

OBS' COP 2021 CLIMATE CHANGE AND PUBLIC OPINION INTERNATIONAL OBSERVATORY

**Presentation of results in the United
Kingdom**

OCTOBER 2021

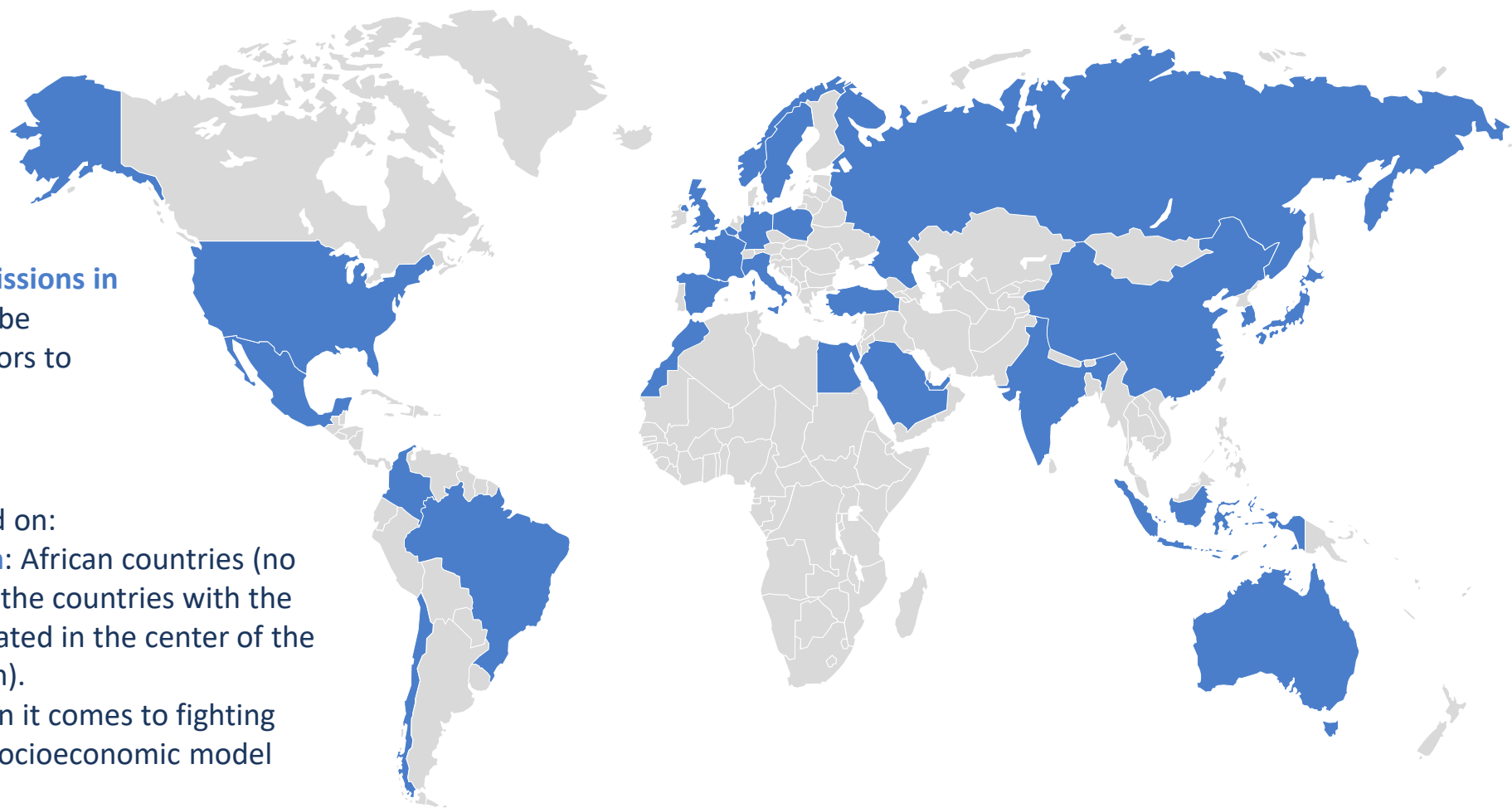
GAME CHANGERS



A reference study in 30 countries

The sample of countries questioned includes:

- 1 Countries with the **highest CO2 emissions in tons per year**, which can therefore be considered as the biggest contributors to climate change
- 2 Along with countries selected based on:
 - their **geographic location**: African countries (no African countries among the countries with the highest emissions) or located in the center of the European Union (Belgium).
 - their **exemplariness** when it comes to fighting climate change and the socioeconomic model (Norway, Sweden)



Context and methodology

Context

A wide-ranging, brand-new study initiated by EDF and conducted by Ipsos in 30 countries, including countries with the highest CO2 emissions, and representative of two-thirds of the global population.

As a major player in the energy sector on an international level, EDF wanted to produce an international status report on opinions, knowledge, expectations and levels of engagement in relation to climate change, to add to reflection and contribute to the constructive search for solutions for the future.

This report is intended for the UK only.

Methodology

Nationally representative sample of the population aged 16 and over.

Data collection method: Ipsos online panel

Sample size: 1000 respondents

Quotas: gender, age, region, profession, agglomeration size

Fieldwork dates: 7th-15th September 2021

Findings (1/2)

Climate change: status of knowledge and perceptions among the UK population

Economy and environment are prominent stakes in public opinion

- **The British take a very severe view of the current status of the environment and the economy in their country**, with a majority judging each of these situations as bad (62% for the environment and 68% for the economy). The cost of living (52%, +3pts) and the environment (45%, -1pt) are also among the topics that concern the population the most along with the healthcare system (50%, +5pts). COVID has dropped considerably (44%, -21pts)*.
- **There are many concerns in relation to the environment**: the British are primarily concerned about the question of waste accumulation (63%, -4pts), climate change ranks second (59%, -1pt). Following a summer marked by a series of natural disasters worldwide, the issue of extreme climate events is an increasing concern (49%, +3pts), after a large increase had already been recorded between 2019 and 2020 (+6pts).
- **This concern is directly expressed in what the population wants**: priority should first be given to the environment rather than economic growth (51%, -1pt vs 34%, +2pts). Note however that **the British do not see the environment and the economy as opposed**. If priority was given to the environment in their country, they consider that this would tend to create jobs (35%) or that it would at least have no consequences in terms of employment (21%).

The reality of climate change is no longer disputed

- The share of **climate-skeptics** in the UK (i.e. people who reject the idea of climate change of human origin) is similar to the level observed globally but has progressed faster since 2020 (35%, +4pts in the UK vs 34%, +2pts worldwide).
- Industry is viewed as the activity producing the most greenhouse gases (87%), along with cars (86%), electricity production from fossil fuels (85%) and the destruction of forests (84%). The British are better able to identify activities that emit greenhouse gasses than elsewhere, notably agriculture (63% vs 45% globally) and building heating/air conditioning systems (73% vs 65%). They are also less likely to point the finger at nuclear power plants (46% vs 57%).

Anxiety can be felt within the population in the face of climate change that is already obvious

- Climate change primarily causes **concern** (65% of the people questioned claimed to be worried) whereas 34% claimed to feel **anger** and 24% claimed to be demoralized. However a similar share claimed to be skeptical (24%).
- Climate change has become **a tangible and observable reality** close to home since 62% claim to have already observed its effects in their own region. Moreover they consider that climate change will mainly have negative consequences where they live (50%), below the global average (58%).
- Concretely, those who have already observed the effects of climate change in their region report an **increase in temperatures**, heatwaves (65%), **disruption of the seasons** (57%) and **phenomena relating to flooding and rising water levels** (44% vs 33% globally).

* Fieldwork conducted between 7th and 15th September 2021 prior to the resurge of the epidemic in the UK

Findings (2/2)

Climate change: who should act as a priority and to do what?

Mobilization should primarily be driven by governments, which should be doing more according to public opinion

- **Much is expected of the government**, which is identified as the player that should be taking action as a priority (73%). The gap between expectations of the British government and the action it is considered to be taking is very big: 73% think that it should be taking action but only 47% consider that it is really taking action (a 26-point gap, as in 2020).
- **This gap can be seen again in the choice of priority between environment and economy**: most people want priority to be given to the environment (51%) but fewer than half of that number think that this is what will actually happen (23%). While the gap between what people want and what they predict will happen is large (28-point delta), it is decreasing (38-point delta in 2020).
- Despite this critical view, British citizens believe that **their country is making as much of an effort as the others** to fight climate change (49%), 21% even think that it is doing more.

The British are not very engaged in everyday actions and feel somewhat helpless in relation to actions that would be useful and effective in fighting climate change.

- **To fight climate change**, the Britons questioned think that most of all **we need to make big changes in our life style** (53%, -6pts), the share focusing on a technical and scientific solution is still a minority (29%, +3pts). However, in detail, fewer than 2 out of 10 people (14%) know precisely what should be done to fight climate change on their own level.
- When it comes to individual actions, **efforts to fight climate change are still not very integrated into their daily lives**, except for sorting waste (74% do this systematically). On the whole, they are however **more active than the world average** notably when it comes to sorting waste (+26 pts for doing this systematically), the fact of limiting heating/air conditioning (40%, +7 pts vs the global figure), choosing products with the least possible packaging (32%, +4pts). In contrast, **certain actions are less widespread than elsewhere**: avoiding buying products produced in distant countries (17%, -4pts compared to the global average), travelling by bicycle (only 9%, -8pts) and prioritizing seasonal fruits and vegetables (31%, -13pts).
- On a more political level, **about one out of every two people have mobilized in their own way**: 54% have signed a petition, 47% have boycotted a product and 46% have voted for a political party because of its strong commitment to fighting climate change.

Acceptable measures as long as they don't directly affect individuals and mobility

- **The most acceptable measures** are the ones that **impact citizens the least on an individual level**: installing solar panels (85%), building wind farms at sea or on land (around 80%).
- **Measures aimed at taxing individuals or impacting mobility fail to win approval from the majority**: 39% acceptable for urban tollbooth at the entrance to large cities, 45% for taxing household waste to encourage less waste and 48% for limiting access to city centers to electric or hybrid vehicles.



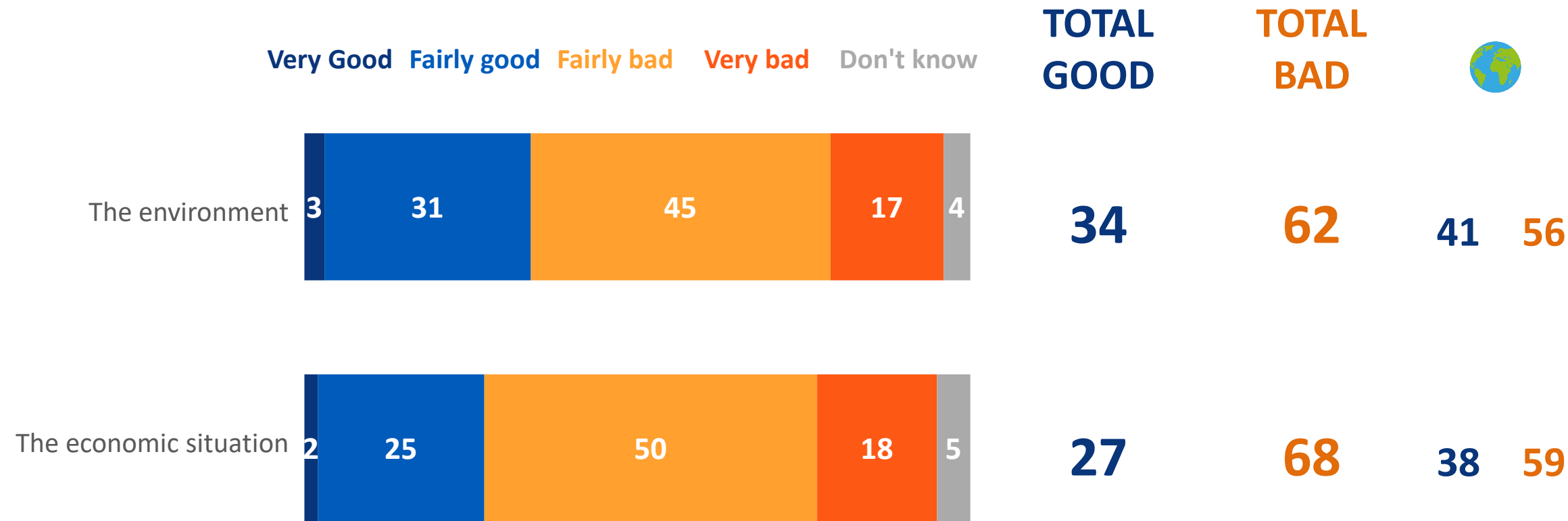
Climate change: status of knowledge and perceptions among populations

