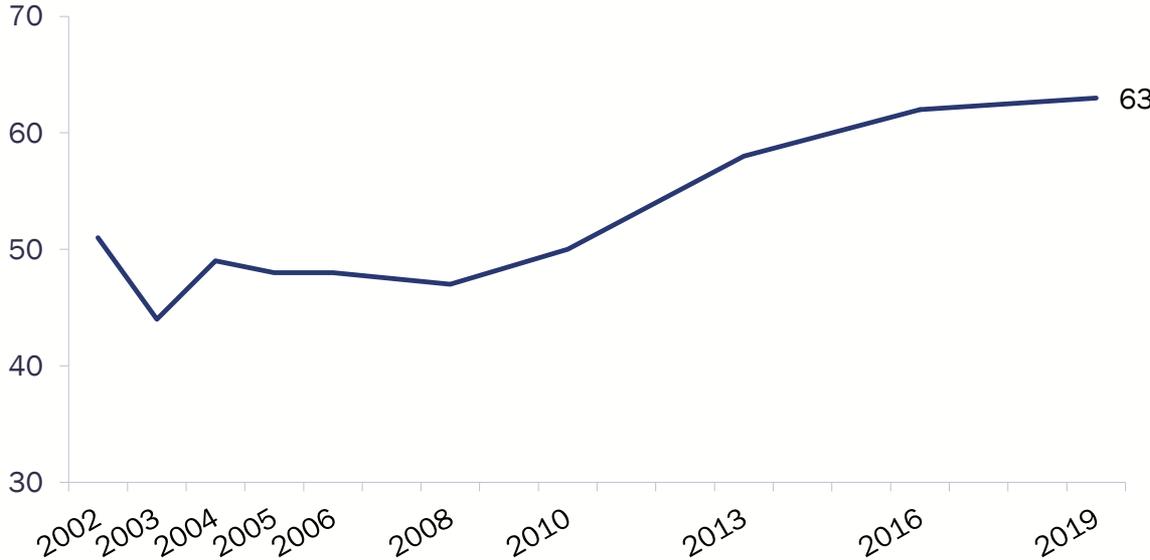
T4. For each of the following statements, please tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.
– Large companies pay their fair share of taxes in our country. – Companies pay their fair share of taxes on our country, “Strongly Agree” + “Somewhat Agree”



There is strong and growing support for regulating corporate responsibility



Governments Should Require Large Companies to Work toward a Better Society, Agree (“Strongly Agree” and “Somewhat Agree”), Average of 18 Countries,* 2002–2019



There is strong and growing agreement that governments should create laws that require companies to go beyond their business interests and contribute to a better society, suggesting people do not believe companies will do so on their own.

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*Includes Argentina, Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Mexico, Nigeria, Russia, South Korea, Spain, Turkey, UK, and USA. Not all countries were asked in all years. This question was previously asked in GlobeScan’s Radar research programme, using an in-person and telephone methodology.

T4. Please tell me if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree with each of the following statements – Our government should create laws that require large companies to go beyond their traditional economic role and work to make a better society, even though this could lead to higher prices and fewer jobs.



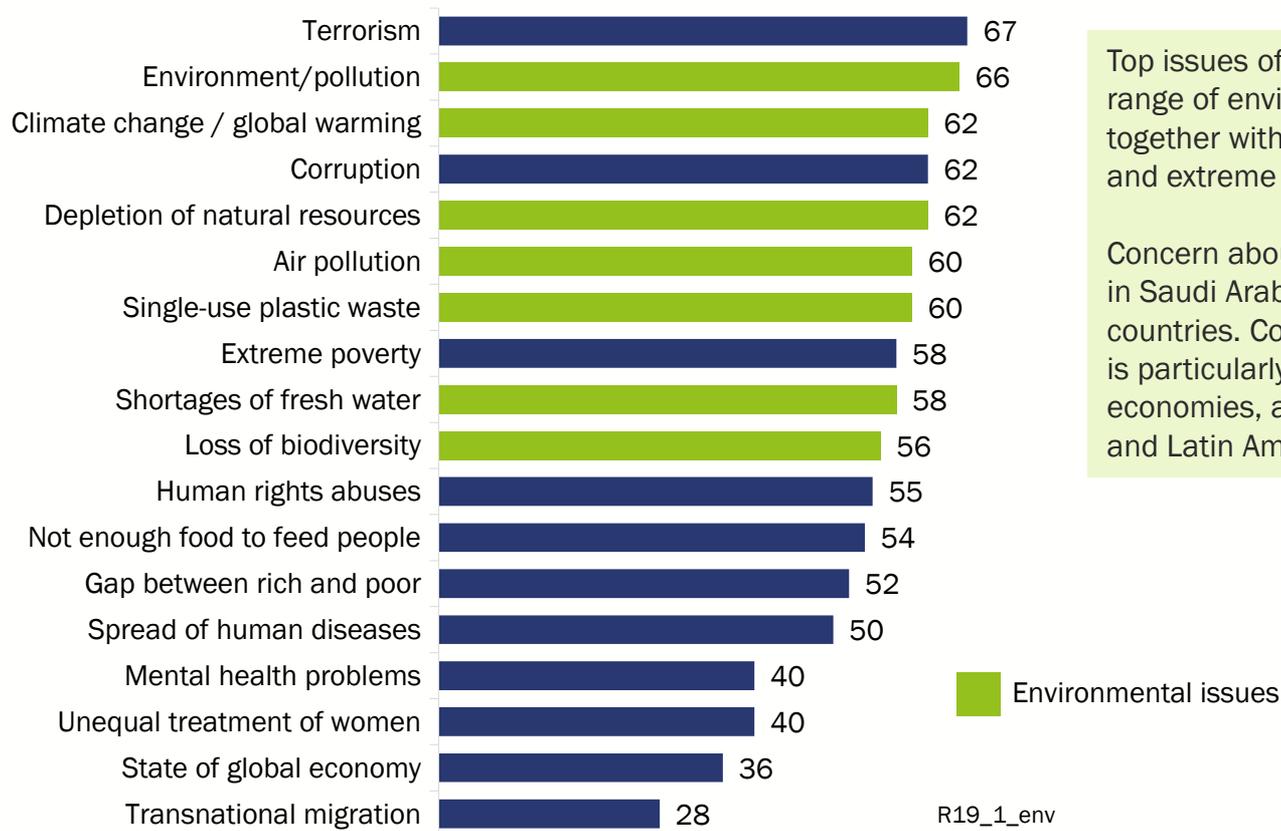
3. A growing wave of environmental concern



- Globally, concern about the environment and pollution is on par with concern about terrorism, with worries about specific environmental issues on the rise on average across the countries studied over time. In 21 of the 25 countries surveyed, over 50 percent of people now say that climate change is a “very serious” global problem.
- However, the countries with the lowest proportions recognizing climate change as a “serious” global threat include China, Russia, and the United States – three of the four top emitters of carbon dioxide as of 2019.
- Worries about the environment and climate change are likely to continue to grow, especially as younger generations tend to be significantly more attuned to these issues than older respondents.
- There will likely be increasing participation in citizen movements around environmental issues, many of them led by youth.

