

Earth Day 2019

How does the world perceive our changing environment?

IPSOS GLOBAL ADVISOR

GAME CHANGERS



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Environmental Issues

Which environmental issues are most concerning to citizens?

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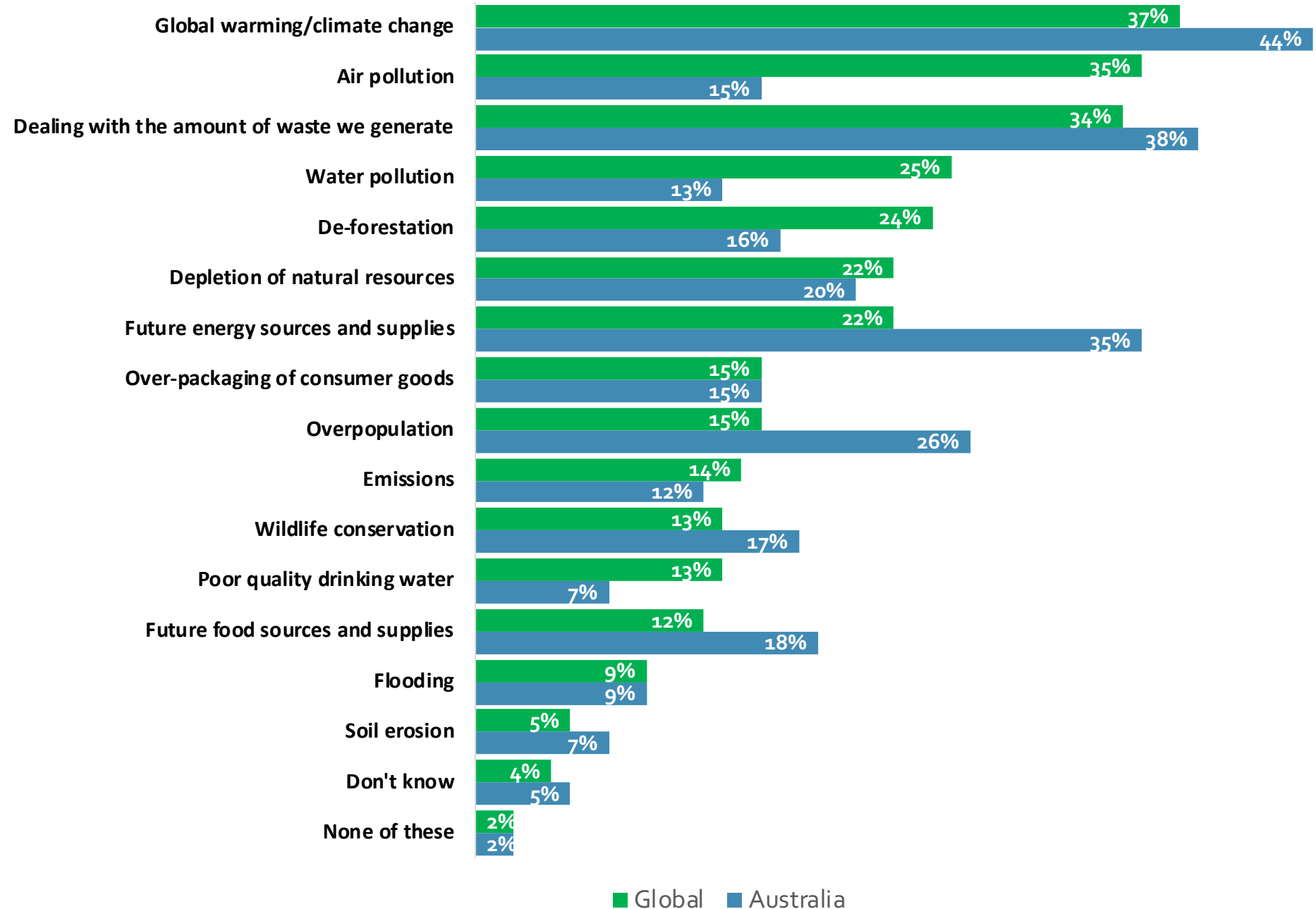
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Top environmental issues around the world

- Across the world, global warming/climate change, air pollution, and dealing with waste are the top three environmental issues of concern.
- Meanwhile, soil erosion, flooding, future food sources and supplies, and poor quality drinking water are reported as less concerning issues.

Q. In your view, what are the three most important environmental issues facing [COUNTRY] today? That is, the top environmental issues you feel should receive the greatest attention from your local leaders?

[TOPIC] is a top three environmental issue



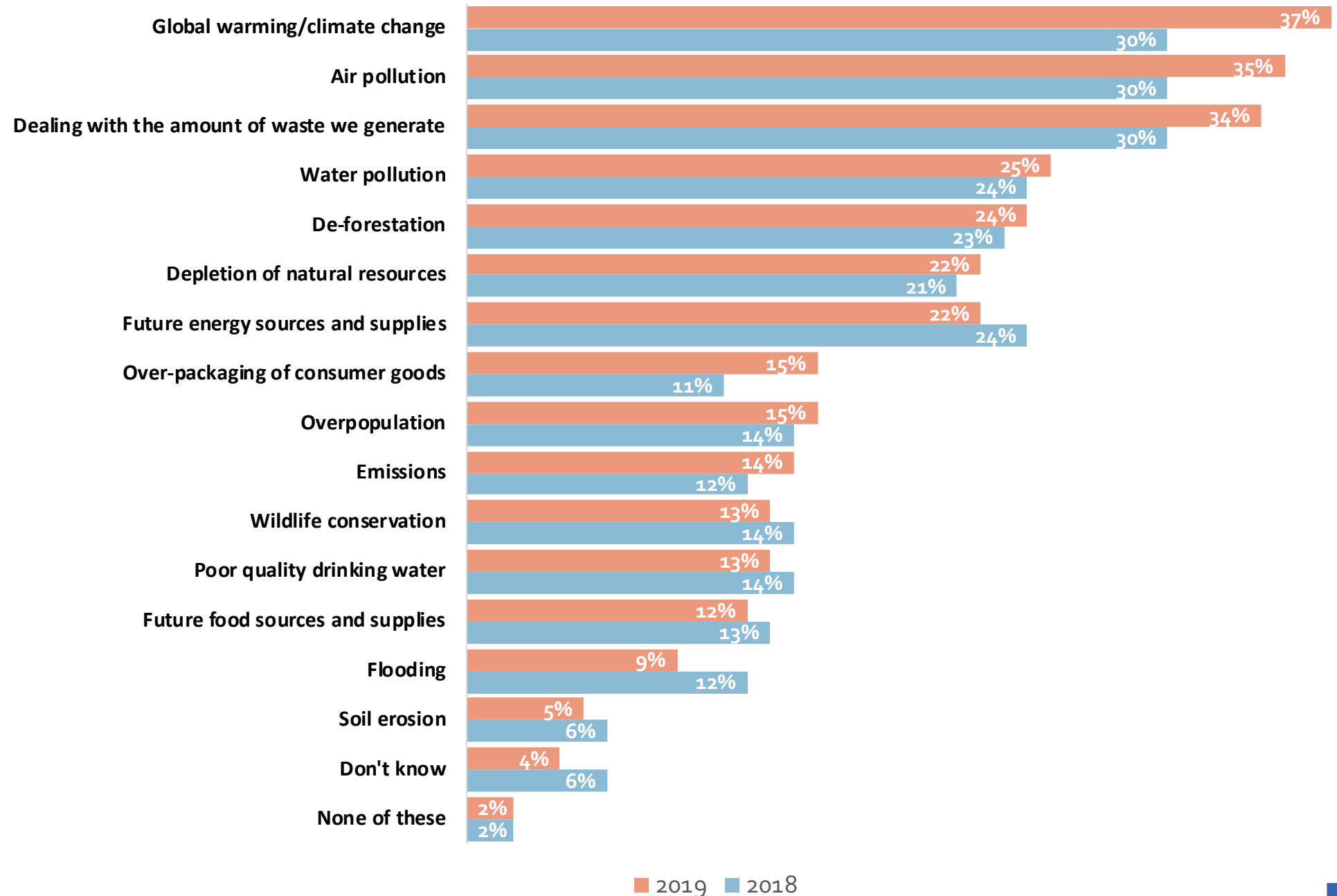
Base: 19,519 online adults aged 16-74 across 27 countries February 22 – March 8 2019

Top environmental issues around the world

2019 vs. 2018,
Global data

Q. In your view, what are the three most important environmental issues facing [COUNTRY] today? That is, the top environmental issues you feel should receive the greatest attention from your local leaders?

[TOPIC] is a top three environmental issue



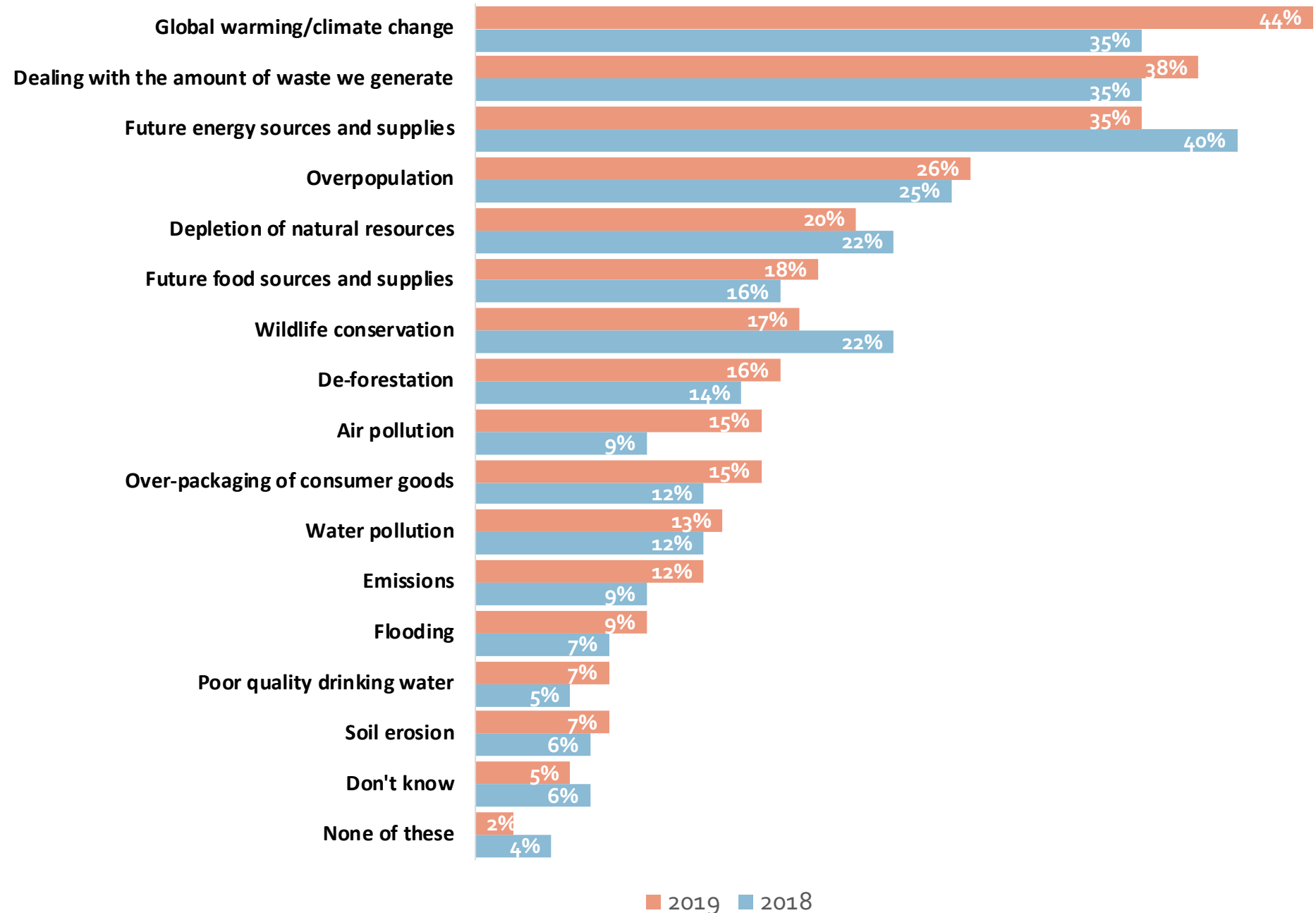
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Top environmental issues around the world

2019 vs. 2018,
Australian data

Q. In your view, what are the three most important environmental issues facing [COUNTRY] today? That is, the top environmental issues you feel should receive the greatest attention from your local leaders?

[TOPIC] is a top three environmental issue



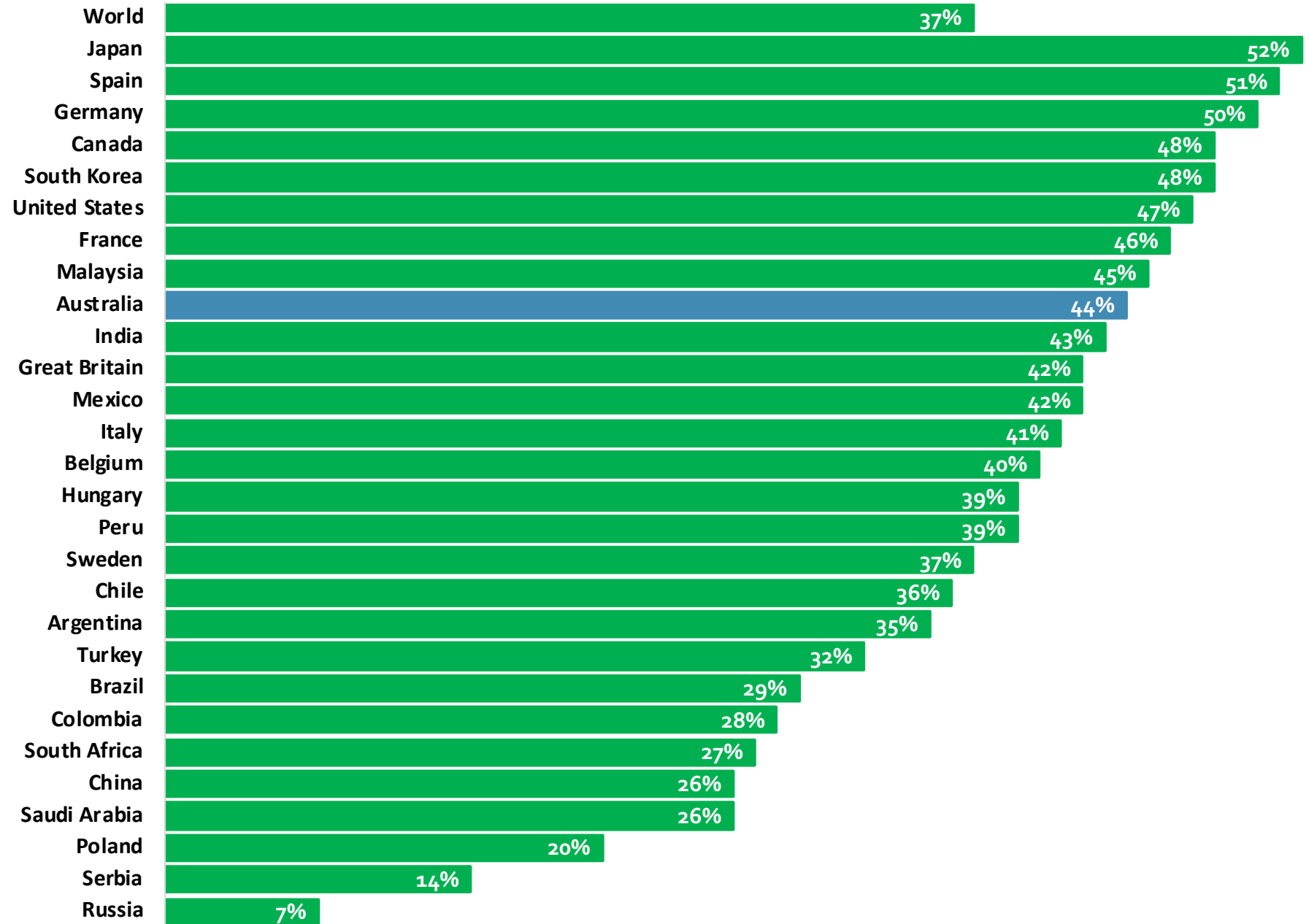
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Global warming or climate change

- Global warming, or climate change, is the observation that the Earth has seen an average global temperature increase over recent centuries. Scientists expect these changes to have a corresponding effect on the weather and climate systems of the Earth.
- Australia is the 9th most likely to consider global warming/climate change a top environmental issue.

Q. In your view, what are the three most important environmental issues facing [COUNTRY] today? That is, the top environmental issues you feel should receive the greatest attention from your local leaders? – Global warming

By Country Detail



■ Global warming or climate change is a top three environmental issue

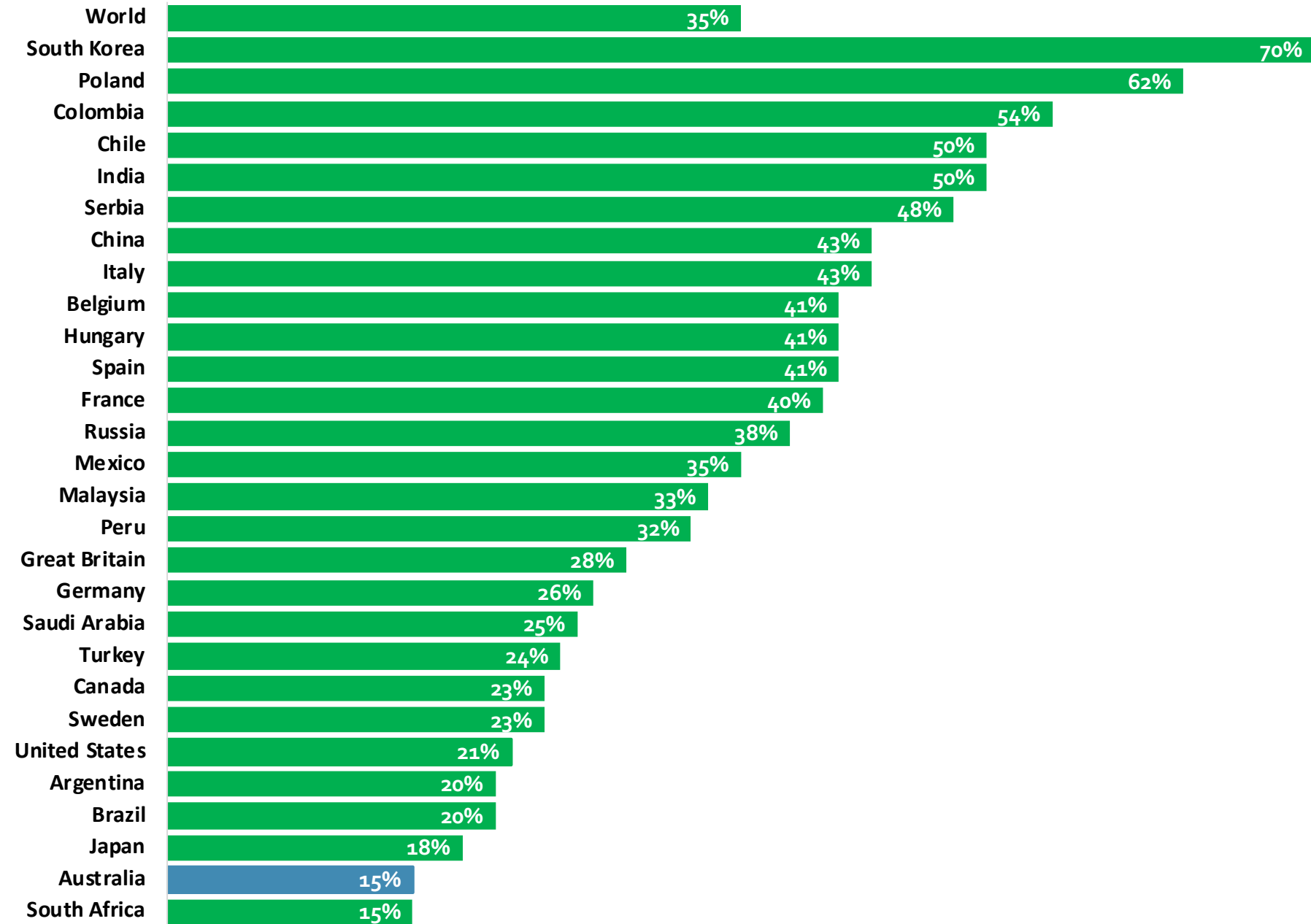
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Air pollution

- Air pollution refers to the existence of harmful or excessive quantities of gases or particulates in the atmosphere.
- Australia are equal least inclined to consider air pollution a top environmental issue.