1

 **With the economy and the environment,
many global challenges**

In the eyes of a majority of British people, the economic and environmental situation of their country has deteriorated and is worse than elsewhere

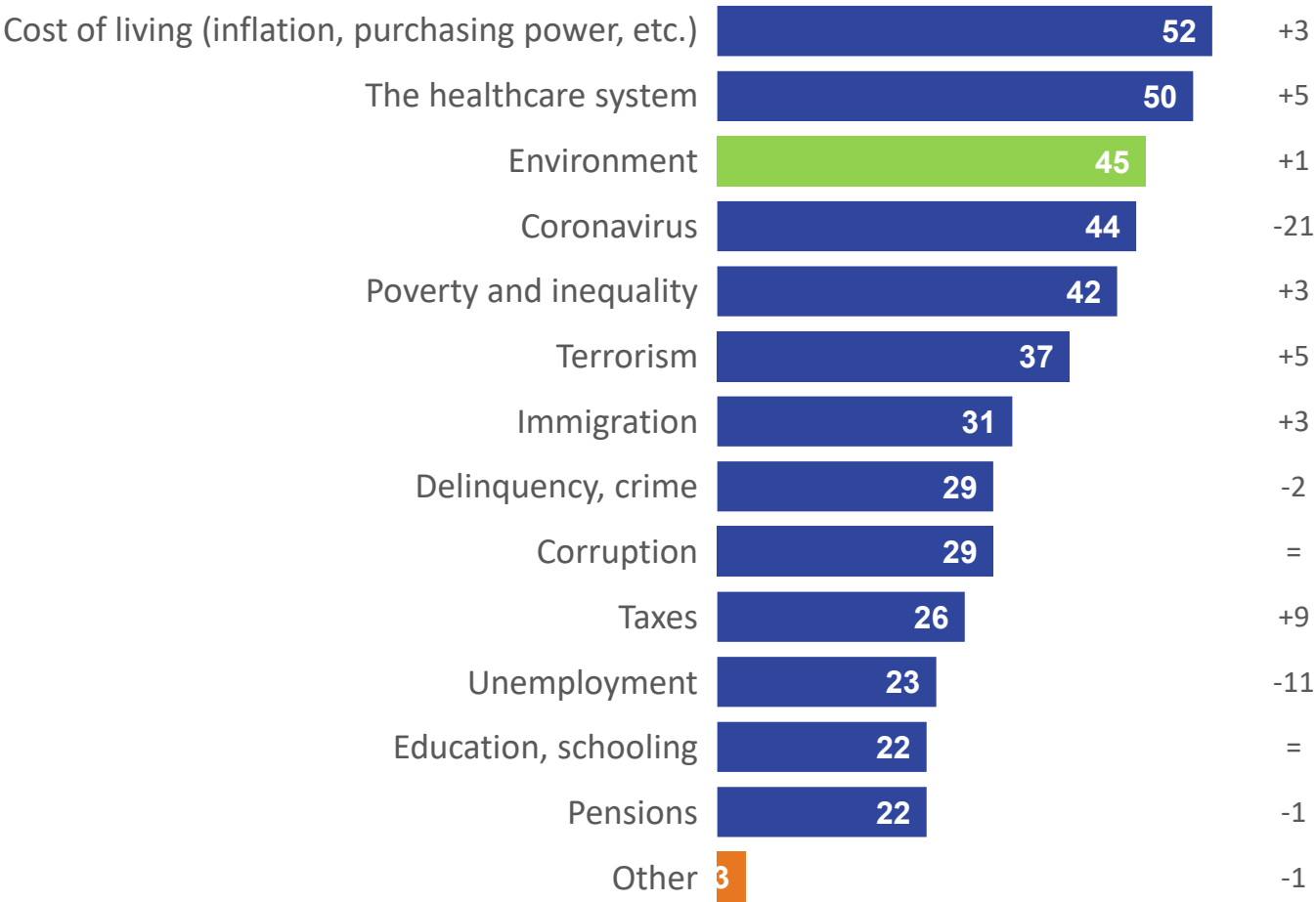
Diagnosis of the situation in the country



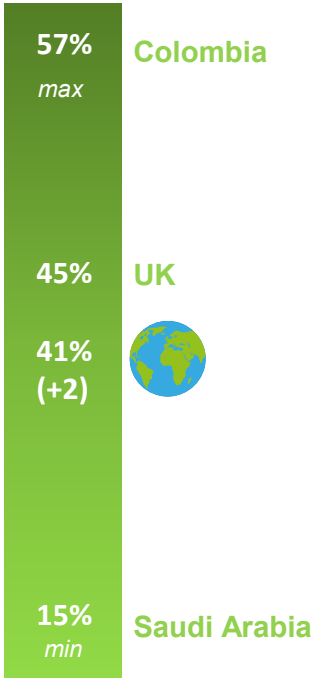
Question A1. For each of the following areas, tell me whether the situation in your country seems to you to be: :Base: All

Within this context, the cost of living and the environment are among the top 3 most concerning topics in public opinion

Hierarchy of concerns



% Environment



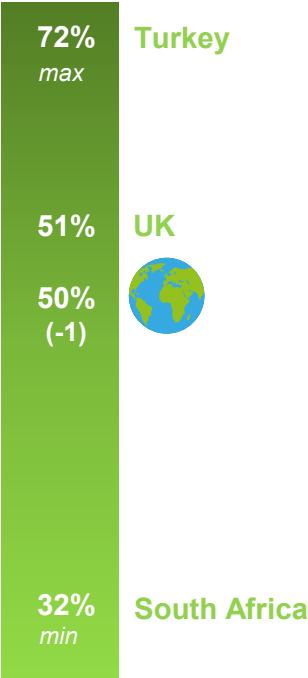
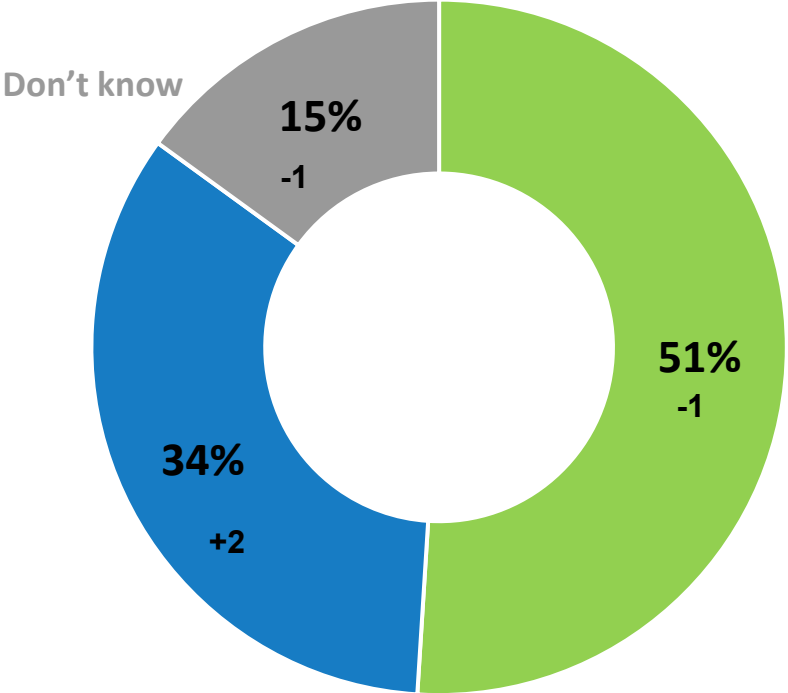
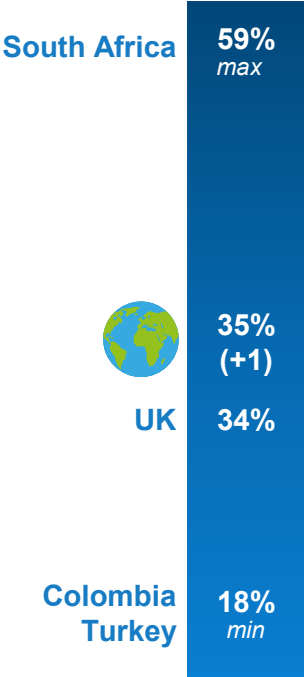
Question A1bis. From this list, which topics worry you the most? Base: All

Priority should be given to the environment over the economy according to a small majority of the population

Which of the following two statements do you agree with most?

Priority SHOULD be given...

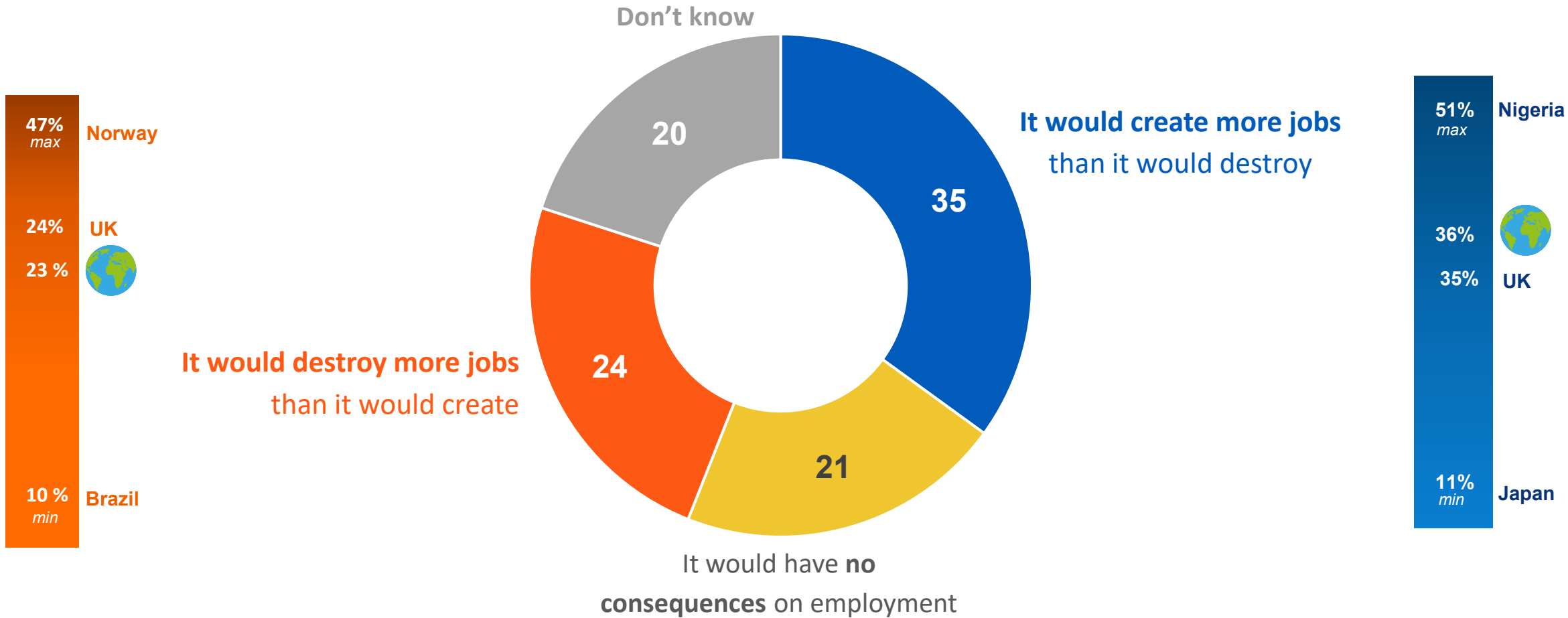
- to economic growth and jobs, even if it might have harmful consequences for the environment
- to the environment, even if it might slow down economic growth in your country and cause job losses



Question A2. Which of the following two statements do you agree with most?
Base: All

Favoring the environment would have more of a positive impact – or at least a neutral one – on employment

