

MAKING THE JUST TRANSITION A REALITY: THE IMPERATIVE FOR GOVERNMENT AND BUSINESS



Introduction

At the outset of a historic election year, farmers from Europe to India have hit the streets to demand relief from what they see as unfair climate change policies, bureaucracy, and crop prices while far-right parties are stirring a backlash against green policies around the world. These developments make it an opportune time to dig deeper into the public’s attitudes toward the green transition.

GlobeScan’s global public opinion research reveals that people around the world are now increasingly feeling the impact of the climate crisis and want progress toward a better future, with majorities everywhere wanting to see a transformation toward a green economy.

However, there is also a growing resistance to change in regions like North America and Western Europe as seen in the support of politicians opposing green policies and protests by European farmers, coupled with a widespread sentiment of anxiety where people everywhere feel they might be left behind in a rapidly changing world.

It is therefore essential for governments and businesses to lead a transition that is just and equitable, otherwise it is likely that distrust and resistance will grow and progress will stall.

Based on a largely representative online survey of nearly 30,000 people across 31 countries and territories, *Radar* draws upon GlobeScan’s unique database of over two decades of polling public opinion about people’s outlook toward societal actors and the issues affecting them.



Key Insights

INSIGHT 1

People want a sustainable future. We are approaching a tipping point where soon most people will experience the climate crisis firsthand as results show that people feel increasingly impacted by climate change and other environmental issues. There is overwhelming support for progress on climate change and protecting nature, with majorities everywhere wanting to see a transformation toward a green economy – although there are pockets of resistance in places like the USA, Australia, and Western Europe.

INSIGHT 2

But we cannot take people’s support for green policies for granted. People are anxious about the pace of change and some think that the green transition will not benefit them especially in regions like North America and Western Europe. Unless it is demonstrated more clearly how climate policies deliver solutions that benefit people in their day-to-day lives, there is a risk of backlash against green policies and of people retrenching in the status quo.

INSIGHT 3

An imperative for businesses and governments to step up and make the just transition a reality. There is growing pressure on both governments and companies to address the climate crisis as well as the loss of nature and wildlife, as the burden cannot be left on the shoulders of citizens alone. There is an opportunity for businesses and governments to work together to create fair and inclusive green policies that are needed to secure and grow public support moving forward.



INSIGHT 1

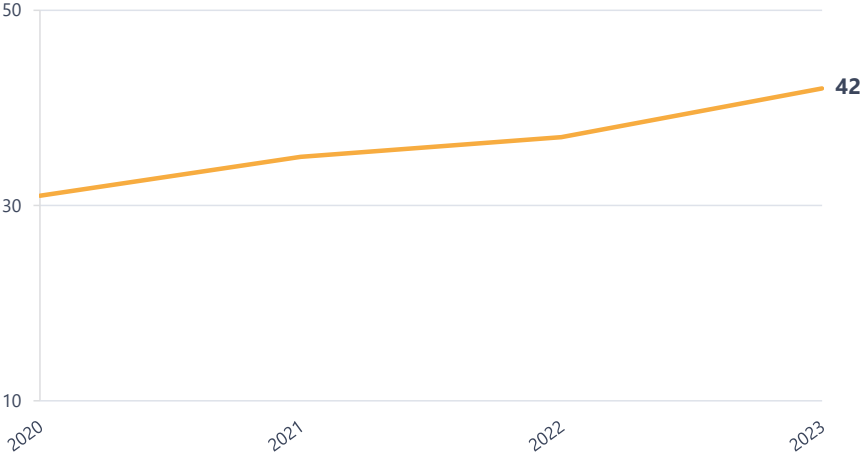
PEOPLE WANT A SUSTAINABLE FUTURE

Worries about war and conflict remain at the forefront of global concern but worries about climate change and water pollution follow closely behind. Although perceived seriousness about most issues tracked in our *Radar* program (whether environmental, economic, or social) has stalled or slightly decreased in the past few years, more than half of the global public still views a range of mostly environmental challenges as “very serious.” Top concerns vary across regions, with climate change at the top in Asia-Pacific and water pollution most worrying in Latin America, while war and conflict is the top concern elsewhere.