Majorities are very worried about a range of environmental challenges

Concern about Global Issues, “Very Serious,” Average of 25 Countries, 2019

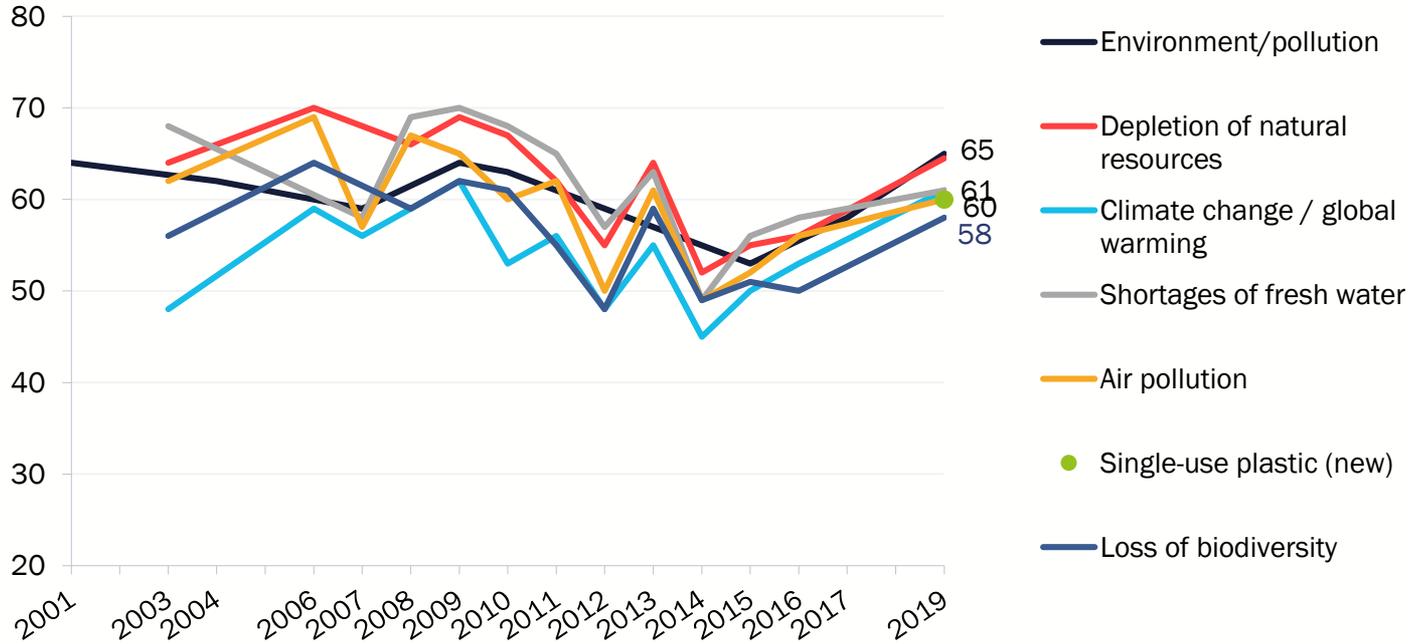


Top issues of concern include a range of environmental issues, together with terrorism, corruption, and extreme poverty.

Concern about terrorism is highest in Saudi Arabia and African countries. Concern about corruption is particularly high in emerging economies, and especially in Africa and Latin America.

Concerns about environmental issues are increasing

Concern about Environmental Issues, “Very Serious,” Average of 17 Countries,* 2001–2019



Worries about a range of tracked environmental issues have continued to grow over the past few years, after dipping earlier in the decade.