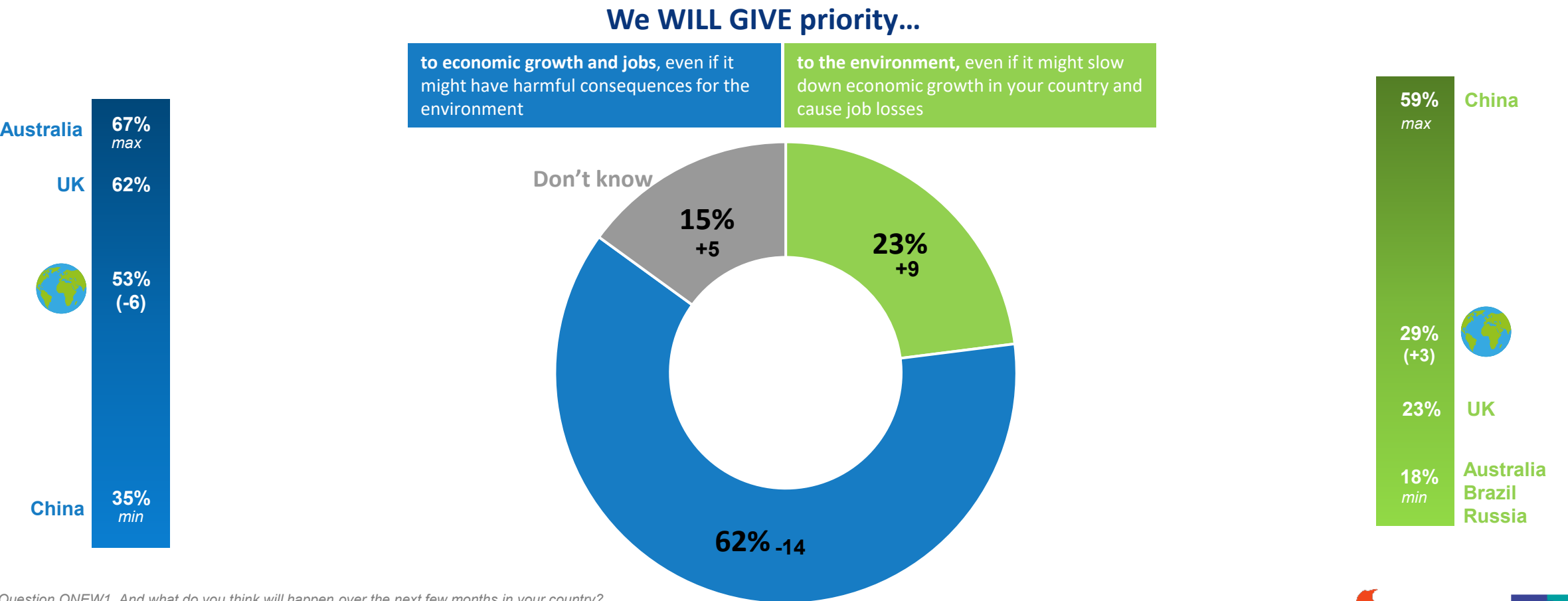
If the decision was made to prioritize the environment in your country, do you think that:



Question A4. If the decision was made to prioritize the environment in your country, do you think that: : Base: All

In reality, the British consider that priority will be given to the economy and employment. However, a larger number this year think that priority will be given to the environment

And what do you think will happen over the next few months in your country?



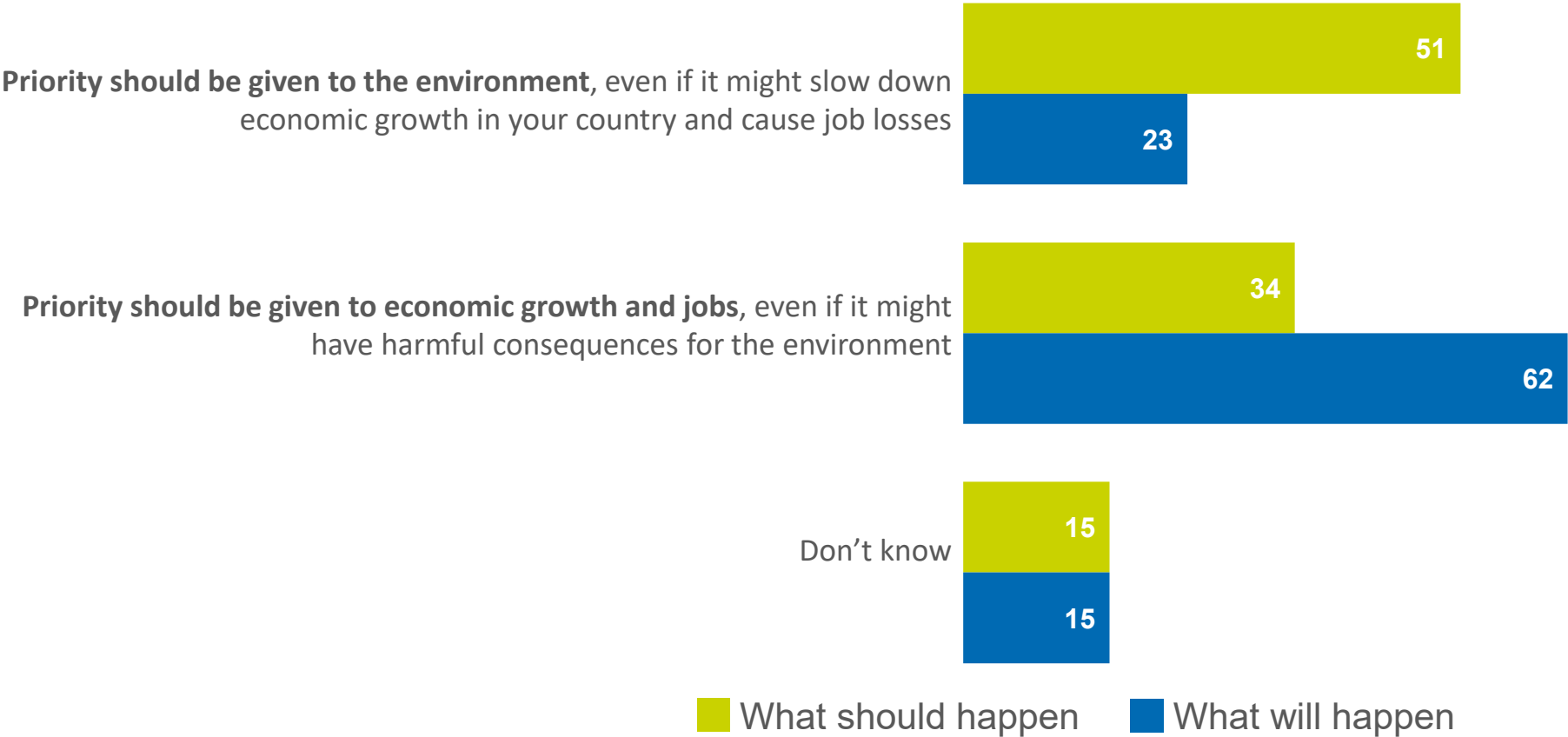
Question QNEW1. And what do you think will happen over the next few months in your country?
Base: All



Despite this progression for the environment, a big gap still remains between what the population want and what they expect to happen

Which of the following two statements do you agree with most?

And what do you think will happen over the next few months in your country?



Question A2. And what do you think will happen over the next few months in your country?
Question QNEW1. And what do you think will happen over the next few months in your country?
Base: All





The reality of climate change is no longer disputed, but one third of the British people interviewed still doubt the human causes of the phenomenon

Among the environment-related problems, extreme climate events are an increasing source of worry. Climate change is a concern for a large majority of public opinion.

Which environmental problems do you think are the most concerning in your country?



	% Concerns			Global average		Country where the concern is the highest
	1st rank	Total		2021		
The accumulation of waste, packaging, plastic	20	63	-4	46	-2	United Kingdom (63%)
Climate change	26	59	-1	44	-1	Singapore (64%)
Extreme climate events (floods, heatwaves, droughts, cyclones, forest fires...)	13	49	+3	41	=	Japan (68%)
Air pollution	12	48	-5	40	-2	South Korea (62%)
The decrease in biodiversity (decline of animal and plant species)	5	37	+13*	27	+7	Norway (47%)
Water pollution	3	25	+1	34	-2	Russia (54%)
Running out of resources (water, soil, wood...)	5	25	-2	32	-2	Turkey (52%)
Deforestation	4	22	-1	28	+1	Brazil (54%)
Soil pollution (use of fertilizers, pesticides)	1	17	-4	25	=	Egypt (38%)
Desertification, drought	1	9	+1	20	+1	Chile (47%)

Question A3. From the following list, which environmental problems do you think are the most concerning in your country?
Base: All
*Evolution to be interpreted with caution. Last year, the item was formulated as follows: The decrease in biodiversity [no detail].

Despite the increase in the number of climate-skeptics, almost two-thirds of citizens remain convinced of the existence of climate change caused by human activity

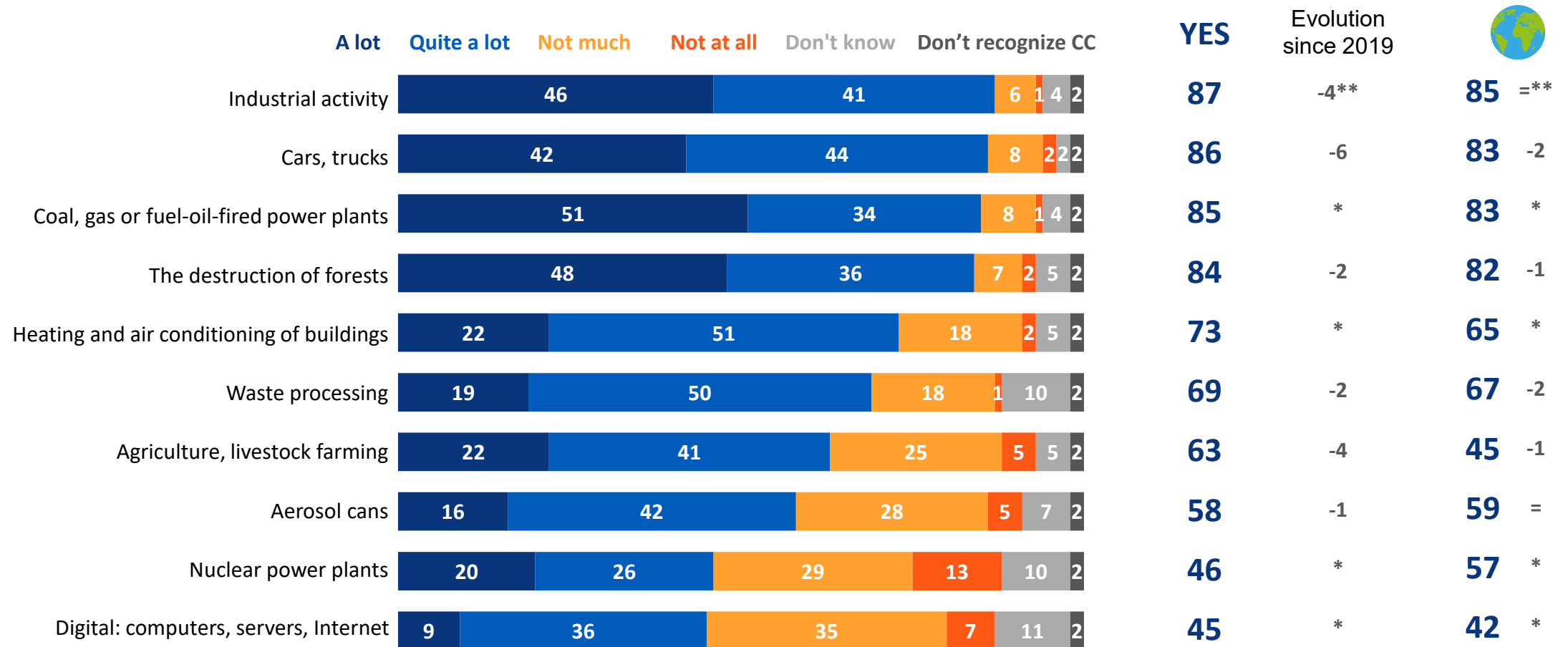
Summary of climate skepticism levels



Question B1. Would you say that we are experiencing a change in climate?
Question B3. And concerning this climate change that we hear about, would you say:
Base: All
16 – © Ipsos | EDF – October 2021

Industry is viewed as the activity producing the most greenhouses gases, along with cars, production of electricity from fossil fuels and the destruction of forests. The impact of agriculture is more clearly identified than elsewhere.

Do the following activities produce greenhouse gases that cause climate change?