Q. In your view, what are the three most important environmental issues facing [COUNTRY] today? That is, the top environmental issues you feel should receive the greatest attention from your local leaders? – Air pollution

By Country Detail



■ Air pollution is a top three environmental issue

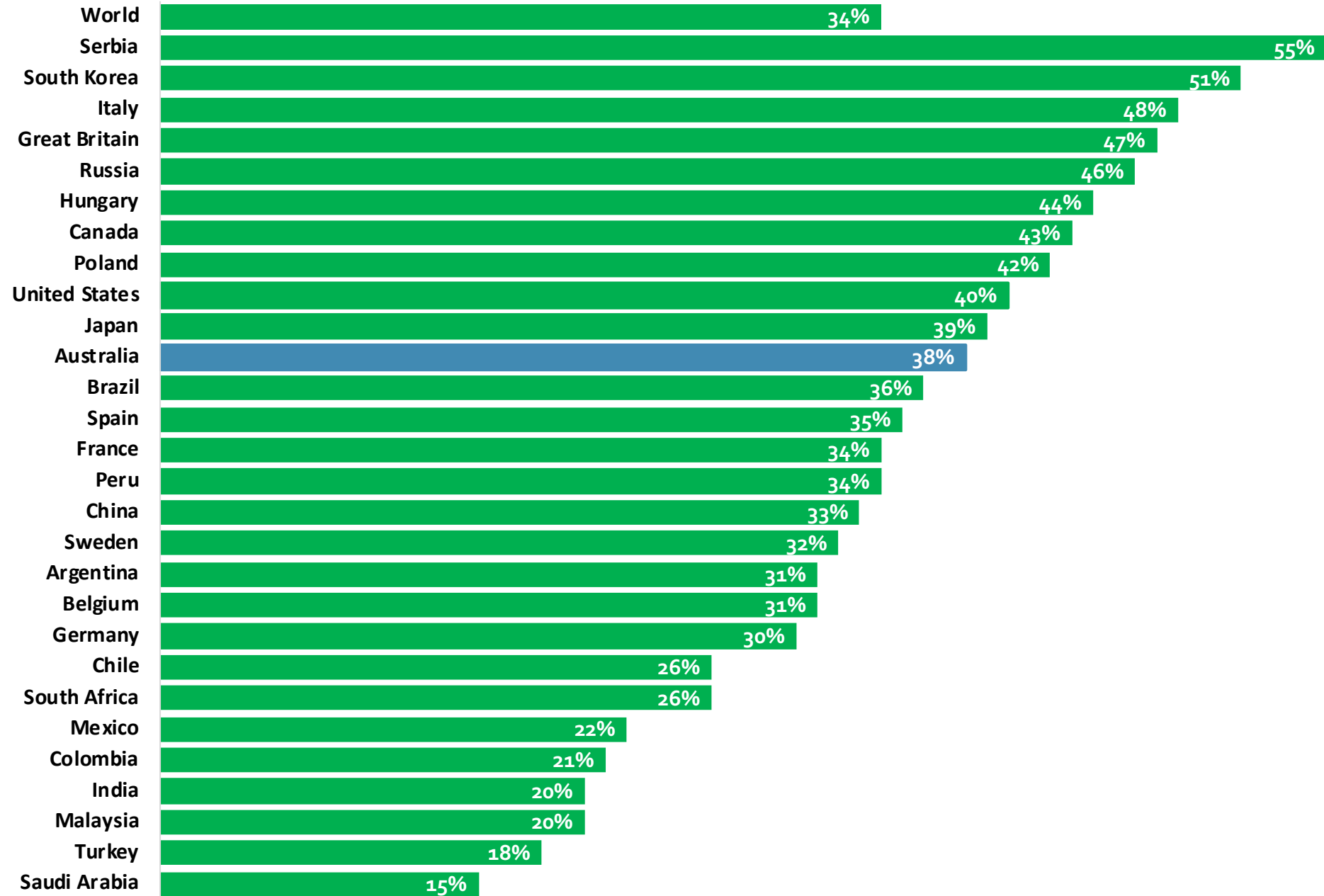
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Dealing with waste

- As global income increases, so too will the demand for goods and the waste generated from the production and use.
- As a major waste producing country, Australia falls just slightly above the world average in considering dealing with waste a top environmental issue

Q. In your view, what are the three most important environmental issues facing [COUNTRY] today? That is, the top environmental issues you feel should receive the greatest attention from your local leaders? – Dealing with waste

By Country Detail



■ Dealing with the amount of waste we generate is a top three environmental issue

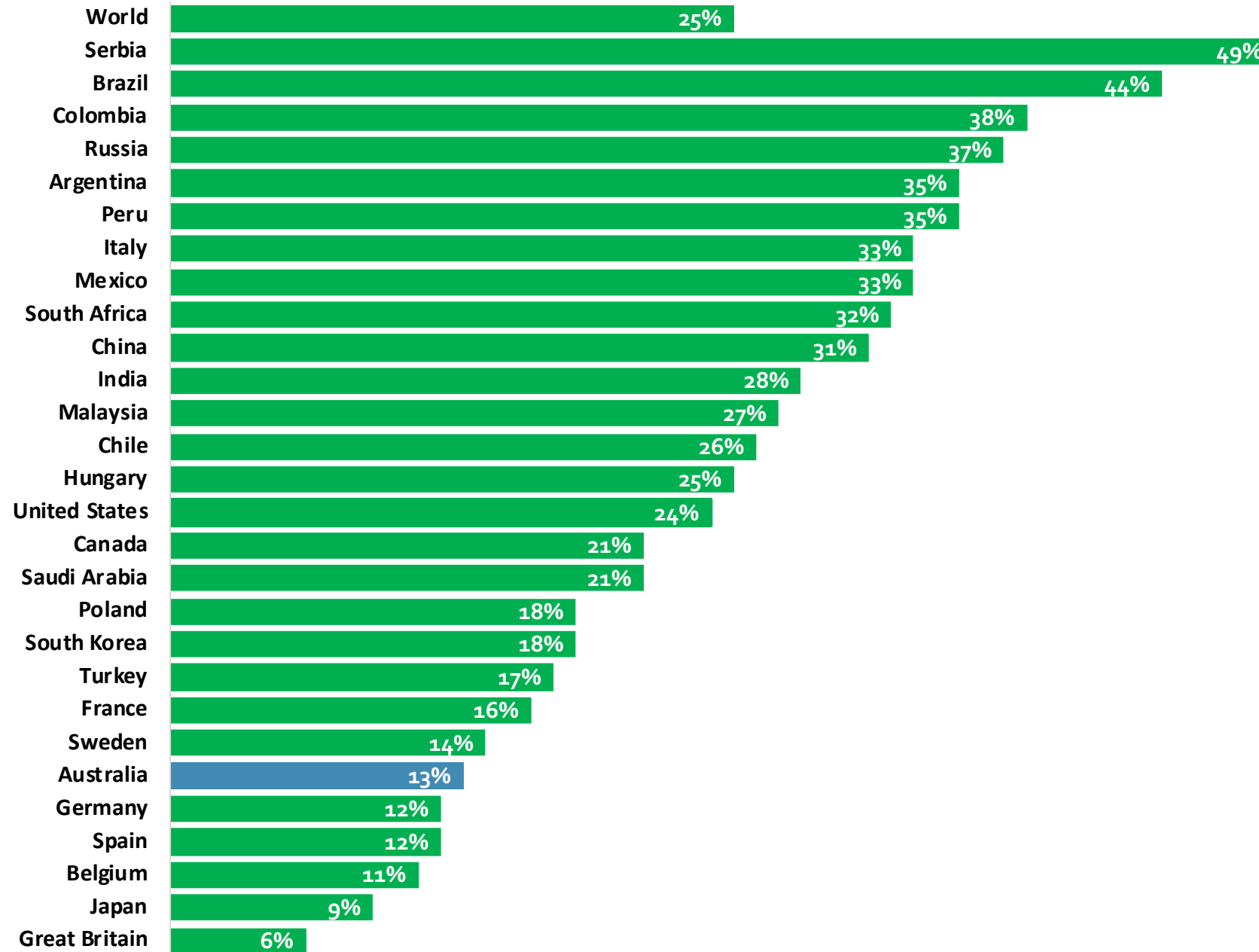
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Water pollution

- *Water pollution refers to the contamination of water bodies. Usually, contaminants are introduced by human activities such as farming or waste production.*
- *Australia is one of the nations least likely to consider water pollution a top concern.*

Q. In your view, what are the three most important environmental issues facing [COUNTRY] today? That is, the top environmental issues you feel should receive the greatest attention from your local leaders? – Water pollution

By Country Detail



■ Water pollution is a top three environmental issue

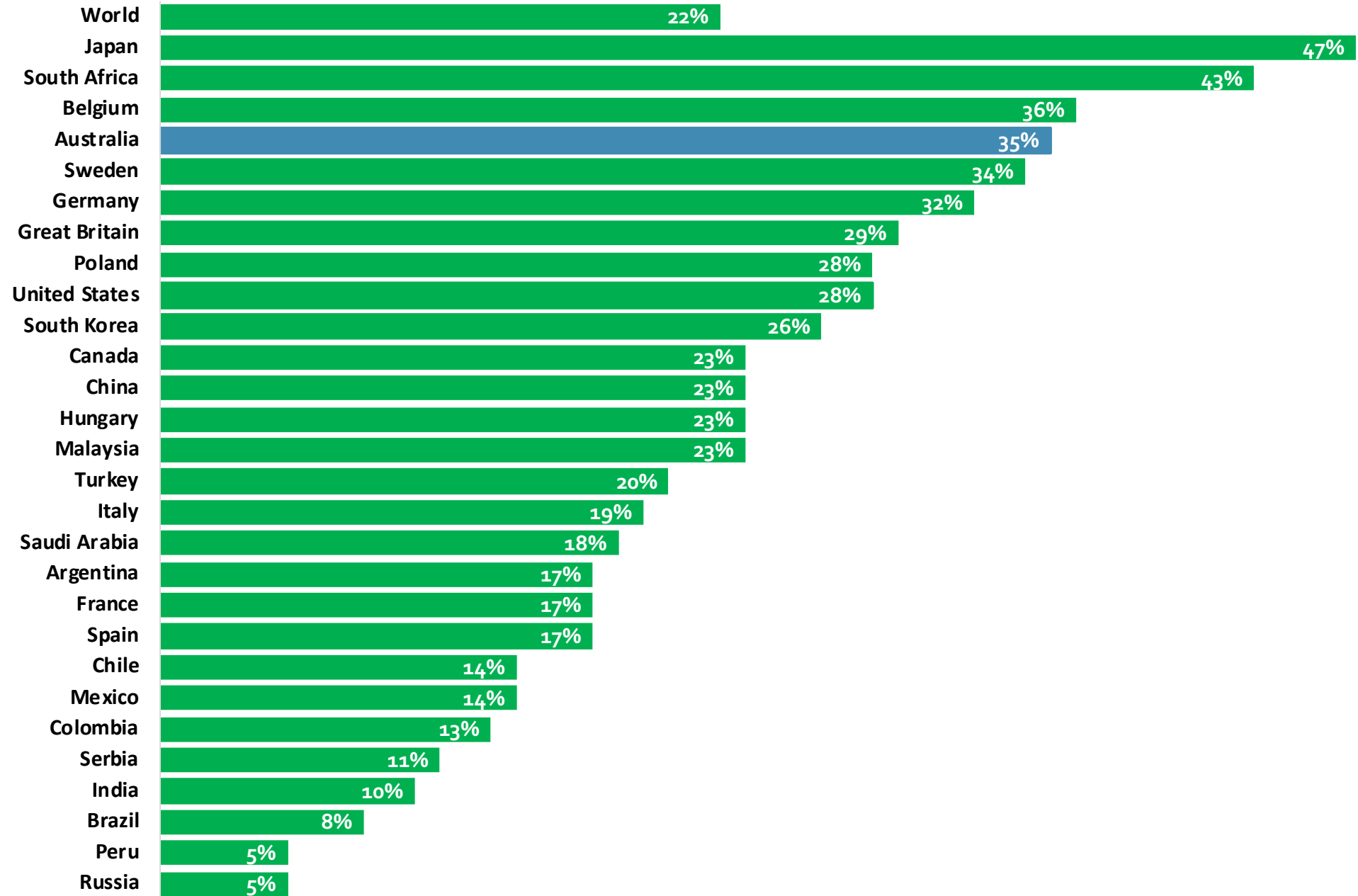
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Future energy sources and supplies

- Some energy sources take millions of years to develop and are depleted after one use.
- Energy use of this form has a finite supply, whether it be in the short term or the long term.
- Australia is 4th most likely to consider future energy sources and suppliers as a top environmental issue.

Q. In your view, what are the three most important environmental issues facing [COUNTRY] today? That is, the top environmental issues you feel should receive the greatest attention from your local leaders? – Future energy sources and supplies

By Country Detail



■ Future energy sources and supplies are a top three environmental issue

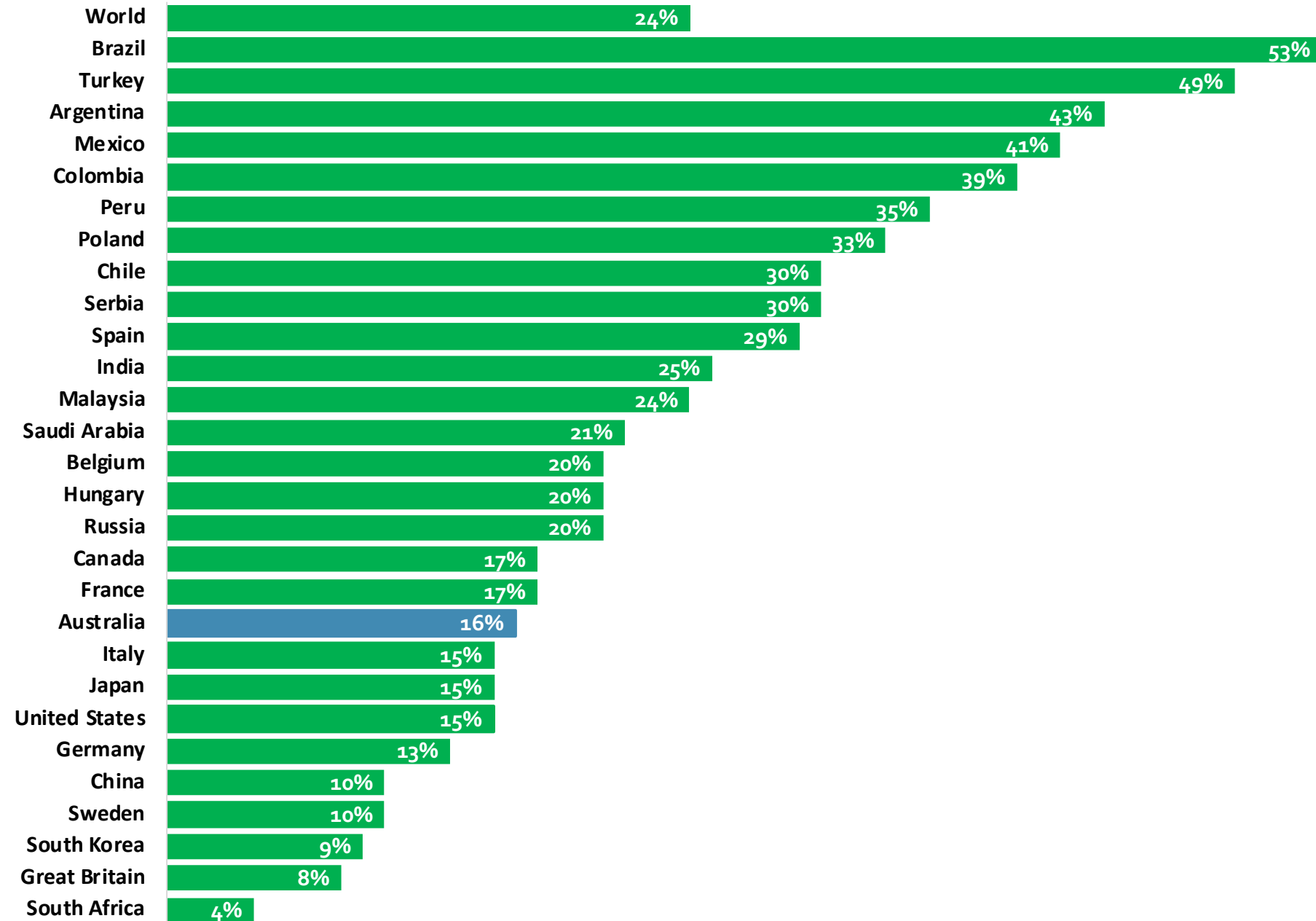
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Deforestation

- *Deforestation increases the amount of carbon dioxide in the atmosphere, leading to a stronger greenhouse effect.*
- *While developed countries are less likely to see deforestation as top environmental issue, Australia was more likely than most.*

Q. In your view, what are the three most important environmental issues facing [COUNTRY] today? That is, the top environmental issues you feel should receive the greatest attention from your local leaders? – Deforestation

By Country Detail



■ Deforestation is a top three environmental issue

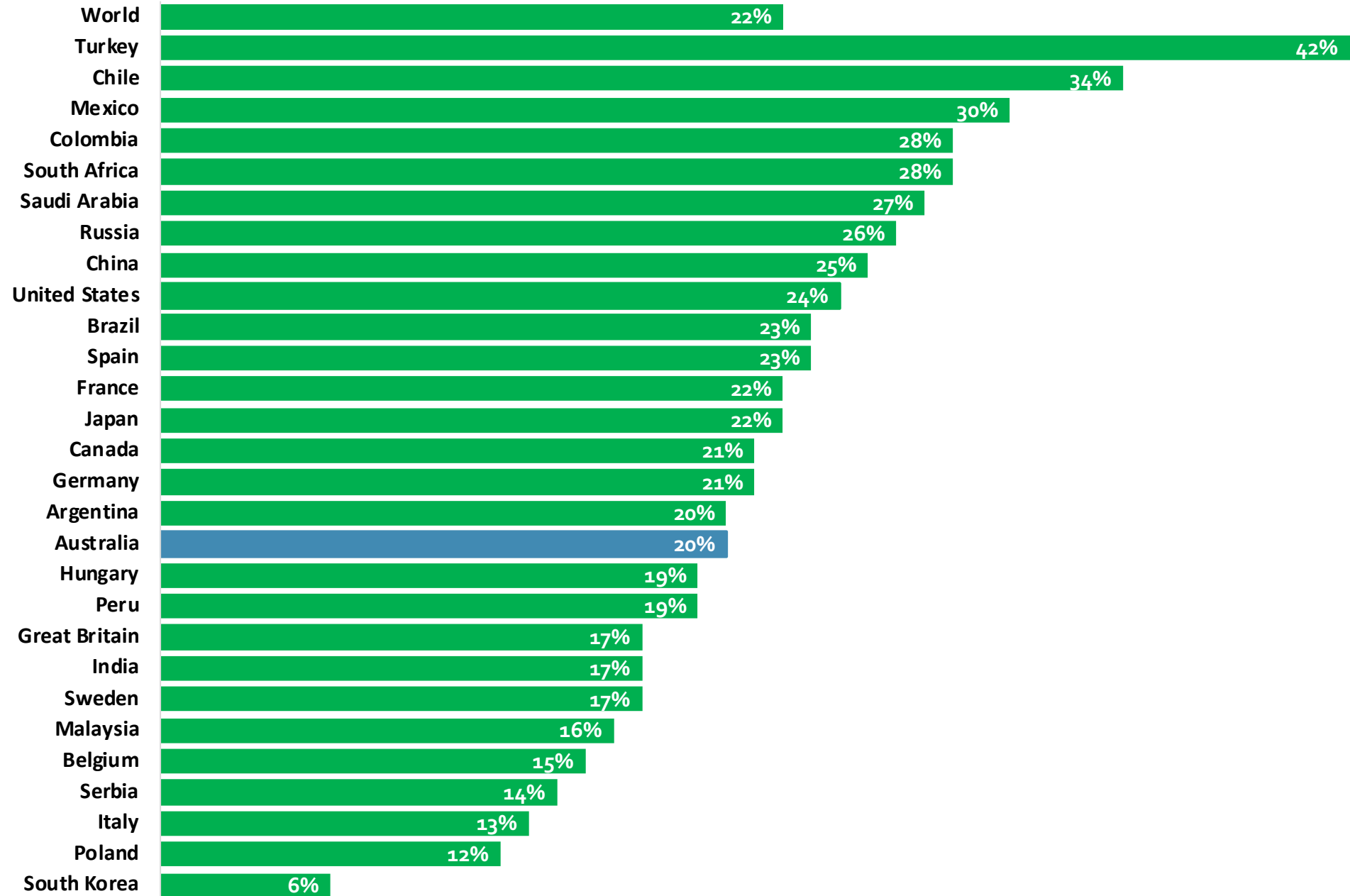
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Natural resource depletion

- Natural resource depletion is a difficult discussion topic.
- On the one hand natural resources are finite.
- On the other hand, though, they are necessary to produce goods and services needed across the entire global population.
- Australia is below the global average.

Q. In your view, what are the three most important environmental issues facing [COUNTRY] today? That is, the top environmental issues you feel should receive the greatest attention from your local leaders? – Natural resource depletion

By Country Detail



■ Natural resource depletion is a top three environmental issue

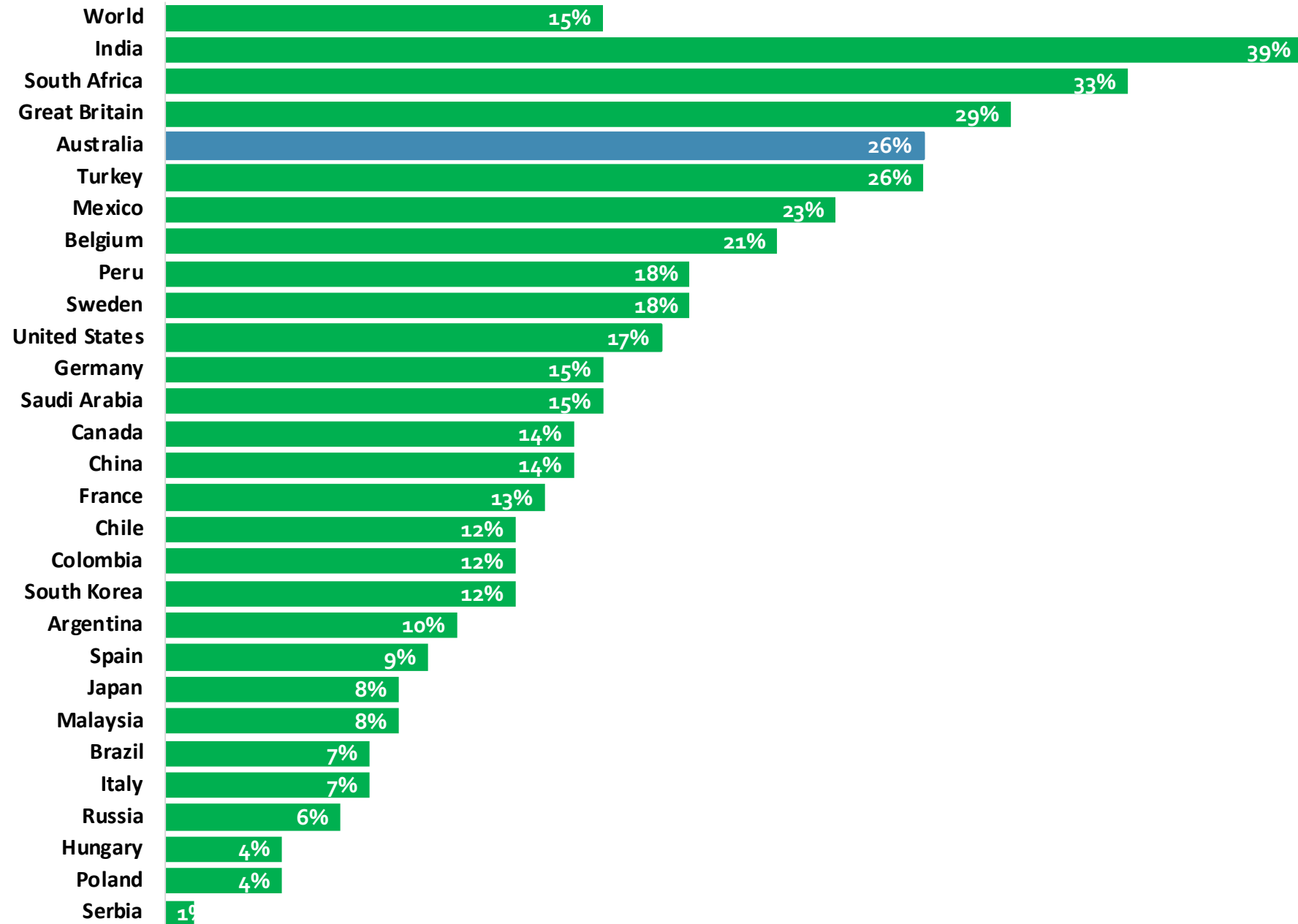
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Overpopulation

- As the global population grows, so too will competition for space and resources.
- Australians are the 4th most likely to consider overpopulation a top concern.