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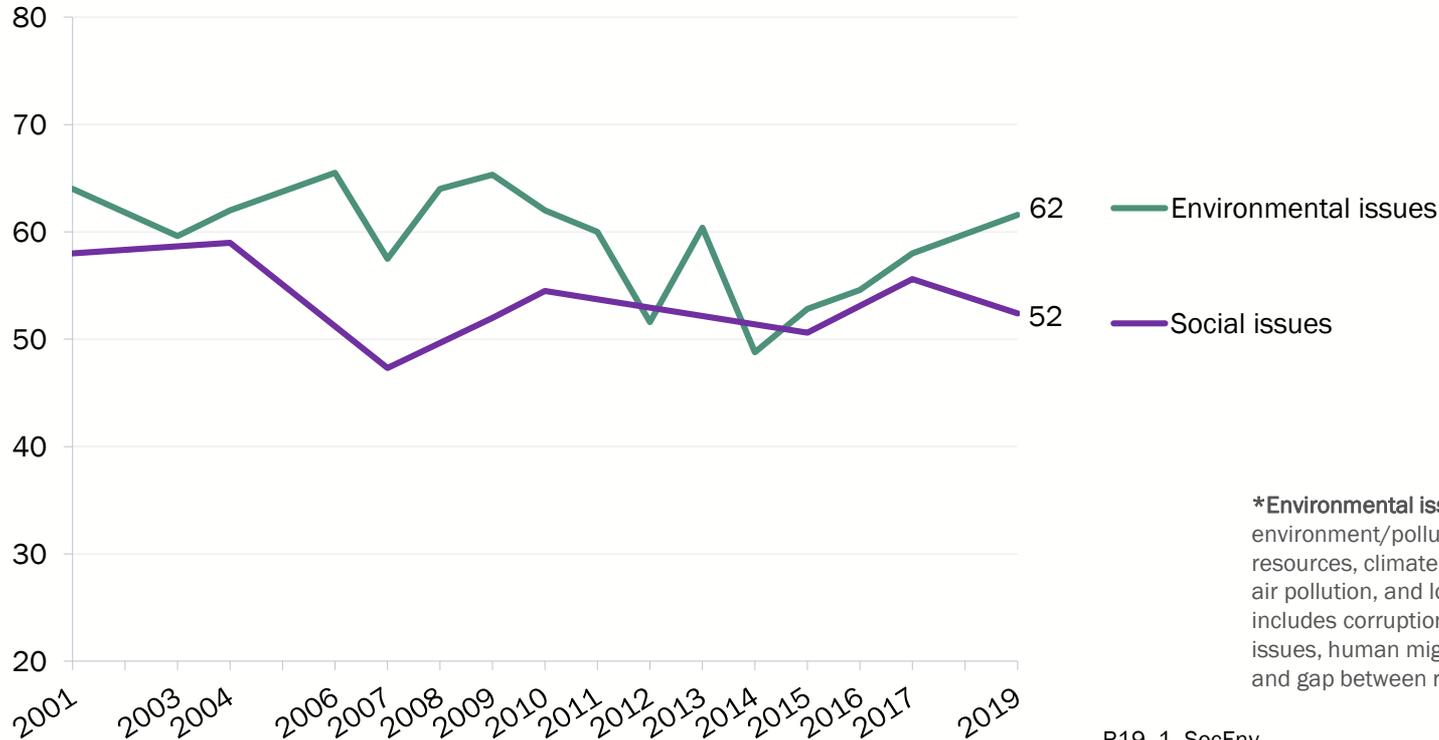
*Includes Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Kenya, Mexico, Nigeria, Russia, Spain, Turkey, UK, and USA. Not all countries were asked in all years. This question was previously asked in GlobeScan’s Radar research programme, using an in-person and telephone methodology.

Q1. For each of the following possible *global* problems, please indicate if you see it as a very serious, somewhat serious, not very serious or not at all serious problem.

Rising concern about environmental issues contrasts with stable concern about social issues



Concern about Environmental vs Social Issues,* “Very Serious,” Average of 17 Countries,** 2001–2019



While concern about a range of tracked environmental issues on average has increased, averaged concern about the social issues tracked has remained relatively constant over the past decade.

***Environmental issues** includes environment/pollution (generally), depletion of natural resources, climate change, shortages of fresh water, air pollution, and loss of biodiversity. **Social issues** includes corruption, extreme poverty, human rights issues, human migration, spread of human diseases, and gap between rich and poor.

R19_1_SocEnv

**Includes Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Kenya, Mexico, Nigeria, Russia, Spain, Turkey, UK, and USA. Not all countries were asked in all years. This question was previously asked using an in-person and telephone methodology.

T1. For each of the following possible global problems, please indicate if you see it as a very serious, somewhat serious, not very serious, or not at all serious problem.



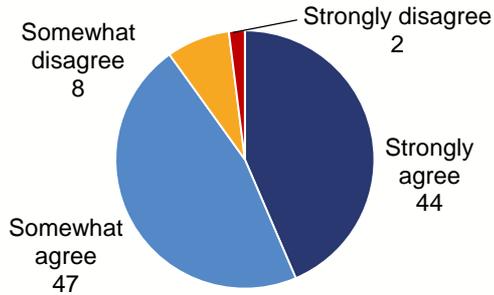
4. Growing faith in science and technology



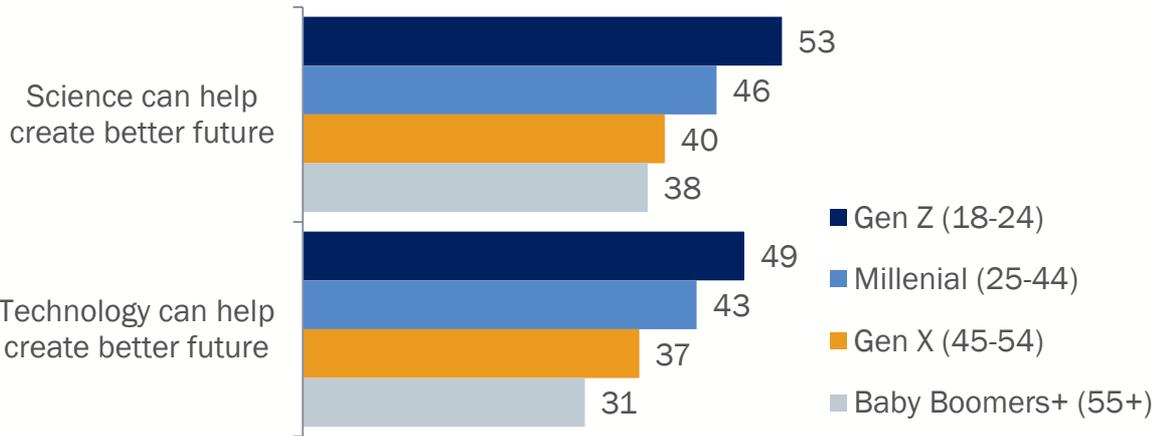
- The technology sector is seen as fulfilling its responsibilities to society better than other sectors. Not only are technology companies rated highest in terms of their fulfillment of responsibilities to society, 88 percent of respondents believe that technology will help create a better future, while 90 percent believe science will do the same.
- Young people, particularly those in Generation Z (18-24), have especially strong faith that science and technology will help create a better future. Around half of this group strongly agree with this notion, suggesting the focus on science-based solutions will continue to grow in the future.
- The trend of rising trust in scientific institutions, combined with the decrease in trust in governments and business, suggests that people are increasingly placing their faith in science and technology—in objective observers, rather than vested interests—to solve complicated challenges like climate change. Technology companies, straddling this trust boundary, are likely to become even more influential.