However, concern about challenges like climate change is becoming less abstract and is now increasingly affecting people directly. Over four in ten now claim to feel greatly personally affected by climate change, a trend that has been on the rise every year since 2020. Young people, women, those living in cities, and people with children in the household are more likely to say they are greatly affected by climate change.

Extent Personally Affected by Climate Change

“Greatly Affected,” Average of 26 Countries,* 2020–2023



*Includes Argentina, Australia, Brazil, Canada, China, France, Germany, Hong Kong, India, Indonesia, Italy, Japan, Kenya, Mexico, Nigeria, Saudi Arabia, Singapore, South Africa, South Korea, Spain, Sweden, Thailand, Turkey, UK, USA, and Vietnam.

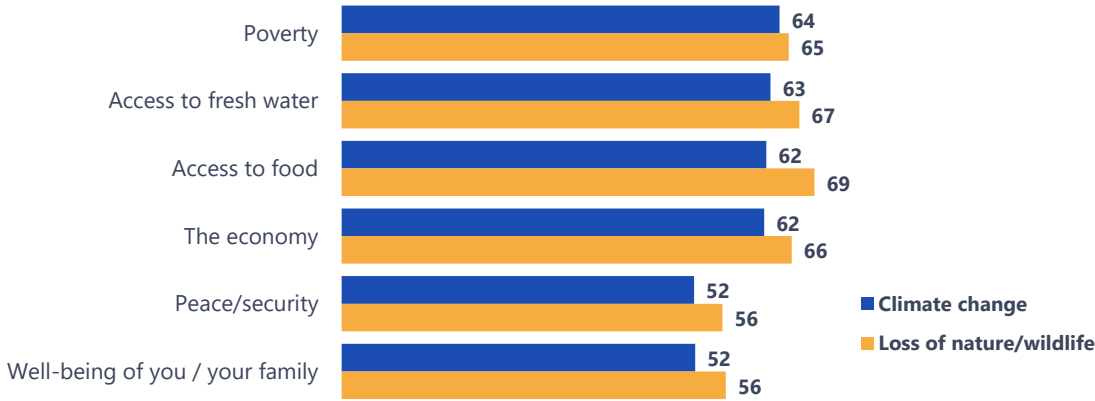
T2. How much are you personally affected by each of the following? – Climate change or global warming

Nearly four in ten people globally also feel greatly affected by air pollution while one-third say they are greatly affected by water shortages and loss of nature. The proportions that feel directly impacted by air pollution and shortages of fresh water are also increasing.

In addition to increasingly feeling the impact themselves, people also believe that climate change and loss of nature will impact personal well-being and exacerbate poverty and access to food and fresh water, reinforcing the importance of addressing the climate and nature crisis. The loss of nature and wildlife is believed to have an even greater negative future impact than climate change, especially when it comes to feeding the global population and ensuring there is water to drink, as well as having a greater negative impact on the economy in general.

