

The Global Future Pulse Sustainability



Contents

Executive summary 03

05 Guest editorial

09 Introduction

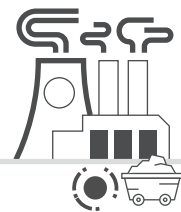
10 Part I
**How dangerous is
global warming?**



12 Part II
**Awareness of
the need for
sustainability**



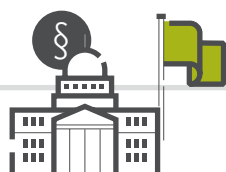
15 Part III
Who is responsible?



17 Part IV
**Faith in digital
solutions**



20 Part V
Trust in government



23 Part VI
**Are regulations
the answer?**



Conclusion 26

Appendix 27

Imprint 35

Executive summary



For years, climate change loomed as a future threat. And as each passing year became “one of the warmest on record”,¹ it became increasingly clear that we, as a society, were going to have to make far-reaching changes to address the challenge.

It is beginning to look as though that future is now. Hardly a week went by this summer without yet another report of a wildfire in Siberia, a heat dome in the American West or flooding in Europe and China. The Intergovernmental Panel on Climate Change (IPCC) topped things off in August with its clearest warning yet, leading Secretary-General António Guterres to declare a “code red for humanity”, adding that “inclusive and green economies, prosperity, cleaner air and better health are possible for all, if we respond to this crisis with solidarity and courage”.²

The Vodafone Institute for Society and Communications wanted to determine the degree to which “solidarity and courage” are present in select nations around the world and to learn whether the world is ready to respond as necessary. This study, “Global Future Pulse: Sustainability”, is the product of that inquiry, for which 17,000 people were surveyed in 17 countries across the globe.

The countries chosen reflect the North-South global divide that is a constant feature of climate negotiations, such as the recently concluded COP26 talks in Glasgow, Scotland.



That divide, clearly, is the product of vastly different interests among various regions of the world and was perhaps most clearly articulated by Indian Prime Minister Narendra Modi. As “the voice of developing countries”,³ he demanded that the wealthier nations of the world vastly increase their funding to countries needing assistance to deal with the consequences of global warming.

How, though, do people themselves see the problem? What actions are individuals prepared to take? And what do they want their governments to do?

Our survey found that there is plenty of solidarity and courage to go around. There is a deep-seated awareness of the dangers presented by climate change and a significant desire to see governments invest more to tackle the problem.

¹ <https://public.wmo.int/en/media/press-release/2020-was-one-of-three-warmest-years-record>

² <https://news.un.org/en/story/2021/08/1097362>

³ <https://www.mea.gov.in/Speeches-Statements.htm?dtl/34466/National+Statement+by+Prime+Minister+Shri+Narendra+Modi+at+COP26+Summit+in+Glasgow>

Digitalisation, most feel, will be an important tool in the fight against rising temperatures. But there is also a broad understanding that solving the climate conundrum is a shared responsibility and that people, companies and governments must all do their share. Furthermore, a huge percentage of people across the globe express a willingness to dip deeper into their pocketbooks to buy sustainable products. Still, regional differences between the Global North and the Global South do exist. People in developing nations

appear to have a greater willingness to spend more on sustainable products than those in the North. There is also a greater desire in the South for governments to invest more, and survey participants from developing nations were also likelier to say their country is lagging in the fight against climate change.

The message that emerges perhaps loudest and clearest, though, is that people around the world are ready to act.

Key findings

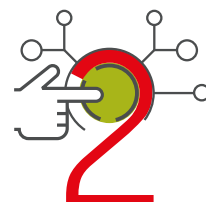


Respondents everywhere in the world would like their governments to invest more heavily in measures to combat global warming (84%). That desire, however, is slightly more pronounced in countries in the Global South, with each of the seven countries in the region exceeding the global average. Faith in their governments' will, skill and capacity to act tends to be more pronounced in the Global South, though with striking exceptions.



A strong plurality of survey participants across the 17 countries say that responsibility for the costs of climate change should be borne by the state, companies and citizens alike. While most believe governments should play the largest role in driving measures to achieve net-zero emissions, respondents in all countries also believe that companies, individuals and global institutions have a strong role to play.

There is a strong belief that digitalisation is a key lever in the battle against climate change, with 64% of all respondents identifying it as either one of the tools available or the single most effective tool. Fully 31% of Indians and almost a quarter of respondents in Egypt and Kenya even agree that it is "the biggest lever to mitigate climate change".



People in the Global South report a greater willingness to pay more for sustainable products (85%) than respondents in countries belonging to the economically stronger Global North (67%). That gap was widest between survey respondents in India (88%) and Kenya (86%) in the South, and the USA (57%) and the UK (60%) in the North.



Guest editorial

Thoughts on the North-South divide

Professor Franz Josef Radermacher is a globalisation expert. He has been working for years on the transition of society into the information society, questions of the responsibility of persons and systems, energy and climate, environmentally compatible mobility and the problem of overpopulation. Since 1987 he has been director of the Research Institute for Application-Oriented Knowledge Processing (FAW or FAW/n) and was Professor of Databases and Artificial Intelligence at the University of Ulm until his retirement in March 2018. Franz Josef Radermacher has received several awards for his outstanding achievements. He is a member of various working groups, political advisory bodies and organisations, such as the Club of Rome and the Eco-Social Forum Europe. From 2000 to 2018, he was a member of the Scientific Advisory Board to the Federal Minister of Transport and Digital Infrastructure. Franz Josef Radermacher is President of the Senate of the Economy e. V., member of the Sustainability Conference of the State of Hesse and co-initiator of the Global Marshall Plan Initiative. He has been a member of the Vodafone Sustainability Advisory Board since October 2020.



The following study by the Vodafone Institute for Society and Communications casts light on compelling insights into individual attitudes on the climate challenge from a global perspective. The Institute's foremost concern in conducting the survey was to gauge differences in attitudes between people in the Global North and the Global South. The examination of the North-South issue is of central importance because the question of equity between North and South is always the most important point of contention in climate negotiations. It is even more pressing given that, when it comes to economic processes and population development, the greatest movement is to be found in the Global South, which will lead to a further aggravation of the climate situation. These dynamics and the underlying fairness issues surrounding them were also central themes at COP26 in Glasgow.

To determine where differences in perspectives exist between the North and the South, this study polled respondents on their personal attitudes and their perceptions of the dangers posed by climate change, in addition to their confidence in the ability of political decision makers to act, and their willingness to accept additional costs for climate protection.

How should China and India respond under the current conditions? A whole lot of people in these countries are not faring well economically. There are great and legitimate expectations for a bigger share of prosperity in the future within those populations. It is imperative to these countries that they defend the level of prosperity that has already been achieved. Not surprisingly, China is now the single most important factor in the climate issue, accounting for one-third of global CO2 emissions. But it also wants and indeed must create new prospects for many millions of people still living in poverty. And all of these factors exist against a backdrop of significant geopolitical rivalries and ambitions that make high economic performance an existential prerequisite for a country's own positioning.

What do the difficult conditions described above mean for (1) the assessment of climate dangers, (2) the preparedness to pay more for climate protection, and (3) the perception of the potential for action by one's own government?



1 Assessment of climate dangers

In general, it is evident that a clear majority of people everywhere consider climate change to be a serious threat that requires action. People's perceptions reflect the global debate on the issue. However, differences are also apparent in their reactions. Women generally view climate change to be more dangerous than men do, and quite a few more countries in the South see it as being more dangerous than people in the countries of the North.

The more relaxed responses from respondents in the richer countries (in Sweden, for example) can likely be explained by the fact that geographical location tends to mean that there are fewer negative climate impacts to deal with. Those respondents are also in a rich country that can cope with material damage more easily. Besides, people there know that a lot is already being done for the climate in their country.

The survey was conducted in September/October 2021, a period in which devastating weather-induced events took place at several locations in many different parts of the world, both floods and wildfires.

The survey was conducted in September/October 2021, a period in which devastating weather-induced events took place at several

locations in many different parts of the world, both floods and wildfires. Turkey, in particular, was severely affected at the time, but so too was Southern Europe.



It should therefore come as no surprise that greater differences can be observed among young people worldwide in their assessment of the dangers of the climate crisis. Why, for example, are risks seen less in China than, say, in Brazil or Turkey? There is much to suggest that this is a product of the government's information policy in China, which tends to focus on economic successes and the country's strength rather than on problems associated with the climate crisis. In Brazil, with the large-scale deforestation that has been going on for years in the Amazon region and the global discussion of this topic, it is not surprising that the issue is much more topical to young people there.

In Turkey, it appears that severe weather events in the country before the survey period may have influenced the assessments given. This included major heat waves in addition to disastrous flooding and mudslides that occurred close to the time of the survey. As previously noted, there were few if any events in Sweden at the time, and the threat level in the country is also objectively lower. Spain, on the other hand, along with Southern Europe in general, was badly affected.

2 Willingness to pay more for climate protection

In the study, survey participants in the countries of the Global South express a greater willingness to spend more money on sustainable products. It is a willingness that goes significantly beyond that expressed by respondents in Central Europe and the United States. However, it should also be noted that consumer behaviour in countries of the North is already much more oriented towards sustainability, and those costs are already being borne accordingly. As such, it is unsurprising that they indicate less additional willingness to pay more.

One must also consider the fact that people in the Global North have more experience with greenwashing. People are generally more sceptical when progress is promised in exchange for higher prices.



3 Trust in the government

The question of trust in governments as problem solvers is also interesting. Generally, it appears that governments in more authoritarian countries like China, India, Egypt and Kenya are trusted to do more on climate protection than are decision makers in the rich world. This is likely a reflection of the existing power structures, but also of the extensive regulation of the media in those countries. It is also important to note how weak the busi-

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ness sector is in relation to the state in these countries, and how weak civil society is. In this respect, it is not surprising that people rely on the state to carry out such tasks. This is particularly true of China.

The situation is different in France, Brazil and the U.S. In those countries, it is well-known that companies play an important role in processes of social change. And that the

people can and should articulate themselves. It is also known that the government is usually reluctant to implement measures against the will of the people, especially those that entail higher costs. The uprising of the “yellow vests” in France sent a clear message. All this leads to greater scepticism.

Summary

Clever minds will draw many interesting conclusions based on the insights to be found in the Vodafone Institute’s latest publication. I am therefore pleased that this important survey has been conducted and that its findings have now been published. Quite deliberately, the interpretation of the data obtained has not been fully completed. The Vodafone Institute’s idea is instead to provide readers with valuable information for their own research and consideration. We are looking forward to the reactions, which will also provide us with a basis for further discussion of the issue, also in the context of the recent decisions taken at COP26.