People across the world, especially younger generations, strongly believe that science and technology can help us create a better future

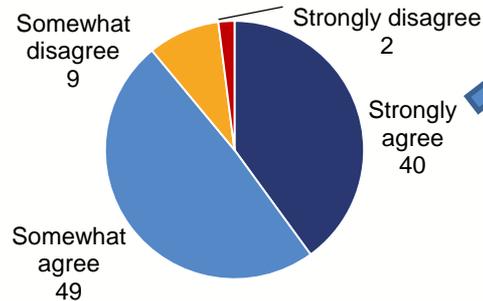
Science Can Help Create a Better Future
Average of 25 Countries, 2019



Science/Technology Can Help Create a Better Future, "Strongly Agree,"
Average of 25 Countries, by Generation, 2019



Technology Can Help Create a Better Future
Average of 25 Countries, 2019



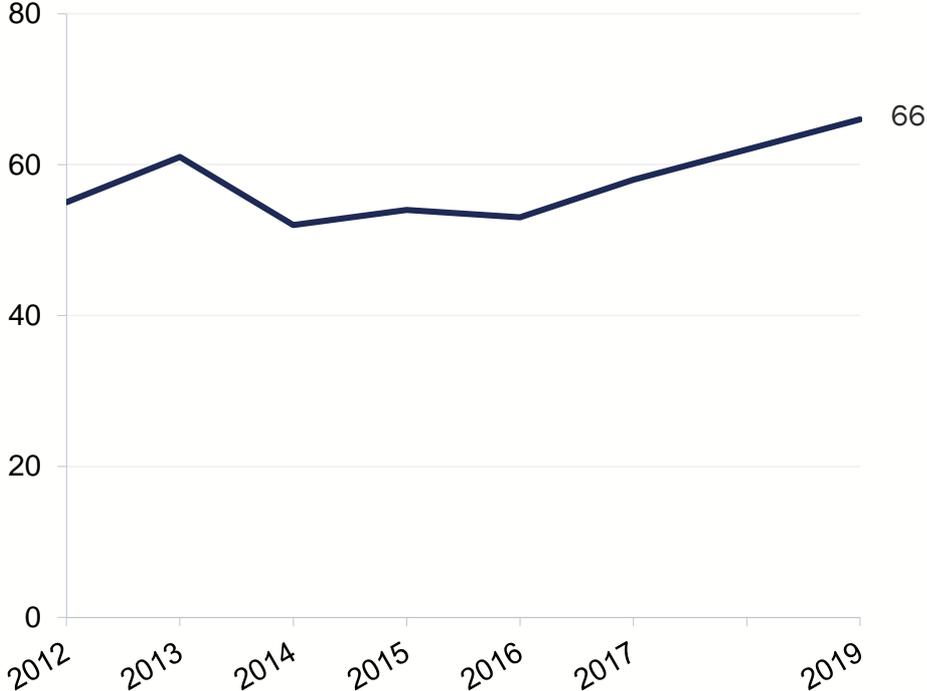
When asked whether they believe that science and technology can help create a better future, people almost universally agree that this is the case. However, young people are markedly more optimistic than older generations.

T4. For each of the following statements, please indicate if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree.
- I believe science/technology can help us create a better future.

Trust in scientific and academic institutions is increasing



Trust in Science/Academic Institutions , Net Trust,* Average of 17 Countries,* 2001–2019



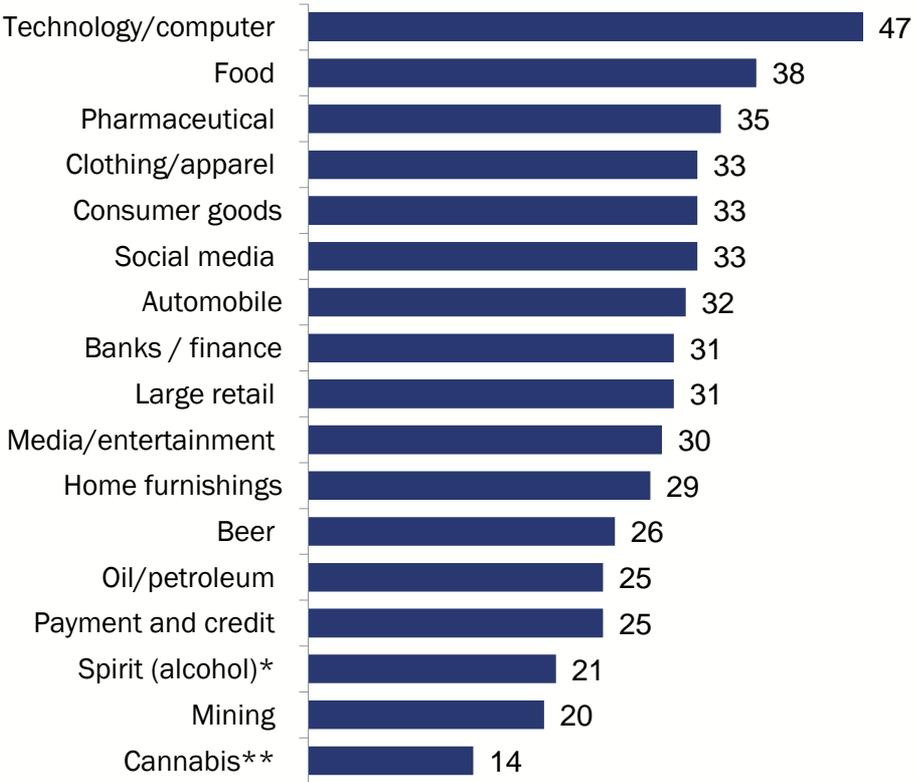
Trust in scientific and academic institutions to operate in the best interest of society has increased over the past three years, particularly in emerging markets.

*Includes Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Kenya, Mexico, Nigeria, Russia, South Korea, Spain, Turkey, UK, and USA. These estimates are therefore slightly different from those of net trust for all 25 countries in 2019. Not all countries were asked in all years. This question was previously asked using an in-person and telephone methodology.

T2. Please indicate how much you trust each of following institutions to operate in the best interest of society. Would you say you have a lot of trust, some trust, not much trust, or no trust at all in...?