Expected Impact of Climate Change vs Loss of Nature

“Will Make Worse,” Average of 31 Countries, 2023



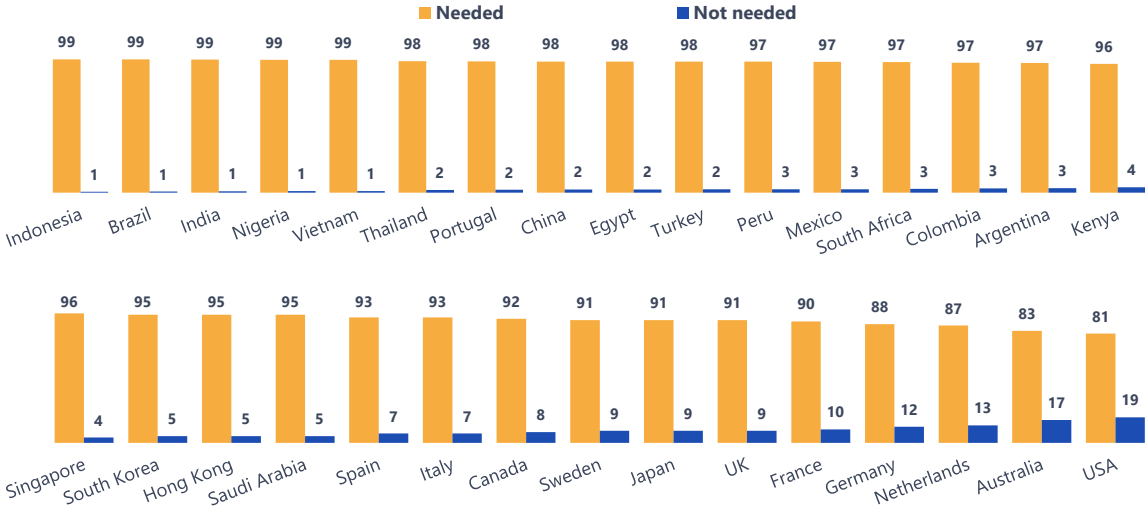
Nex3. Do you think climate change / global warming will make each of the following better or worse?
 Nex4. Do you think loss of nature and wildlife will make each of the following better or worse?



As they increasingly experience negative environmental impacts personally, most people around the world recognize the need to transition to a green economy, that is, shifting from fossil fuels to renewable energy. Strong majorities across all countries surveyed say that this shift to a green economy is needed: 94 percent believe this transition is required compared to 6 percent who say that it is not. The strongest resistance to this energy transition comes from developed countries, including the USA, Australia, the Netherlands, Germany, and France.

Perceived Need for Shifting to a Green Economy

“Very Much” and “Somewhat Needed” vs “Not Very Much” and “Not at All Needed,” by Country, 2023



T51. In the past few years, some societies have begun shifting from fossil-based energy (e.g., oil, gas, coal) to renewable sources of energy (e.g., wind, water, solar) to address climate change. This is often called the transition to the green economy. How much would you say the shift to the green economy is needed?

What does this mean?

The need for the energy transition is urgent and clear: people are experiencing the impacts of climate change and want to see the transition to a green economy happen. The issue is no longer whether the world needs to transition, but how it should be done.

INSIGHT 2

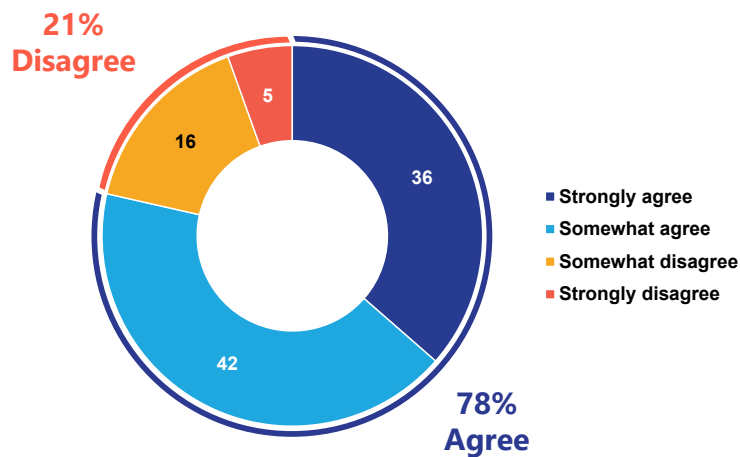
BUT WE CANNOT TAKE PEOPLE'S SUPPORT FOR GREEN POLICIES FOR GRANTED

People are anxious about the pace of change and some think that the green transformation will not benefit them especially in regions like North America and Western Europe.

Although people acknowledge the necessity of changing to a more sustainable economic system, there is also overwhelming agreement that the world is changing too quickly, a sentiment that can easily be harnessed to promote a more regressive agenda. Our research shows that the public across all regions and demographics largely agree with the notion that they cannot keep up with a fast-changing world. Nearly eight in ten people worldwide believe that “the world is changing too quickly for me,” indicating an overall sense of anxiety in this current state of polycrisis.