Question B9 For each of the following activities, you think it produces a lot, quite a lot, not much or no CO2 (the greenhouse gas that causes climate change)?Base: All

*Item modified from the previous wave

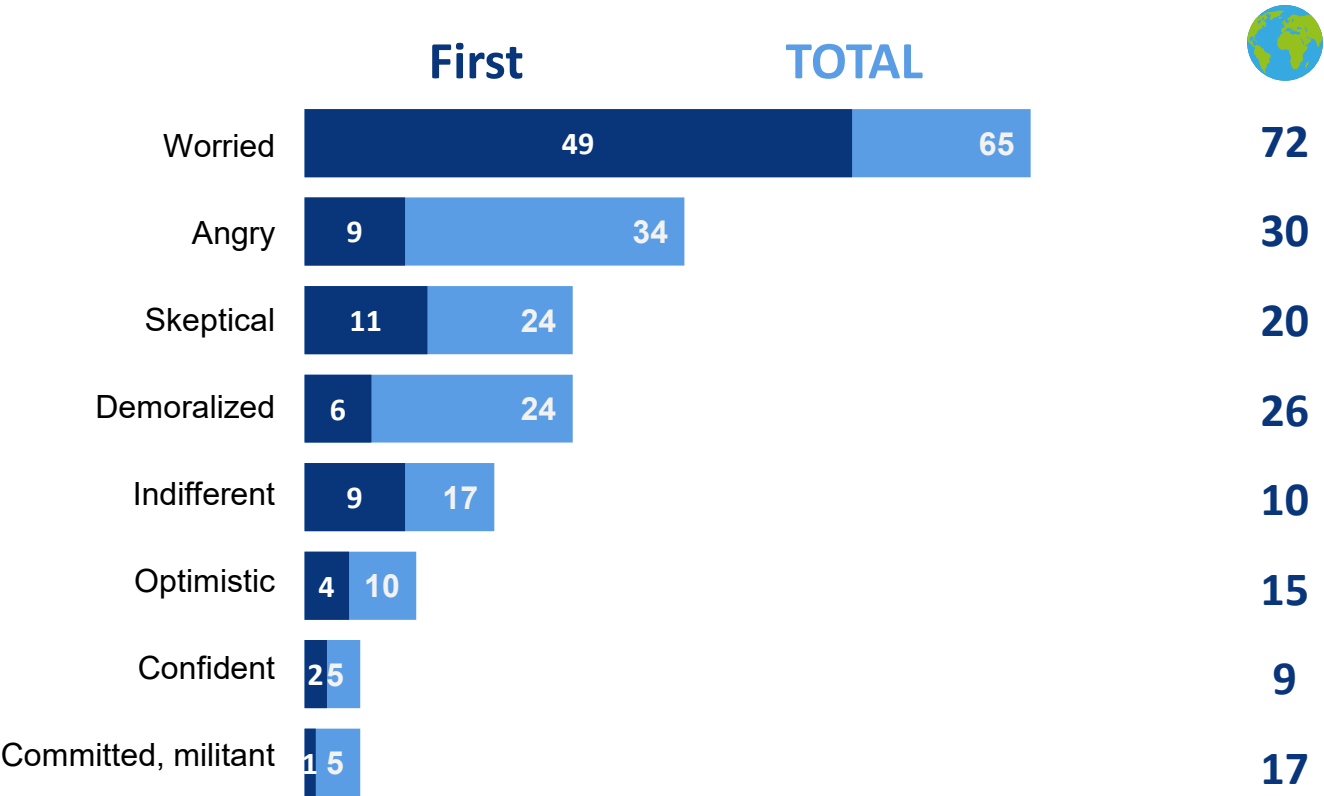
**Evolution to be interpreted with caution. In 2019, the item was formulated as follows: The industry



The change in the climate is anxiety-inducing and already obvious

Confronted with climate change, eco-anxiety is affecting two-thirds of Britons

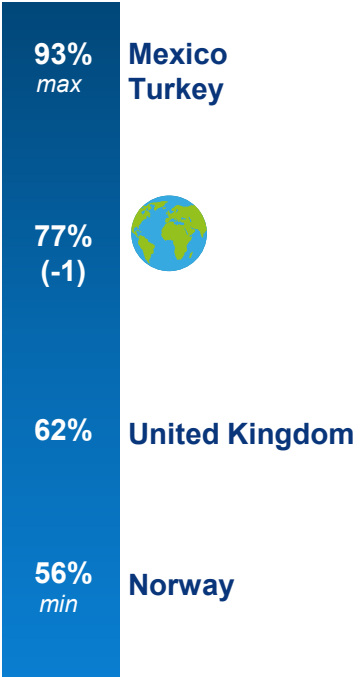
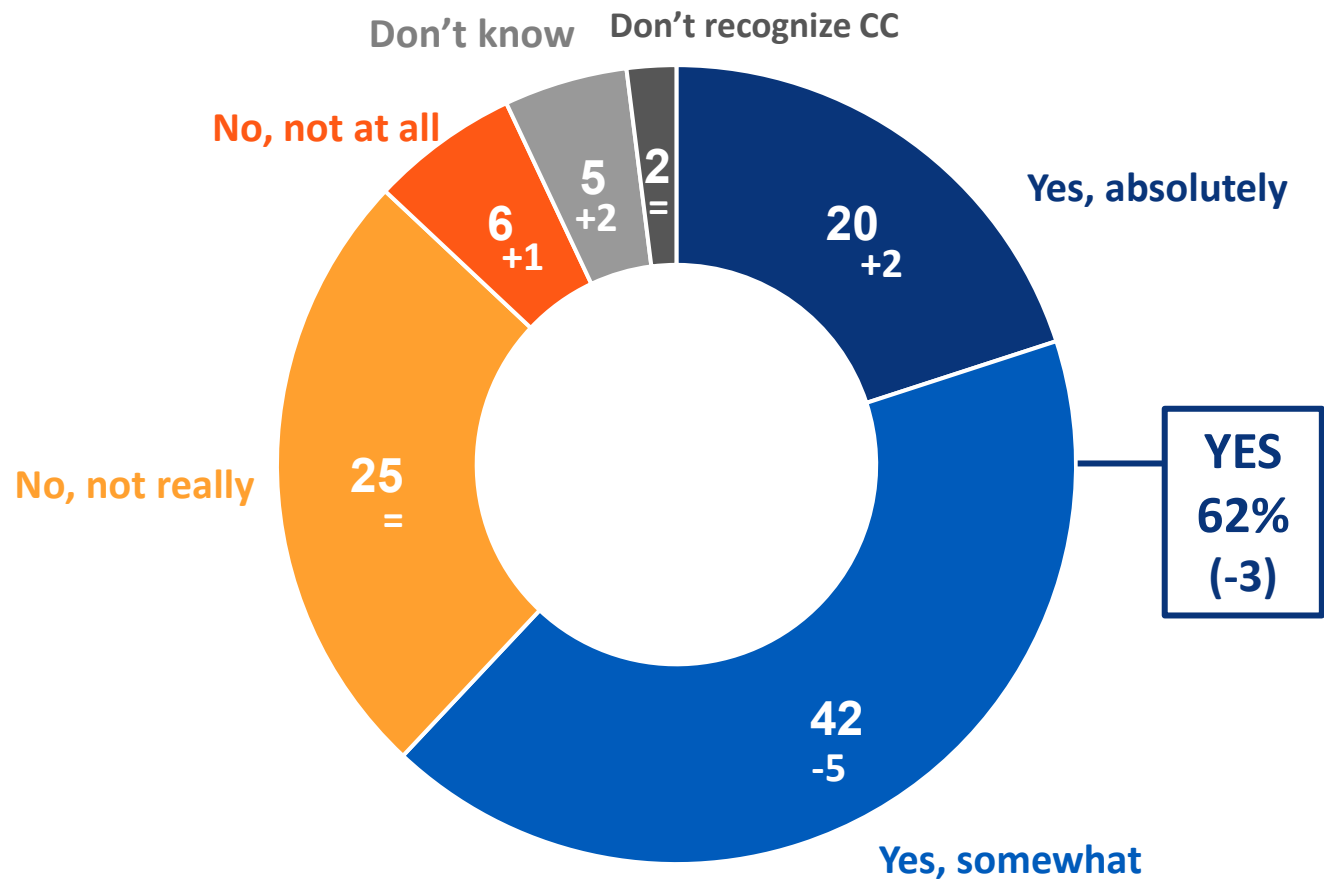
When you think about climate change, do you feel:



Question NEW4. Personally, when you think about climate change, what goes through your mind? Do you feel... first? and then? Base: All

Climate change is a tangible reality today: 62% have already observed its effects. The British seem less impacted than elsewhere.

Have you already noticed the effects of climate change in your region?

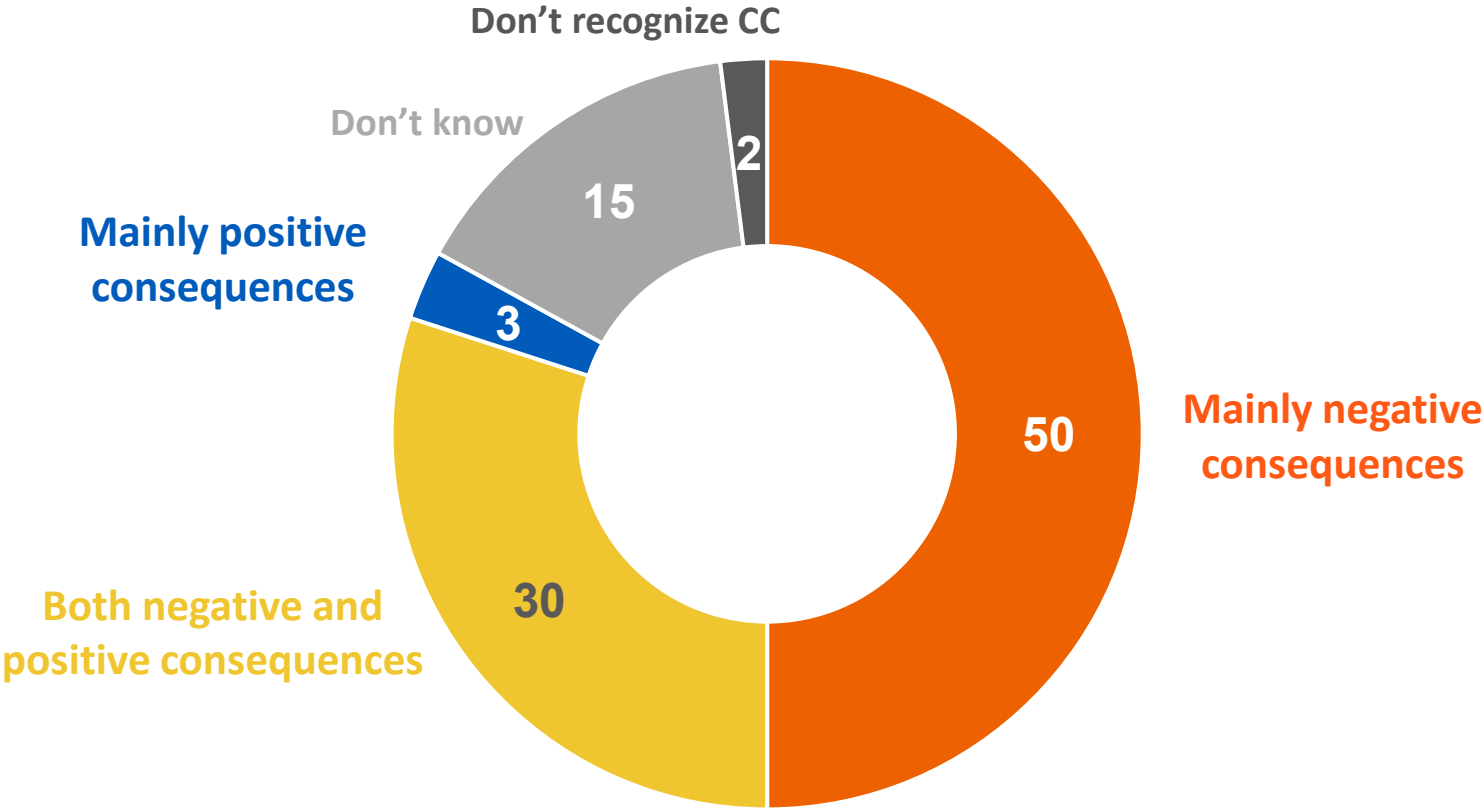


Question B7. On the whole, would you say that, in your region, you have already noticed the effects of climate change?
Base: All

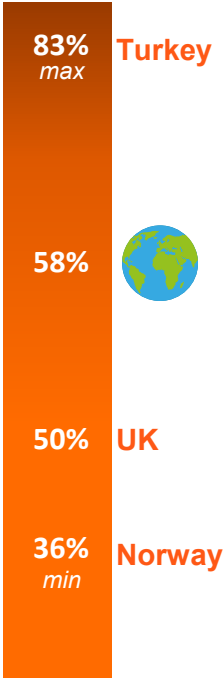


Especially since they consider that climate change will primarily have negative consequences where they live (but less so than elsewhere)

Consequences of climate change where you live:



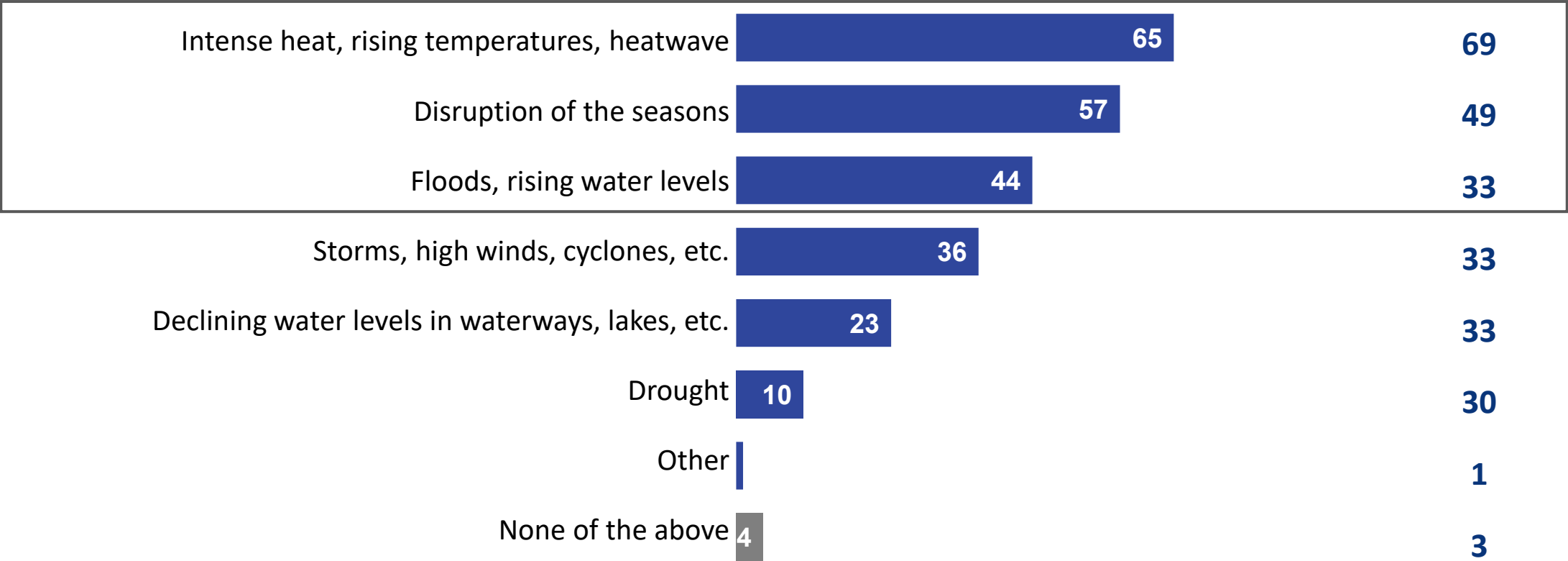
% Mainly negative consequences



Question B5NEW. In your opinion, what consequences will climate change have where you live? Base: All

In detail, the British find themselves to be more affected by disruption of the seasons and flooding

Have you already experienced the consequences of climatic disturbances in recent years?



Question B6B. Where you live, in recent years, have you been affected by the consequences of the following listed climatic disturbances?
Base : Have already noticed the effects of climate change



**Climate change:
who should act
as a priority and
to do what?**

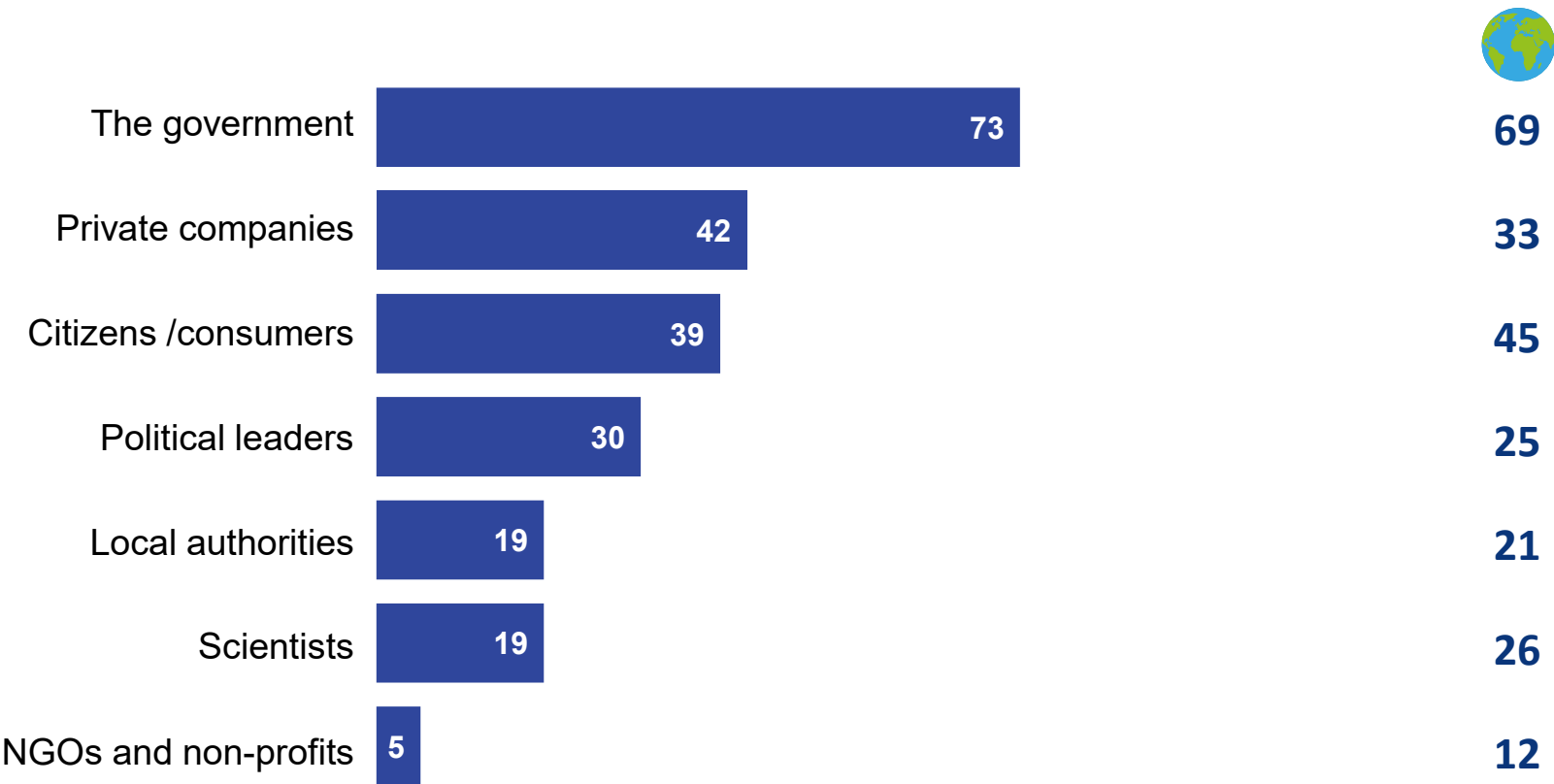
2



Mobilization should primarily be driven by governments, which unfortunately are not viewed as meeting the challenge.

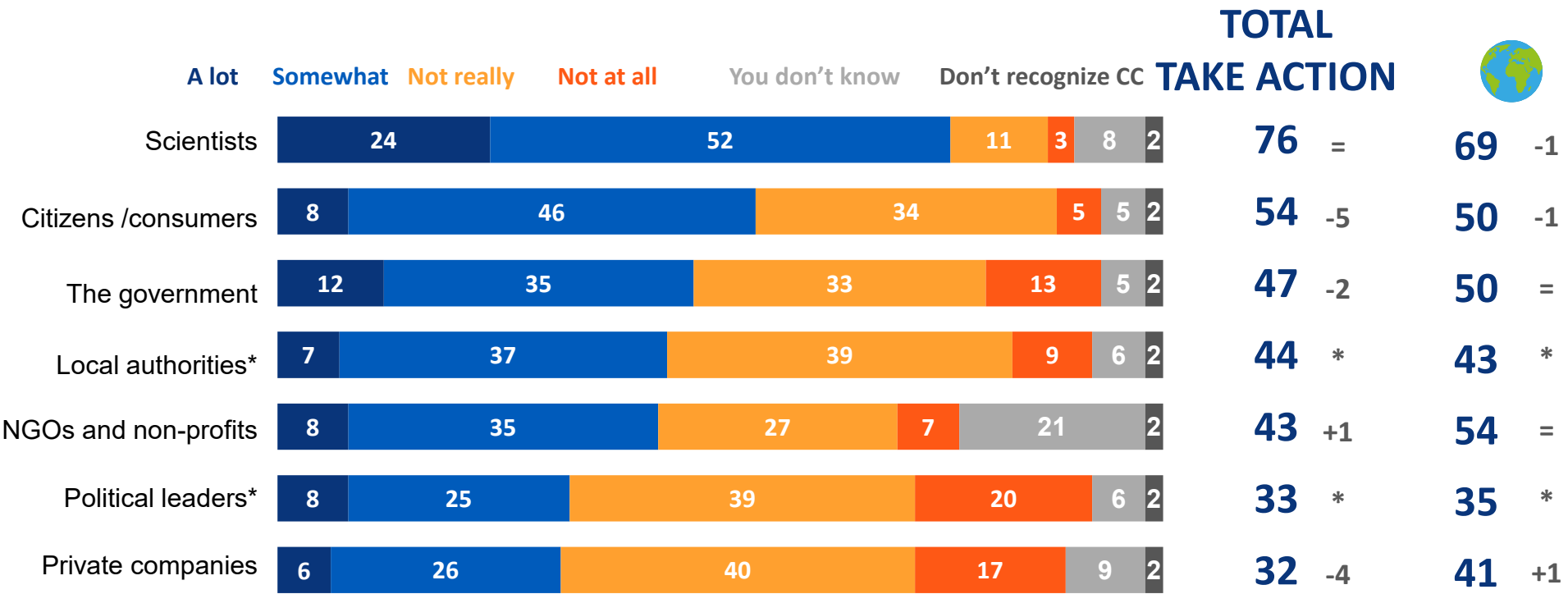
High expectations of the government, which is identified as the player that needs to take action as a priority. Companies and citizens also have their responsibilities in this struggle.

Which entities need to take action first and foremost to fight climate change in your country?



Scientists are recognized for their action by the very large majority, but in contrast fewer than one out of two citizens thinks that their government is taking action

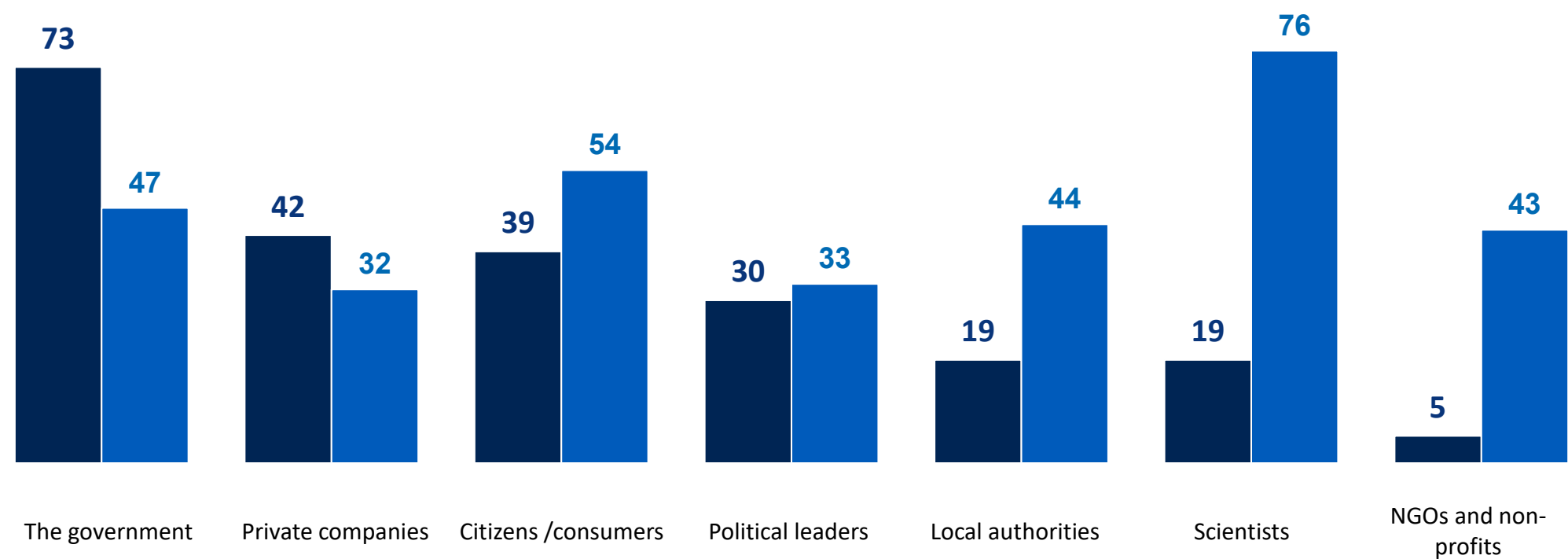
Do you think that they are taking action to fight climate change in your country?