Technology companies are viewed most positively as fulfilling their responsibilities to society

Performance of Sector in Fulfilling their Responsibilities to Society, “Among the best” and “Above average,” Average of 25 Countries, 2019



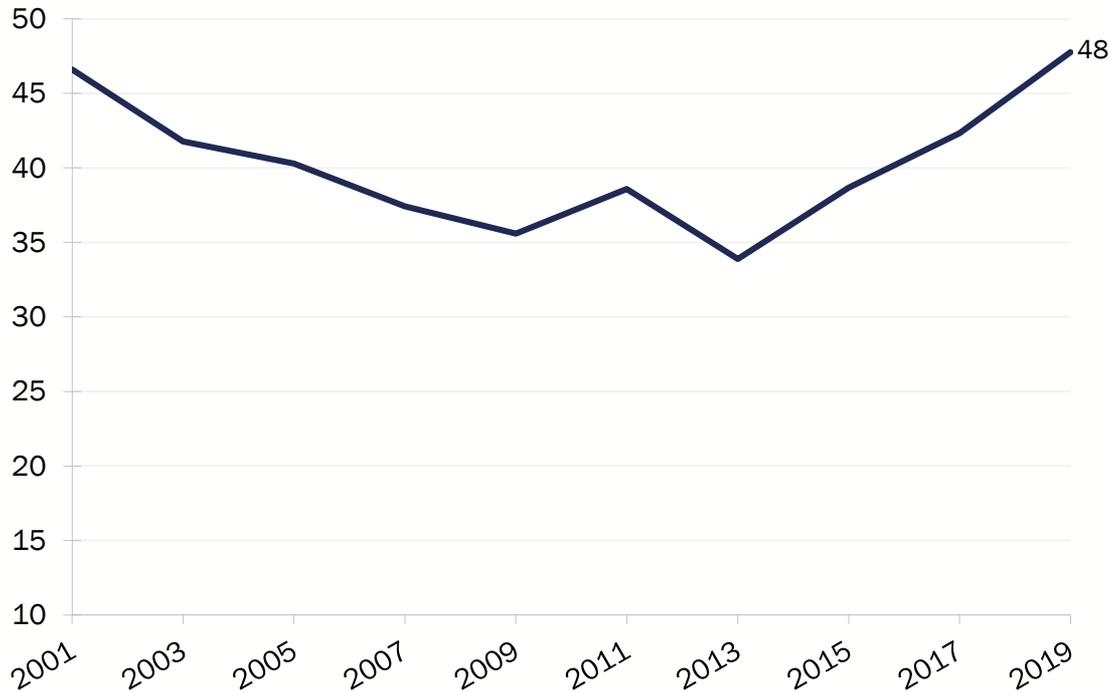
The global public rate technology and computer companies more highly than other types of companies for fulfilling their societal responsibilities.

*Not asked in Indonesia, Saudi Arabia, and Turkey.
**Asked only in Australia, Brazil, Canada, France, Germany, Italy, Mexico, Philippines, South Korea, USA, and UK.
T8. Please rate each of the following types of companies on how well they fulfil their responsibilities to society compared to other types of companies...?

People increasingly believe that technology and computer companies are socially responsible



Performance of High-tech/Computer Companies in Fulfilling their Responsibilities to Society, “Among the best” and “Above average,” Average of 17 Countries,* 2001–2019



Technology and computer companies continue to see a positive upward trend in consumer ratings for meeting their responsibilities to society, with increase since 2013.

*Includes Argentina, Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Nigeria, Russia, South Korea, Spain, Turkey, UK, and USA. (Indonesia and Turkey not included in averages for Beer and Spirits). Not all countries were asked in all years. This question was previously asked in GlobeScan’s Radar research programme, using an in-person and telephone methodology.

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T8. Please rate each of the following types of companies on how well they fulfil their responsibilities to society compared to other types of companies...