We at the Advisory Board of the Vodafone Institute hope that readers enjoy this publication and that it opens up new insights for them.

I would like to wish readers all the best, in addition to a peaceful, happy and joyous New Year and an excellent 2022.

Introduction

Different views in different regions



If 2020 was the year of COVID-19, then 2021 has required the world to place a renewed focus on the dangers of global warming. From wildfires and flooding to droughts and unusually high temperatures, there was a steady stream of concerning, climate-related news throughout the summer.

Furthermore, this year's crucial COP26 climate summit in Glasgow, Scotland, was widely seen by many observers as one of the last, best opportunities the world will have to build on the 2015 Paris Agreement and take the steps necessary to limit global warming to 1.5 degrees Celsius relative to pre-industrial times.

It is therefore no surprise that the Vodafone Institute's report "Global Future Pulse: Sustainability" found that almost two-thirds of the 17,000 people surveyed for the study across 17 countries around the world identify climate change as a serious threat to them and their environment. On the other end of the scale, only 5% think it poses no risk at all.

This study, however, found compelling differences in attitudes between survey participants in the Global North¹ and those in the Global South². Specifically, the survey found that people in the Global South seem willing to spend more of their own money for sustainable products and they tend to have more faith in their governments' abilities to do what it takes to tackle climate change. They also see digitalisation as an important tool in the fight.

The "Global North vs. Global South" narrative, of course, is one that has been part of climate negotiations for years. Many countries in the South require financial support to deal with the consequences of climate change and also feel their responsibility for the problem is not as great as that of the industrial North. There is also a fair amount of divergence when it comes to respondents' confidence in their government's ability to tackle the challenges associated with climate change.

Regardless of that divide, however, strong majorities in almost all countries surveyed would like to see their governments invest more in efforts to combat climate change. Furthermore, even if the willingness to spend more appears to be more pronounced in the South, respondents everywhere seem to recognise that sustainability must be paid for.

And perhaps most importantly, there is a strong degree of consensus on a couple of important points. First, in every country surveyed, a plurality of respondents agree that combating climate change is a shared responsibility, and that the costs associated must be shared by the state, by companies and by private citizens alike. And second, when it comes to pushing forward measures to attain the goal of net-zero emissions, we must all pull together – from global and supranational bodies, national governments and NGOs, all the way down to companies and individuals. People see climate change as a shared challenge.

¹ United States, United Kingdom, France, Germany, Sweden, France, Hungary, Romania, Slovenia and Spain
² China, India, Kenya, Egypt, South Africa, Brazil and Turkey. Selection based on the OECD's list of countries receiving Official Development Assistance: <https://www.oecd.org/dac/financing-sustainable-development/development-finance-standards/DAC-List-of-ODA-Recipients-for-reporting-2020-flows.pdf>

Part I

How dangerous is global warming?

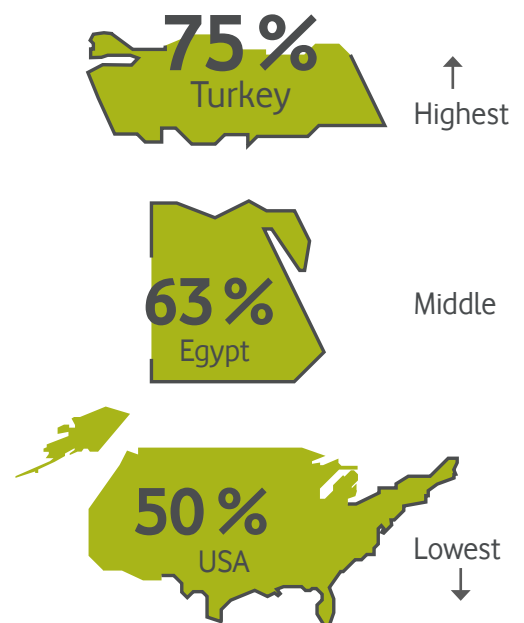


64 % identify global warming as tremendously dangerous or a serious threat

Just 5 % believe it represents no threat at all

Across the globe, concern about the climate is high. Two-thirds of all people who participated in the survey identify global warming as being either “tremendously dangerous” (27 %) or a serious threat (37 %). On the other end of the spectrum, just 5 % believe it represents “no threat at all”.

In contrast to many other questions asked in this survey, however, there does not appear to be a clear distinction regarding the perceived dangers of climate change between the Global North and the Global South. At least 60 % of respondents in almost all EU member states say warming temperatures are either tremendously dangerous or a serious threat, though Sweden is an exception, where just 51% say it is a tremendous or serious threat, the lowest rate in Europe. Respondents in the United States also don’t appear to be overly concerned, with only 50 % saying global warming is a tremendous or serious threat, the lowest rate of all countries in the survey, and 27 % saying it represents no threat or just a small one.



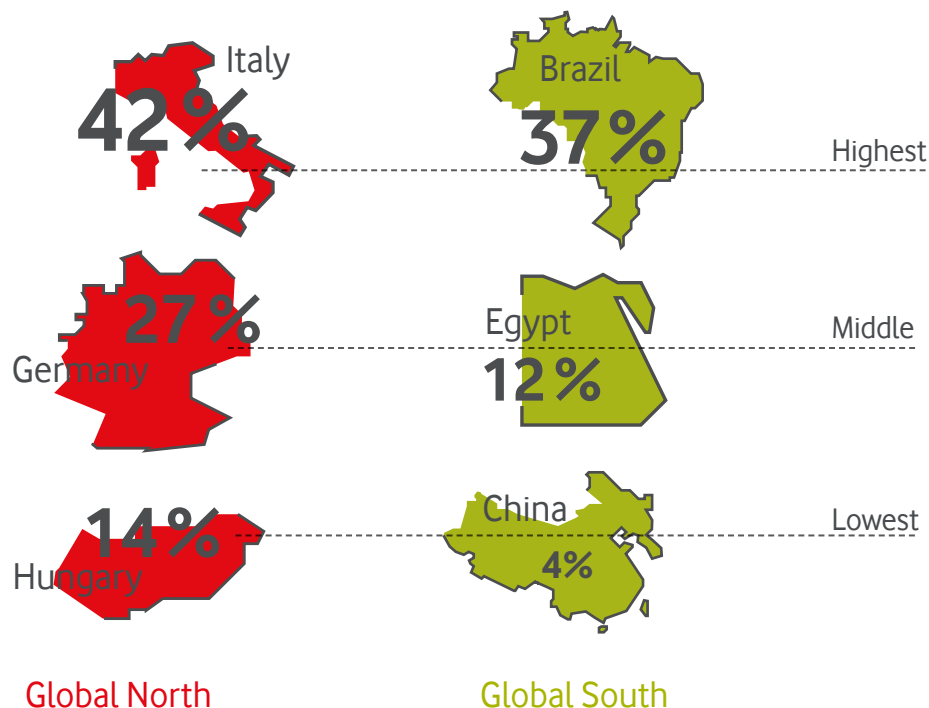


Among the youngest respondents, 22% believe that global warming is a tremendous threat.

The main outlier in the Global South, meanwhile, is Turkey, where fully 50 % of those surveyed identify global warming as being “tremendously dangerous”, far and away the highest total found in this survey. Another 25 % say it is a serious threat. People in Brazil are also concerned, with 71 % of respondents saying rising temperatures are a tremendous or serious problem, followed by South Africa, at 68 %. Respondents in China, India and Kenya report a lower level of concern. Interestingly, the survey’s youngest respondents, while still expressing significant concern about global warming, were least likely among study participants to say it is “tremendously dangerous”. Among those aged 16-24, just 22 % believe that global warming is a tremendous threat, while 7 % (the highest for any age group) say it represents no threat at all.

Still, concern in this age group varies widely from country to country. Whereas 42 % of young Italians and 37 % of their counterparts in Spain and Brazil feel global warming is a grave threat, only 4 % of those aged 16-24 in China agree, as do just 12 % in Egypt. In Europe, German youth (27 %) are likewise concerned, while just 14 % of young people in Hungary say climate change is a tremendous threat, and fully 11 % say it is no threat at all. Only in Egypt (12 %) did more respondents from this age group say that rising global temperatures represent no danger.

Temendous danger of climate change: Concern among those aged 16-24 varies widely from country to country.



Part II

Awareness of the need for sustainability



The amount of money developing countries need to adapt is five to 10 times greater than what is currently available.

But adjustments on the micro-level are needed as well, and people around the world seem to understand that fact.

On a global level, the sums that will be required to adapt to the growing impacts of climate change are immense. The 2021 Adaptation Gap Report, released by the United Nations Environment Programme in November, noted that the amount of money developing countries need to adapt is five to 10 times greater than what is currently available, and could reach \$500 billion per year by 2050.¹

But adjustments on the microlevel are needed as well, and people around the world seem to understand that fact. In the 17 countries surveyed, fully seven-in-10 say they are “definitely” or “maybe” willing to spend more on all manner of sustainable products, from clothing and energy to software solutions. And 79 % say they wouldn’t mind spending more for sustainably produced food.

