

EARTH DAY 2021

Public opinion on and action on climate change

IPSOS GLOBAL ADVISOR

GAME CHANGERS



Globally, the public ask: “What is the plan?”



2021 is a ‘Super Year’ for international environmental policy, with major deals in progress on climate, biodiversity, food and oceans. Yet **despite their high interest and concern**, low public awareness of the plans suggests they could be **more effectively included and engaged** to play their part.



A Global Market Average of **just 31% agree their government has a clear plan in place** for how government, businesses and people are going to work together to tackle climate change, 34% disagree. All markets included in our research have **signed the Paris Agreement and almost all have submitted and published initial NDCs – plans to tackle climate change**. These are due to be updated and expanded in 2021.



A Global Market Average of 65% agree that **if their government does not act now to combat climate change, it will be failing its citizens**. 72% agree that if individuals do not act now to combat climate change they will be failing future generations.

What is the plan?

Who should act to combat climate change?



A Global Market Average of just **31%** agree their government **has a clear plan in place** for how government, businesses and people are going to work together to tackle climate change.

34% disagree.

The public perceive combatting climate change as a shared responsibility

Globally, the public believe that governments, businesses and individuals need to play their part, or risk failing others.



A Global Market Average of 72% agree that if **individuals** do not act now to combat climate change they will be failing future generations.



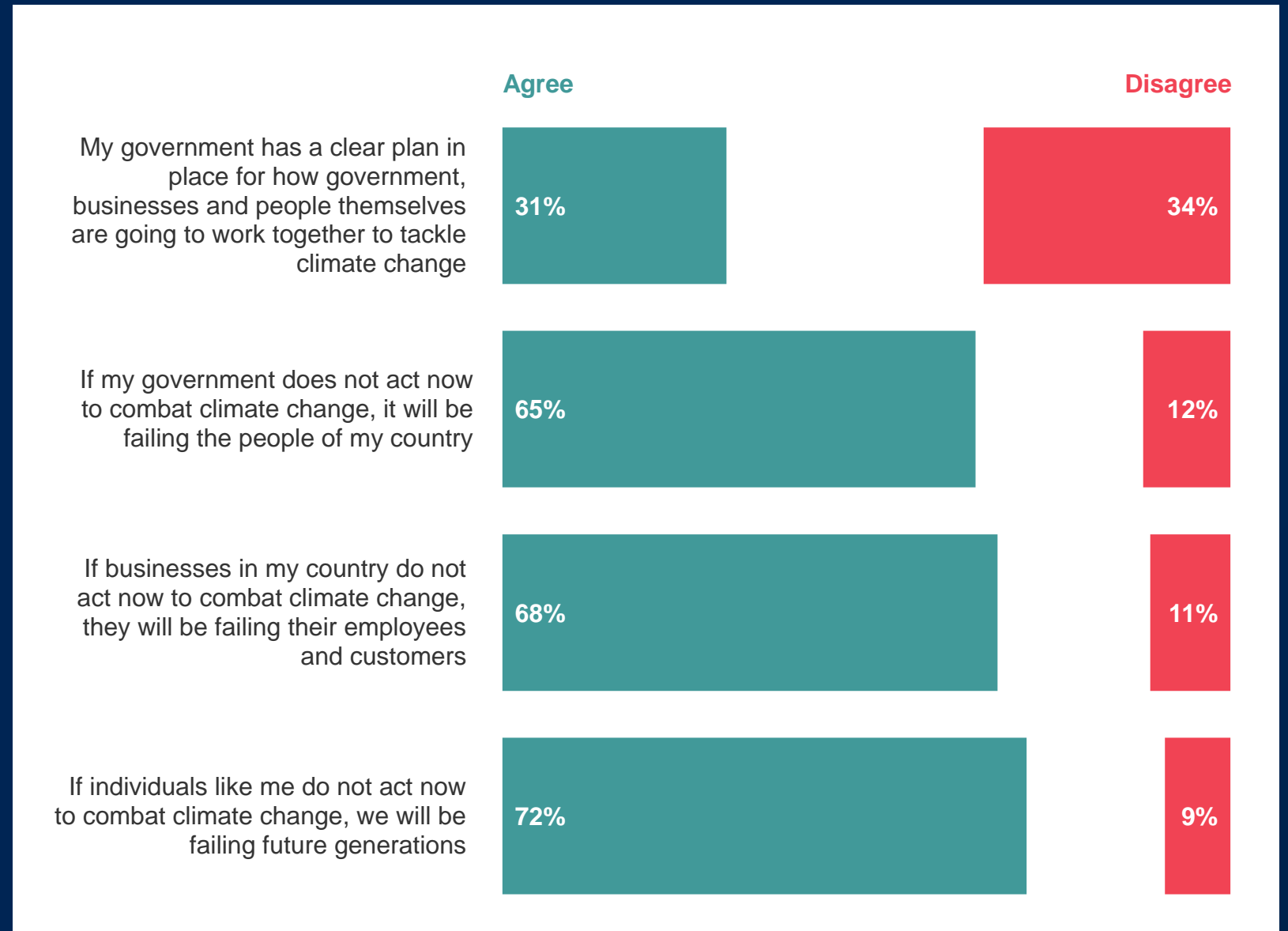
68% say that if **businesses** do not act now to combat climate change then they are failing their employees and customers.