Q. In your view, what are the three most important environmental issues facing [COUNTRY] today? That is, the top environmental issues you feel should receive the greatest attention from your local leaders? – Overpopulation

By Country Detail



■ Overpopulation is a top three environmental issue

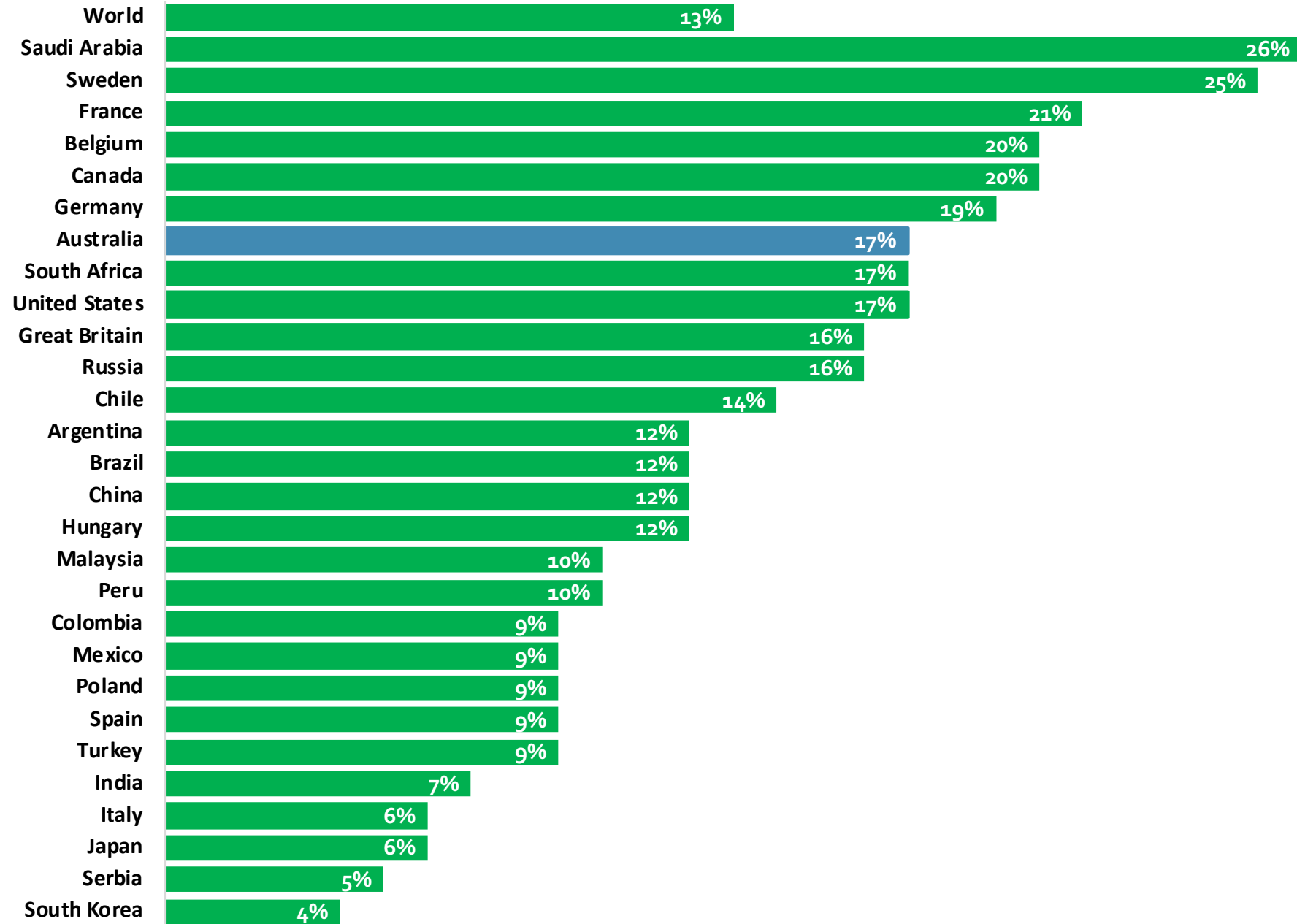
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Wildlife conservation

- According to the World Wildlife Foundation, the number of wild animals on Earth has halved in the past 40 years.
- Australia falls near the upper-middle in terms of considering wildlife conservation a top environmental issue.

Q. In your view, what are the three most important environmental issues facing [COUNTRY] today? That is, the top environmental issues you feel should receive the greatest attention from your local leaders? – Wildlife conservation

By Country Detail



■ Wildlife conservation is a top three environmental issue

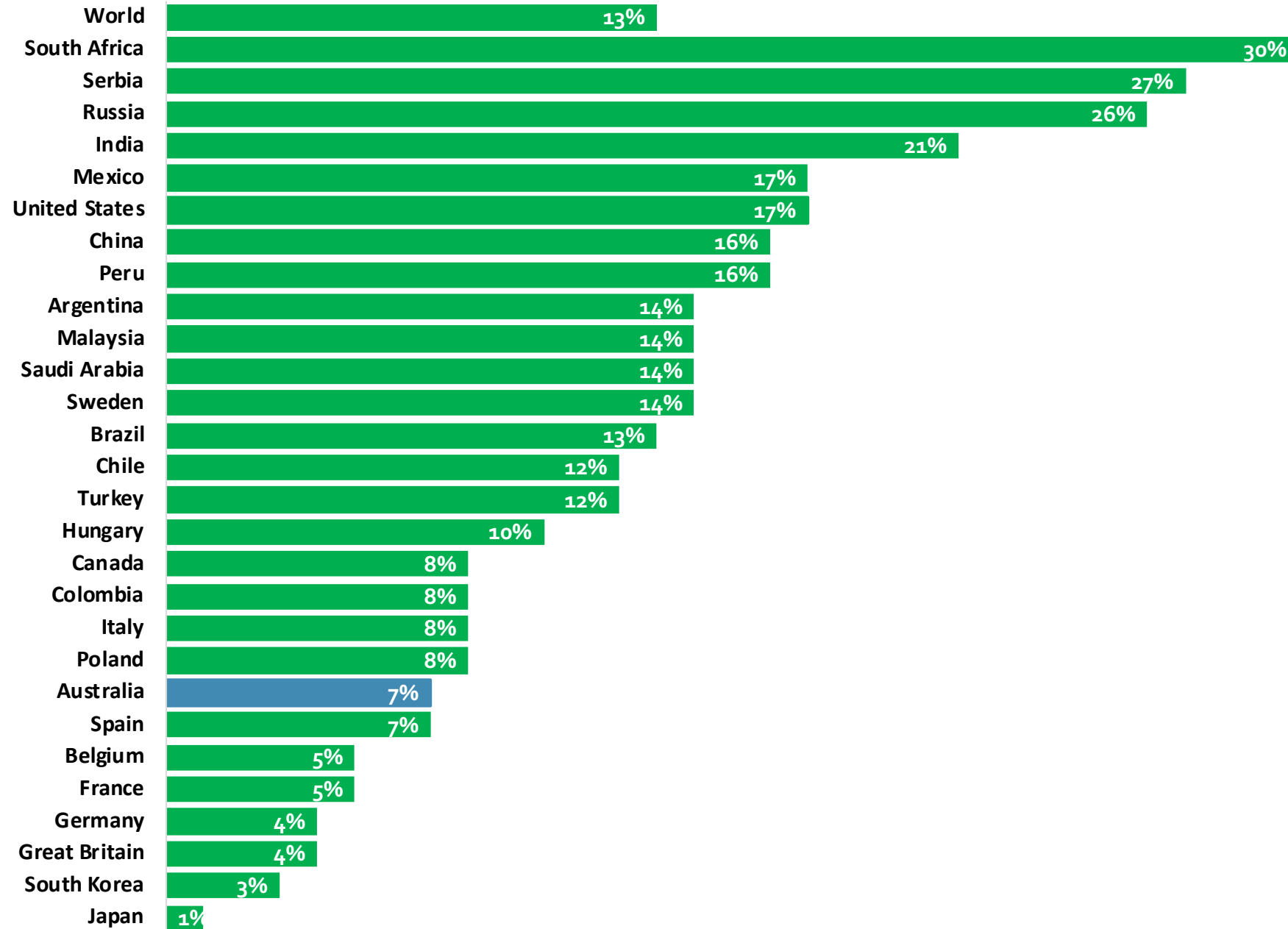
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Poor quality drinking water

- Cape Town, South Africa's recent drought still affects how South Africans view the availability of clean water, as they lead all countries surveyed in thinking that poor quality drinking water is a major problem.
- Australia is among the 10 nations least likely to consider poor quality drinking water a top environmental issue.

Q. In your view, what are the three most important environmental issues facing [COUNTRY] today? That is, the top environmental issues you feel should receive the greatest attention from your local leaders? – Poor quality drinking water

By Country Detail



■ Poor quality drinking water is a top three environmental issue

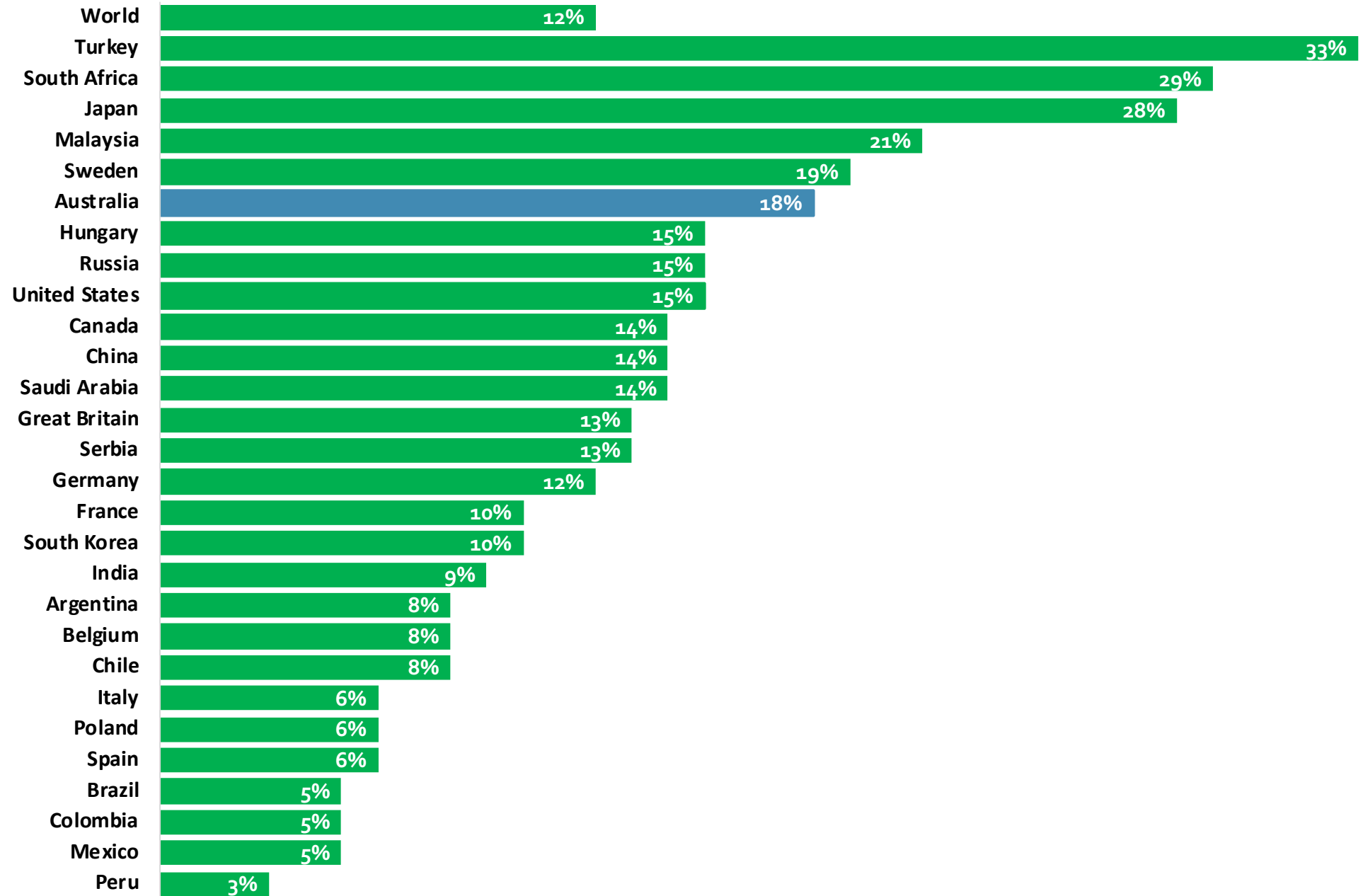
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Future food sources and supplies

- The global population is expected to continue growing and to need to produce greater and greater quantities of food.
- Australia is 6th most likely to consider this a top issue.

Q. In your view, what are the three most important environmental issues facing [COUNTRY] today? That is, the top environmental issues you feel should receive the greatest attention from your local leaders? – Future food sources and supplies

By Country Detail



■ Future food sources and supplies are a top three environmental issue

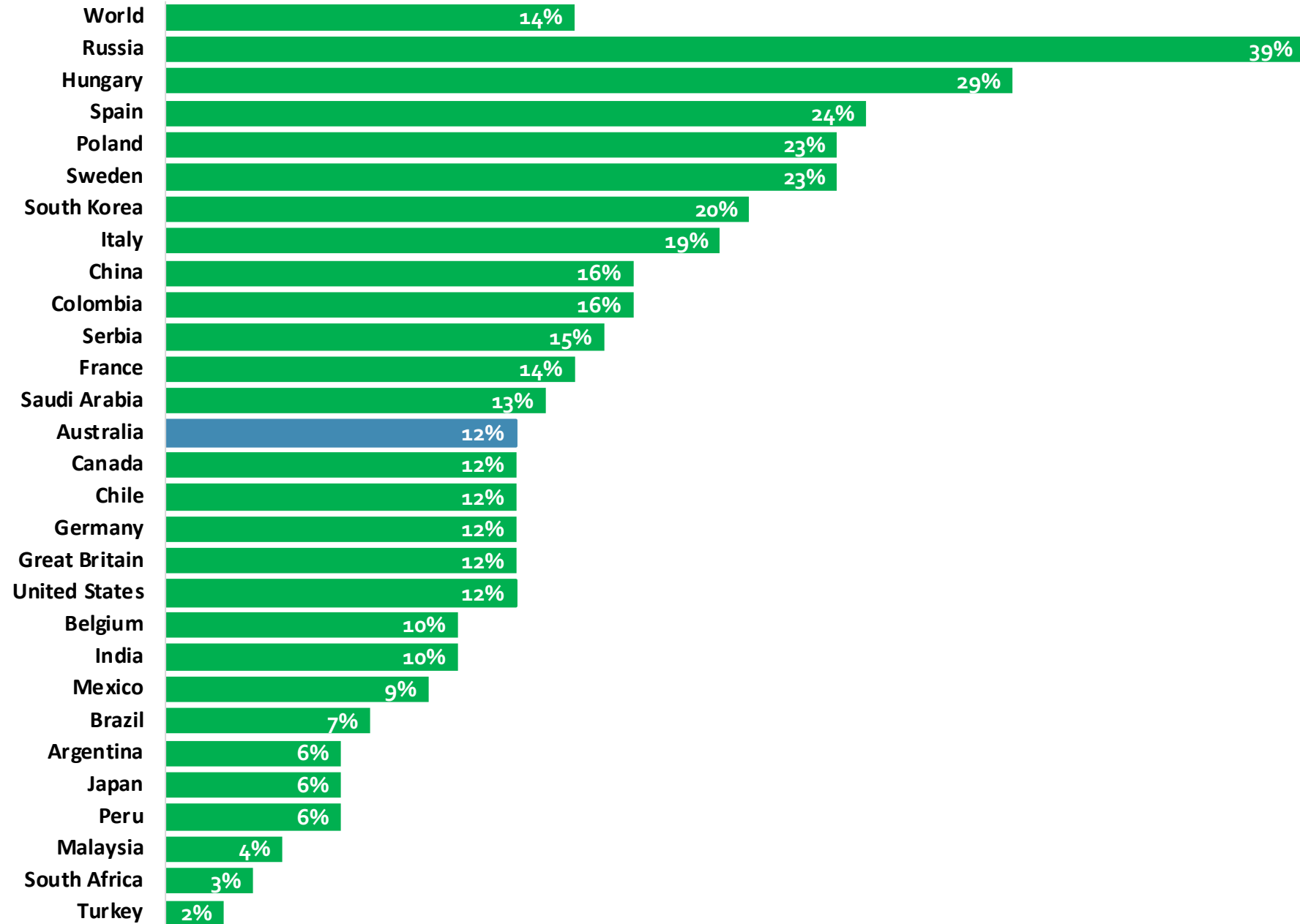
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Emissions

- A common example of an emission can be seen in the gas discharged from a car's tailpipe.
- Only 12% of those in Western developed nations such as Australia, the US, Germany, and Great Britain, consider emissions a top environmental issue.
- Eastern European countries are the most likely to consider this a top issue.

Q. In your view, what are the three most important environmental issues facing [COUNTRY] today? That is, the top environmental issues you feel should receive the greatest attention from your local leaders? – Emissions

By Country Detail



■ Emissions are a top three environmental issue

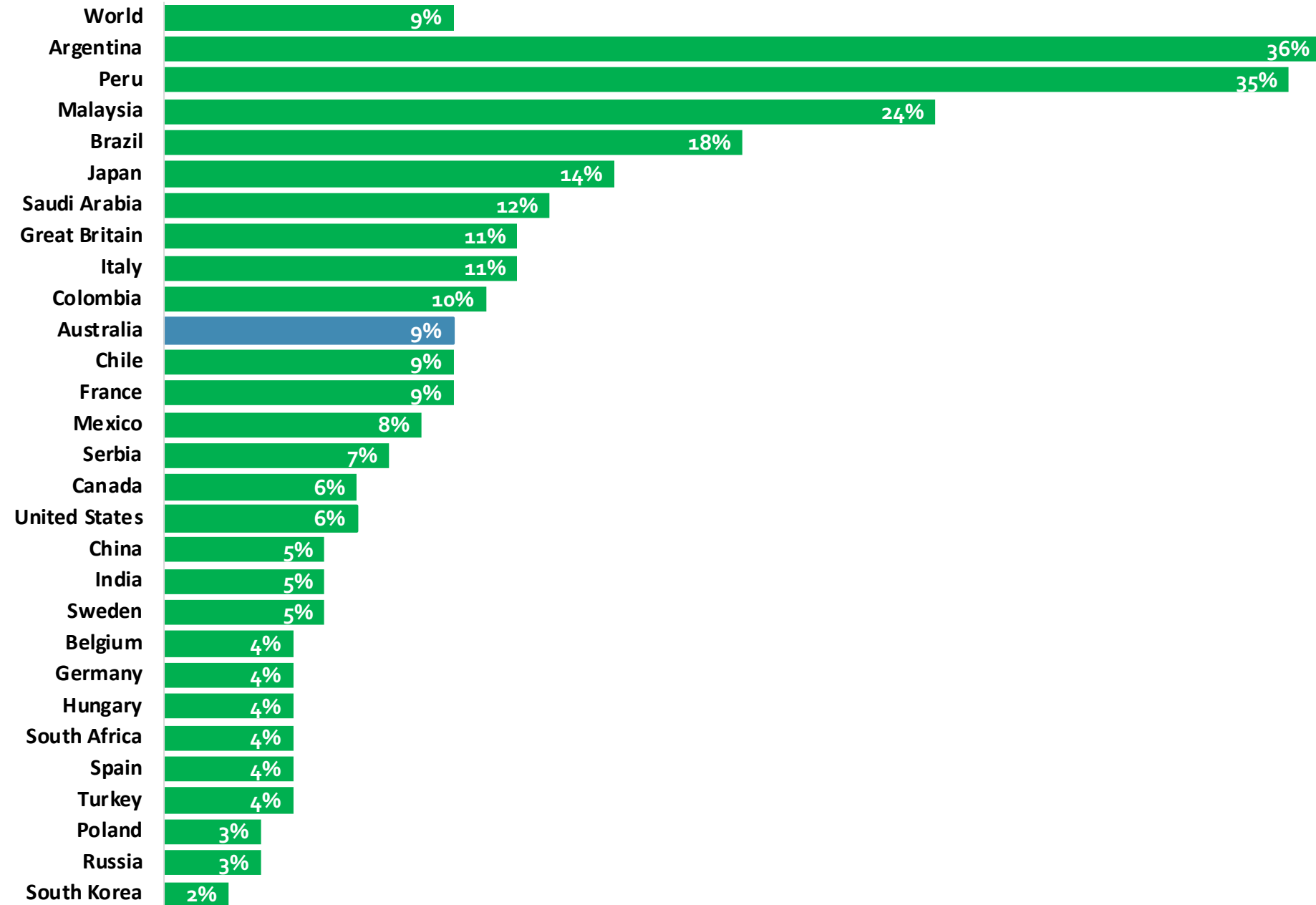
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Flooding

- *The World Resources Institute estimates that 4.24% of the world's population is exposed to river flood risk.*
- *Australia is on the global average for consideration of flooding as a major issue.*

Q. In your view, what are the three most important environmental issues facing [COUNTRY] today? That is, the top environmental issues you feel should receive the greatest attention from your local leaders? – Flooding