Willingness to pay more for sustainably produced



79 %
food



77 %
energy



76 %
clothes



74 %
hardware

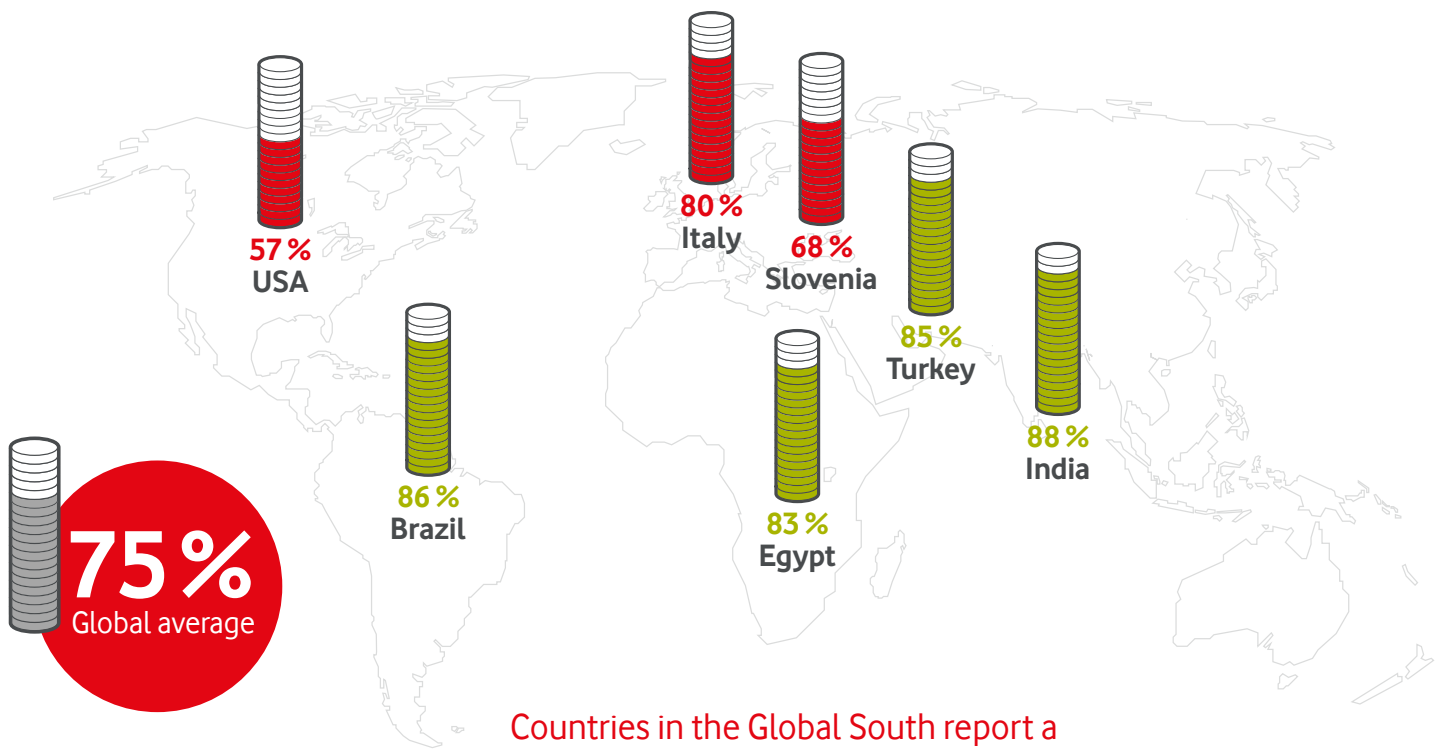


72 %
housing



70 %
software

¹ https://wedocs.unep.org/xmlui/bitstream/handle/20.500.11822/37312/AGR21_ESEN.pdf



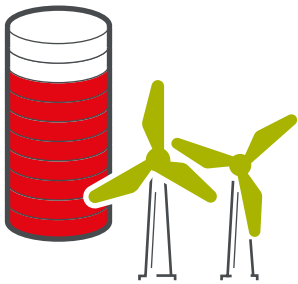
Countries in the Global South report a markedly higher willingness to spend more on sustainable products.

Ongoing supply chain issues and rising budget deficits and sovereign debt loads stemming from the COVID-19 crisis have increased financial jitters across the globe. Nevertheless, there seems to be a strong global consensus that sustainability needs to be a top priority.

This outcome is notable in an era of rising costs of living – particularly for such basics as electricity and housing – almost everywhere in the world. Ongoing supply chain issues and rising budget deficits and sovereign debt loads stemming from the COVID-19 crisis have likewise increased financial jitters across the globe. Nevertheless, there seems to be a strong global consensus that sustainability needs to be a top priority. Despite the socioeconomic disadvantages they have relative to the Global North, countries in the Global South report a markedly higher willingness to spend more on sustainable products. Fully 85 % of those surveyed across the Global South express a willingness to pay more, with India leading the way at 88 %.

In the Global North, meanwhile, Italy was the only country surveyed in which 80 % of respondents say they wouldn't mind costs rising in exchange for greater sustainability. That view, though, is shared by only 57 % of respondents in the USA, 60 % in Britain, 61 % in Germany and 62 % in Sweden. Indeed, only 20 % of UK residents say they would "definitely" be willing to spend more for sustainable products, against 56 % of Kenyans.

As other recent studies on attitudes toward sustainability and purchasing habits have also found², the Global Future Pulse study identifies strong differences between age groups. Over 80 % of respondents across all countries in the 16-24 and the 25-34 age groups say they are willing to spend more money for electricity from renewable energy sources and for sustainable digital hardware services, and just under 80 % say the same for sustainable software.



65 %* indicate enthusiasm for spending more on green energy sources



61 %* saying they would do the same for digital hardware sustainability



Just 53 %* are interested in spending more for sustainable software

*aged 55 and above

Among respondents aged 55 and above, around two-third indicate enthusiasm for spending more on green energy sources, with 61 % saying they would do the same for digital hardware sustainability. Just 53% are interested in spending more for sustainable software.

² <https://www.businesswire.com/news/home/20211014005090/en/Recent-Study-Reveals-More-Than-a-Third-of-Global-Consumers-Are-Willing-to-Pay-More-for-Sustainability-as-Demand-Grows-for-Environmentally-Friendly-Alternatives>

Part III

Who is responsible?

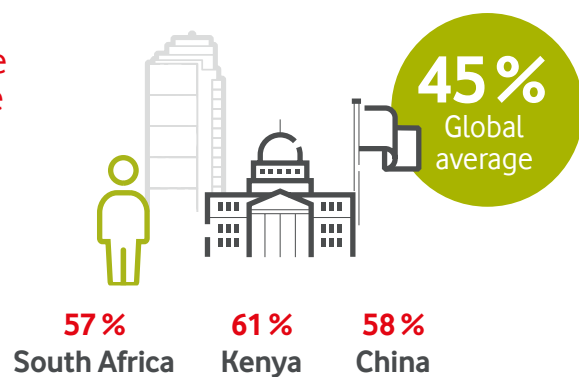


A plurality said that paying for the costs associated with rising temperatures is a shared responsibility, with states, companies and individual citizens all needing to chip in.

Even as individuals around the world appear willing to do their part, the survey also revealed a broad understanding that combating climate change is a shared responsibility. In almost every single country surveyed, a plurality of respondents said that paying for the costs associated with rising temperatures is a shared responsibility, with states, companies and individual citizens all needing to chip in.

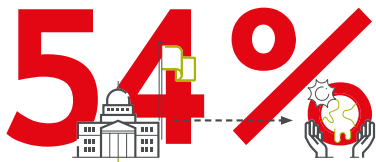
Countries in the Global South seem slightly more supportive of sharing out the costs, with 61 % of Kenyans, 58 % of Chinese and 57 % of South Africans saying that states, companies and citizens all must bear the costs of combating climate change together. Turkey, though, is a prominent outlier, with 47 % of respondents from the country saying that the state is primarily responsible.

The countries of the Global South seem to be slightly more supportive of sharing the costs of combating climate change between states, companies and citizens.

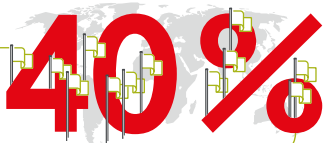


Responsibility for taking the lead in tackling climate change.

In the Global North, support for sharing out the costs among the state, companies and citizens is around 40 % in most countries, though over half of Swedes express support for such an approach. A quarter of those surveyed in Hungary, Slovenia and the UK feel companies should foot more of the bill, a higher rate than in any of the other countries.



worldwide see **national governments as primarily responsible** for tackling climate change.



believe **global institutions** should take the lead.



see **businesses and individuals** as primarily responsible.

The view of shared responsibility is similar regarding who should take the lead in driving measures to reach net-zero emissions targets. On this question – to which respondents could choose more than one answer – 54 % said that national governments should be in the driver’s seat, 40 % said global institutions should take the lead and a roughly equal number of 39 % identified businesses and individuals as bearing primary responsibility. A higher percentage of respondents said that the UN should carry most of the load (40 %) than “supranational bodies” like the European Union or the African Union (33 %).

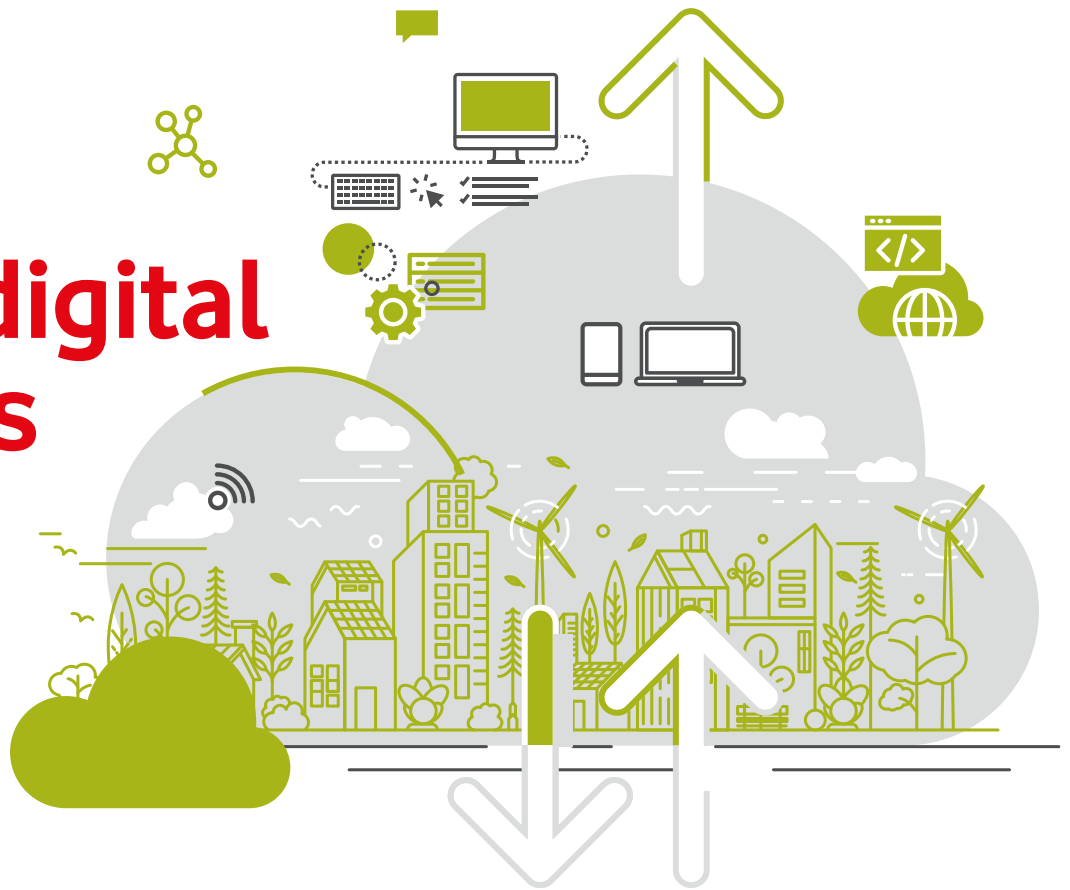
In Germany, interestingly, more respondents said businesses have primary responsibility than their national government, a sentiment shared by no other country in the survey except for France.