World Is Changing Too Quickly

Average of 31 Countries, 2023



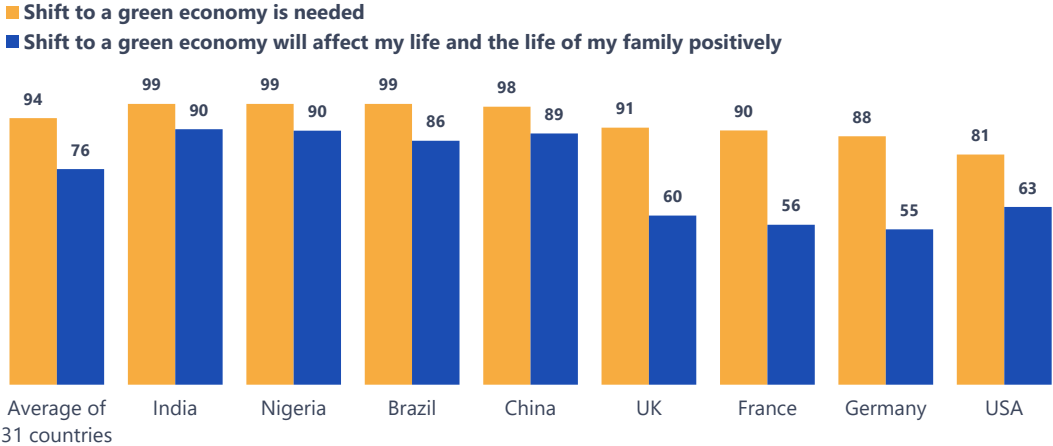
T8. For each of the following statements, please indicate if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree. – The world is changing too quickly for me.

With people feeling overwhelmed with the pace and intensity of change, it becomes increasingly more difficult to build confidence in the emerging agendas of government as well as business. This highlights the need for a just transition where people feel that they are included in the potential benefits of this change or at least understand what it will bring and how they will be supported. Failing that, a growing proportion of the global public will likely be susceptible to arguments calling for a return to the status quo – with severe implications for the sustainability agenda from climate to DE&I.

And while most people do say that the effect of a green transition would be positive for themselves and their families, there is less agreement on personal benefit than on whether the transition is needed. Especially in Europe and North America, relatively small but potentially influential and growing proportions worry about the negative effects of a green transition on their own lives. In countries like France, Germany, the UK, and the USA, there are significant gaps between the size of the proportions saying the transition is needed and the proportions believing the transition will be beneficial to their own lives.

Shift to Green Economy: Is Needed vs Personal Benefit

Shift to Green Economy "Very Much" and "Somewhat Needed" vs Effect on People's Lives "Very" and "Somewhat Positively," Selected Countries, 2023



T51. In the past few years, some societies have begun shifting from fossil-based energy (e.g., oil, gas, coal) to renewable sources of energy (e.g., wind, water, solar) to address climate change. This is often called the transition to the green economy. How much would you say the shift to the green economy is needed? T52. Speaking about you personally, how would this shift to the green economy affect your life and the life of your family?

People in the Global South are more likely to view the shift to a green economy as having a positive effect on their lives and those of their families, but majorities in nearly all countries and territories surveyed believe that the effect would be at least somewhat positive. However, to secure ambitious climate action and a just transition to a low-carbon economy, it will be important to demonstrate more clearly how climate policies deliver solutions that benefit people in their day-to-day lives. Our data show that people living in smaller towns and villages (often traditional conservative-voting areas) are less convinced that the green transition will benefit them, a sentiment that may spread and grow over time if direct positive impacts fail to materialize.

What does this mean?

The inability to see the benefits of green policies along with rising anxiety about the future pose a risk of backlash and of people retrenching in the status quo.