By Country Detail



■ Flooding is a top three environmental issue

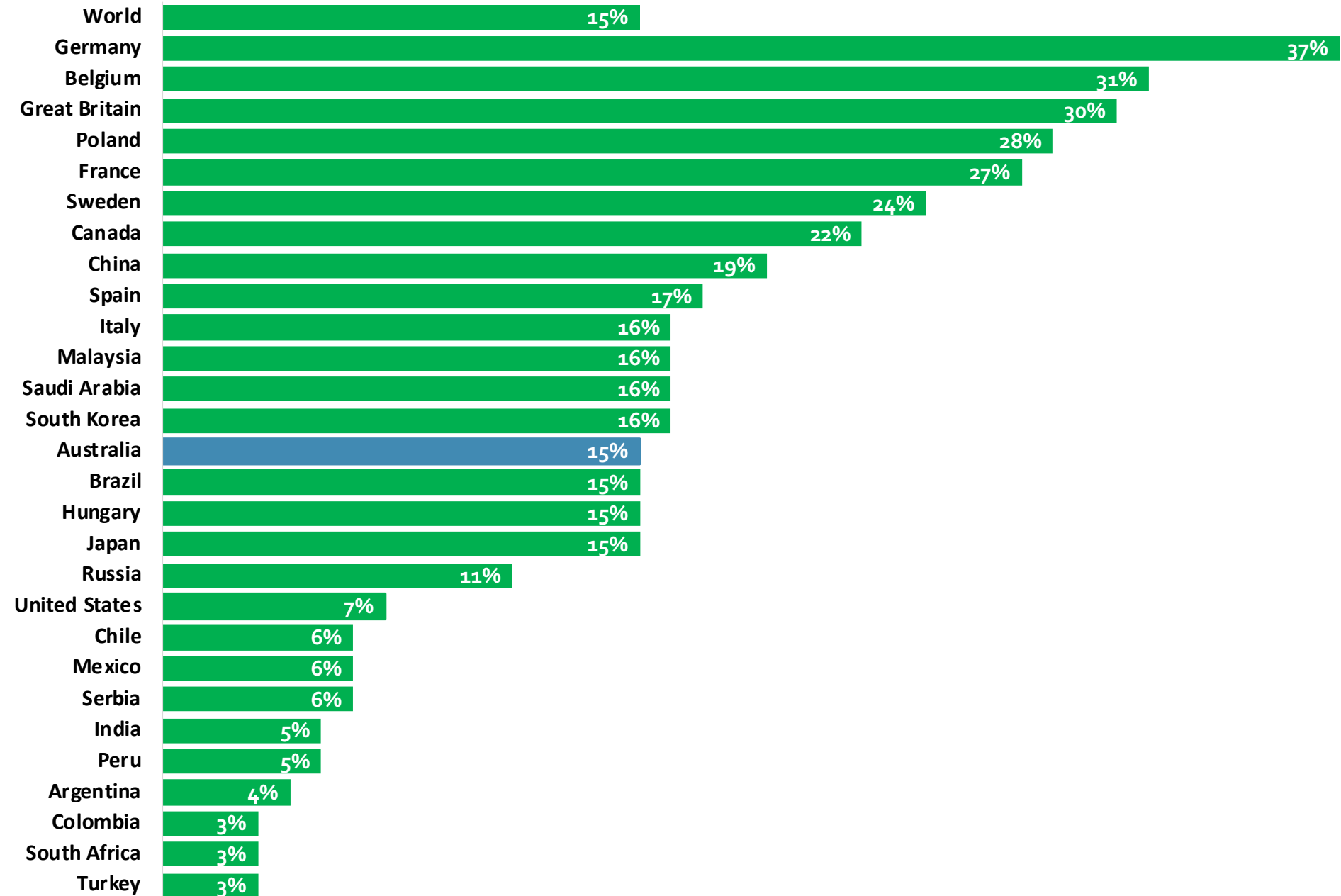
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Over-packaging of consumer goods

- *In a world that is increasingly reliant on e-commerce and shipping, overpackaged goods run the risk of creating unnecessary waste.*
- *Australia is equal to the global average in amount of those who consider over-packaging a major issue.*

Q. In your view, what are the three most important environmental issues facing [COUNTRY] today? That is, the top environmental issues you feel should receive the greatest attention from your local leaders? – Over-packaging of consumer goods

By Country Detail



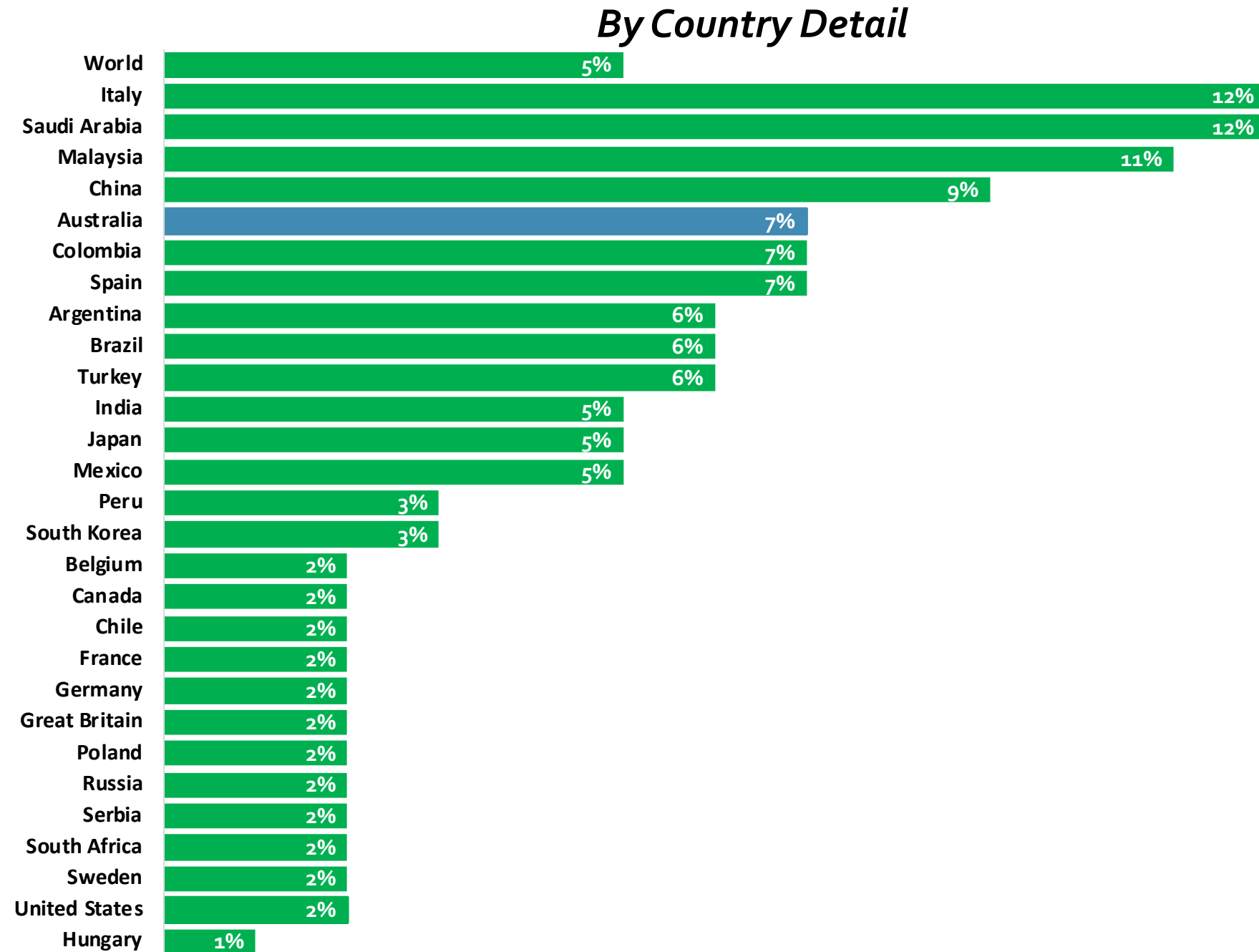
■ The over-packaging of consumer goods is a top three environmental issue

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Soil erosion

- *Soil erosion refers to the removal of the Earth's topsoil, the most fertile, uppermost layer of the ground.*
- *Australia is the 5th most likely to consider soil erosion a top environmental issue.*

Q. In your view, what are the three most important environmental issues facing [COUNTRY] today? That is, the top environmental issues you feel should receive the greatest attention from your local leaders? – Soil erosion



■ Soil erosion is a top three environmental issue

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Non-Recyclable Product Waste

How concerned is the world with non-recyclable product waste?

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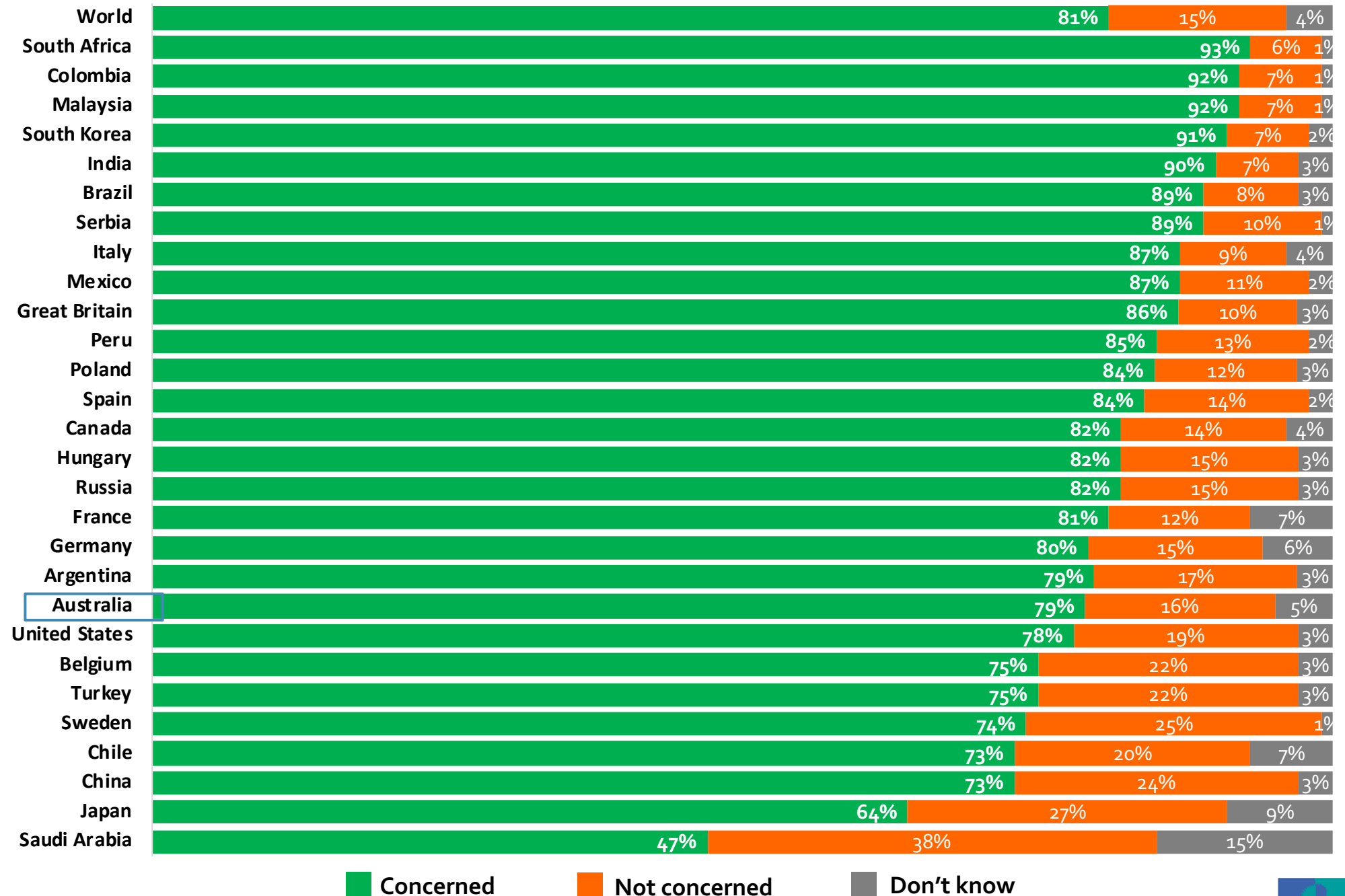


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Concern with the use of disposable, non-recyclable products

- Plastic straws, for example, are given by default in nearly every drink purchased at a restaurant, then thrown away.
- These straws are non-recyclable and take 200 years to degrade.
- In general, citizens across the world are at least somewhat concerned with the overuse of disposable, non-recyclable products.

Q. Some people have recently been discussing the effects on the environment of plastic packaging, plastic bags, and other disposable objects which cannot be recycled. How concerned, if at all, would you say you are about this issue?



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Non-Recyclable Product Waste

What kind of policy action should be taken?

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Potential policy actions

- A plurality of global respondents believe increased government spending would help reduce the use of non-recyclable products.*

Q. Which if any of the following do you think would be effective at reducing the problems caused by unnecessary use of plastic and packaging that cannot be recycled?

Forcing government spending to improve the range of recyclable items

46%

44%

Taxing shops that use these products

33%

30%

Taxing these products to increase their price

30%

31%

Public information campaigning

27%

21%

The government "naming and shaming" shops that use a lot of these products

26%

26%

Fining households that do not recycle enough

24%

17%

Don't know

10%

13%

None of these

8%

11%

Australia
Global

Base: 19,519 online adults aged 16-74 across 27 countries February 22 – March 8 2019

Potential policy actions

2019 vs. 2018,
Global data

Q. Which if any of the following do you think would be effective at reducing the problems caused by unnecessary use of plastic and packaging that cannot be recycled?

Forcing government spending to improve the range of recyclable items

46%

45%

Taxing shops that use these products

33%

31%

Taxing these products to increase their price

30%

28%

Public information campaigning

27%

23%

The government "naming and shaming" shops that use a lot of these products

26%

23%

Fining households that do not recycle enough

24%

22%

Don't know

10%

12%

None of these

8%

7%

2018

2019

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Potential policy actions

2019 vs. 2018,
Australian data

Q. Which if any of the following do you think would be effective at reducing the problems caused by unnecessary use of plastic and packaging that cannot be recycled?

Forcing government spending to improve the range of recyclable items

44%

40%

Taxing these products to increase their price

31%

31%

Taxing shops that use these products

30%

30%

The government "naming and shaming" shops that use a lot of these products

26%

23%

Public information campaigning

21%

21%

Fining households that do not recycle enough

17%

13%

Don't know

13%

19%

None of these

11%

12%

2018
2019

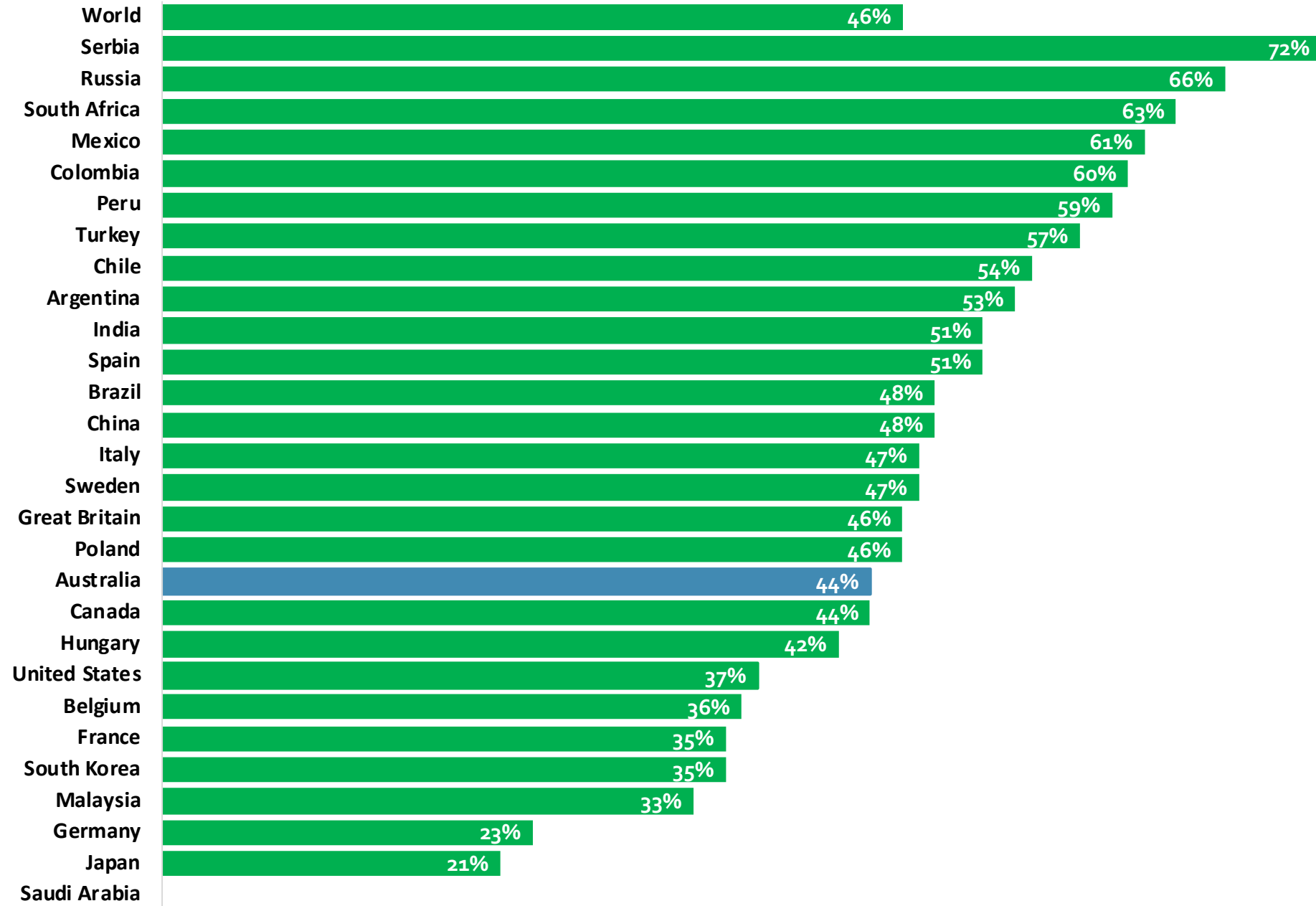
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Government investment to improve recycling

- Increasing government investment in recycling would require a tax increase, or a decrease in funding for another sector.

Q. Which if any of the following do you think would be effective at reducing the problems caused by unnecessary use of plastic and packaging that cannot be recycled? – Forcing local government to spend more on recycling so that a wider range of items can be recycled

By Country Detail



■ This policy would be effective in reducing the use of non-recyclable products

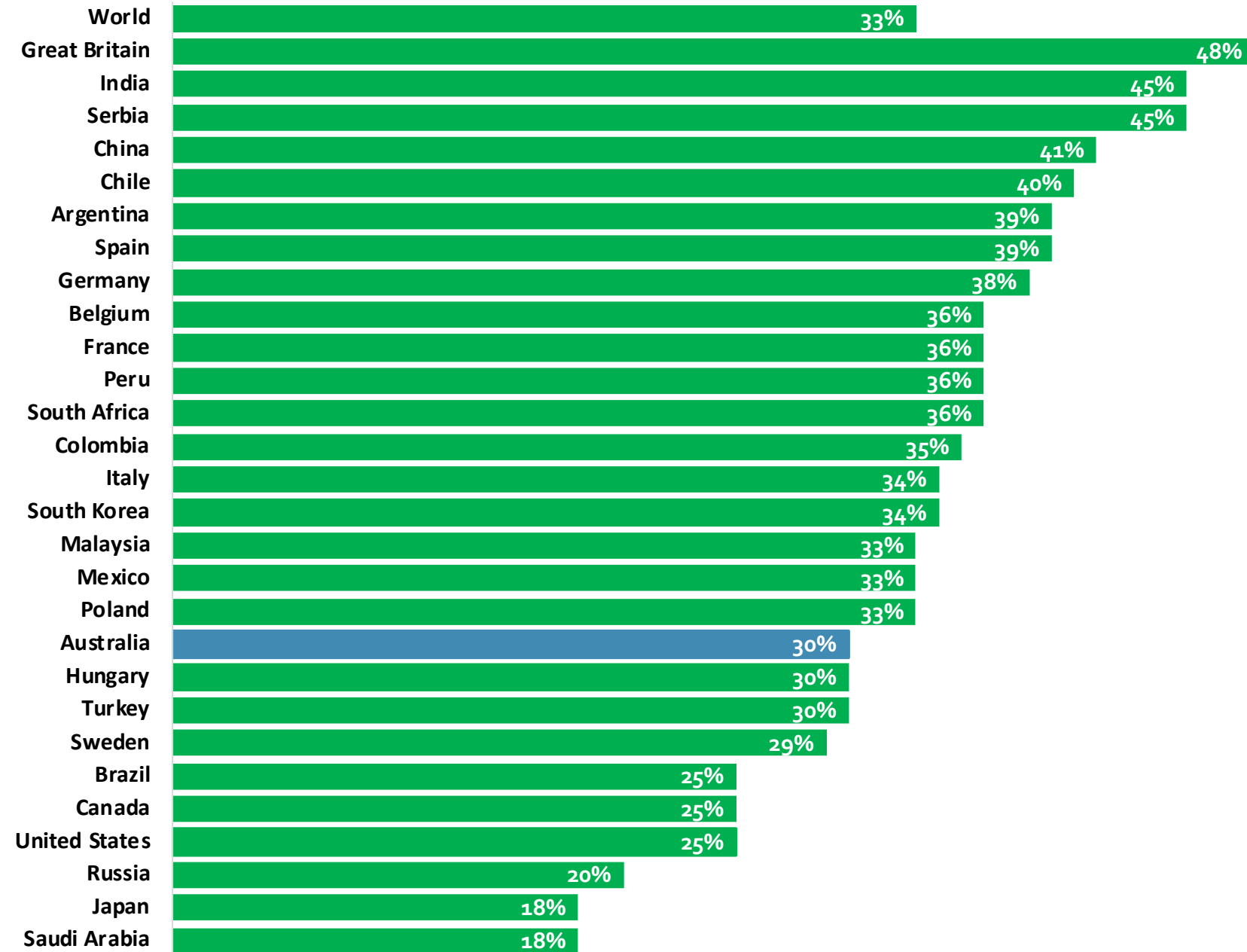
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Higher taxes on supermarkets and shops using a lot of non-recyclable packaging