In Germany, interestingly, more respondents said businesses have primary responsibility (53 %) than their national government (52 %), a sentiment shared by no other country in the survey except for France.

On the other end of the scale, half of respondents in India and South Africa, along with 58 % in Kenya, said that individuals bear primary responsibility for measures aimed at reaching net-zero emissions. In Kenya, 50 % also said NGOs have a leading role to play.

There were also some interesting differences among age groups on the question of who should take the lead in pushing for net-zero emissions. Respondents in the 16-24 age group were more likely to say individuals (38 %) bear primary responsibility than businesses (30 %). Meanwhile, the older the respondent was, the more likely they were to say that companies bear the most responsibility, with fully 47 % of those 65 and older agreeing with the premise.

Part IV Faith in digital solutions



In addition to their willingness to spend more for sustainable products, young people around the world also exhibit a far greater faith that digitalisation can be an important, or even the most important, tool in the climate protection toolbox. More than seven-in-10 survey respondents in the 25-34 age group across the 17 countries polled say that digitalisation will be key in the fight against global warming.

Furthermore, just short of 20 % of people in this age group say digitalisation will be the single most important lever. Respondents in the 16-24 age group and 35-44 age group express similar levels of confidence in digitalisation.

Age 25-34



7/10 said that digitalisation will be key in the fight against global warming.

Age 55 and older



5/10 said that digitalisation will be key in the fight against global warming.



are confident that digitalisation is a lever or the most important lever in mitigating climate change.

That enthusiasm, perhaps unsurprisingly, isn't completely shared by respondents aged 55 and older. Only slightly over half of that demographic express belief that digitalisation will either play a role or be the primary lever in the global response to rising temperatures.

The older generations' wariness, of course, is not borne out by the science. While it is true that global computing – particularly when it comes to the vast quantities of computational power needed to train Artificial Intelligence systems¹ – does produce its fair share of greenhouse gases, digital solutions can also result in vast improvements in efficiency, thus preventing significantly more emissions than they cause. A report released in March 2021 by the German digital association bitkom found that digital technologies can contribute half of the emissions reductions necessary for Germany to achieve its 2030 climate objectives.² The World Economic Forum, meanwhile, believes that digital tools can cut global emissions by 15 %.³ To point to a more specific example, a study performed by the International Energy Agency, called "The Future of Trucks: Implications for energy and the environment," found that applying digital solutions to truck operations and logistics could reduce the amount of energy required for road freight by 20-25 %.⁴

Confidence in the powers of digitalisation tends to be broadly high across most of the 17 countries surveyed for the current study, with 64 % of all respondents identifying digital tools as one or the most effective tool available. The Global South, though, seems slightly more convinced.

1 https://www.vodafone-institut.de/wp-content/uploads/2021/03/Paper_The_AI_Gambit_16032021.pdf
2 https://www.bitkom.org/sites/default/files/2021-11/210318_charts_klimastudie_akt.pdf
3 <https://www.weforum.org/agenda/2019/01/why-digitalization-is-the-key-to-exponential-climate-action/>
4 <https://euagenda.eu/upload/publications/untitled-93874-ea.pdf>

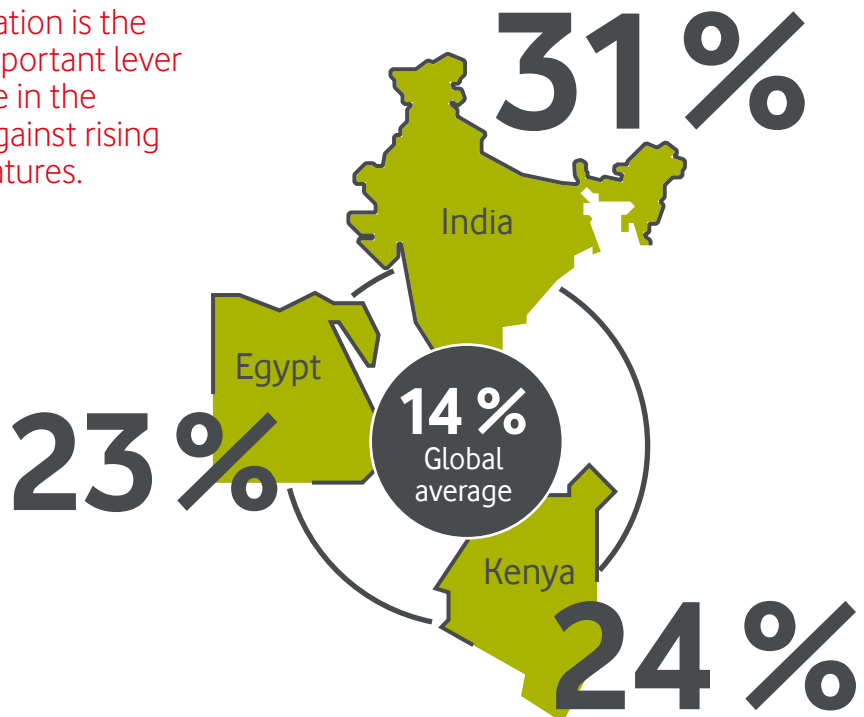
A report released in March 2021 by the German digital association bitkom found that digital technologies can contribute half of the emissions reductions necessary for Germany to achieve its 2030 climate objectives.

Across the nine European countries that participated in the study, 57 % believe that digitalisation is a part of the answer to climate change.

Indeed, almost a third of respondents in India (31 %) believe that digitalisation is the most important lever available, a view shared by roughly a quarter of respondents in Egypt and Kenya. While a lower share of survey participants in China say it is the single most important tool, fully 86 % believe it is at least part of the solution.

Support for digital tools in the battle against rising temperatures is also high in Europe, with the highest rates found in Italy (70 %), Romania (65 %) and Spain (62 %). Across the nine European countries that participated in the study, 57 % believe that digitalisation is a part of the answer to climate change, which appears to be a slight increase over the findings of the Vodafone Institute's "Digitising Europe Pulse" study from October 2020, which found that 54 % believed digital technologies have a positive role to play.⁵

Countries of the Global South seem slightly more convinced, that digitalisation is the most important lever available in the battle against rising temperatures.



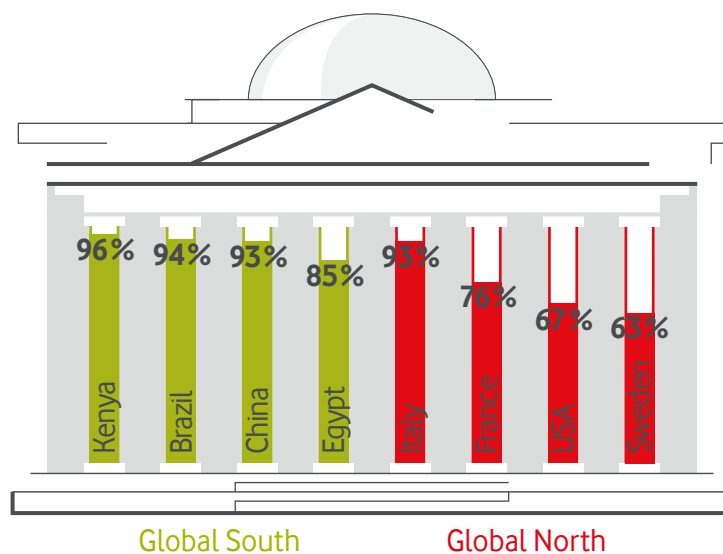
5 https://www.vodafone-institut.de/wp-content/uploads/2020/10/VFI-DE-Pulse_Climate.pdf

Part V

Trust in government



There is a strong desire in every one of the countries surveyed for governments to invest more to address climate change. On average, 84 % of all respondents say they want to see their government devote more money to the issue, with the Global South again leading the way. Fully 96 % of respondents in Kenya, 94 % in Brazil and 93 % in China and India want their leaders to spend more. In the Global North, Italy and Romania led the way, also with 93 %, with the USA (67 %) and Sweden (63 %) bringing up the rear.



In all countries surveyed, there is a strong desire for governments to invest more in tackling climate change.

Do leaders worldwide have the abilities to address climate change?

Leaders have the will:

58%



Leaders have the skills:

58%



Leaders have the capacity:

59%



But do leaders have what it takes? On that question, opinions diverge sharply. Across all survey participants, a solid 58 % say their leaders have the will, 58 % say they have the skills and 59 % say they have the capacity to address global warming. Beyond that, there doesn't seem to be much agreement – though it should be borne in mind that political structures vary between countries, potentially influencing how people respond to questions about government performance.

The four countries from our survey reporting the most faith in their governments are all located in the Global South, with 70 % or more of respondents from China, India, Egypt and Kenya saying their government has the will, the skills and the capacity to act on global warming. China leads the way, with nine out of 10 professing faith in their government in all three categories, though respondents in India aren't far behind, at roughly 85 % in those three categories. There are, though, several glaring exceptions in the Global South, with just 42 % of survey participants in Turkey saying their government has the will and the skills, and the citizens of South Africa and Brazil are only slightly more optimistic about their leaders.

In the Global North, confidence among respondents in their governments' skill and will to tackle climate change is not universally robust. Apprehension appears highest in Slovenia, where just 39 % say their leaders have the will, and only 36 % think they have the skill. Respondents in

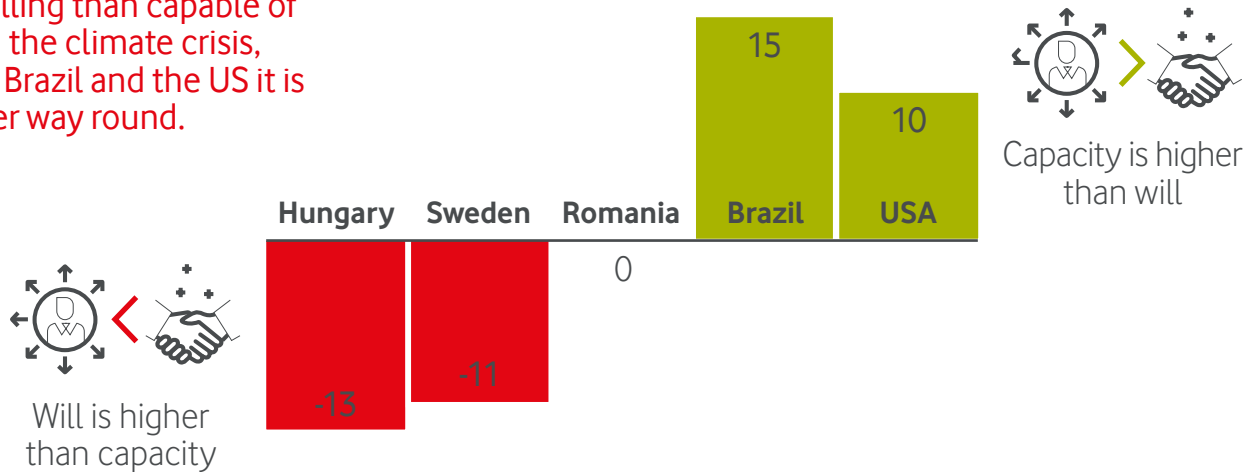
Spain appear relatively confident about their leaders' will and skill (65 % and 72 % respectively), and most other EU countries fall within the global average and assessments of their governments' capacities do not significantly diverge. The French, however, do seem a bit more concerned about their leaders, with 59 % agreeing they have the capacity to act, but only 49 % saying they have the will.