*New item
Question C2. And for each of the following players, do you think that they are taking action to fight climate change in your country?
Base: All

A gap between expectations of the government and its perceived action

Who should take action as a priority to fight climate change in your country?



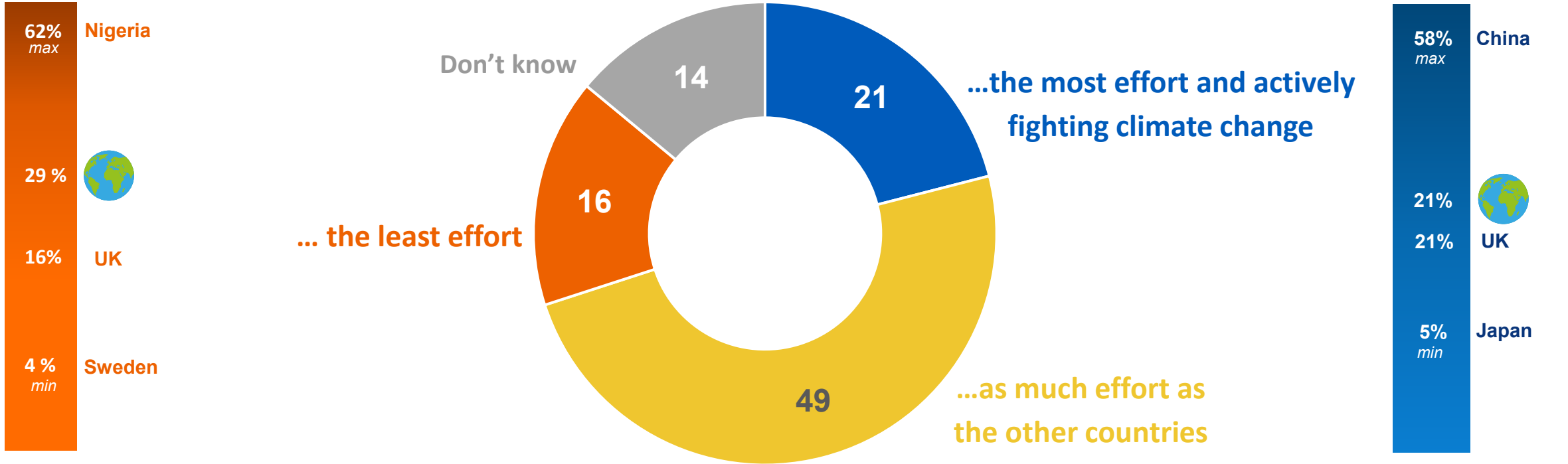
Question C3. In your opinion, which entities in the following list need to take action first and foremost to fight climate change in your country?

Question C2. And for each of the following players, do you think that they are taking action to fight climate change in your country?

Base: All

However, citizens consider that the United Kingdom is making as much effort as the other countries to fight climate change

In the fight against climate change, your country is among those that are making:



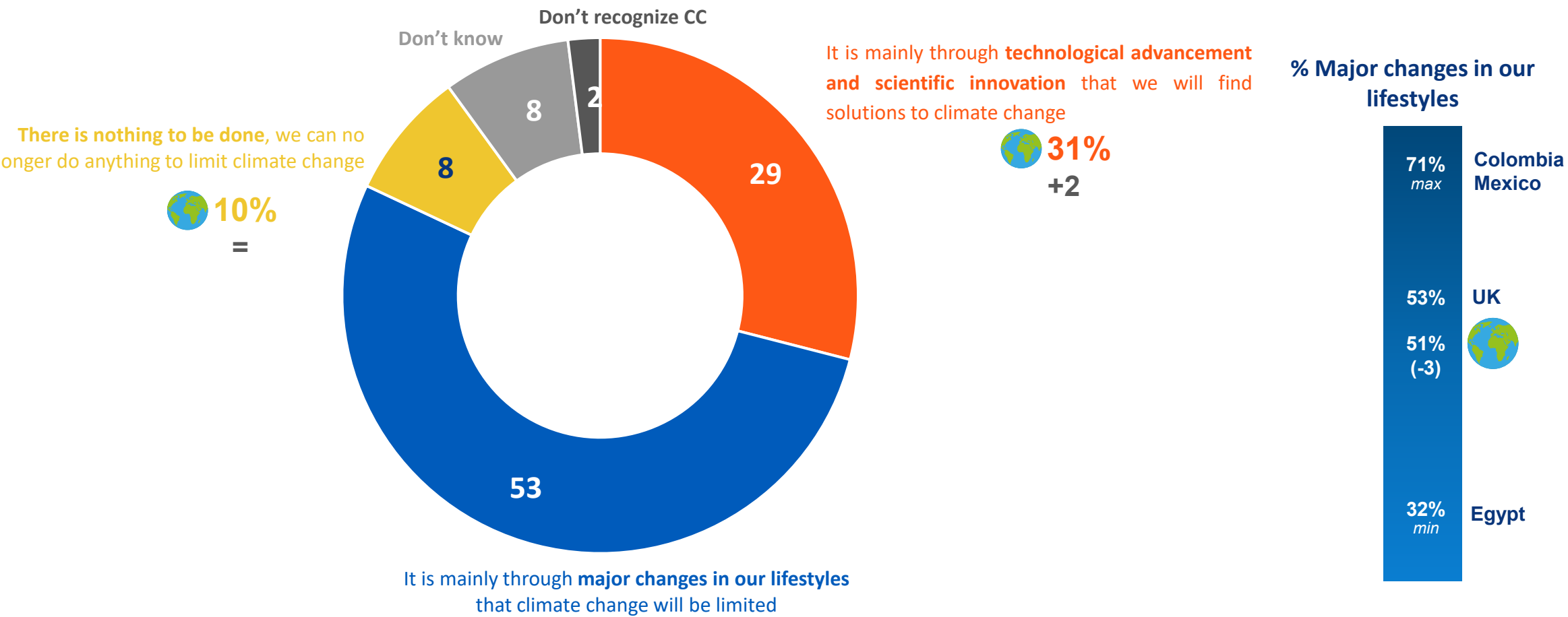
Question C4bisNEW: In your opinion, what is the situation of your country in terms of the fight against climate change? Base: All



Although citizens are convinced that there need to be changes in lifestyles, that is not always followed by concrete action on a daily basis

The solution for fighting climate change goes via a major change in lifestyles, an idea that is shared less this year

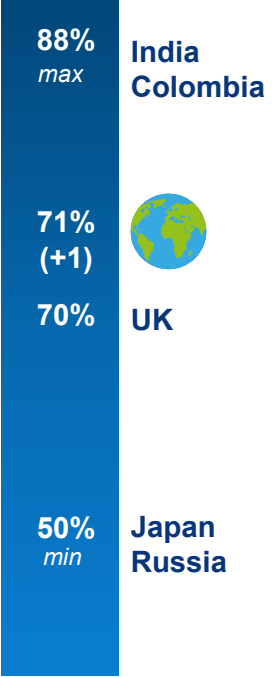
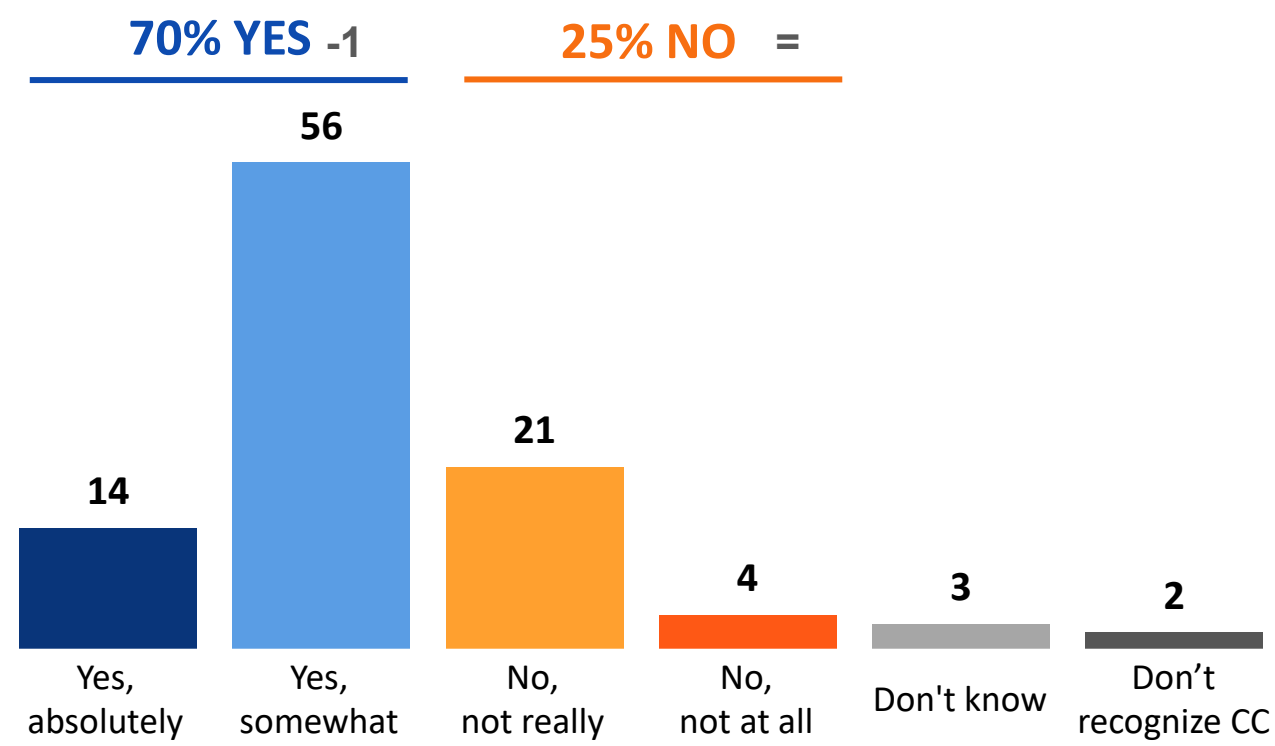
The preferred solution to fight climate change



Question B8. Which of these three opinions is closest to your own?
Base: All

A majority know what to do on their own level to fight climate change but fewer than 2 out of 10 are sure about it

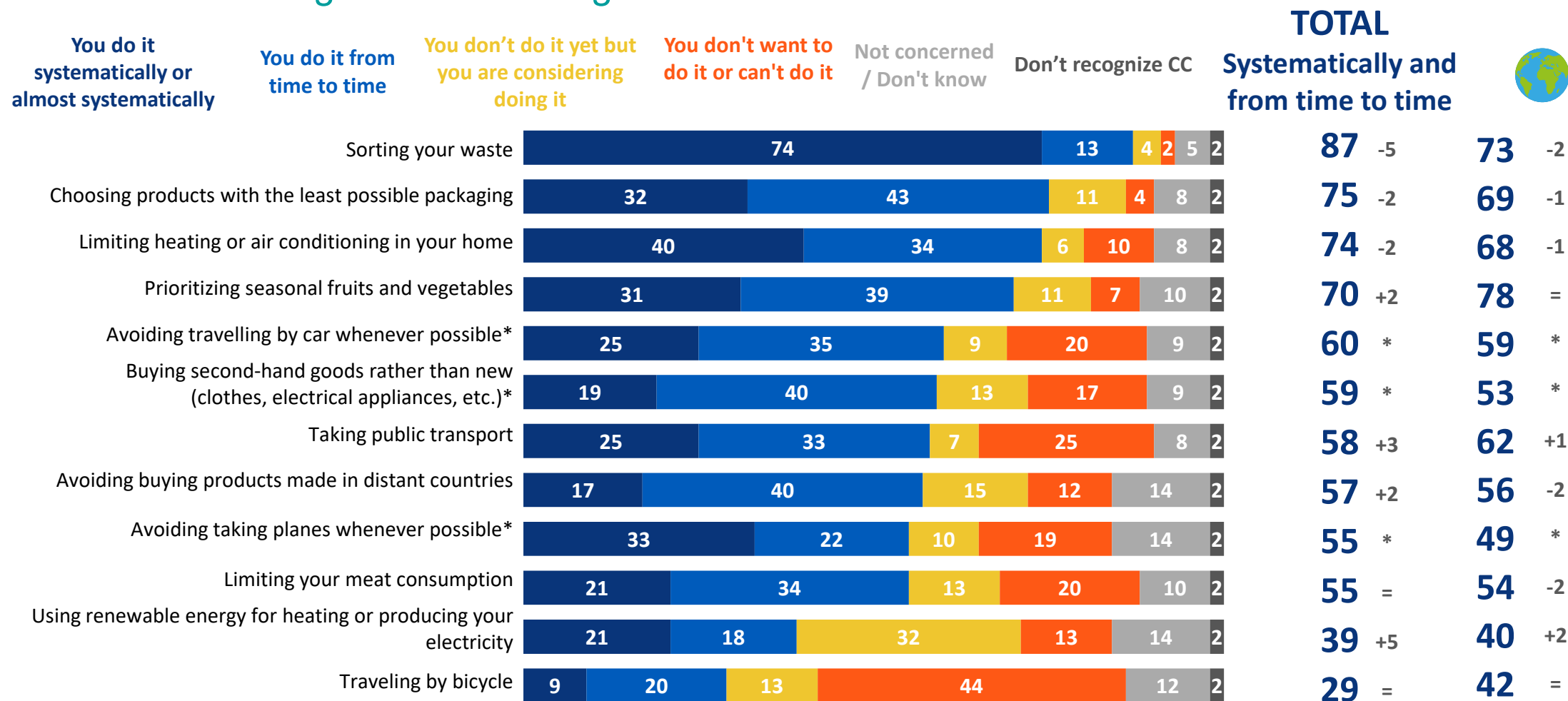
Do you feel like you know what you can do on a personal level to fight climate change?