5. The Global South: engaged and optimistic

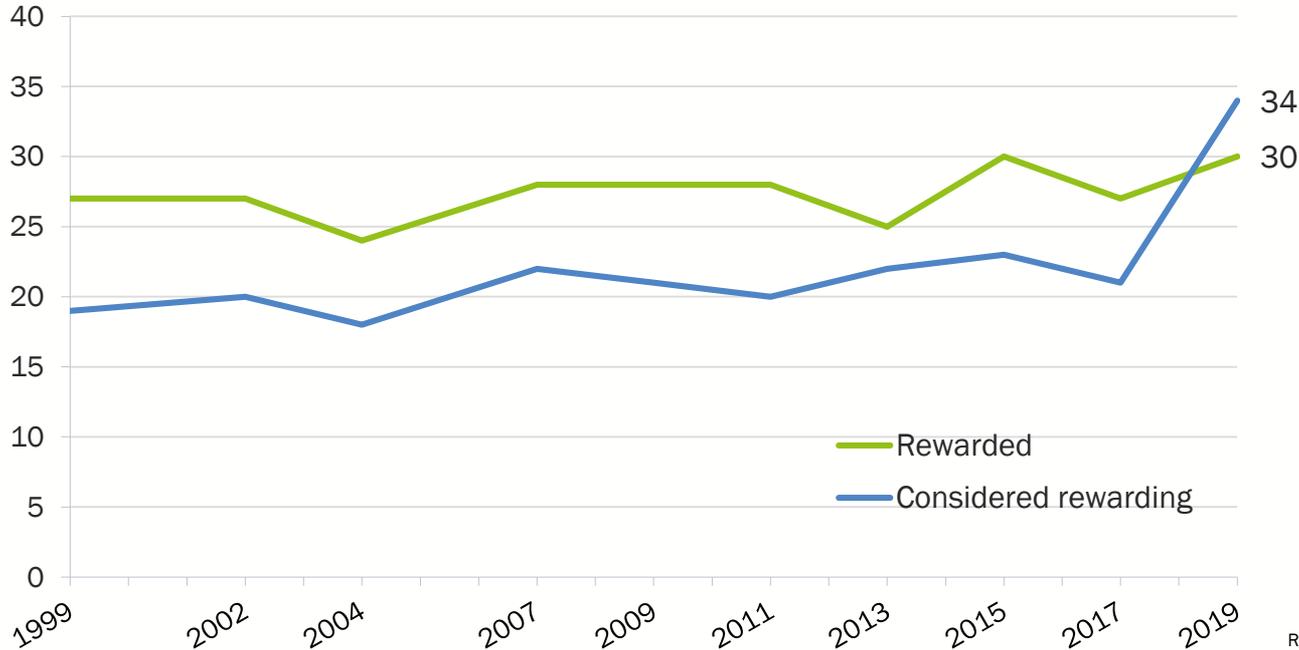


- Most people across the 25 countries surveyed have at least *considered* rewarding a company for socially responsible behavior, but less than a third report that they have *actually done* this. Consumers in emerging markets are increasingly driving ethical consumption, as people in emerging markets are now more likely than those in OECD countries to claim to have rewarded, as well as considered rewarding, responsible companies.
- As emerging market consumers are more trusting of large companies, they are also likely to be more positive and receptive toward purpose-driven initiatives by large companies and may be more likely to engage in ethical consumption going forward. In contrast, continued distrust in companies' motives may be creating a barrier to consumer demand for more responsible products in industrialized countries and may partly explain the decline in those claiming to have preferred responsible companies in North America and Europe.
- Despite lack of confidence in large global companies, there is continued faith in an open international economic system. In a continuing trend, globalization is increasingly perceived as having a positive effect on people's interests. Nearly two-thirds of people across the 25 countries now support a free-market economic system.
- The increase in positive views of globalization has mostly taken place in emerging markets, including significant increases in large countries such as Brazil, China, India, Indonesia, and Russia.
- However, most of the public also wants their countries to use tariffs and trade barriers to protect jobs and industries. This belief is stronger in emerging economies.
- There is also a pronounced difference in optimism about the future between people in emerging economies, who tend to be much more hopeful, and those in the OECD markets, where fewer than half believe that future generations will enjoy a higher quality of life than today.

Consistent with previous years, about a third of consumers reward companies for socially responsible behavior



Rewarded Companies for Being Socially Responsible, Average of 16 Countries,* 1999–2019



Overall, the proportion of those reporting that they have rewarded companies for socially responsible behavior has held relatively constant, at slightly less than one-third, since tracking began in 1999.

In 2019, those who are *considering* rewarding companies has increased substantially after many years of near stability at around one-fifth of consumers.

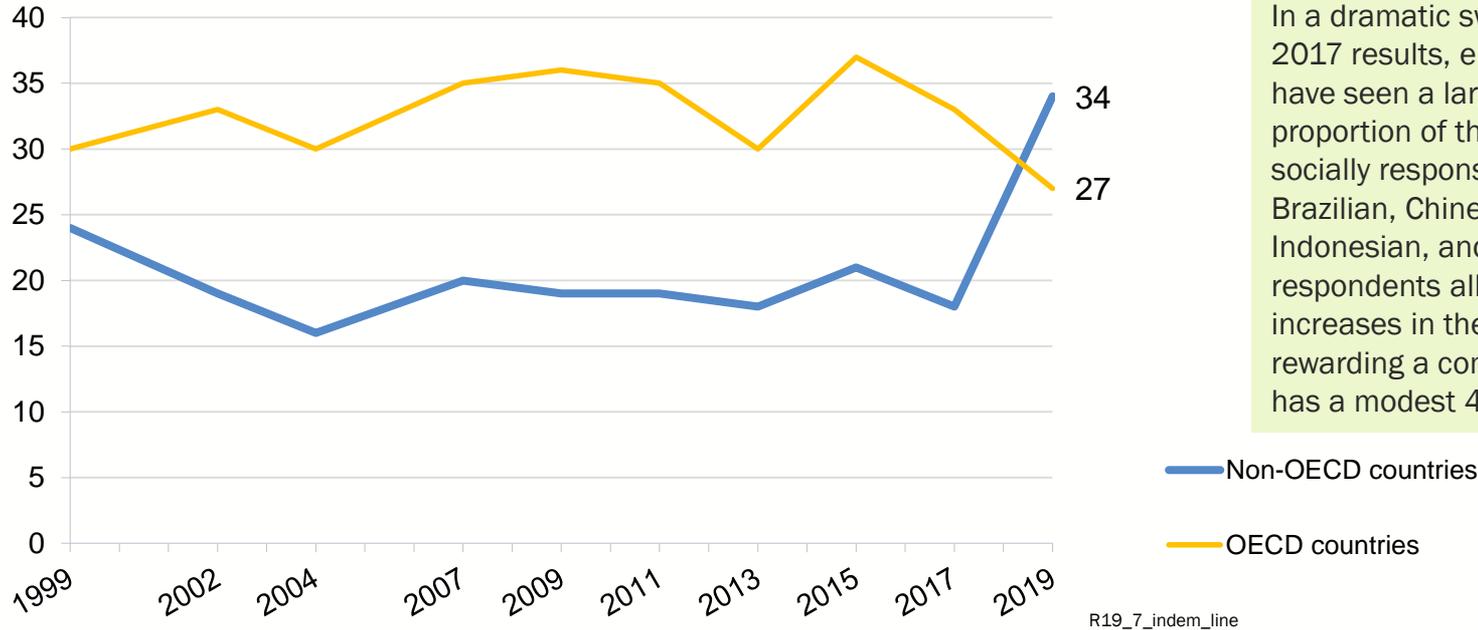
*Includes Argentina, Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Nigeria, Russia, Spain, Turkey, UK, and USA. Not all countries were asked in all years. This question was previously asked using an in-person and telephone methodology.

T7. Over the past year, have you considered rewarding a socially responsible company by either buying their products or speaking positively about the company to others? Would you say you have...?

Rewarding of socially responsible companies has increased in large emerging markets, but is down in OECD countries



”Have Rewarded Companies Seen as Socially Responsible,” by Economic Development, 1999–2019



In a dramatic swing from very low 2017 results, emerging markets have seen a large increase in the proportion of those rewarding socially responsible companies. Brazilian, Chinese, Indian, Indonesian, and Nigerian respondents all have double-digit increases in the proportion reporting rewarding a company, while Russia has a modest 4-point increase.

OECD countries include Australia, Canada, France, Germany, Mexico, Spain, Turkey, UK, and USA. Non-OECD countries include Argentina, Brazil, China, India, Indonesia, Nigeria, and Russia. Not all countries were asked in all years. This question was previously asked using an in-person and telephone methodology.