It is a finding that is in line with other surveys that have been conducted in Europe on faith in political leaders, most recently in a European Investment Bank poll released in late October. That study found that 58 % of EU citizens believe their countries will fall short of their Paris Agreement pledges, while fully 75 % of EU respondents to that survey – along with 69 % of Britons and 59 % of Americans – say they are more concerned about climate change than their governments are.¹

¹ <https://www.eib.org/en/surveys/climate-survey/4th-climate-survey/skepticism-reduced-carbon-emission-targets.htm>

The Global Future Pulse survey, though, has discovered interesting discrepancies between how respondents gauge their governments' will to act versus their capacity to do so. In Hungary and Sweden, for example, people see far more potential in their leaders' will to tackle climate change than in their capacity, with the gap being fully 13 percentage points in Hungary. In Brazil, on the other hand, and to a slightly lesser degree in the USA and France, citizens believe their governments' capacity is higher than its will. The gap is 15 percentage points in Brazil and 10 in France and the USA.

The governments in Hungary and Sweden are seen as being more willing than capable of tackling the climate crisis, while in Brazil and the US it is the other way round.



Part VI

Are regulations the answer?



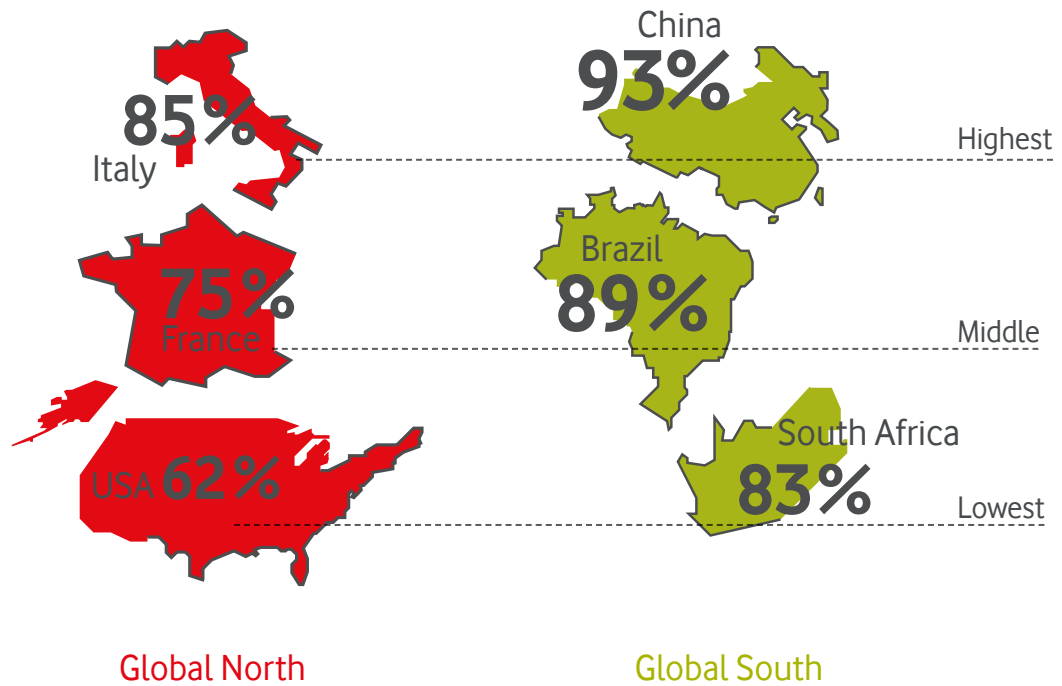
80%

worldwide consider **strong governmental regulations** as inevitable to manage climate change.

A majority of respondents feel that strong government action is inescapable for tackling global warming. When asked if they feel stricter regulations from the top are inevitable, 80 % of all survey participants responded “definitely” or “maybe”, with the USA, at 62 %, the only country that fell below the seven-in-10 mark.

Again, though, countries from the Global South tend to be more resigned to stricter government regulations than those in the Global North. Over 90 % of respondents in China, India and Kenya, along with 89 % in Brazil and Turkey, say they “definitely” or “maybe” feel stronger government regulations are inevitable – with fully 64 % of those surveyed in Turkey saying “definitely”. In the Global North, only Italy stands out, with 85 % saying they feel strict regulations from the top are certainly or possibly inevitable. Aside from the USA, the lowest cumulative values were found in Slovenia (70 %) and in Germany and Spain (71 % each), with just 24 % in Spain saying tougher regulations were “definitely” coming, the lowest in the study.

Respondents from the Global South are more likely to believe that **stricter government regulations** are coming than those in the Global North.

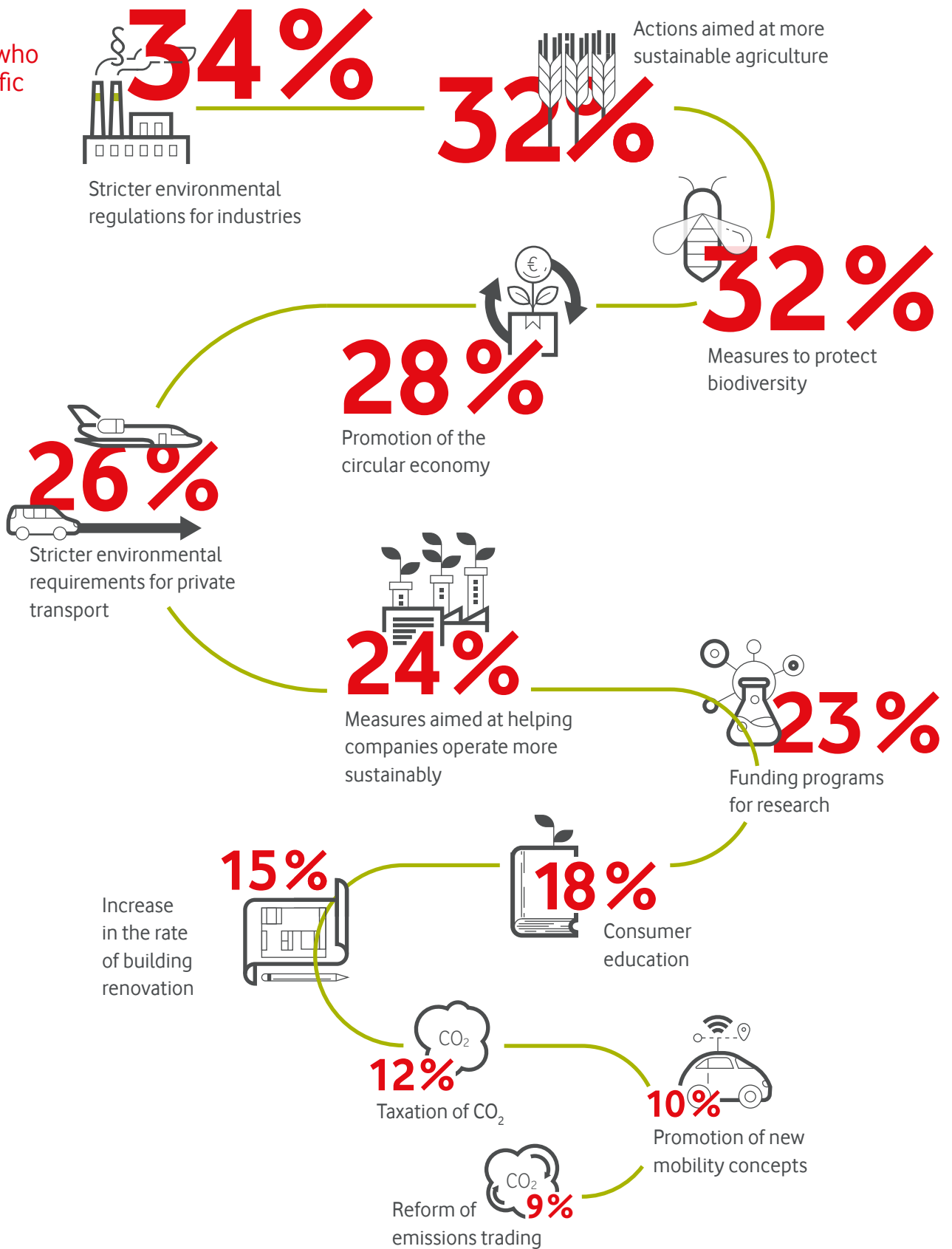


When it comes to what those regulations should look like, respondents in almost every country in Europe, with France and Romania being the exceptions, point to stricter regulations on industry as their top priority when asked to identify three. The USA and Romania were the only other Global North countries to not prioritise industry regulation, though it was the second choice of American survey respondents. In the Global South, however, only South Africans identified industry regulation as the top priority, while neither Turkey, China nor India had the measure in their top three.

Across all countries surveyed, the top three areas respondents felt need a strong government hand are industry, agriculture and biodiversity.

Across all countries surveyed, however, the top three areas respondents felt need a strong government hand are industry (34%), agriculture (32%) and biodiversity (32%), though respondents in China identify promoting the circular economy as the top priority. On the bottom of the list, only 9% chose emissions trading reform and 10% identified the promotion of new mobility concepts as priorities.

Share of respondents who support specific government actions



Conclusion We're all in this together



People want their countries to do more to combat climate change. That much emerges loud and clear from the Global Future Pulse study. While there are certainly differences in priorities and emphasis, overall it can be said that people in all parts of the world want to see more investment in sustainable technologies and a greater emphasis on digital solutions.

Just as important, people around the world seem ready to do their part. Whether it is spending more for sustainable products, accepting an increase in regulations in the pursuit of climate goals or playing a role in achieving the goal of net-zero emissions, the “Global Future Pulse: Sustainability” survey has found that people know and accept that everybody must pitch in.