- Increasing taxes on supermarkets or shops that use a lot of this kind of packaging would incentivize these businesses to find alternative products or to raise their prices

Q. Which if any of the following do you think would be effective at reducing the problems caused by unnecessary use of plastic and packaging that cannot be recycled? – Higher taxes on supermarkets and shops which use a lot of packaging that cannot be recycled

By Country Detail



■ This policy would be effective in reducing the use of non-recyclable products

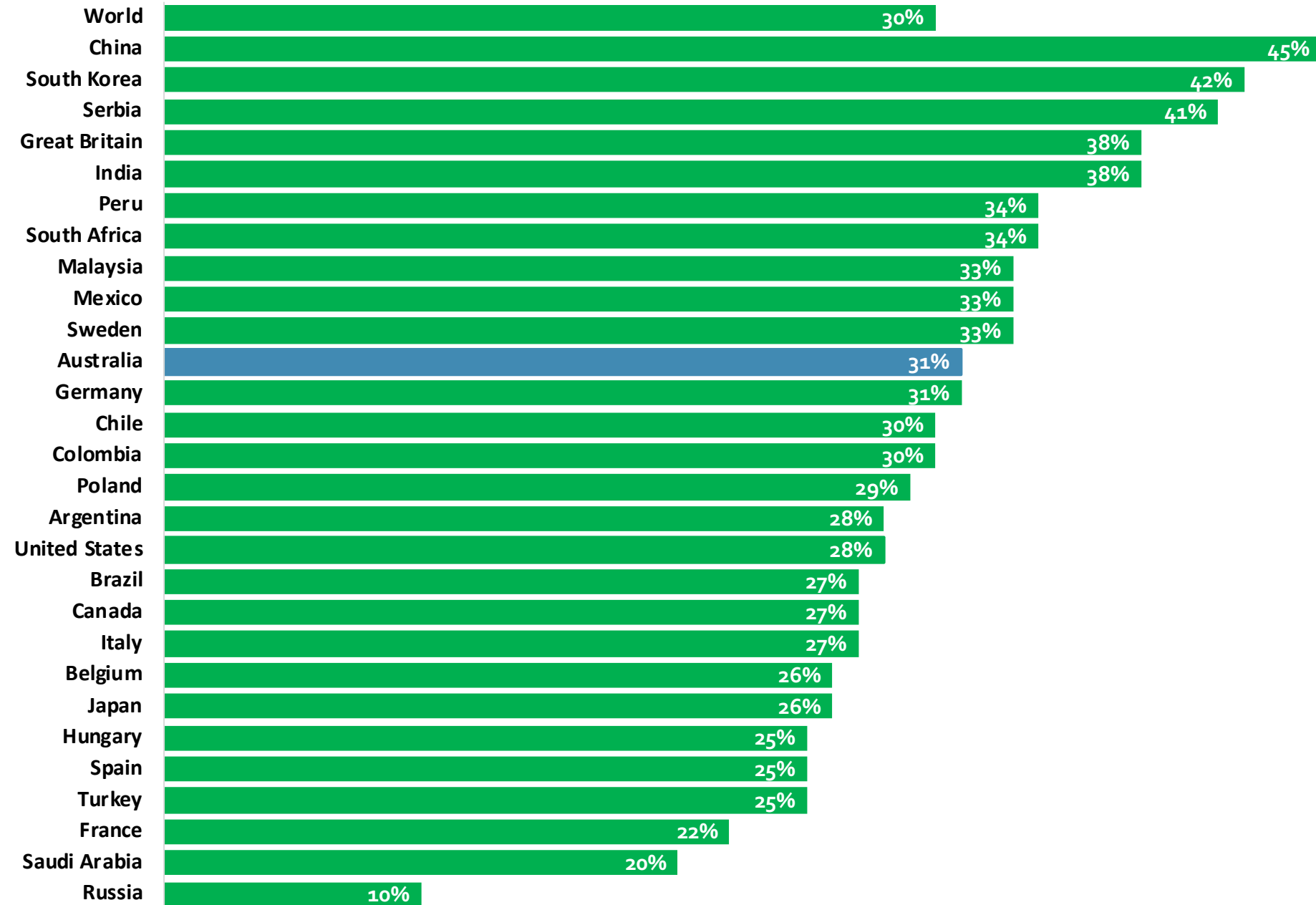
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Taxing non-recyclables

- Taxing non-recyclable containers would put the onus of reduction on the consumers of these goods.

Q. Which if any of the following do you think would be effective at reducing the problems caused by unnecessary use of plastic and packaging that cannot be recycled? – A tax on containers such as plastic drinks, bottles, and disposable coffee cups that cannot be recycled to increase their price

By Country Detail



■ This policy would be effective in reducing the use of non-recyclable products

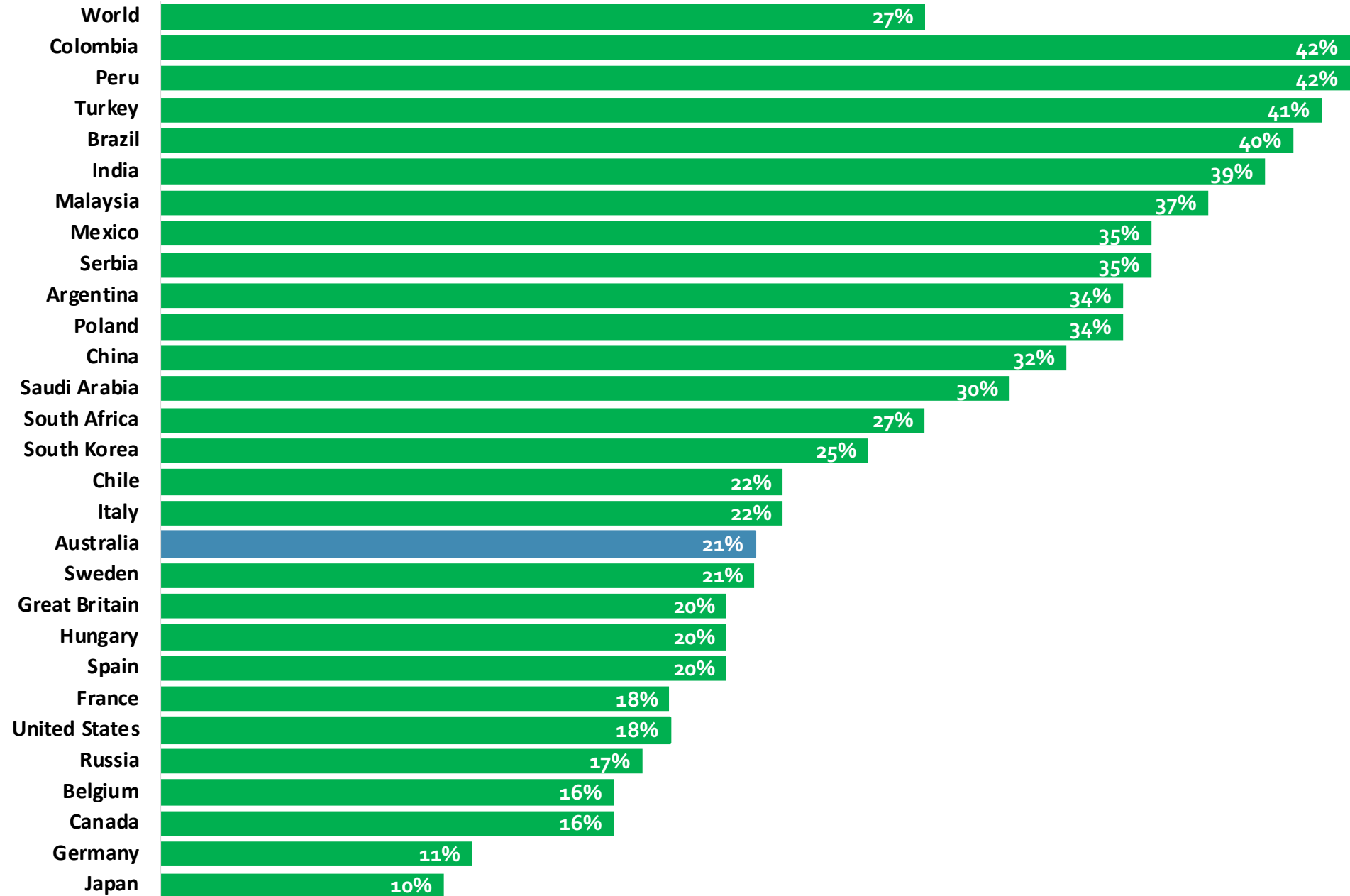
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Public info campaign

- A public information campaign seeks to educate consumers and producers about the consequences of their actions in the hope of changing behaviour without a financial incentive

Q. Which if any of the following do you think would be effective at reducing the problems caused by unnecessary use of plastic and packaging that cannot be recycled? – A public information campaign funded by taxpayers' money to tell people about the issue

By Country Detail



■ This policy would be effective in reducing the use of non-recyclable products

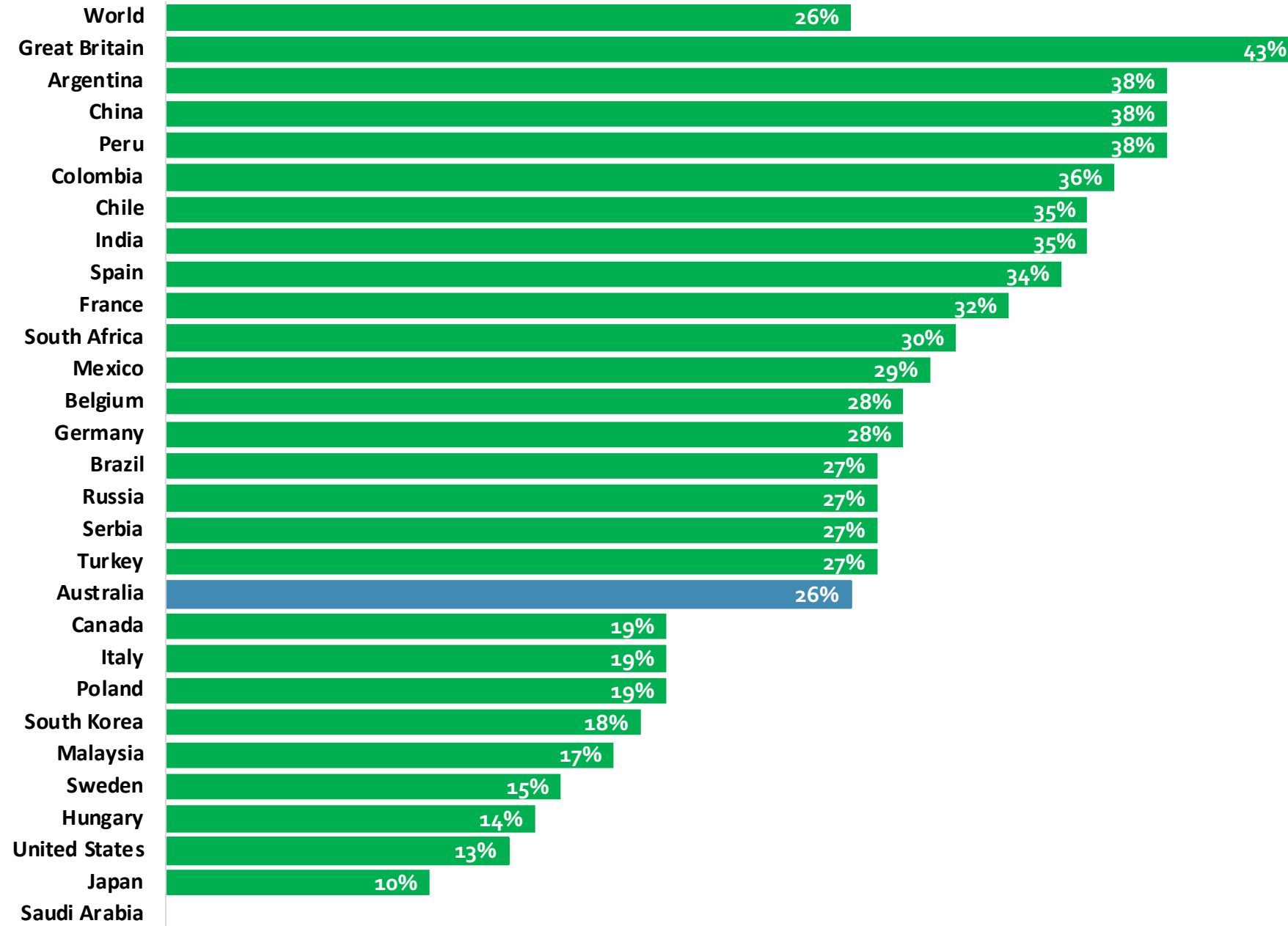
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The government "naming and shaming" bad businesses

- "Naming and shaming" culpable businesses could incentivize decreased use if the negative publicity begins to have an effect on sales.

Q. Which if any of the following do you think would be effective at reducing the problems caused by unnecessary use of plastic and packaging that cannot be recycled? – The government "naming and shaming" supermarkets and shops which use a lot of packaging that cannot be recycled

By Country Detail



■ This policy would be effective in reducing the use of non-recyclable products

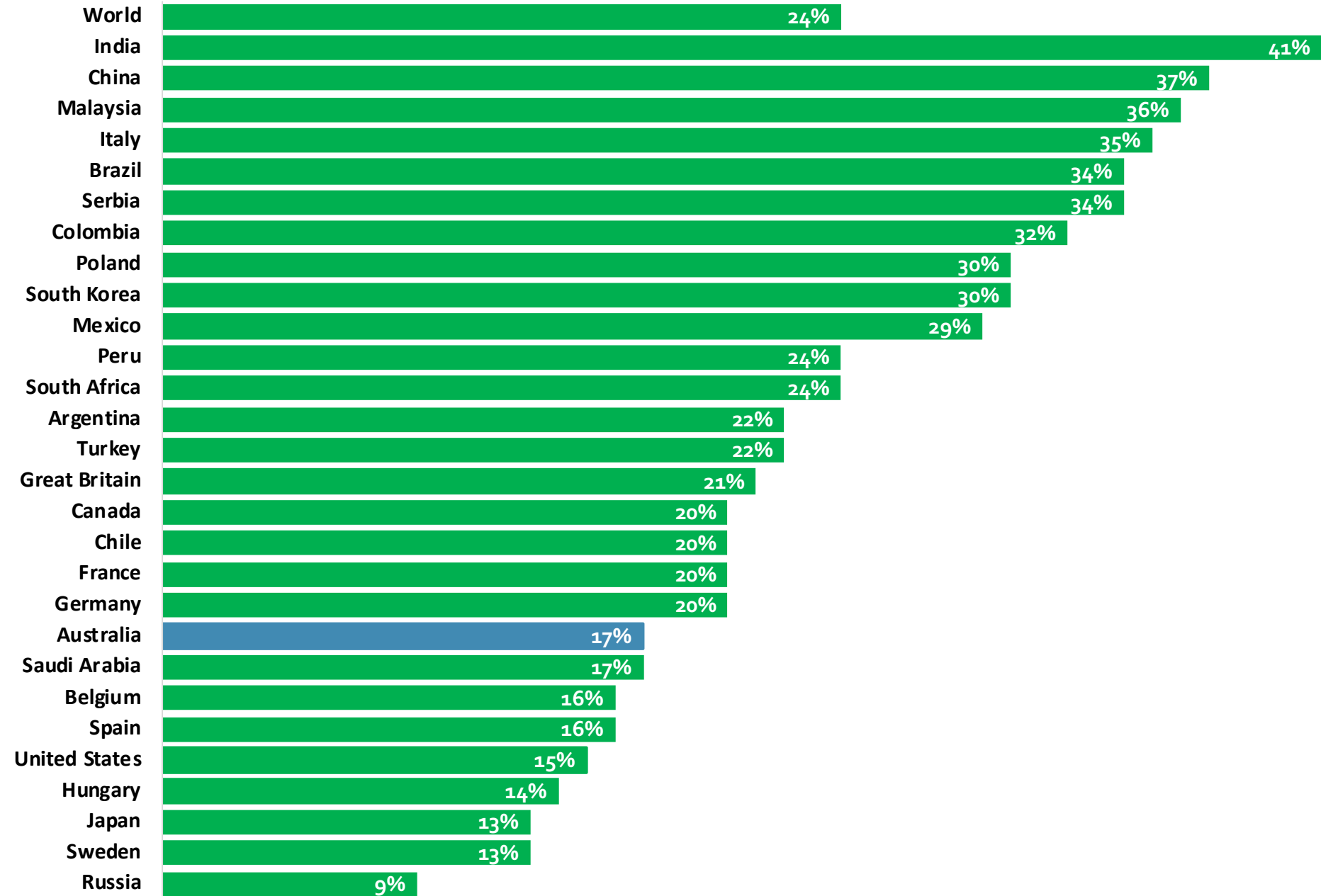
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Fines for households that do not recycle enough

- A fine policy would require investment in the infrastructure that provides households the opportunity to recycle.

Q. Which if any of the following do you think would be effective at reducing the problems caused by unnecessary use of plastic and packaging that cannot be recycled? – Big fines for householders who do not recycle enough of their rubbish

By Country Detail



■ This policy would be effective in reducing the use of non-recyclable products

Base: 19,519 online adults aged 16-74 across 27 countries February 22 – March 8 2019

Non-Recyclable Product Waste

What personal actions are citizens taking?

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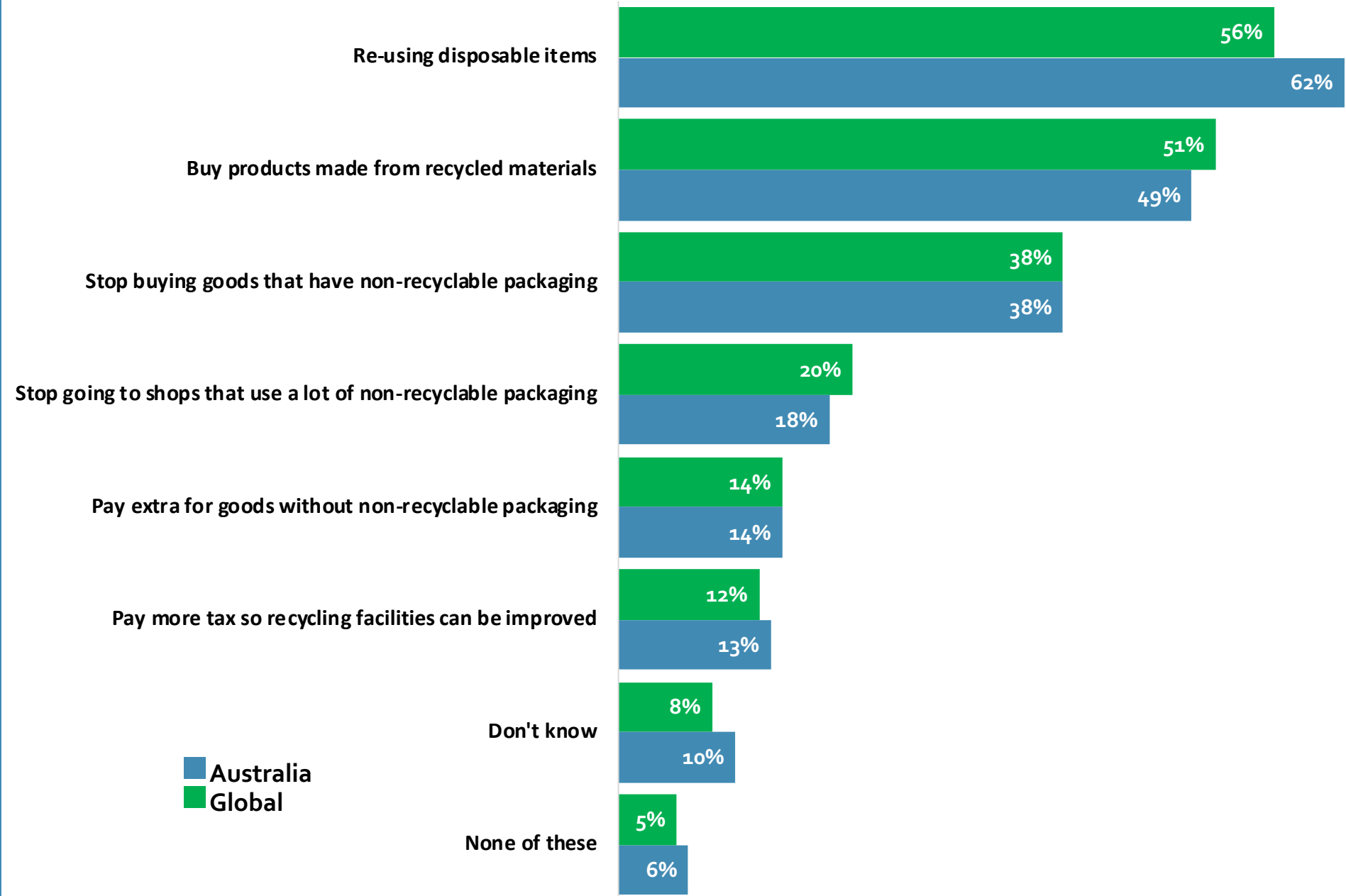


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Personal actions around the world

- *More than half of global respondents are re-using their disposable items to help cut down on waste.*

Q. Which if any of the following would you personally do to reduce the problems caused by unnecessary use of plastic and packaging that cannot be recycled?