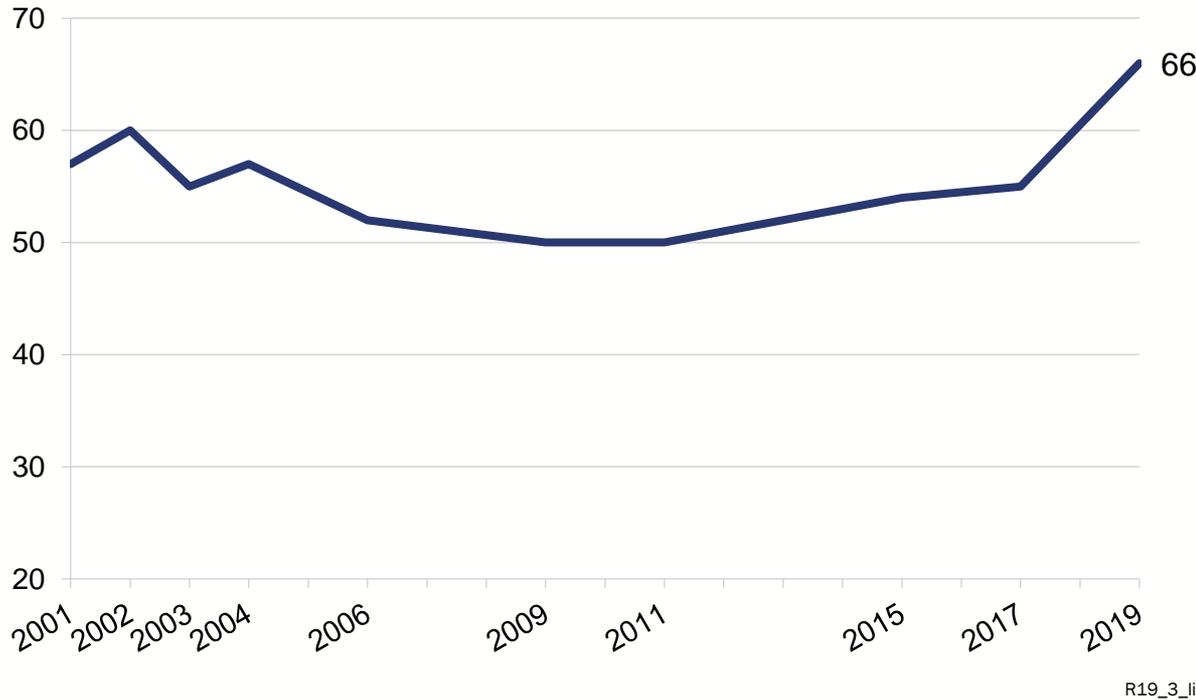
T7. Over the past year, have you considered rewarding a socially responsible company by either buying their products or speaking positively about the company to others? Would you say you have...? “You have actually done this in the past year”



People increasingly see globalization as positively affecting their interests



Views on Globalization, “Positive” Average of 13 Countries,* 2001–2019



Since 2011, people across the countries tracked have increasingly viewed globalization, explained as the increased trade between countries in goods, services and investment, as having a positive effect on their interests. In 2019, this trend hit a new high, with two-thirds indicating that the effect has been positive or somewhat positive.

In all countries surveyed, globalization is seen as positive by most respondents, except in France, where only 36 percent say that it has a positive effect on their interests.

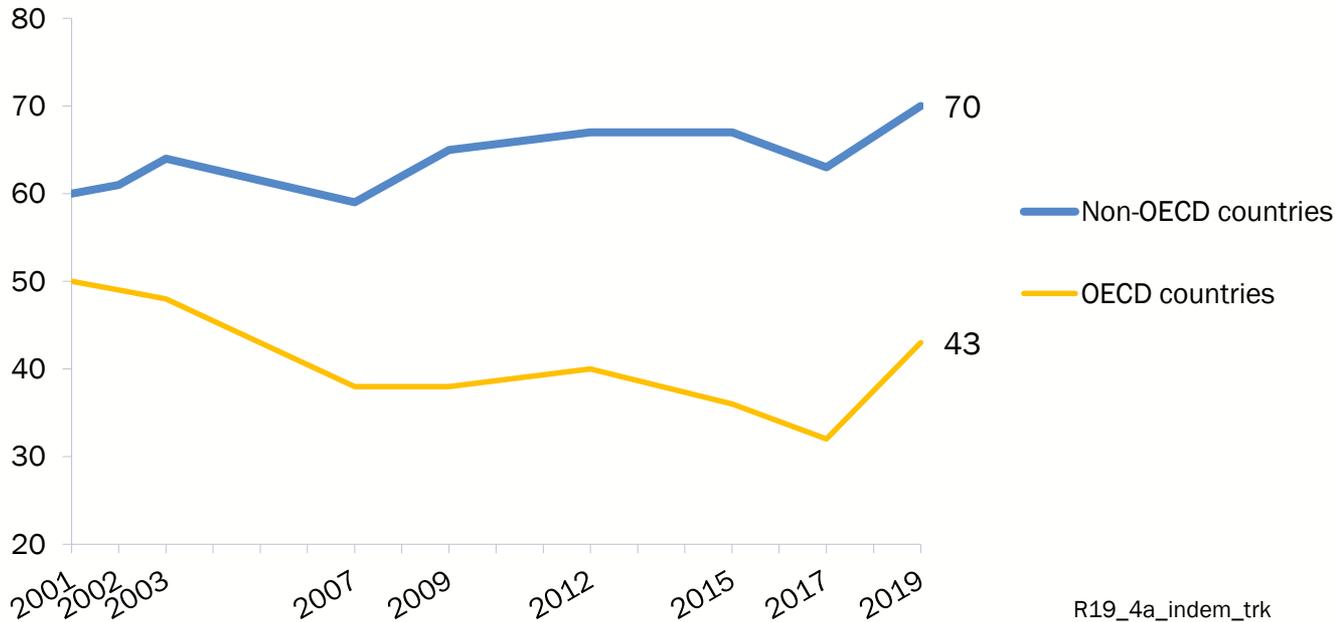
*Includes Brazil, China, France, Germany, India, Indonesia, Mexico, Nigeria, Russia, Spain, Turkey, UK, and USA.

Not all countries were asked in all years.

T3. Thinking of you and your family's interests, do you think the overall effect of globalization is very positive, somewhat positive, somewhat negative or very negative?

People in emerging markets are also more optimistic about future generations' quality of life

Our Children and Grandchildren Will Have Higher Quality of Life, “Strongly Agree” and “Somewhat Agree,” by Economic Development, 2001–2019



There is a pronounced difference in optimism for the future between people in emerging economies, who tend to be much more hopeful, and those in the OECD countries, where fewer than half believe that future generations will enjoy a higher quality of life than we do today.