The regional differences, to be sure, are real. People in the Global South appear to be slightly more willing to do whatever it takes, and perceptions from country to country reflect local proclivities and realities. But there seems to be a broad understanding among the world’s citizenry that the problem of global warming is one that we must all address together. And that there is no single measure that will fix the problem. Instead, as the survey makes clear, there is strong support for action at all levels and waning patience for standing pat with one foot stuck in the past. The message is that people are clear about the risks posed by climate change. It’s time to take the next step forward.

Appendix

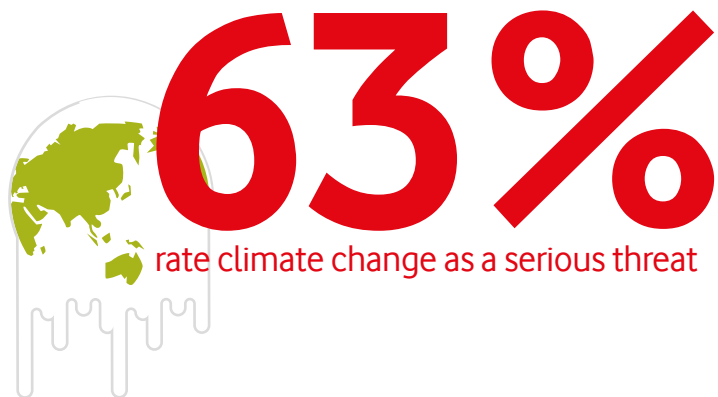
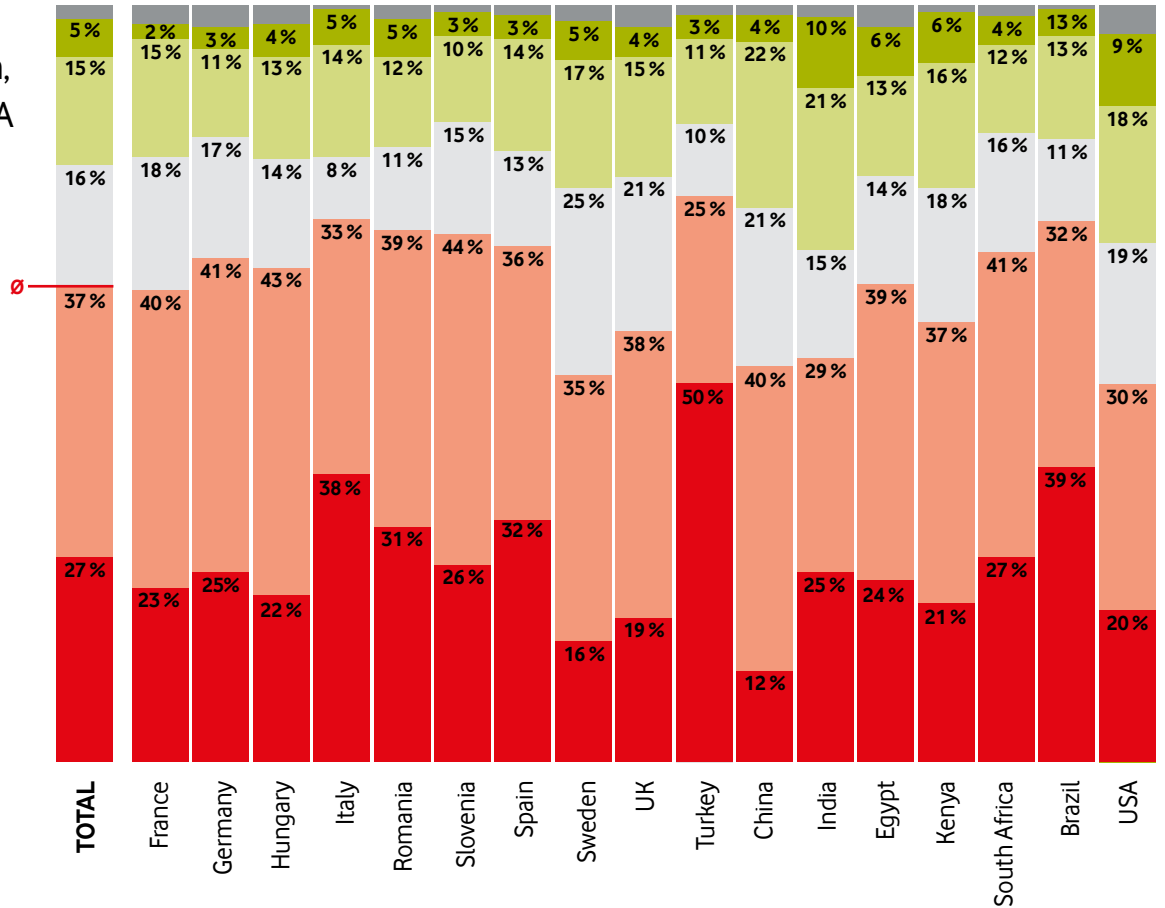
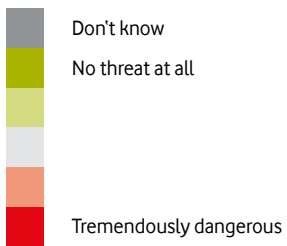


Risk potential of climate change

Countries

Biggest fear in Turkey, while people in Sweden, China, India and the USA feel the safest.

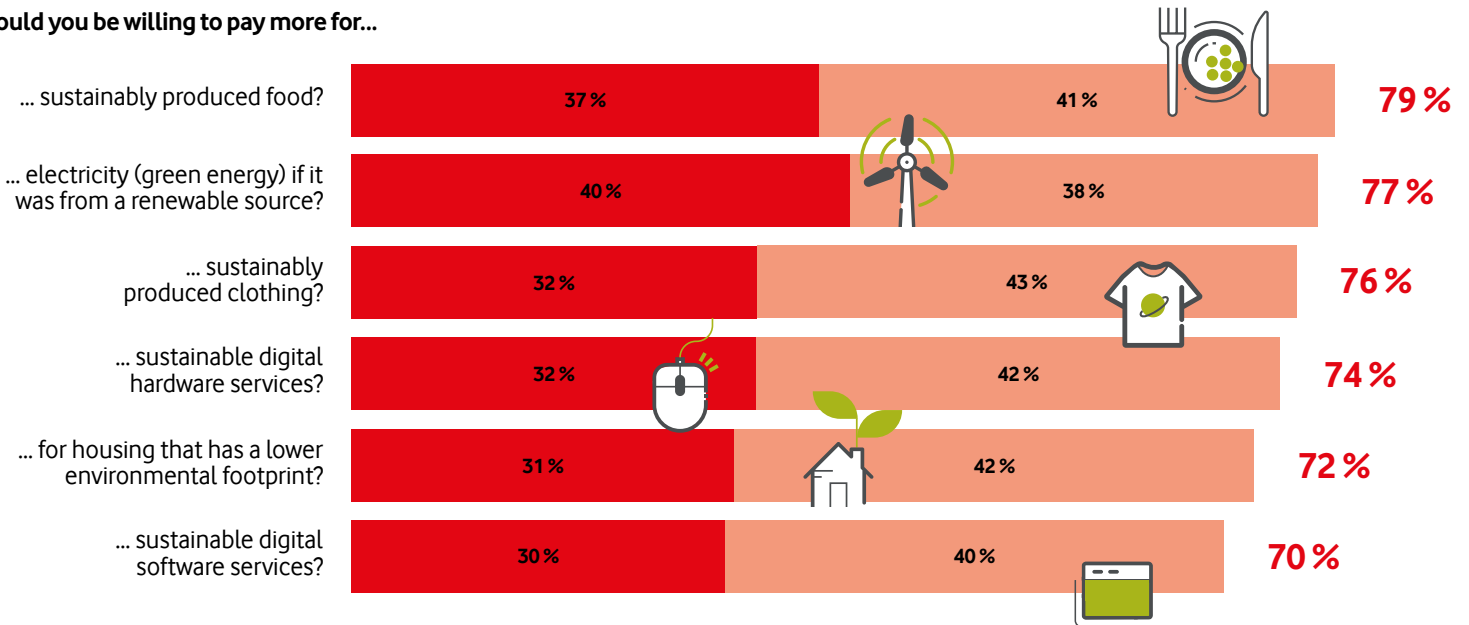
How dangerous do you feel climate change is for you and your environment?



Willingness to pay

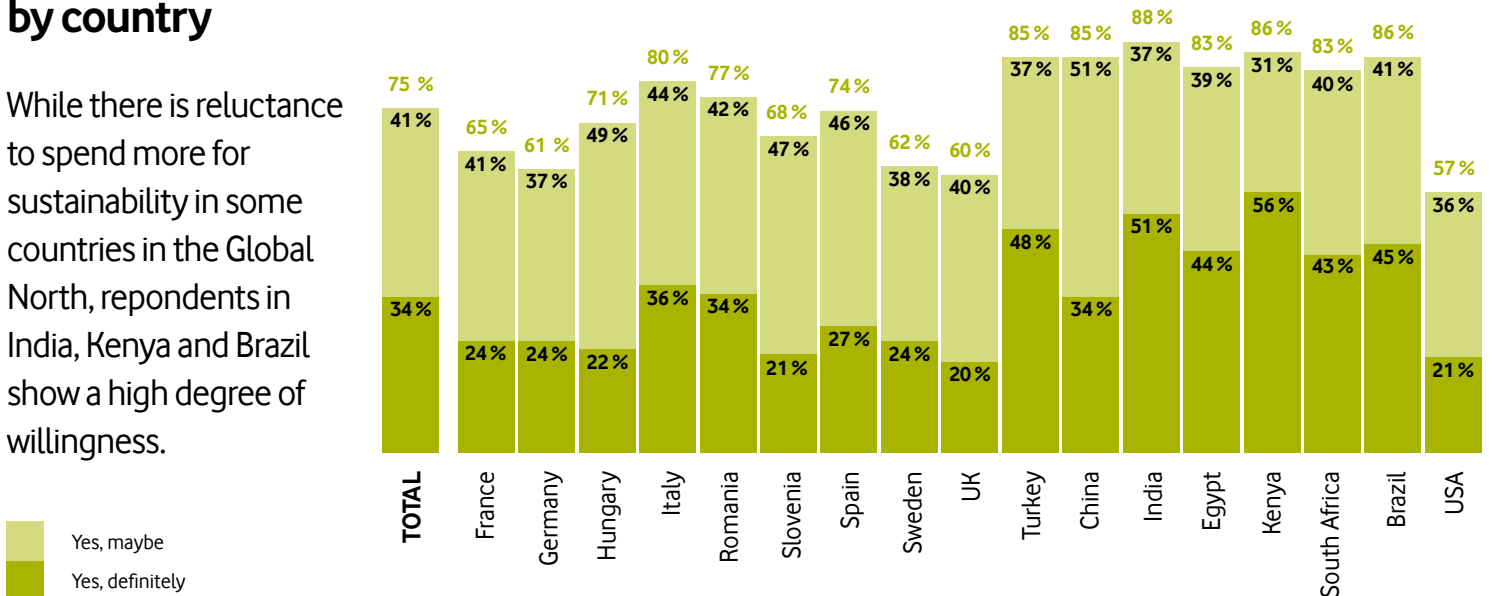
There is a broad willingness to spend more for sustainable products and services.