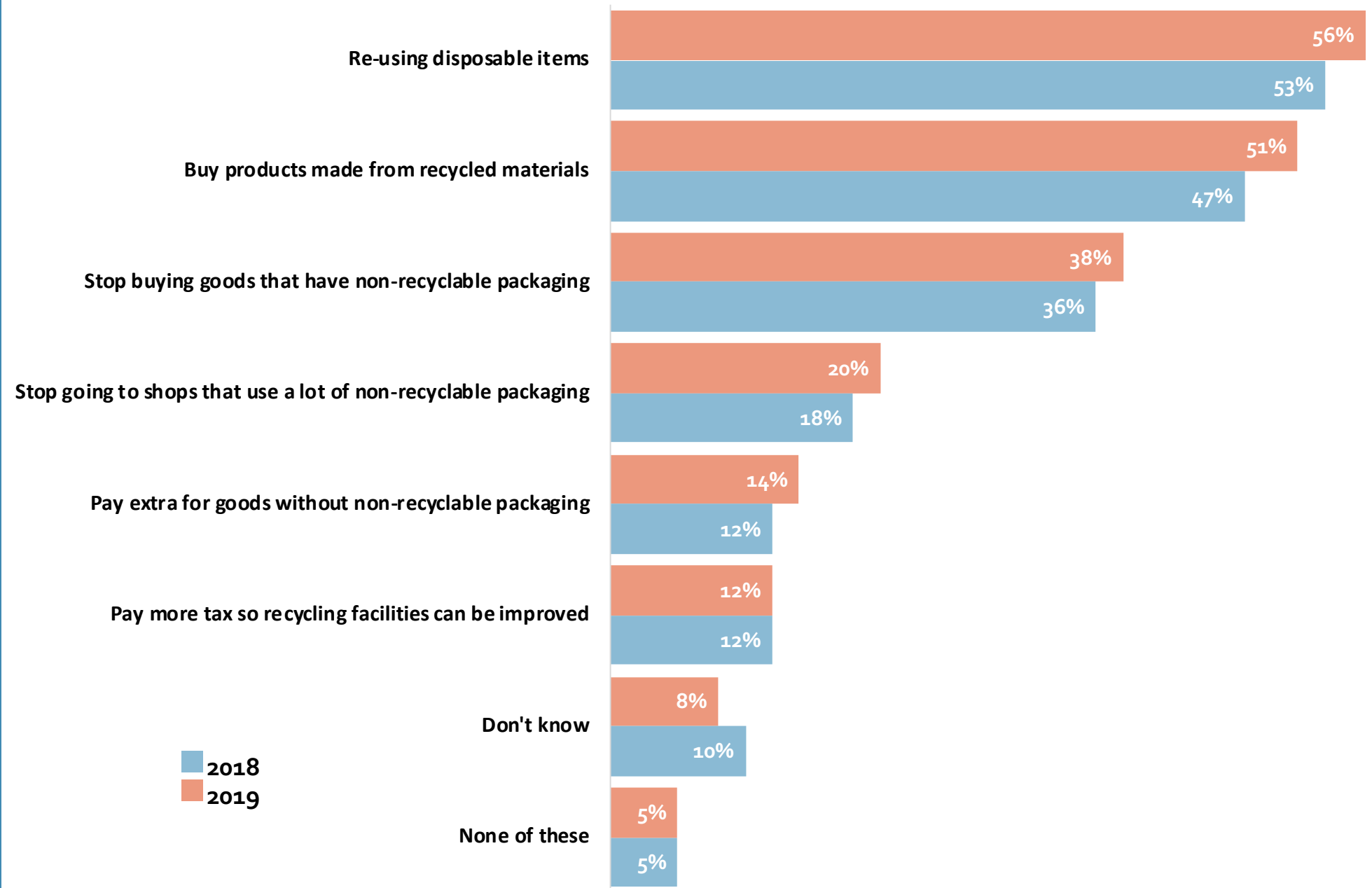


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Personal actions around the world

2019 vs. 2018,
Global data

Q. Which if any of the following
would you personally do to
reduce the problems caused by
unnecessary use of plastic and
packaging that cannot be
recycled?

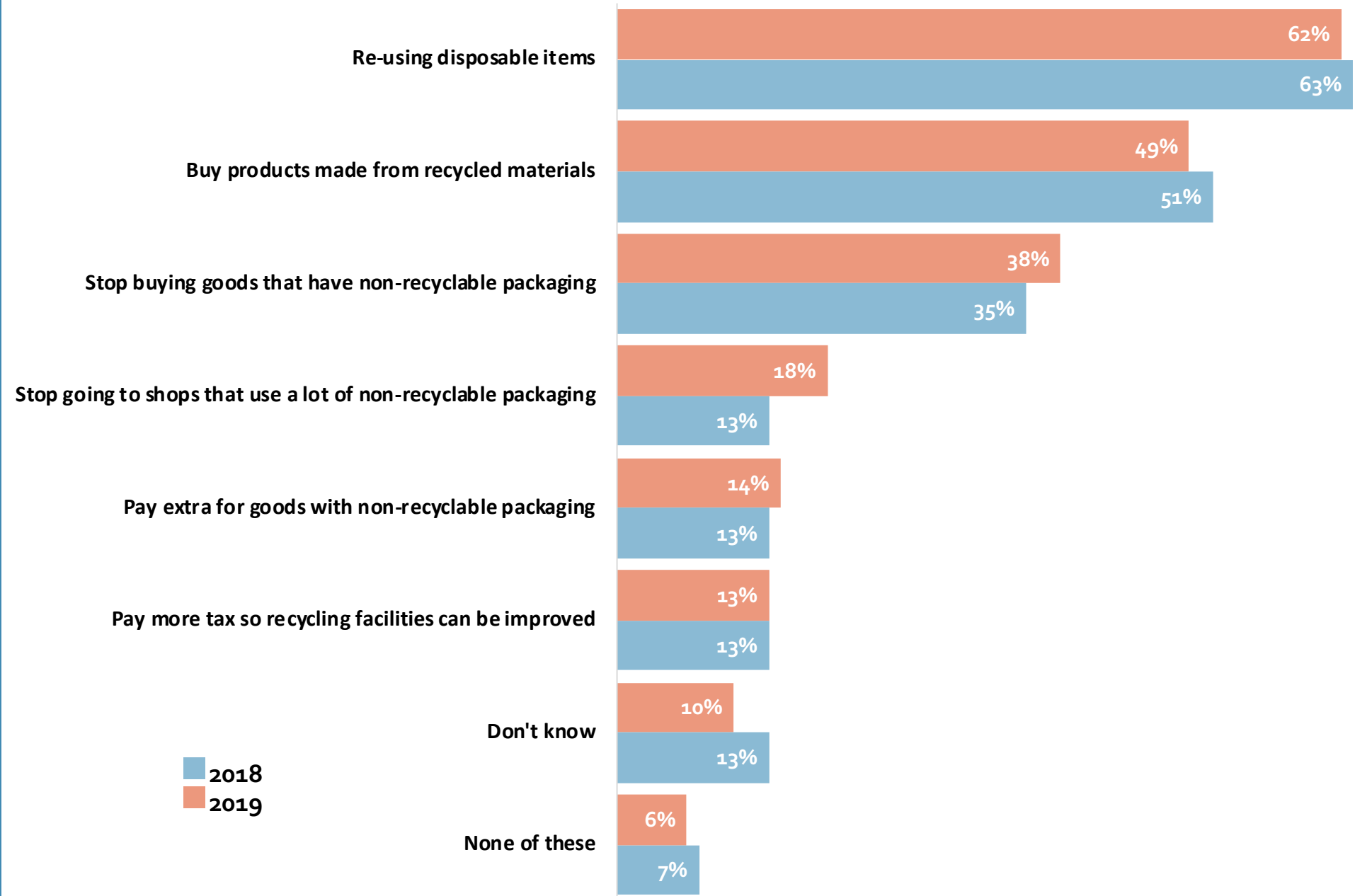


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Personal actions around the world

2019 vs. 2018,
Australian data

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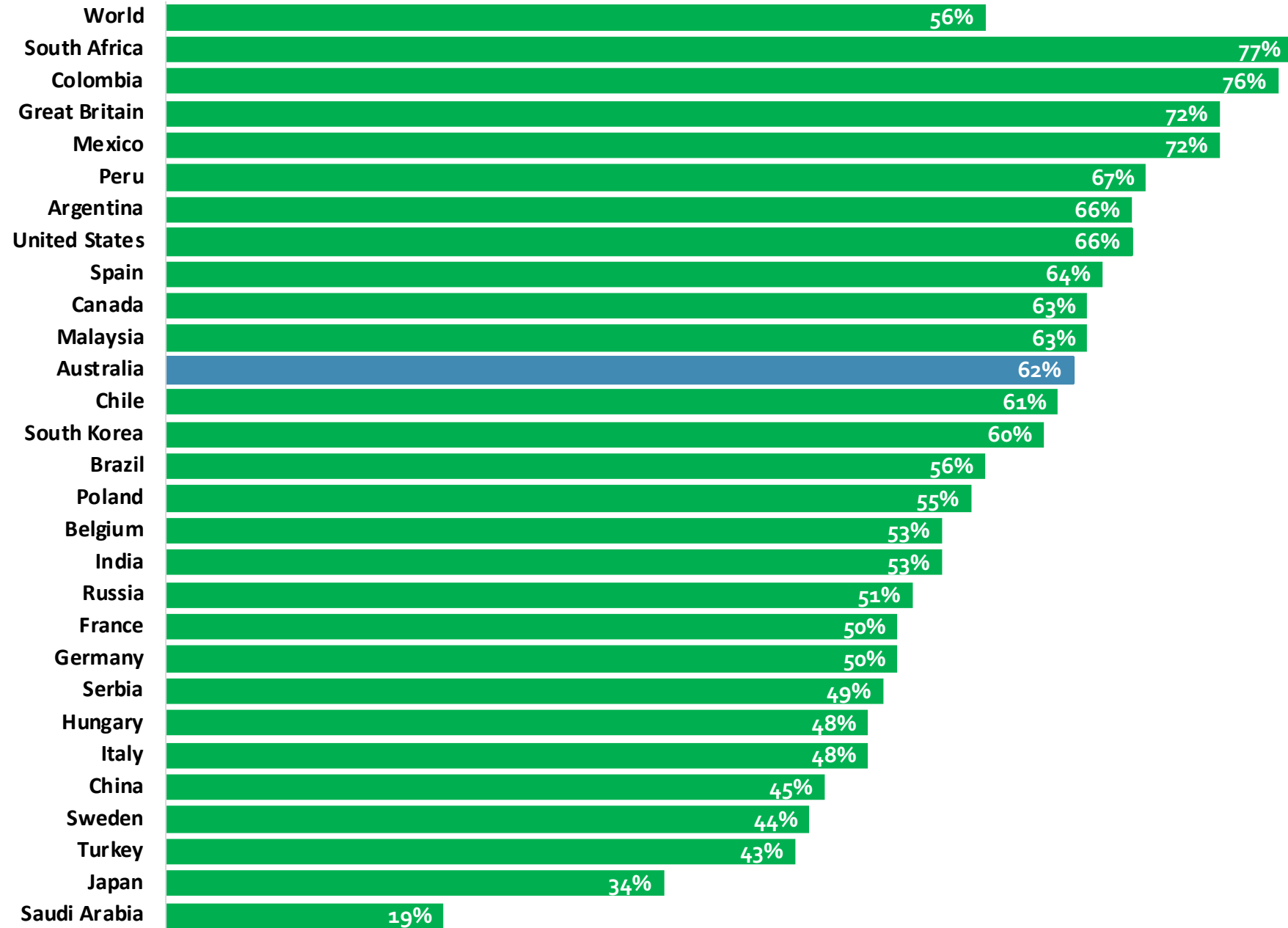
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Re-using disposable items

- *National Geographic estimates that 40 percent of plastic produced is used once and then discarded.*

Q. Which if any of the following would you personally do to reduce the problems caused by unnecessary use of plastic and packaging that cannot be recycled? - Re-use disposable items such as plastic bags and plastic bottles

By Country Detail



☒ I would personally do this to reduce the problems caused by unnecessary use of plastic and packaging that cannot be recycled

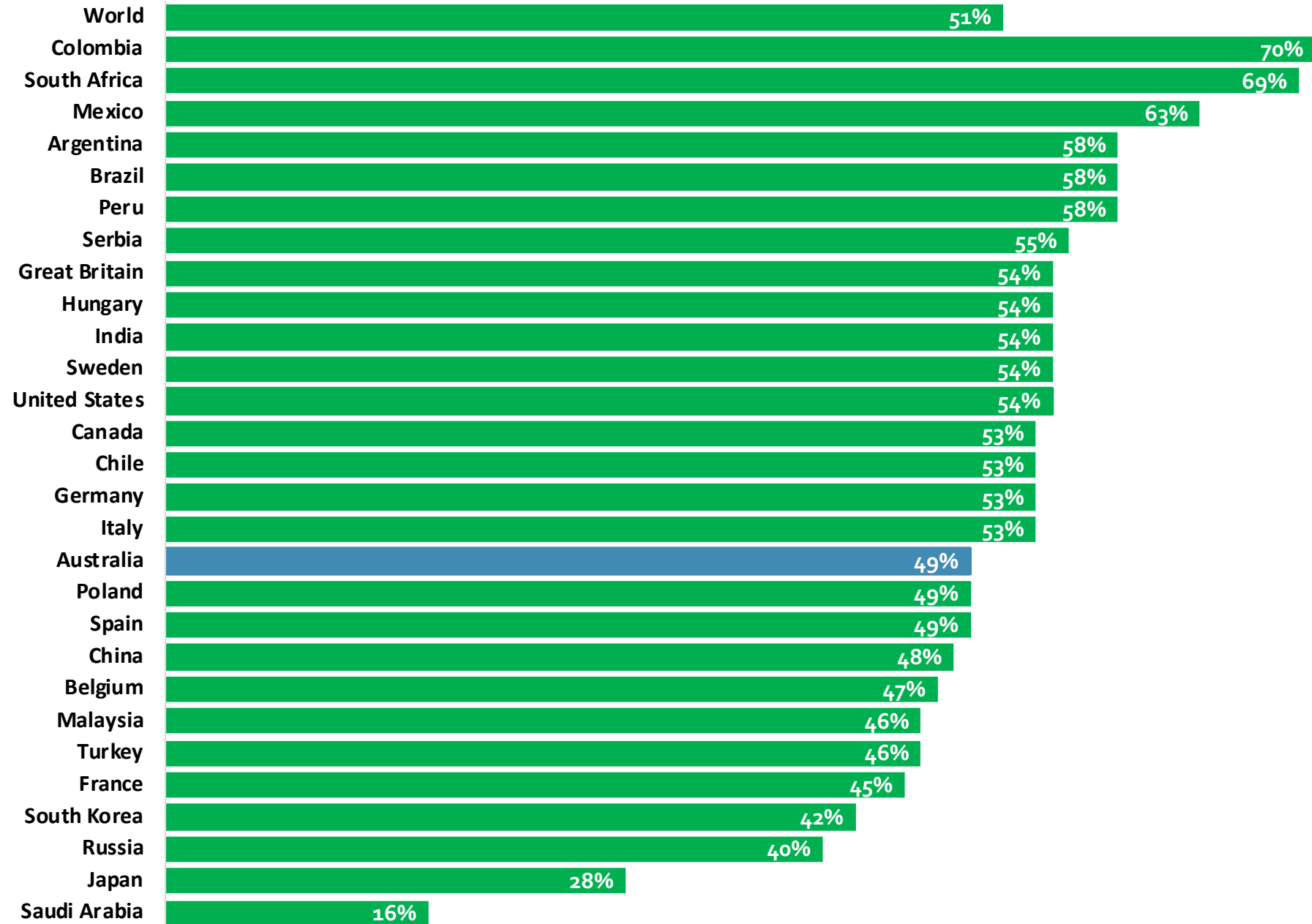
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Buy products made from recycled materials

- Every ton of recycled plastic bottles saves 3.8 barrels of oil resources.

Q. Which if any of the following would you personally do to reduce the problems caused by unnecessary use of plastic and packaging that cannot be recycled? - Buy more products made from recycled materials

By Country Detail



I would personally do this to reduce the problems caused by unnecessary use of plastic and packaging that cannot be recycled

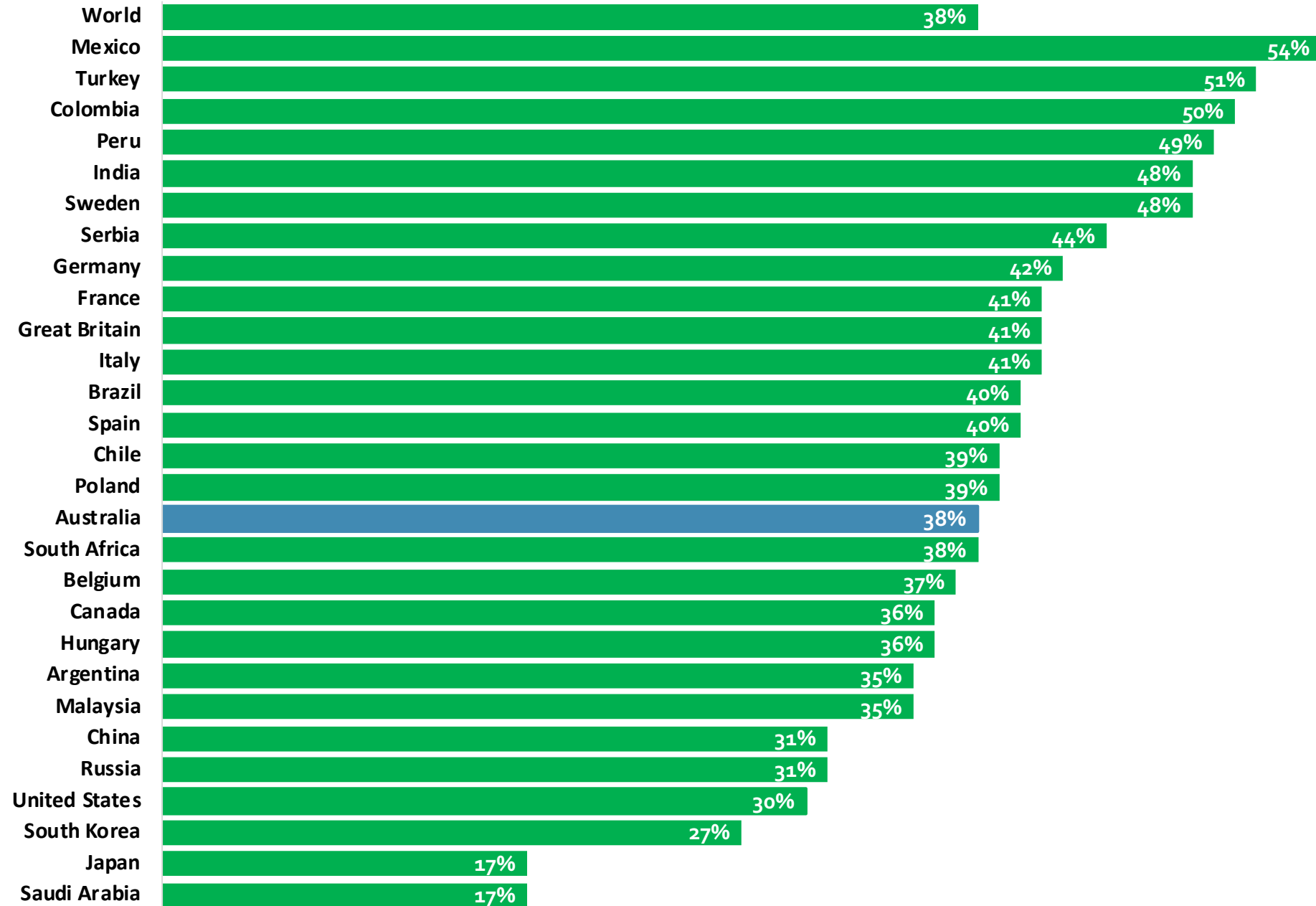
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Stop buying goods that have non-recyclable packaging

- Styrofoam is an example of a product commonly used in packaging that is also very difficult to recycle.

Q. Which if any of the following would you personally do to reduce the problems caused by unnecessary use of plastic and packaging that cannot be recycled? - Stop buying goods that have packaging that cannot be recycled

By Country Detail



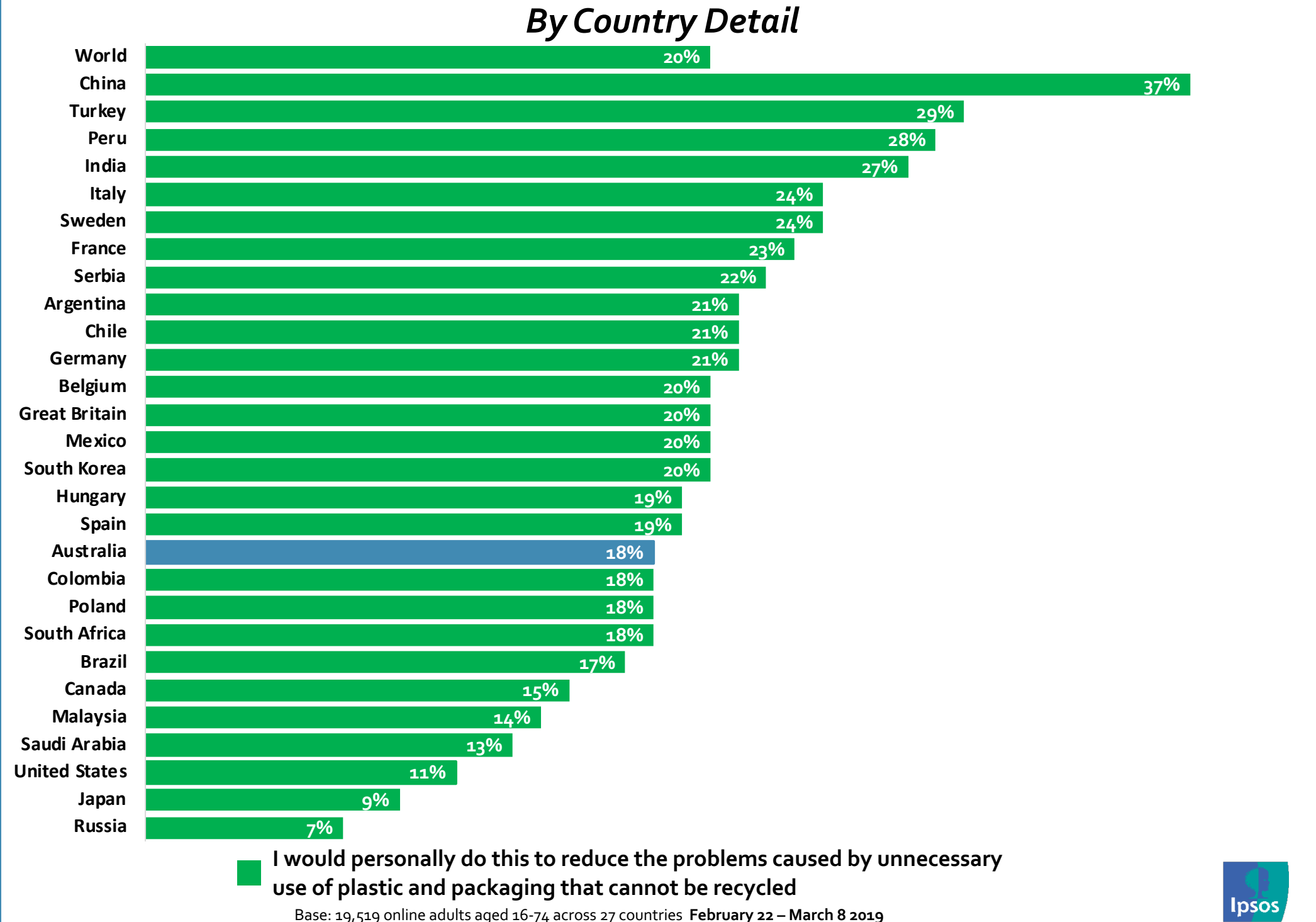
I would personally do this to reduce the problems caused by unnecessary use of plastic and packaging that cannot be recycled

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Stop going to supermarkets and shops that use a lot of non-recyclable packaging

- This is one of the actions that information campaigns rely on to make change.