Question D1. Do you feel like you know what you can do on a personal level to fight climate change? Base: All

When it comes to individual actions, efforts made to fight climate change are still not an integral part of everyday life, except for sorting waste, which is done systematically by three-quarters of Britons

Individual actions to fight climate change

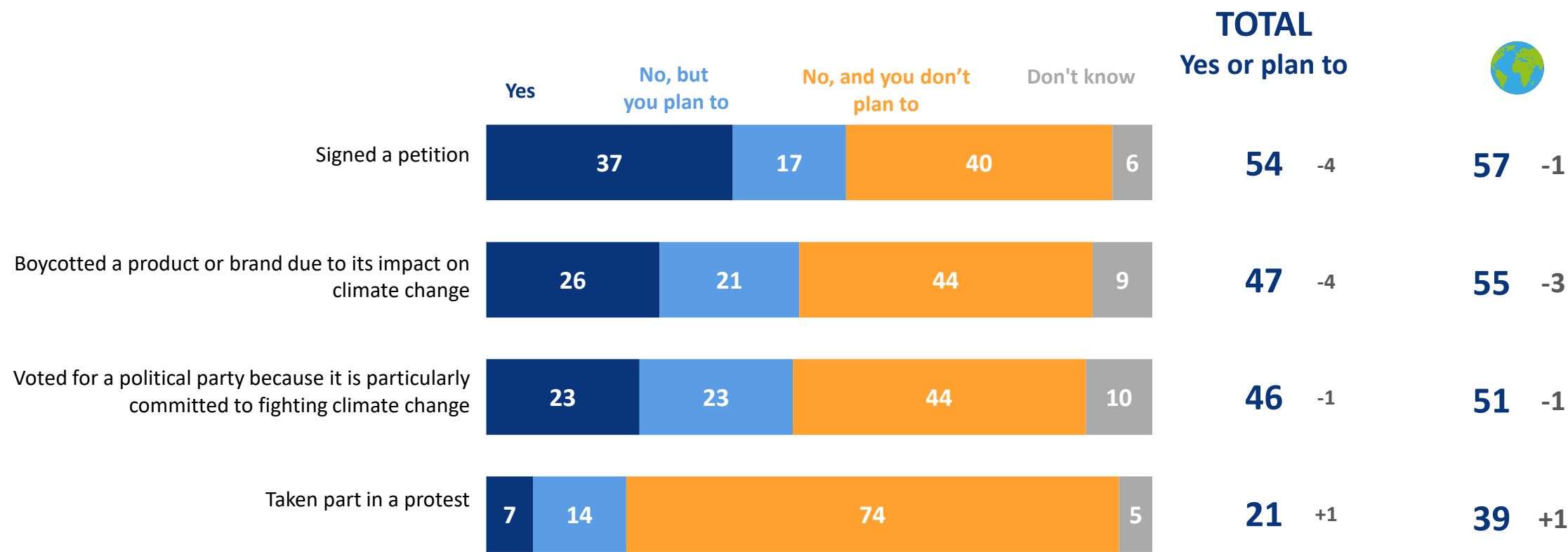


D3. Here are some individual actions that can help fight climate change. For each of these, tell me if: Base: All

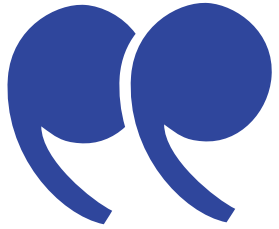
*New item

One out of every two people is mobilized in their own way: petition, boycott or vote.

When it comes to fighting climate change, have you personally ever:



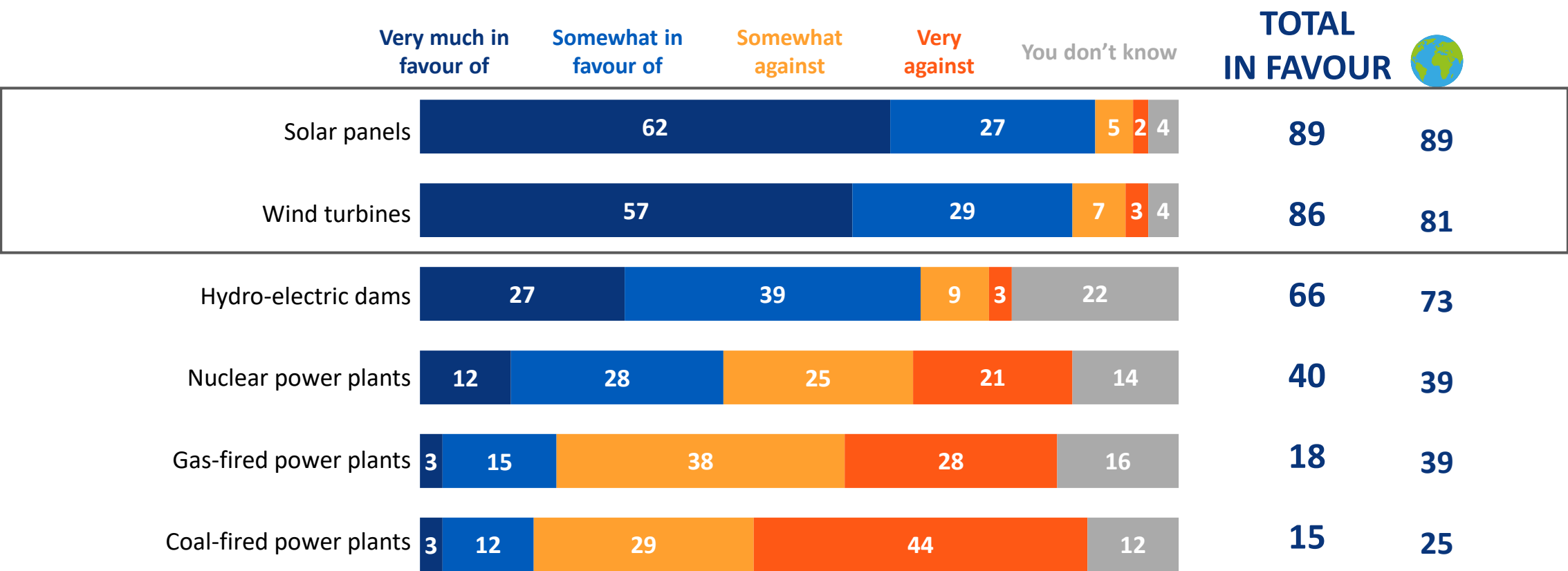
Question C4 When it comes to fighting climate change, have you personally ever: :Base: All



What measures are acceptable for fighting climate change? Hard to find room for maneuver.

The British are clearly very favorable to green energies

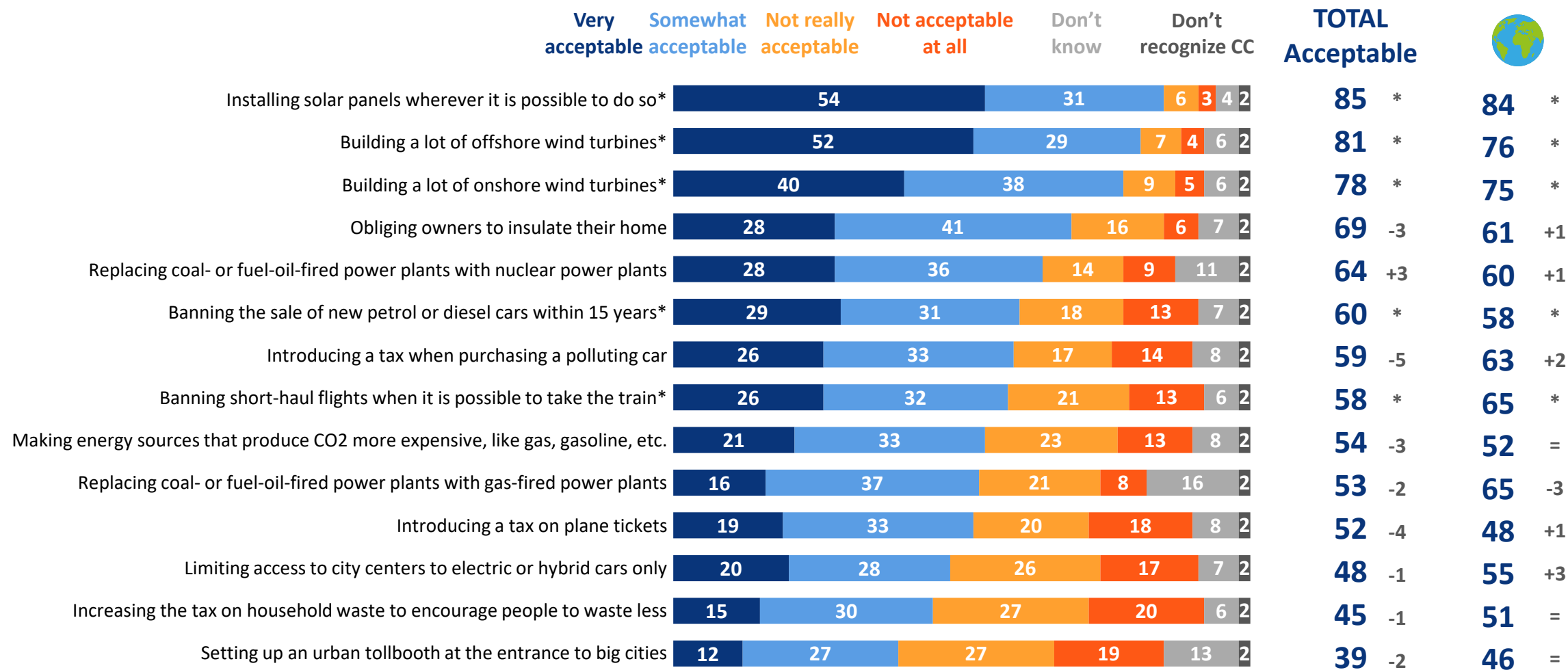
Public opinion on methods of electricity production



Question B11. To produce the electricity that you will need in the future in your country, are you in favour of or against each of the following production methods? Base: All

Opinions differ greatly on the conceivable measures for fighting climate change: the level of acceptability drops whenever citizens are directly forced to do something (taxes, travel, etc.)