65% say that if **their national government** does not act now to combat climate change then it is failing citizens.

Summary: Global Market Averages on plans and responsibility

Q. To what extent do you agree or disagree with the following statements:

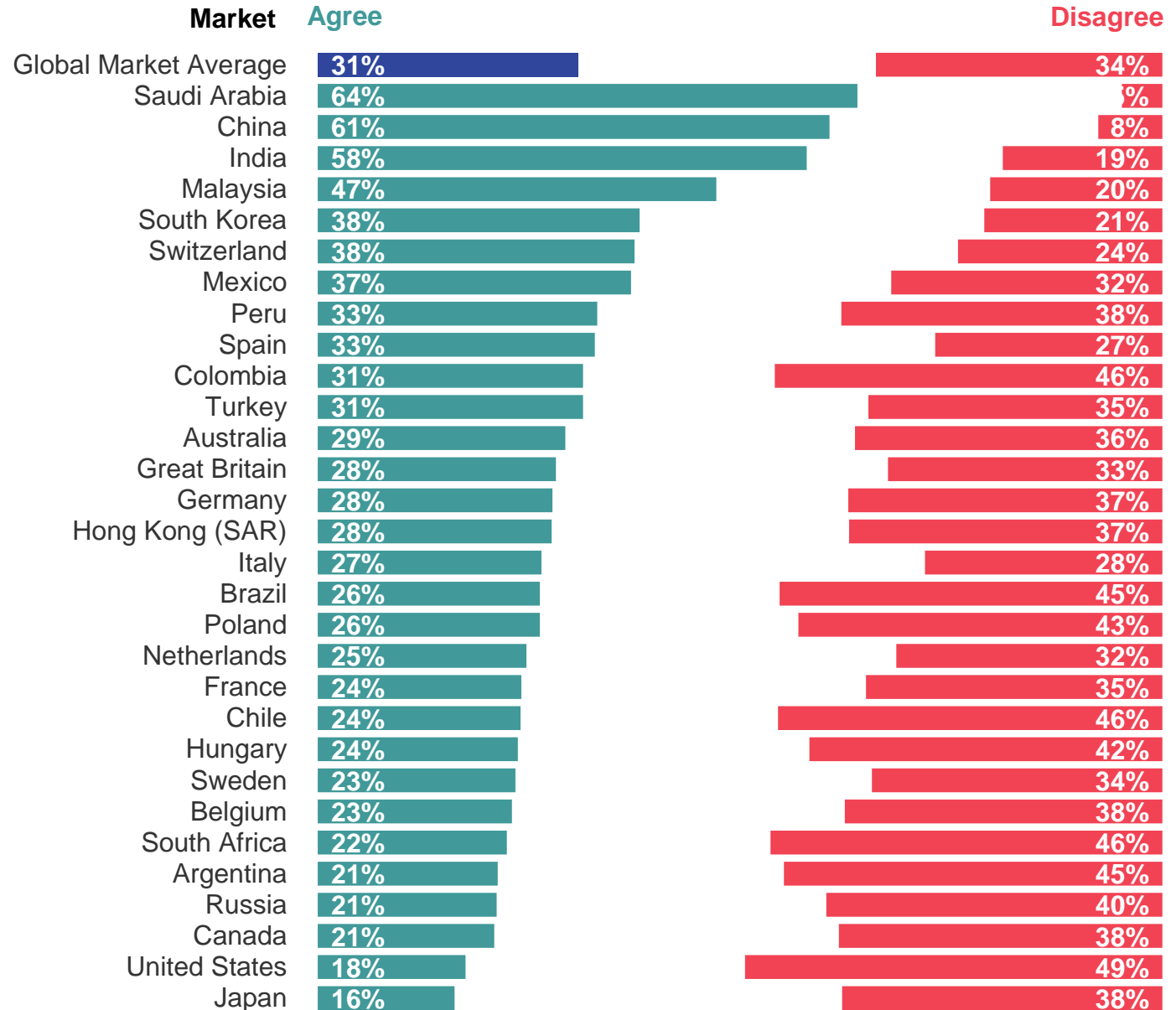


Awareness of government plans to tackle climate change is generally low

Market data

Q. To what extent do you agree or disagree with the following:

[MARKET]'s government has a clear plan in place for how government, businesses and people themselves are going to work together to tackle climate change