Q. Which if any of the following would you personally do to reduce the problems caused by unnecessary use of plastic and packaging that cannot be recycled? - Stop going to supermarkets and shops which use a lot of packaging that cannot be recycled

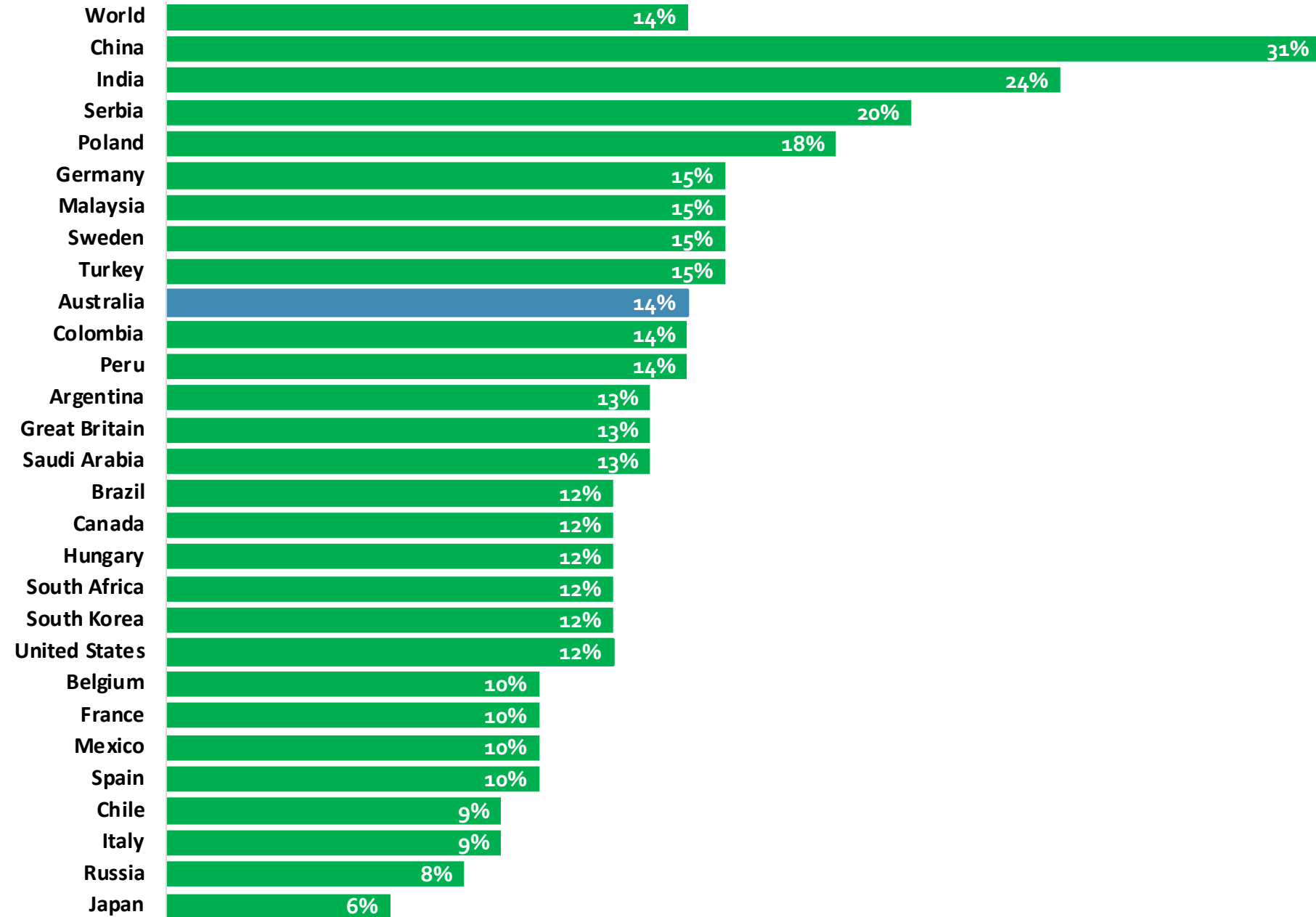


Pay extra for goods without non-recyclable packaging

- Those who pay extra for goods without non-recyclable packaging are said to be purchasing "utility" in the form of the feeling of environmental responsibility.

Q. Which if any of the following would you personally do to reduce the problems caused by unnecessary use of plastic and packaging that cannot be recycled? - Pay extra for goods that have no packaging that cannot be recycled

By Country Detail



I would personally do this to reduce the problems caused by unnecessary use of plastic and packaging that cannot be recycled

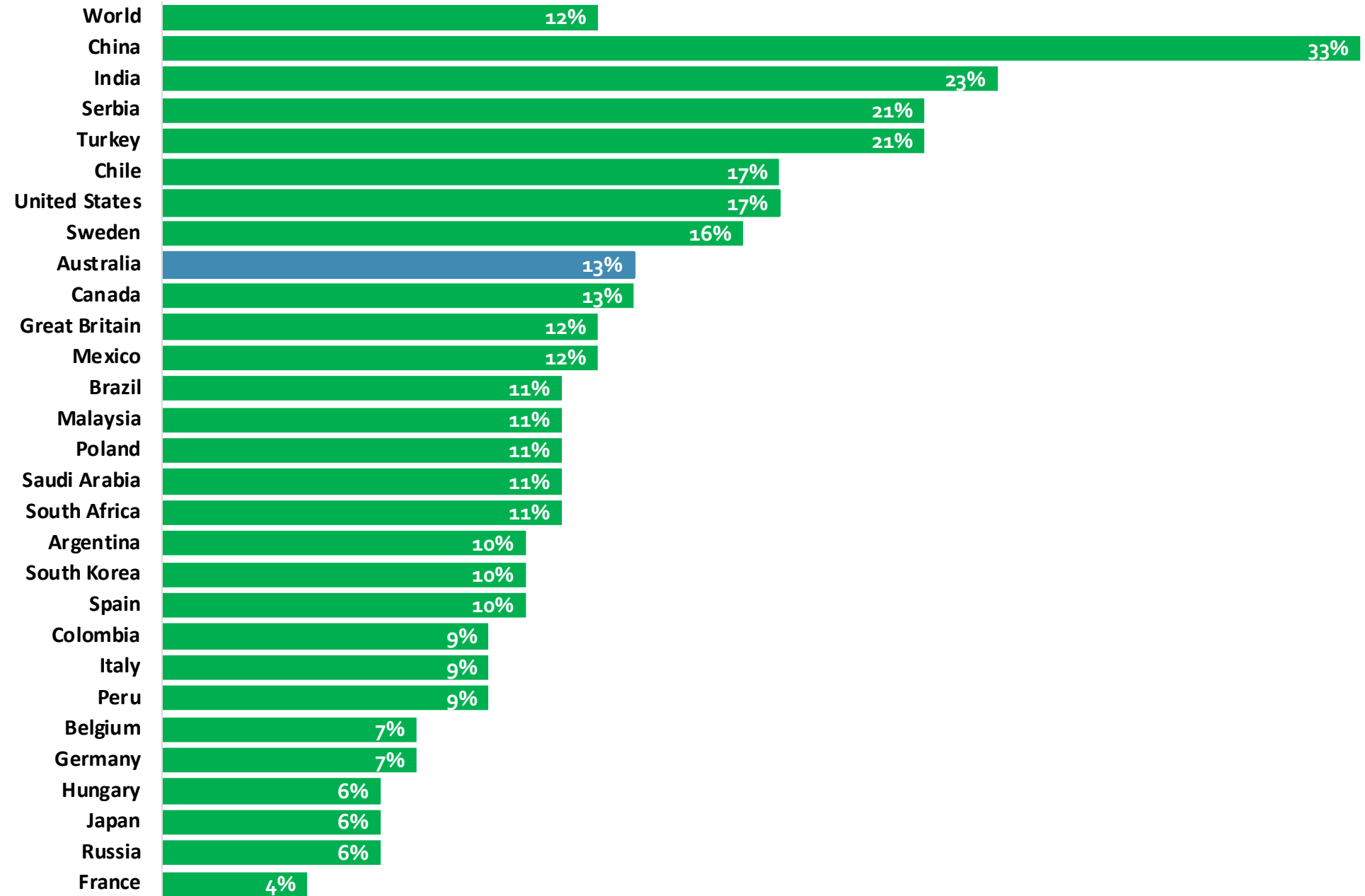
Base: 19,519 online adults aged 16-74 across 27 countries February 22 – March 8 2019


Pay higher taxes

- Paying higher taxes would aid the government in recycling facility investment.*

Q. Which if any of the following would you personally do to reduce the problems caused by unnecessary use of plastic and packaging that cannot be recycled? - Pay more tax so recycling facilities can be improved, allowing a wider range of items to be recycled

By Country Detail



 I would personally do this to reduce the problems caused by unnecessary use of plastic and packaging that cannot be recycled

Base: 19,519 online adults aged 16-74 across 27 countries February 22 – March 8 2019

Unrecyclable Product Waste

Who should lead efforts to reduce unrecyclable product waste?

IPSOS GLOBAL ADVISOR

GAME CHANGERS

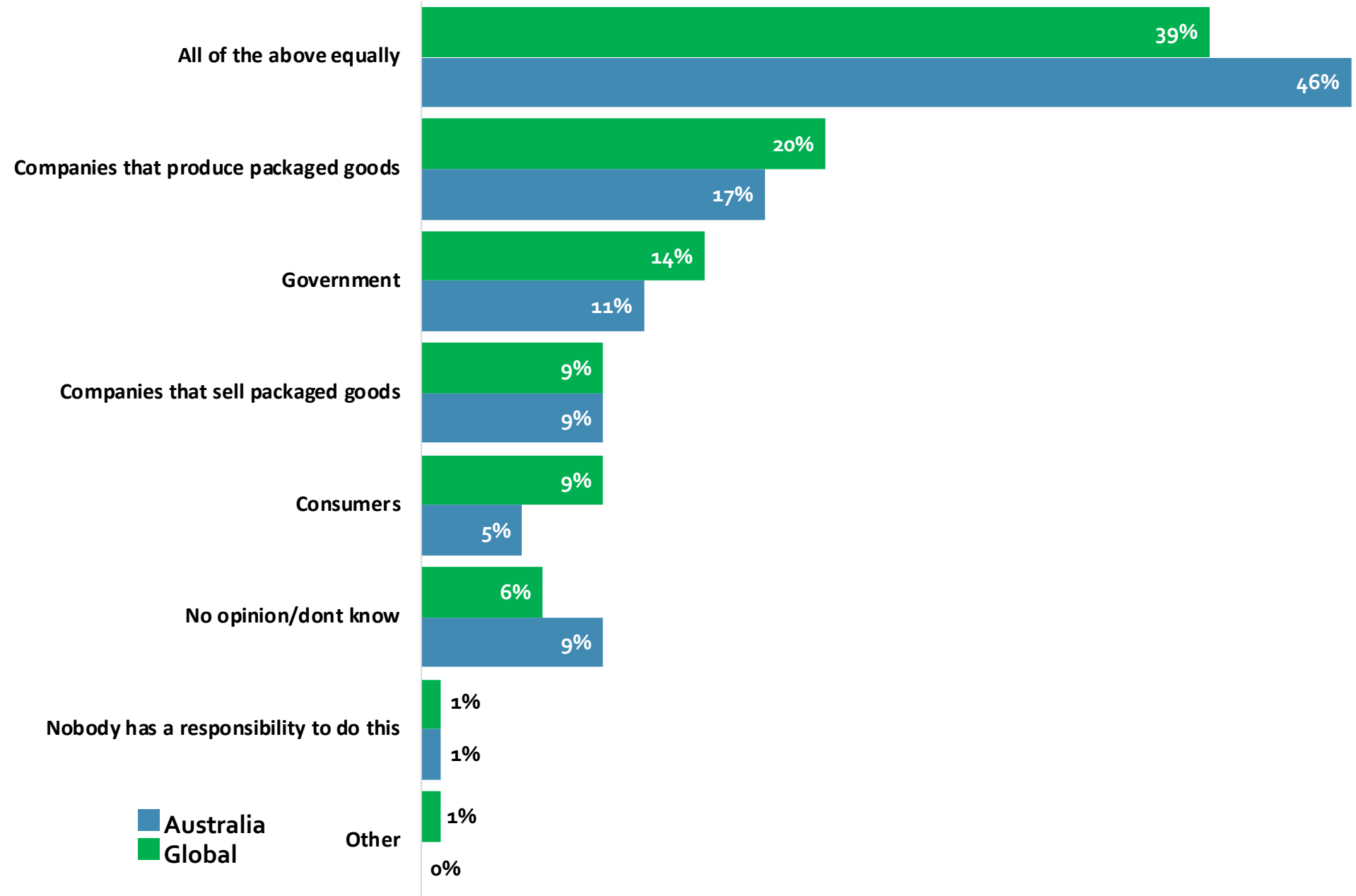


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Who's responsible?

- A majority of people worldwide believe somebody has the responsibility for reducing unnecessary packaging.*

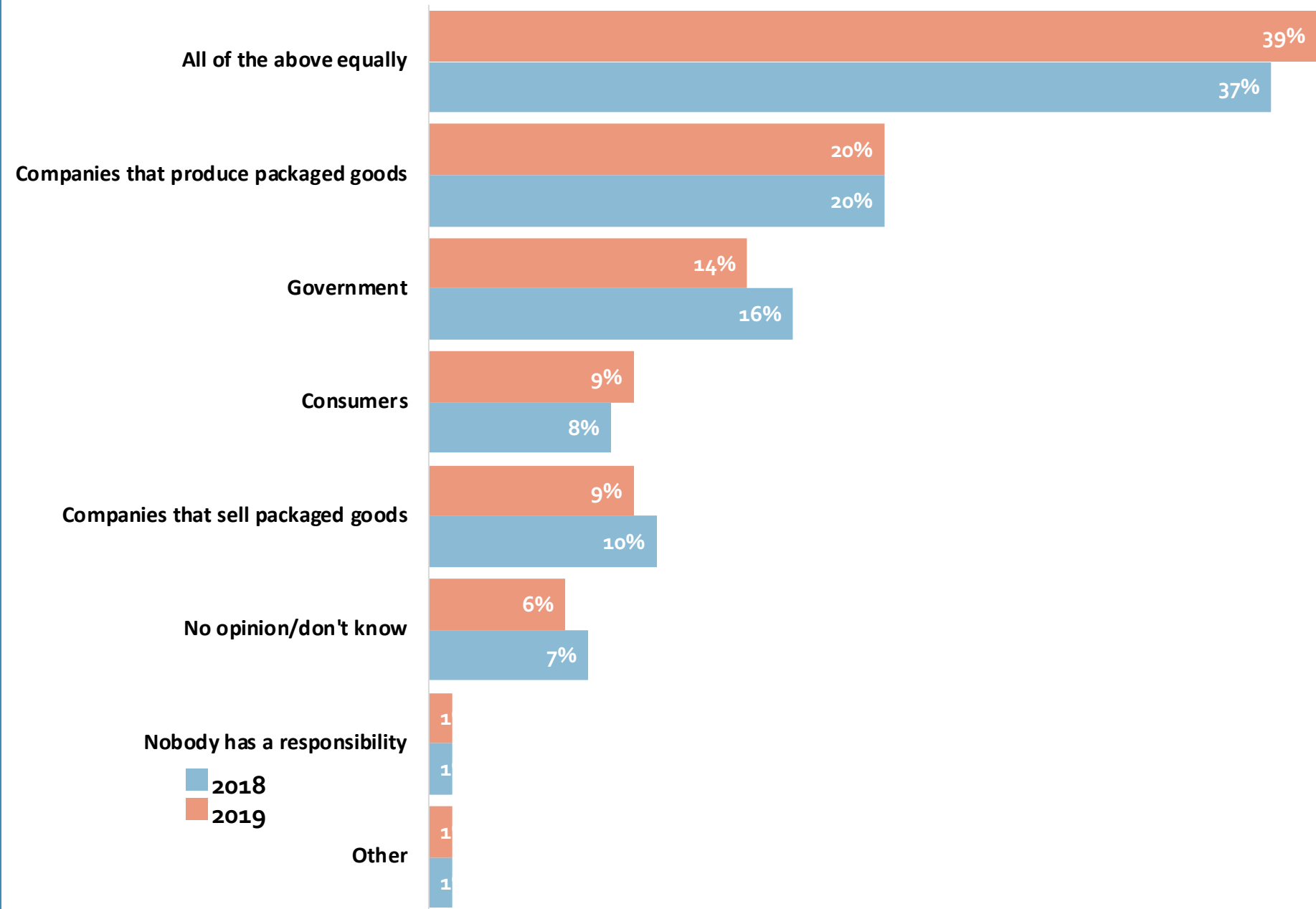
Q. Who if anybody do you believe should take most responsibility for finding a way to reduce the amount of unnecessary packaging which is sold?



Base: 19,519 online adults aged 16-74 across 27 countries February 22 – March 8 2019

Who's responsible? 2019 vs. 2018, Global data

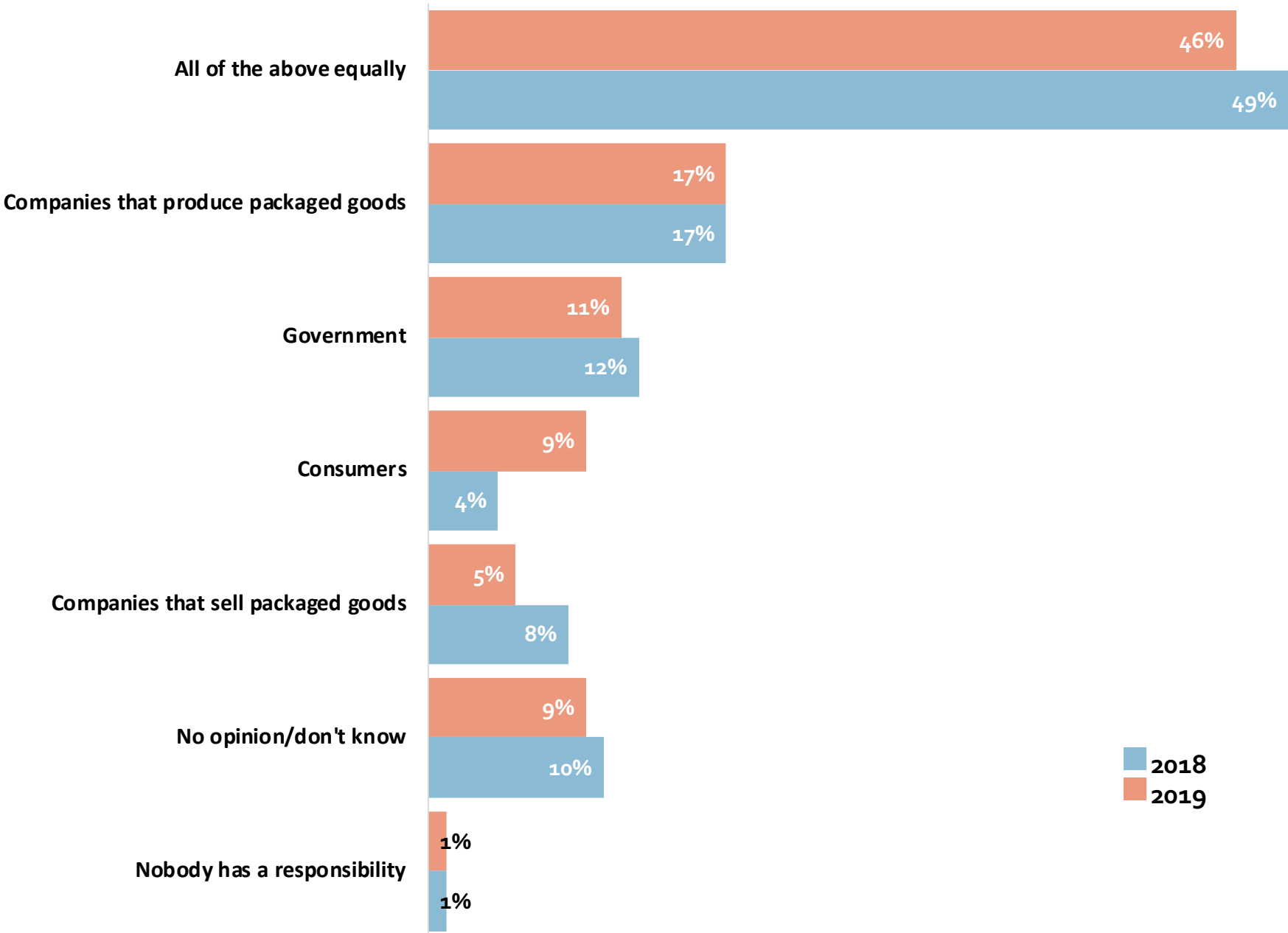
Q. Who if anybody do you believe should take most responsibility for finding a way to reduce the amount of unnecessary packaging which is sold?



Base: 19,519 online adults aged 16-74 across 27 countries February 22 – March 8 2019

Who's responsible? 2019 vs. 2018, Australian data

Q. Who if anybody do you believe should take most responsibility for finding a way to reduce the amount of unnecessary packaging which is sold?