INSIGHT 3

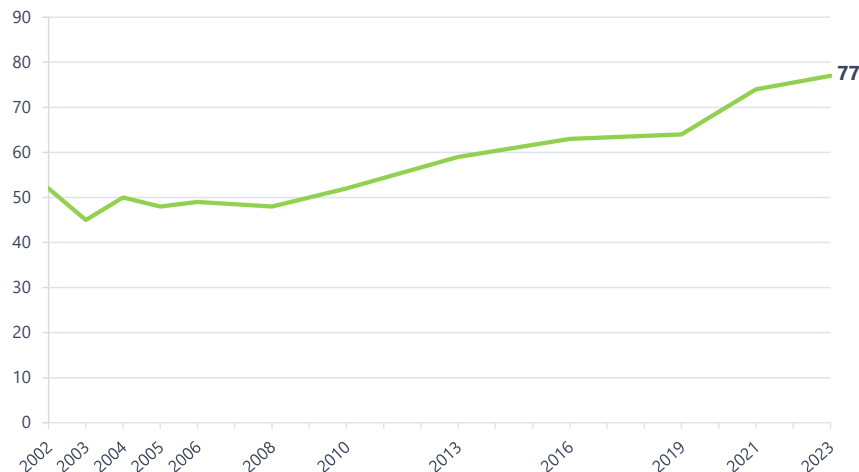
AN IMPERATIVE FOR BUSINESS AND GOVERNMENTS TO STEP UP AND MAKE THE JUST TRANSITION A REALITY

GlobeScan’s research shows that governments and companies are seen to be the most responsible for addressing climate change and the loss of nature, with governments seen as being the most responsible – especially when it comes to protecting nature and wildlife as the burden cannot be left on the shoulders of citizens alone.

People believe that governments should help drive changes in the private sector. In all regions of the world, people are increasingly supportive of governments creating laws that require large companies to go beyond their traditional economic role and work to make a better society, even with the stated caveat that this could lead to higher prices and fewer jobs. This 20-year trend is significant in that it has increased from 52 percent agreeing that governments should force companies to be more responsible in 2002 to 77 percent in 2023.

Support for Regulating Corporate Responsibility

“Strongly” and “Somewhat Agree,” Average of 18 Countries, 2002–2023*



*Includes Argentina, Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Kenya, Mexico, Nigeria, South Korea, Spain, Turkey, UK, and USA. Before 2020 this question was asked using an in-person and telephone methodology.

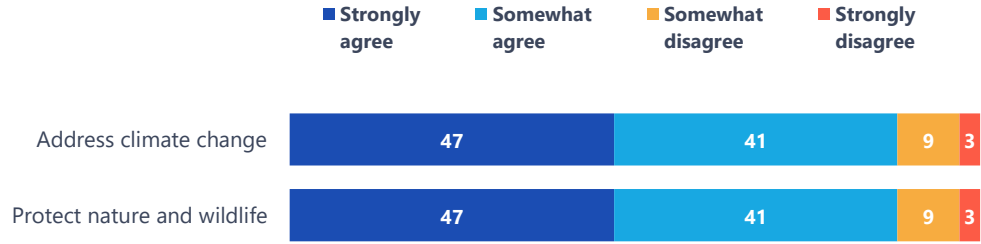
T8_3. Our government should create laws that require large companies to go beyond their traditional economic role and work to make a better society, even though this could lead to higher prices and fewer jobs.

Substantial majorities in key markets like China (83%), Mexico (78%), France (75%), the UK (74%), Germany (68%), and the USA (67%) say they agree with their governments creating laws that require large companies to go beyond their traditional economic role and work to make a better society. Support for regulation has more than doubled in France and Germany over the past two decades and has tripled in Mexico, while support has grown enormously in the USA and the UK over the past decade.

But this is not a one-way street: there is also widespread agreement that industry has a responsibility to lobby governments to address climate change and protect the natural environment. Nearly nine in ten people agree that large companies should engage in climate and nature advocacy, and there is a high level of agreement around the globe. In each country and territory surveyed, more than three-quarters agree that large companies have a responsibility to encourage governments to do more in these areas.