Would you be willing to pay more for...



Willingness to pay more for sustainability by country

While there is reluctance to spend more for sustainability in some countries in the Global North, respondents in India, Kenya and Brazil show a high degree of willingness.



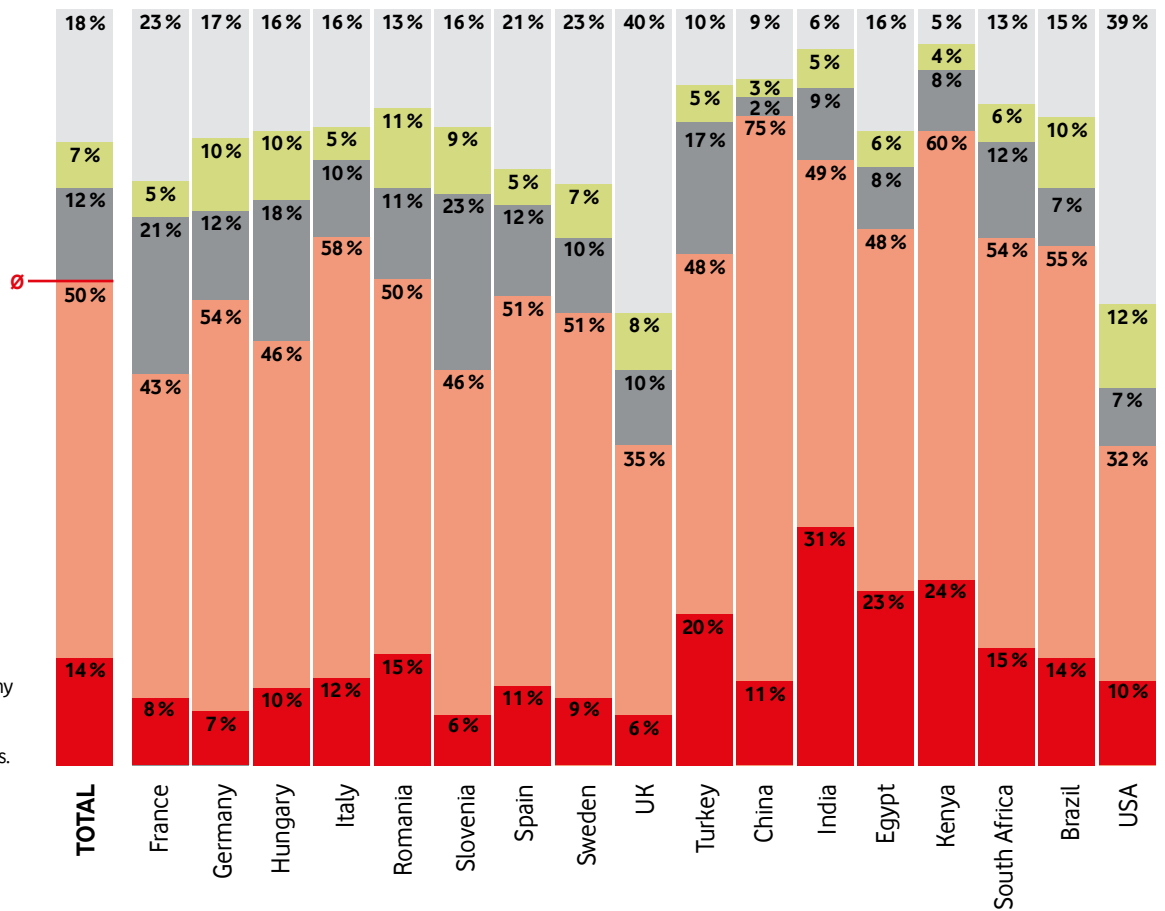
Yes, maybe
Yes, definitely

Role of digitalisation by country

Respondents from India were the most likely to see digitalisation as the most important lever to combat climate change.

What role will digitalisation play in mitigating climate change?

- Don't know
- Digitalisation has no impact.
- Digitalisation will further exacerbate the climate crisis.
- Digitalisation is one factor of many in mitigating the climate crisis.
- Digitalisation is the biggest lever to mitigate the climate crisis.



64%

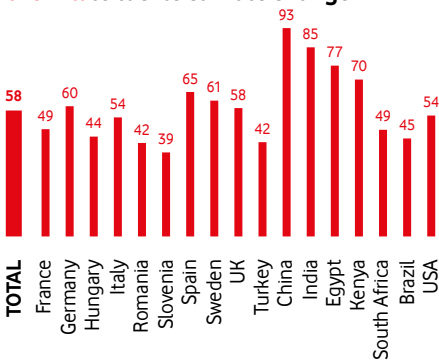
believe digitalisation can make a positive contribution to mitigating climate change.

Abilities of government

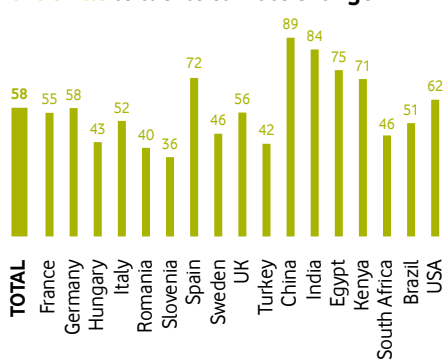
More than half of all respondents believe their government has the will, the skills, and the capacity to tackle the global warming.



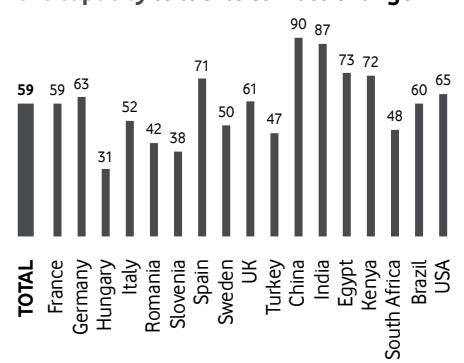
The government in my country has **the will** to tackle climate change