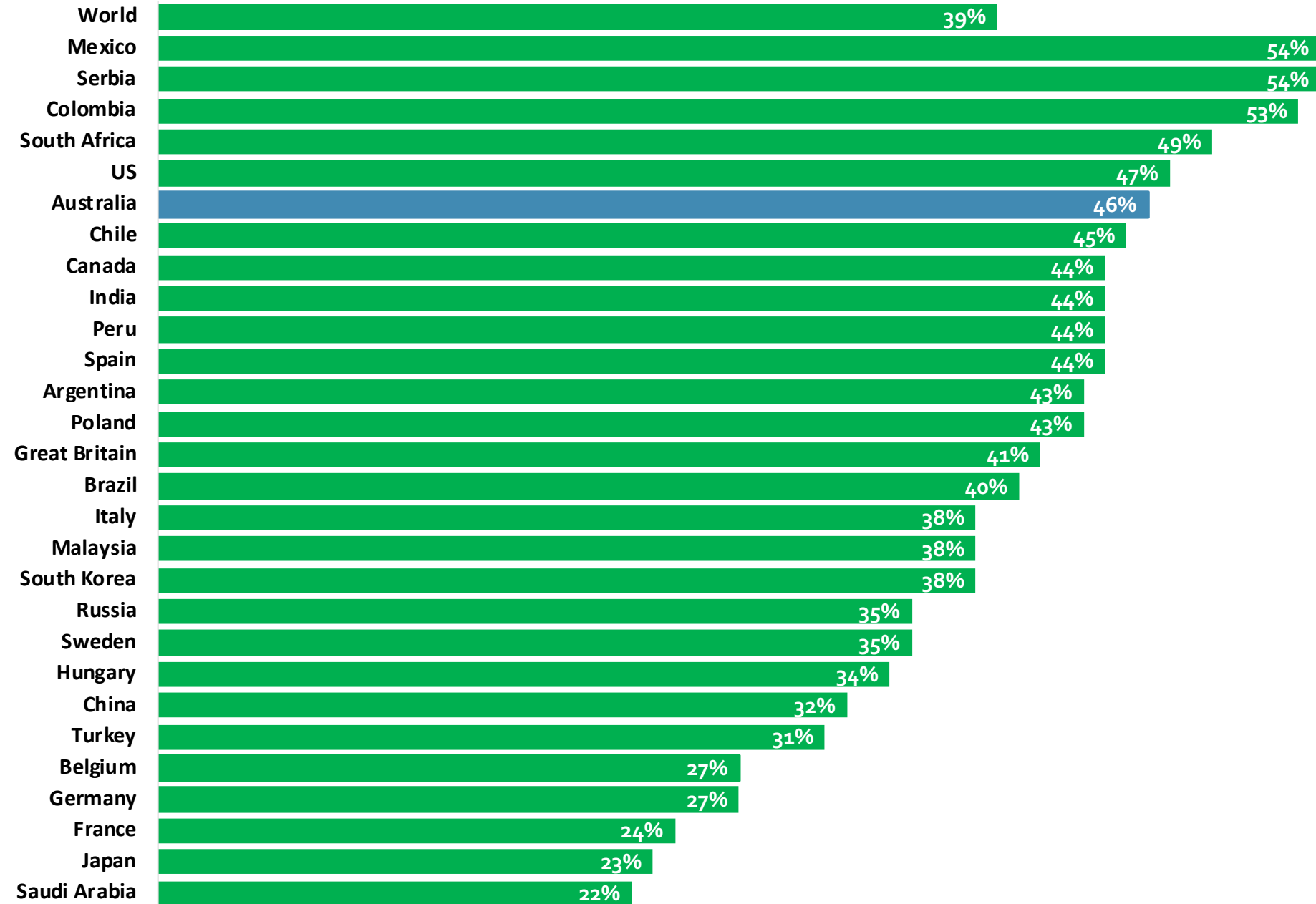
Base: 19,519 online adults aged 16-74 across 27 countries February 22 – March 8 2019

All of the above

- Some people believe that all parties should be held responsible for recycling

Q. Who if anybody do you believe should take most responsibility for finding a way to reduce the amount of unnecessary packaging which is sold? - All of the above equally

By Country Detail



■ All of the above

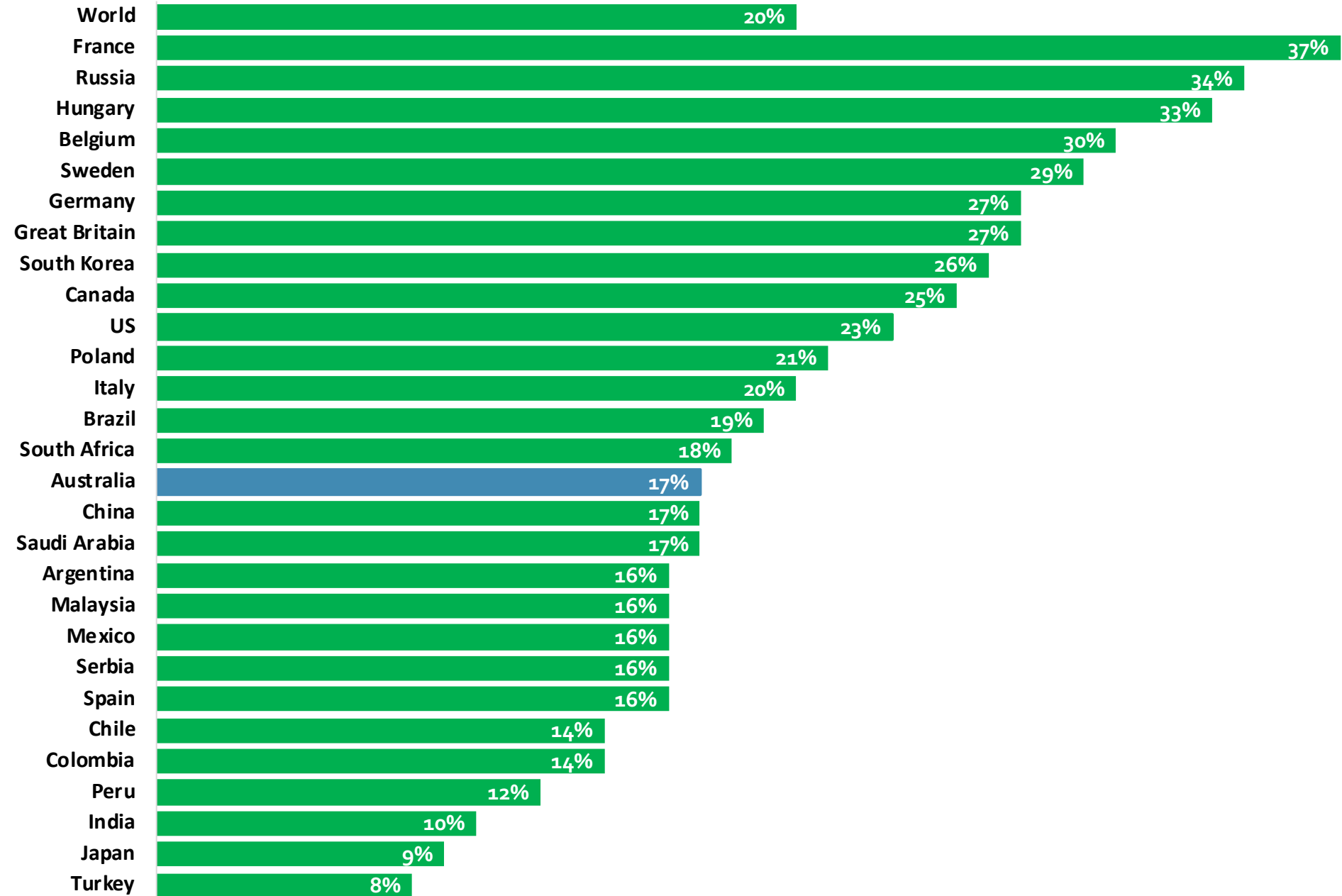
Base: 19,519 online adults aged 16-74 across 27 countries February 22 – March 8 2019

Packaged good producers

- If packaged good producers took the responsibility, they would need to reduce their production, which would harm profits, or find alternative methods of packaging.*

Q. Who if anybody do you believe should take most responsibility for finding a way to reduce the amount of unnecessary packaging which is sold? - Companies that produce packaged goods

By Country Detail



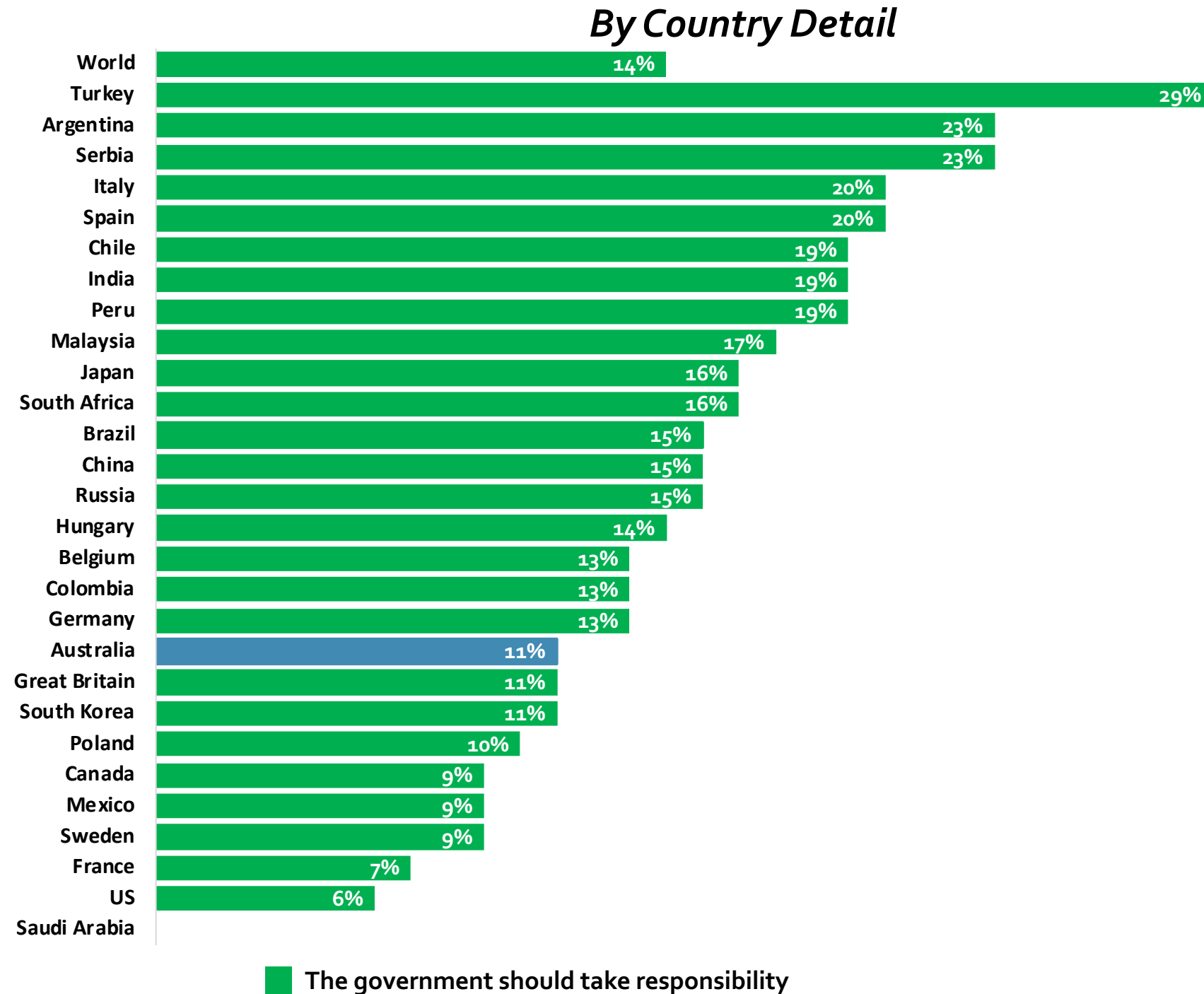
■ Companies that produce packaged goods should take responsibility

Base: 19,519 online adults aged 16-74 across 27 countries February 22 – March 8 2019

The government

- If the government takes responsibility for the issue, they would need to either invest in infrastructure to reduce unnecessary packaging or create policy to incentivize producers, sellers, or consumers to purchase less of these items.*

Q. Who if anybody do you believe should take most responsibility for finding a way to reduce the amount of unnecessary packaging which is sold? - The government



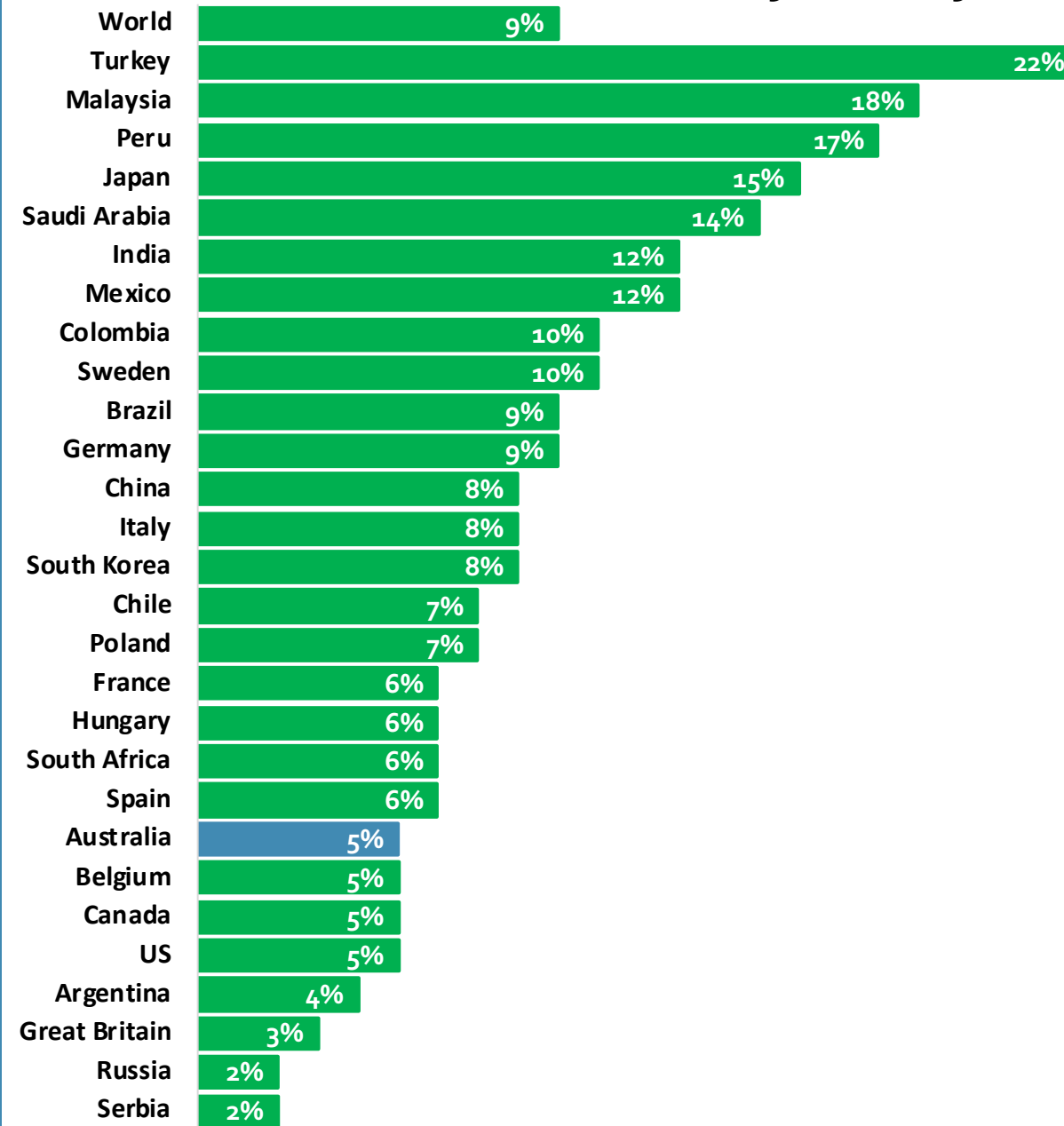
Base: 19,519 online adults aged 16-74 across 27 countries February 22 – March 8 2019

Consumers of packaged goods

- *If consumers bear the responsibility for the issue, they would have to choose to buy from responsible sellers.*
- *This would then incentivize sellers to become responsible, in turn incentivizing producers to decrease their production of unnecessary packaging.*

Q. Who if anybody do you believe should take most responsibility for finding a way to reduce the amount of unnecessary packaging which is sold? - Consumers

By Country Detail



■ Consumers should take responsibility

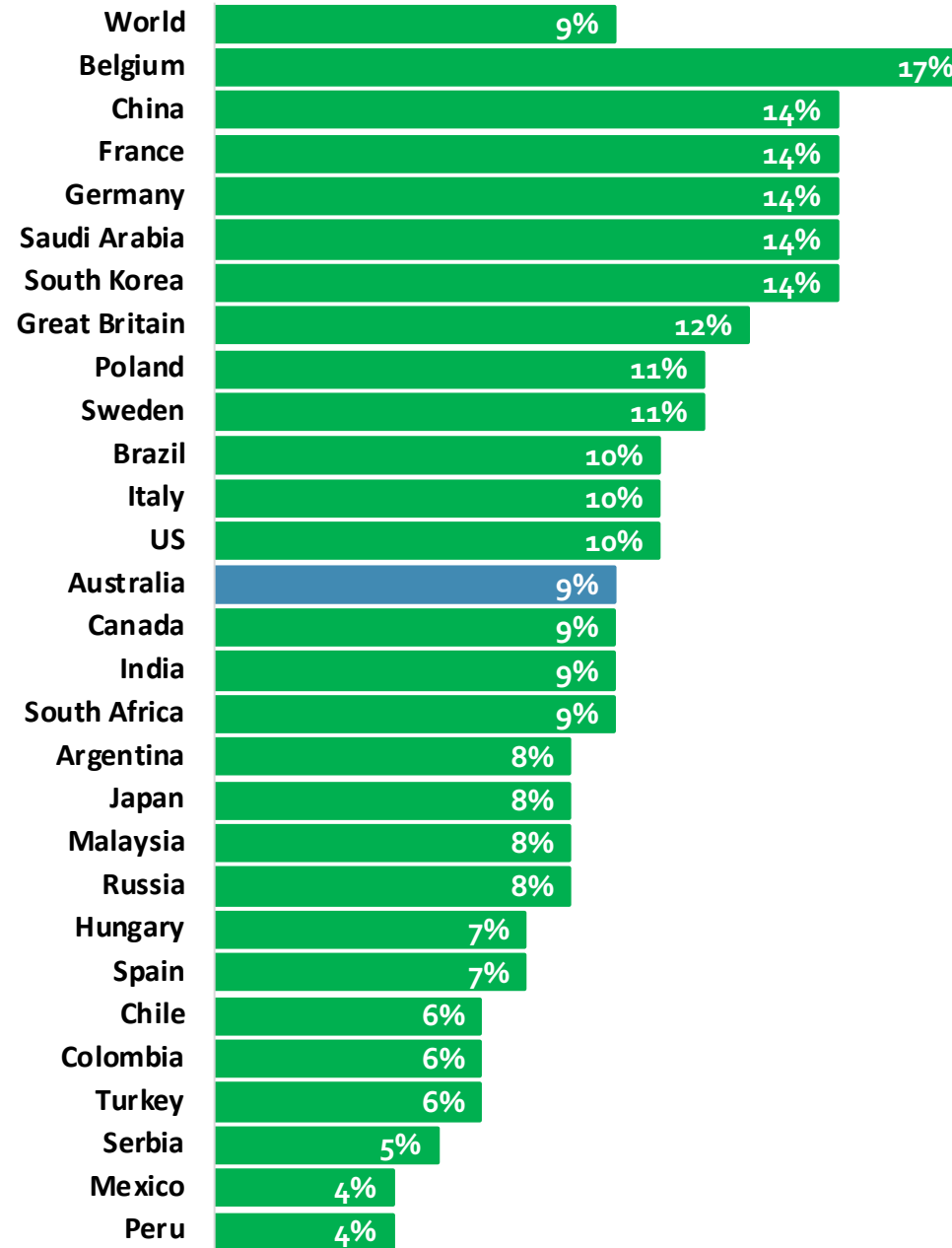
Base: 19,519 online adults aged 16-74 across 27 countries February 22 – March 8 2019

Sellers of packaged goods

- Sellers of packaged goods are the middlemen, buying from those who produce packaged goods in order to sell to individual consumers.
- If they take responsibility, they would need to find alternative goods to sell to consumers.

Q. Who if anybody do you believe should take most responsibility for finding a way to reduce the amount of unnecessary packaging which is sold? - Companies that sell packaged goods

By Country Detail



■ Companies that sell packaged goods should take responsibility

Base: 19,519 online adults aged 16-74 across 27 countries February 22 – March 8 2019

- These are the findings of the Global Advisor, an Ipsos survey conducted between February 22 to March 8, 2019. This study did not have any external sponsors or partners. It was initiated and run by Ipsos, because we are curious about the world we live in and how citizens around the globe think and feel about their world
- The survey was conducted in 28 countries around the world, via the Ipsos Online Panel system in Argentina, Australia, Belgium, Brazil, Canada, Chile, China, Colombia, France, Germany, Great Britain, Hungary, India, Italy, Japan, Malaysia, Mexico, Peru, Poland, Russia, Saudi Arabia, Serbia, South Africa, South Korea, Spain, Sweden, Turkey, and the USA.
- For the results of the survey presented herein, an international sample of 19,519 adults ages 19-74 in South Korea, 18-74 in the US, Canada, China, Malaysia, South Africa and Turkey, and ages 16-74 in all other countries, were interviewed. Approximately 1000+ individuals participated on a country by country basis via the Ipsos Online Panel, with the exception of Argentina, Belgium, Chile, Colombia, Hungary, India, Malaysia, Mexico, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Sweden and Turkey, where each have a sample approximately 500+.
- 15 of the 28 countries surveyed online generate nationally representative samples in their countries (Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, Poland, South Korea, Spain, Sweden, and United States).
- Brazil, China, Colombia, Chile, India, Malaysia, Mexico, Peru, Russia, Saudi Arabia, South Africa and Turkey produce a national sample that is more urban & educated, and with higher incomes than their fellow citizens. We refer to these respondents as “Upper Deck Consumer Citizens”. They are not nationally representative of their country.
- Weighting was then employed to balance demographics and ensure that the sample's composition reflects that of the adult population according to the most recent country Census data, and to provide results intended to approximate the sample universe. A survey with an unweighted probability sample of this size and a 100% response rate would have an estimated margin of error of +/-3.1 percentage points for a sample of 1,000 and an estimated margin of error of +/- 4.5 percentage points 19 times out of 20 per country of what the results would have been had the entire population of adults in that country had been polled. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error, and measurement error.

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