Measures to reduce greenhouse gas emissions



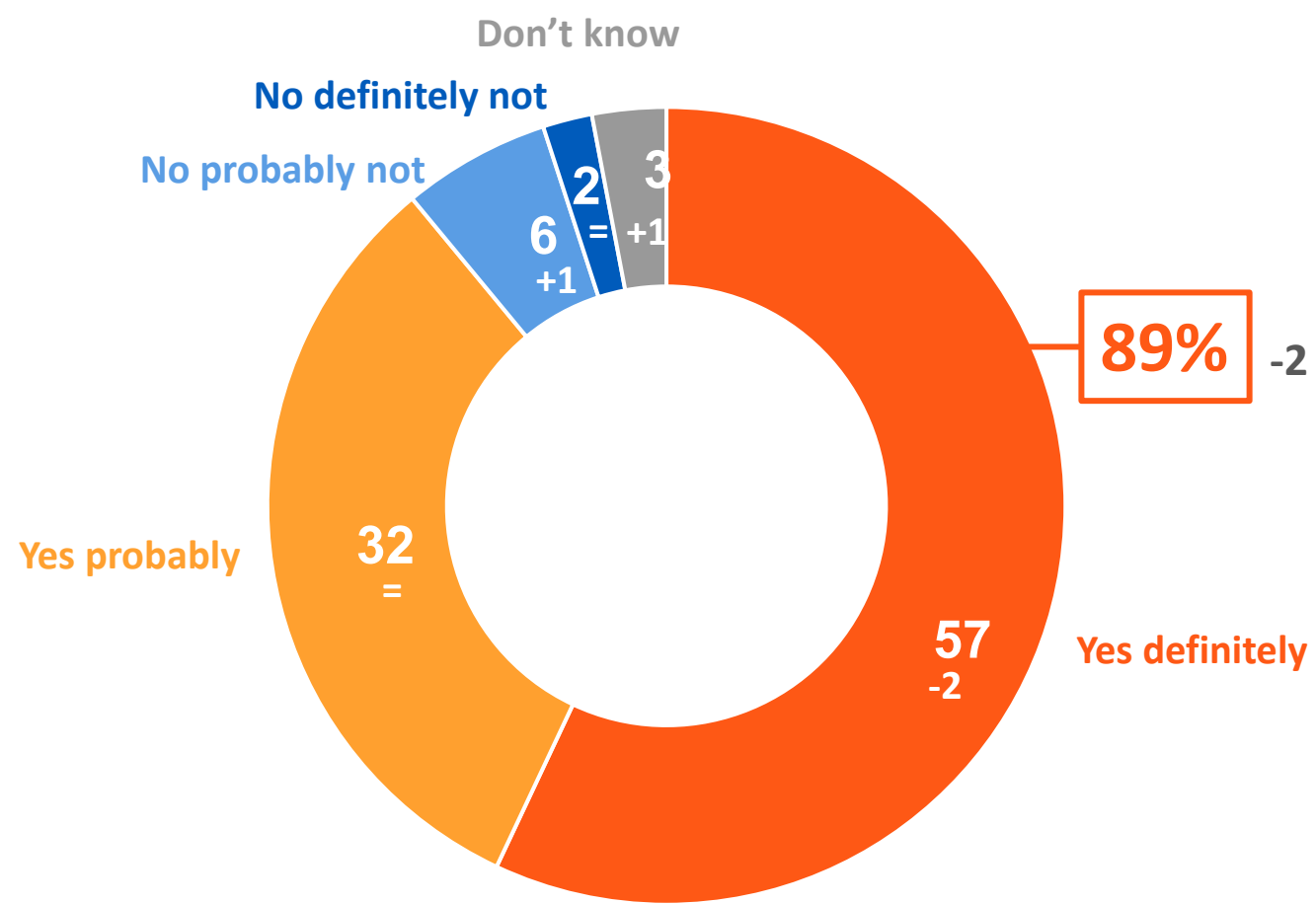
Question D5. Here are some measures that could be adopted in your country to reduce greenhouse gas emissions. For each one, tell me whether it seems to you to be: Base: All

*New item

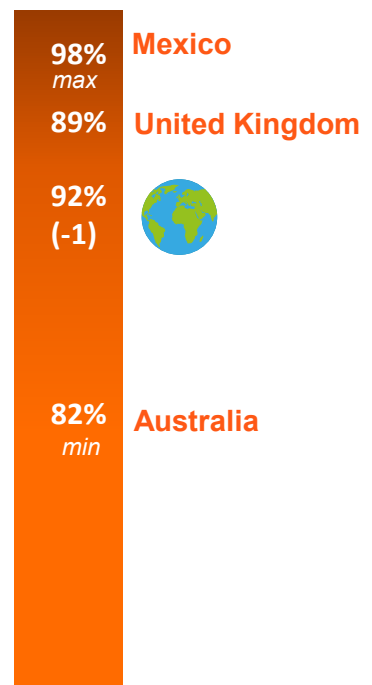
Appendix – details of questions on climate-skepticism

Opinion on the reality of climate change is unanimous

Are we experiencing a change in climate?



% change in climate

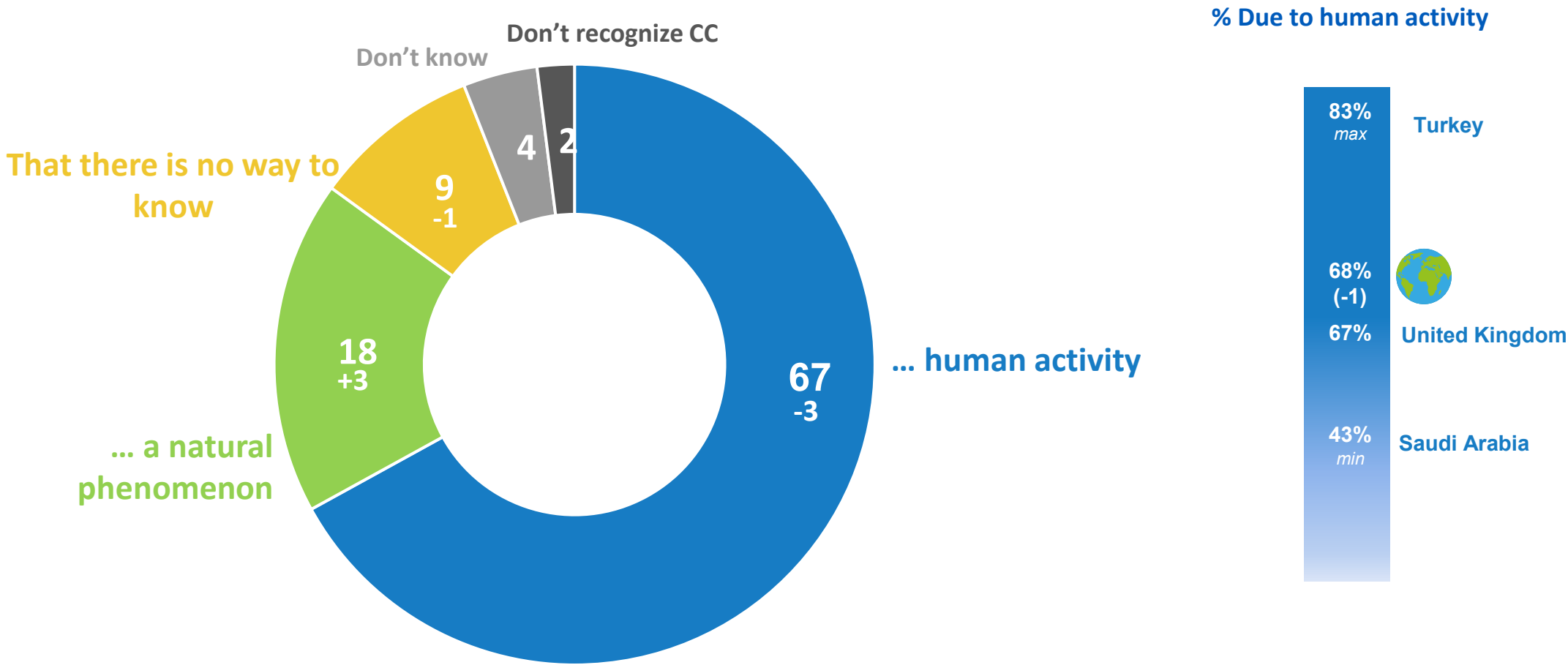


Question B1. Would you say that we are experiencing a change in climate?
Base: All



Two-thirds recognize that climate change is linked to human activity.

You would say that climate change is due to...



Question B3. And concerning this climate change that we hear about, would you say:
Base: All

Appendices and survey overview

OUR COMMITMENT



Professional codes, quality certification and data protection

Ipsos is a member of the following French and European professional Market Research and Opinion bodies:

- **SYNTEC** (www.syntec-etudes.com), French Union of Market Research companies
- **ESOMAR** (www.esomar.org) the European Society for Opinion and Market Research

Ipsos France is consequently committed to applying **the ICC/ESOMAR code** for opinion and market research. This code of conduct defines the ethical rules for Market Research professionals and sets out the protection offered to participants.

Ipsos France complies with the applicable laws. Ipsos has appointed a Data Protection Officer and has implemented a compliance plan to GDPR (Règlement (UE) 2016/679). For more information about the Ipsos Data Protection & Privacy Policy relative to personal data :

<https://www.ipsos.com/en/privacy-data-protection>

The retention period applicable to interviewees' personal data be as follows, unless otherwise agreed with the client :

- 12 months upon Ad Hoc Study completion
- 3 years upon each wave completion of a Continuous Study.



Ipsos France has received ISO 20252: 2012 certification by AFNOR CERTIFICATION

- This document was drawn up in accordance with these international Codes and Quality standards. The technical elements relative to the execution of the project are described in methodological approach or survey overview in the report.
- This project was carried out in accordance with these international Codes and Quality standards



SURVEY OVERVIEW

CAWI survey – Online panel



SAMPLE

- **Target** : Male/female 16-75
- **Selection of the respondent** : participant selection using a quota.
- **Sample representativeness (depending on countries)** : gender, age, social-economic category of individual/head of household, region/marketsize



DATA COLLECTION

- **Fieldwork dates** : 7th-15th September 2021
- **Sample achieved** : 1000 interviews
- **Data collection** : on line
- **Loyalty program** with points- based award system for panelists
- **Response quality control methods**: monitoring of participants' response behaviour (identification of responses that are too quick or careless, e.g. ticked in a straight or zigzag line)
- **Checking of IP and consistency of demographic data**



DATA PROCESSING

- Weighted sample
- Method used: Rim Weighting Method
- Weighting criteria (depending on countries) : gender, age, social-economic category or status of individual/head of household, region/marketsize.

RELIABILITY OF RESULTS :

Self completion online surveys IIS

To ensure the overall reliability of a survey, all possible error components must be taken into account. That is why Ipsos imposes strict controls and procedures at each stage of the survey process.

UPSTREAM OF THE DATA COLLECTION

- **Sample** : structure and representativeness
- **Questionnaire** : the questionnaire is worded by following an editing process with 12 compulsory standards. It is proofread and approved at a senior level and then sent to the client for final validation. The programming (or questionnaire script) **is tested by at least 2 people and validated.**
- **Data collection** : the interviewers are trained in survey techniques through a dedicated training module prior to any participation in a survey. In addition, they receive or attend a detailed briefing at the start of each survey.

DURING THE DATA COLLECTION

- **Sampling** : Ipsos imposes very strict operating rules for its selection frame in order to maximize the random nature of the sample selection : random selection from telephone listings, quota method, etc.

- **Fieldwork monitoring** : collection is monitored and checked (exclusive link, IP validation, panelists' behavior monitoring penetration, interview length, consistency of responses, participation rate, number of reminders, etc.)

DOWNSTREAM OF THE DATA COLLECTION

- The results are analyzed in accordance with the statistical analysis methods (confidence interval versus sample size, significance tests). The first results are systematically checked against the raw results from the data collection. The consistency of results is also checked (particularly the results observed versus comparison sources in our possession).
- In cases where sample weighting is used (margin calibration method), this is checked by the processing teams (DP) and then validated by the survey teams.

SURVEY OVERVIEW

Organization (CAWI survey - Online panel)



ACTIVITIES CARRIED OUT OR COORDINATED BY IPSOS TEAMS IN FRANCE

- Design and methodology
- Conception and design of questionnaire/ validation of scripting
- Coordination and validation of translation
- Coordination of data collection
- Data processing
- Validation of the statistical analyses
- Creation of survey report
- Results presentation design
- Formatting of results
- Oral presentation
- Analyses and summary



ACTIVITIES CARRIED OUT BY IPSOS EXPERT LOCAL TEAMS

- Scripting
- Sampling (IIS panel)
- Emailing



ACTIVITIES ENTRUSTED TO OUR APPROVED PARTNERS

- Translation

SURVEY MATERIAL

Questionnaire



Questionnaire in
english

ABOUT IPSOS

Ipsos is the world's third largest market research company, present in 90 markets and employing more than 18,000 people.

Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. We serve more than 5000 clients across the world with 75 business solutions.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 Index and is eligible for the Deferred Settlement Service (SRD).

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GAME CHANGERS

In our world of rapid change, the need of reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder.
Ultimately, success comes down to a simple truth:
You act better when you are sure.

**BE
SURE.
GO
FURTHER.**

GAME CHANGERS



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