However, there has been a recent uptick in optimism across both OECD and non-OECD countries.

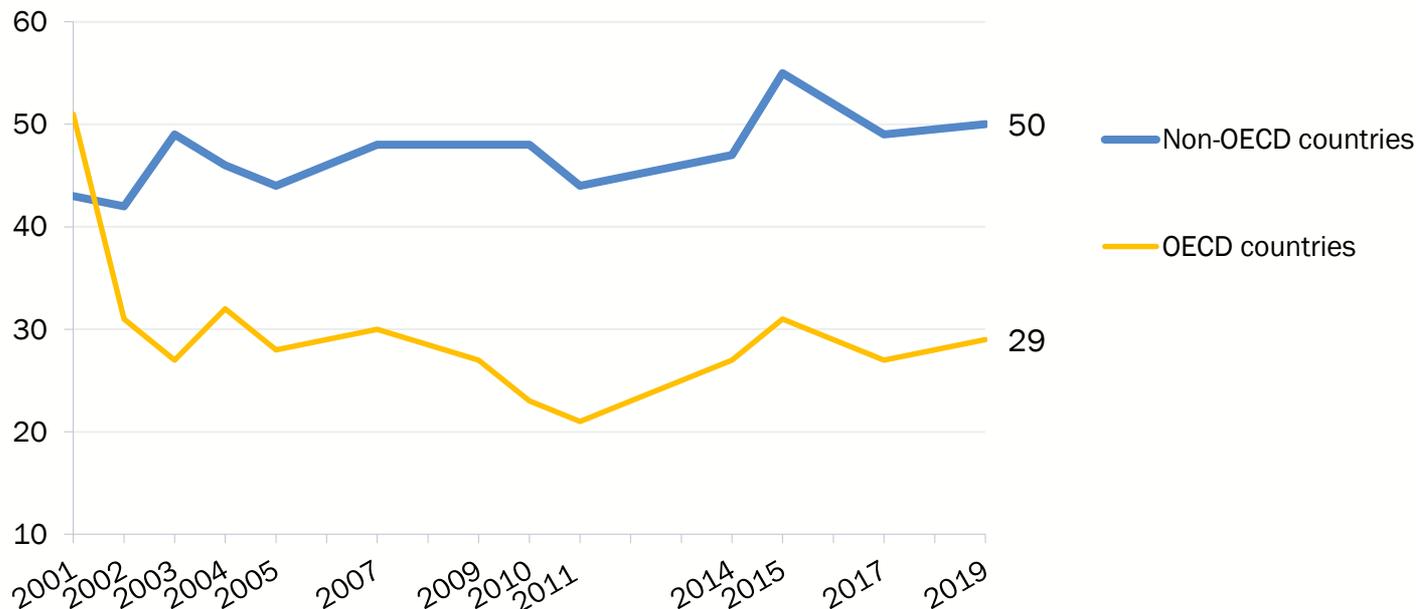
OECD countries include Australia, Canada, France, Germany, Mexico, South Korea, Spain, Turkey, UK, and USA. Non-OECD countries include Brazil, China, India, Indonesia, Kenya, Nigeria, and Russia. Not all countries were asked in all years. This question was previously asked using an in-person and telephone methodology.

T4. For each of the following statements, please indicate if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree
– Our children and grandchildren will have a higher quality of life than we do today.

People in OECD countries tend to be pessimistic about the future of the world, but emerging markets are more optimistic



World Is Going in Right Direction, “Strongly Agree” and “Somewhat Agree,” by Economic Development, 2001–2019



People in emerging markets are much more optimistic than those in the OECD countries about the direction of the world. Optimism in the more industrialized countries remains much lower than in 2001 when tracking began, although it has recovered somewhat after dipping in the wake of the global recession ten years ago.

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OECD countries include Australia, Canada, France, Germany, Mexico, South Korea, Spain, Turkey, UK, and USA. Non-OECD countries include Brazil, China, India, Indonesia, Kenya, Nigeria, and Russia. Not all countries were asked in all years. This question was previously asked using an in-person and telephone methodology.

T4. For each of the following statements, please indicate if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree
– The world is going in the right direction.

Notes to Readers

The findings detailed in the report are based on online surveys of approximately 1,000 adults in each of 25 countries using a stratified sample that is nationally representative of the online population. The survey was carried out between April and May 2019.

Figures, Charts, and Tables

All figures in the charts and tables in this report are expressed in percentages unless otherwise noted. Total percentages may not add up to 100 because of rounding. In the case of some bar charts, white space typically represents the portion of respondents who either answer “don’t know” or do not answer at all (DK/NA).

Trend Charts

Where data are available, tracking information from previous years is provided using trend charts in the body of the presentation of the report. Trend charts are intended to show selected significant changes over time.

Tracking Countries

Global averages are not always based on 25 countries, as some countries were not asked all questions. Selected tracking information is shown where data is available. Where historical data is shown, questions were previously asked in GlobeScan’s Radar research program using an in-person and telephone methodology. As research methodology was different, comparisons between current and previous results are only indicative.

Countries and Country Groupings

Countries included in the 2019 data include: Argentina, Australia, Brazil, Canada, China, France, Germany, Hong Kong, India, Italy, Indonesia, Japan, Kenya, Mexico, Nigeria, Philippines, Russia, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Turkey, United Kingdom, United States.

The countries surveyed for this report have been grouped by region and by economic development to aid in understanding global patterns.

Regional Grouping

North America: Canada, USA

Asia: China, Hong Kong, India, Indonesia, Japan, Philippines, South Korea

Latin America: Argentina, Brazil, Mexico

Africa: Kenya, Nigeria, South Africa

Europe: France, Germany, Italy, Russia, Spain, Sweden, UK, Turkey

Australia: Australia

Middle East: Saudi Arabia

Economic Development Grouping

OECD countries: Australia, Canada, France, Germany, Italy, Japan, Mexico, South Korea, Spain, Sweden, Turkey, UK, USA

Non-OECD countries: Argentina, Brazil, China, Hong Kong, India, Indonesia, Philippines, Kenya, Nigeria, Russia, Saudi Arabia, South Africa

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