The government in my country has **the skills** to tackle climate change

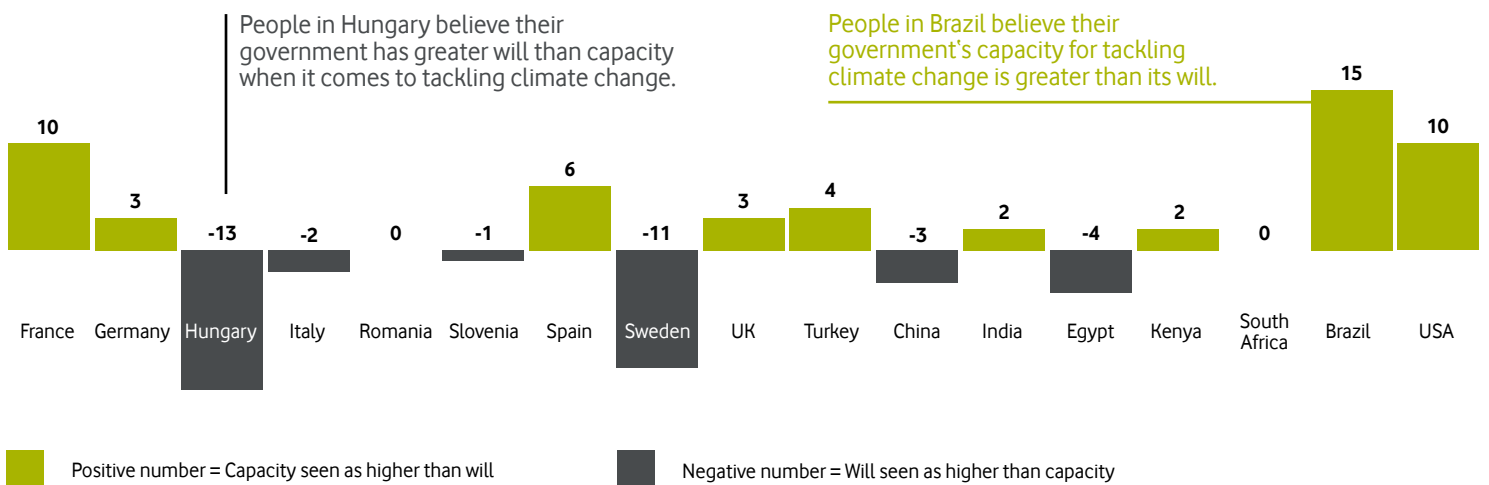


The government in my country has **the capacity** to tackle climate change



Abilities of government

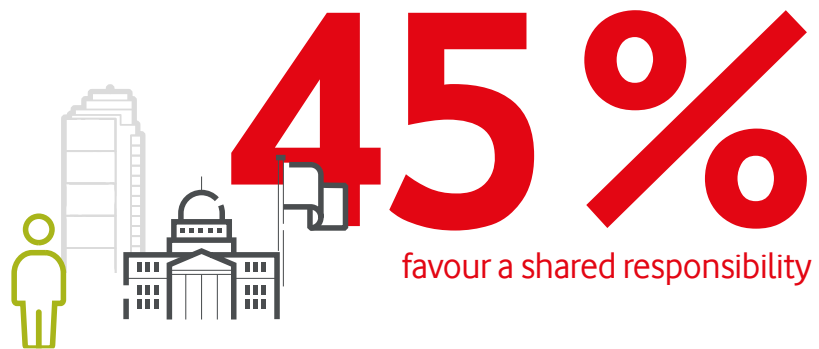
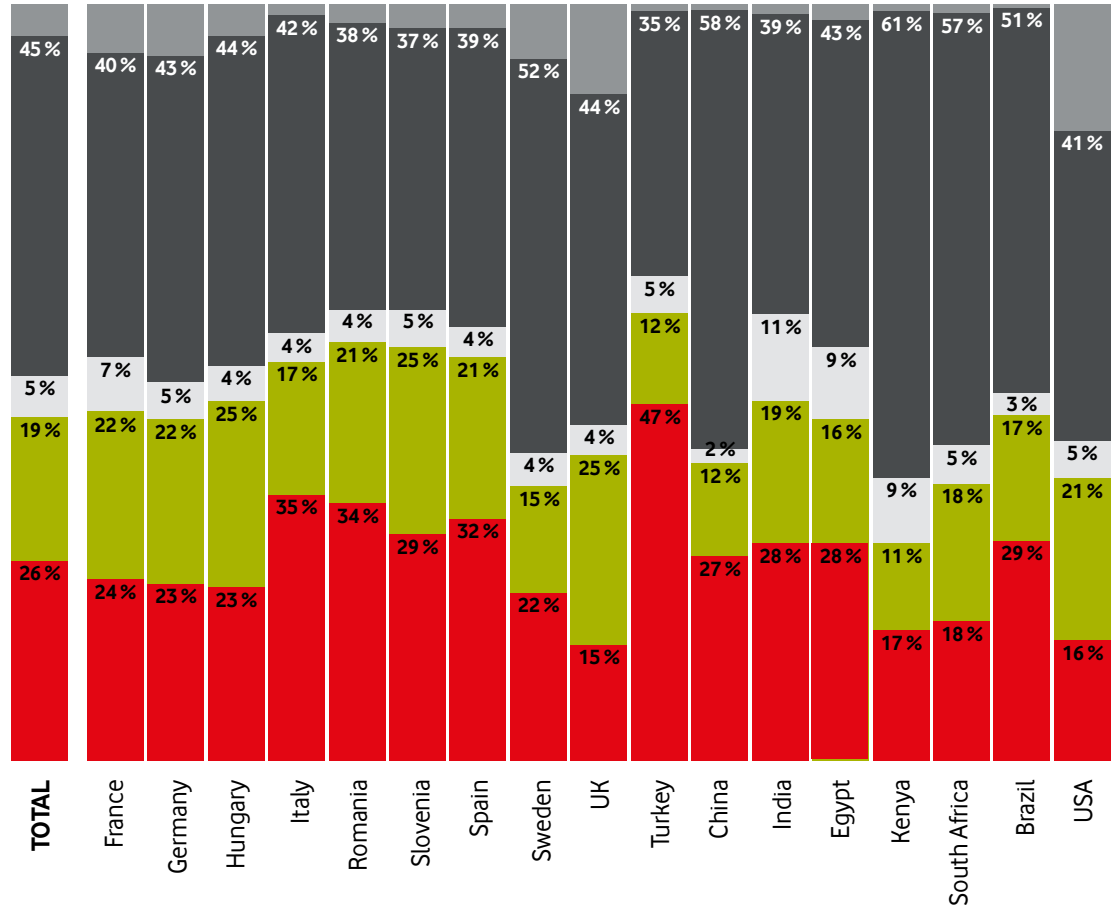
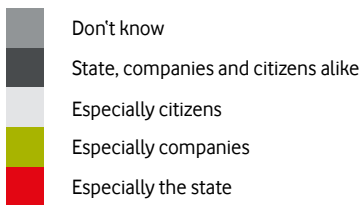
The governments of Hungary and Sweden are seen as being more willing than capable of tackling climate change, while in Brazil, France, and the USA, it is the other way around.



Sharing the costs by country

Respondents in all countries but Turkey believe the costs of responding to climate change should be shared.

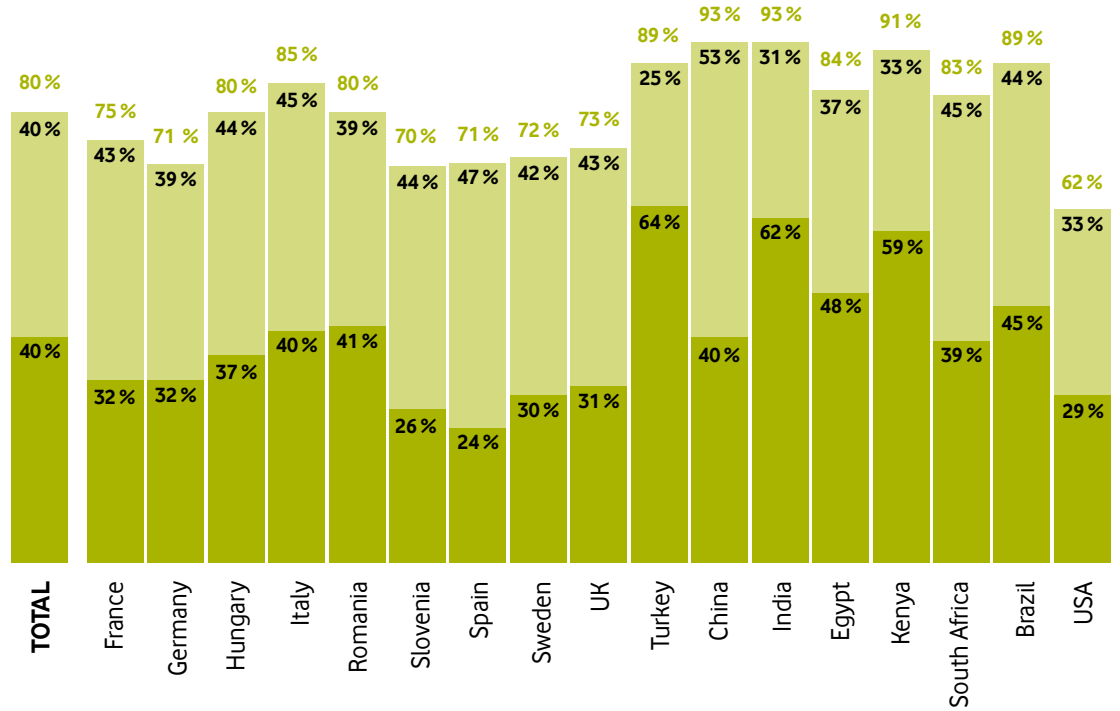
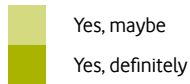
In your opinion, who should primarily bear the costs of combatting climate change?



Acceptance of governmental regulations by country

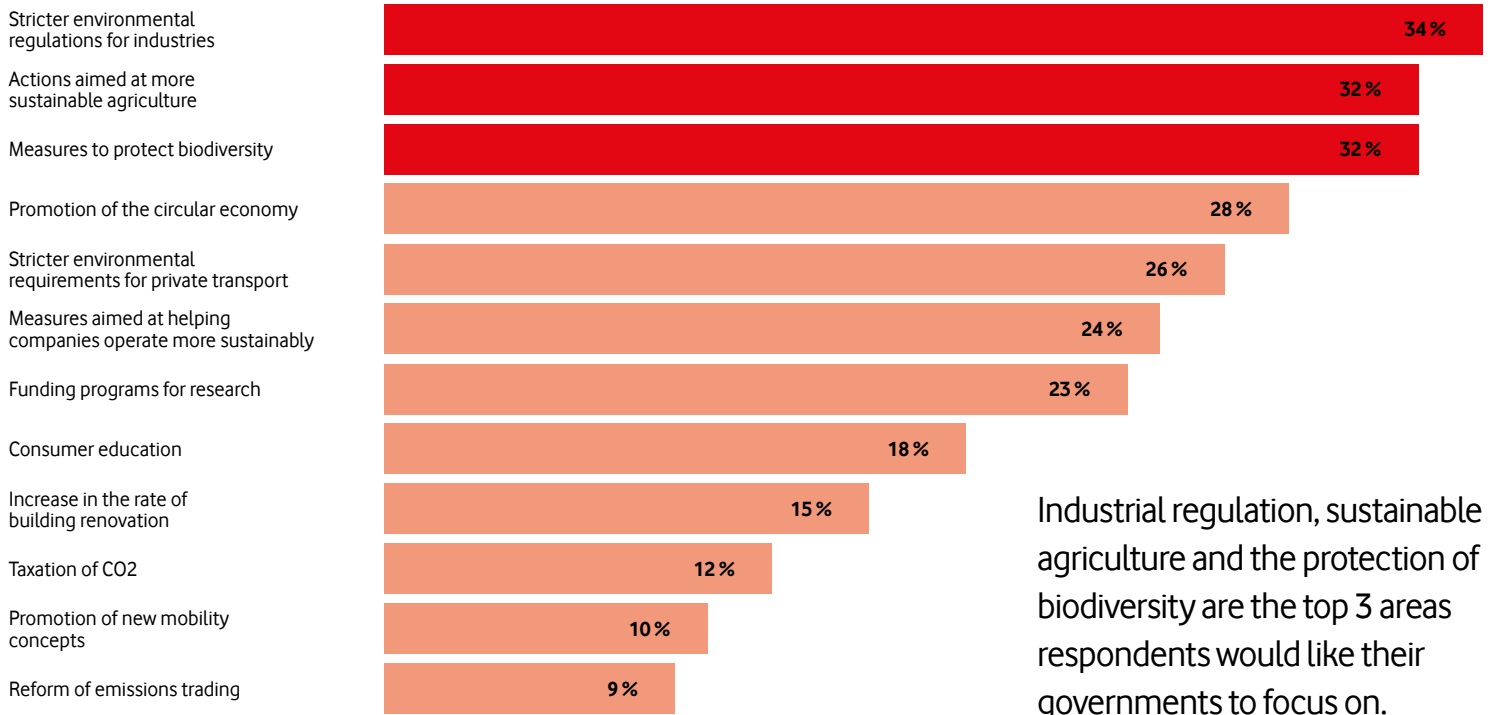
Governmental climate crisis regulations are seen most sceptically in the USA, while the strongest approval can be found in Turkey, India and Kenya.

Do you feel strong governmental regulations are inevitable to manage the climate crisis?



Top 3 effective measures

What top 3 measures do you think your government should focus on?



Industrial regulation, sustainable agriculture and the protection of biodiversity are the top 3 areas respondents would like their governments to focus on.

Methodology

The online survey was conducted by Kantar in the following countries: Brazil, China, Egypt, France, Germany, Hungary, India, Italy, Kenya, Romania, Slovenia, South Africa, Spain, Sweden, Turkey, the UK and the USA.

1,000 interviews were conducted in each country (17,000 interviews in total). All participants in the survey were at least 16 years old. The interviews were conducted between 21 September and 4 October 2021.

Based on a current listing compiled by the OECD, we consider the countries of USA, UK, France, Germany, Sweden, Italy, Hungary, Romania, Slovenia and Spain to belong to the Global North. The countries of China, India, Kenya, Egypt, Turkey, South Africa and Brazil are considered as belonging to the Global South.

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