Support for Corporate Lobbying to Address Climate Change and Protect Nature and Wildlife

Average of 31 Countries, 2023



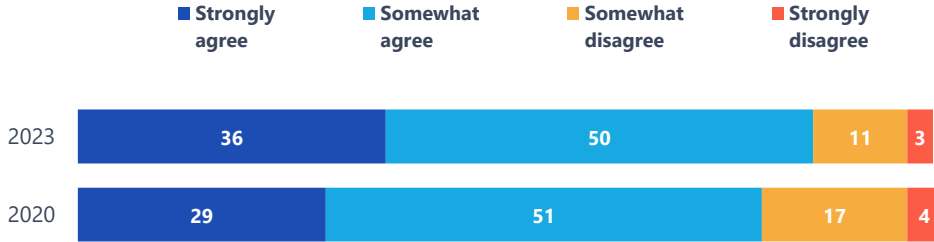
T8. For each of the following statements, please indicate if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree. – Large companies have a responsibility to encourage governments to do more to address climate change. – Large companies have a responsibility to encourage governments to do more to protect nature and wildlife.



People also continue to recognize the importance of corporate participation in solving global challenges, and they increasingly agree that business can help solve the challenges facing humanity. Compared to three years ago, people in nearly all countries surveyed are more likely to agree that companies and their brands are an essential part of the solution for the challenges facing humanity today. Even in Japan and France, the two countries with the lowest levels of agreement, as many as three-quarters at least somewhat agree that companies must be part of the solution. In many other countries, such as China, India, and Mexico, as many as nine in ten say companies must play a role.

Companies Are Essential for Solving Challenges Facing Humanity

Average of 26 Countries, 2020–2023*



*Includes Argentina, Australia, Brazil, Canada, China, France, Germany, Hong Kong, India, Indonesia, Italy, Japan, Kenya, Mexico, Nigeria, Saudi Arabia, Singapore, South Africa, South Korea, Spain, Sweden, Thailand, Turkey, UK, USA, and Vietnam.

T8. For each of the following statements, please indicate if you strongly agree, somewhat agree, somewhat disagree, or strongly disagree. – I believe that companies and their brands are an essential part of the solution for the challenges facing humanity today.

What does this mean?
Government is expected to regulate more, and companies are expected to push government to do more. It is a two-way street where business has the mandate to engage with government to improve green policies, starting with making those policies fairer and more inclusive.

METHODOLOGY



- Representative online samples of approximately 1,000 adults in each of 31 markets (500 each in Hong Kong, Kenya, Nigeria, and Singapore, and 1,500 in USA) ($n=29,565$).
- Samples are representative of online population, weighted to reflect general population census data.
- Online surveying in July and August 2023.
- Where historical data are shown, questions were asked using an in-person and telephone methodology before 2019.



CONTACT US

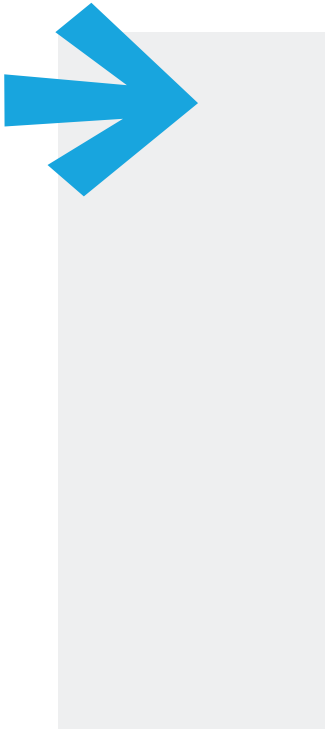
GlobeScan is a global insights and strategy consultancy helping companies, NGOs, and governmental organizations know their world and create strategies to lead a sustainable and equitable future.



We combine over 35 years of data-driven insights with a global network of experts and the ability to engage any stakeholder or consumer. Our unique research programs and global capabilities help to know what's new, what's next, and what's needed. And our advisory services help turn that knowledge into smart, strategic decisions.

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