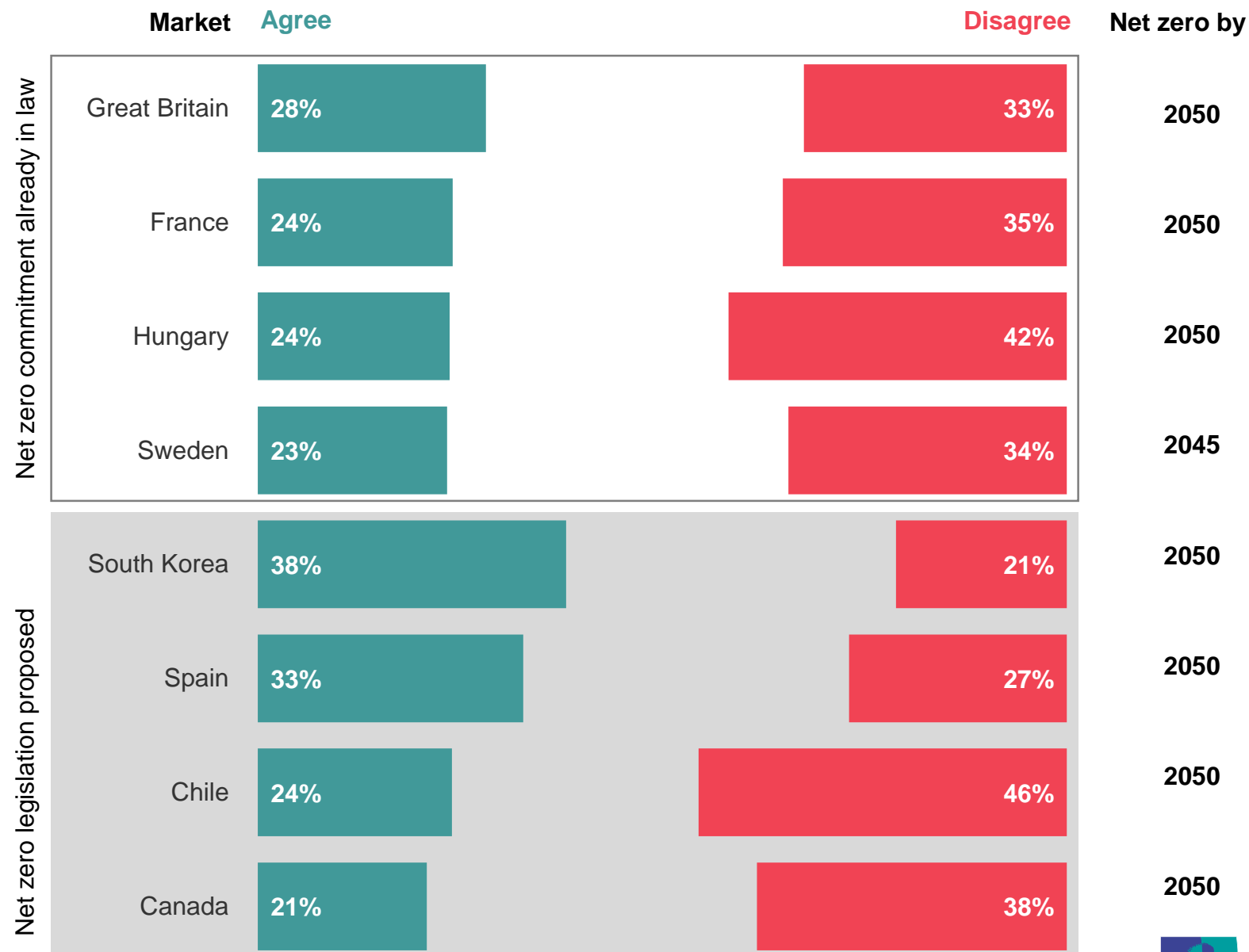
Base: 21,011 online adults aged 16-74 across 30 markets, 19 Feb – 5 Mar 2021

Legally binding net zero commitments do not correlate with higher awareness of a government's plans

Market data

Q. To what extent do you agree or disagree with the following:

[MARKET]'s government has a clear plan in place for how government, businesses and people themselves are going to work together to tackle climate change



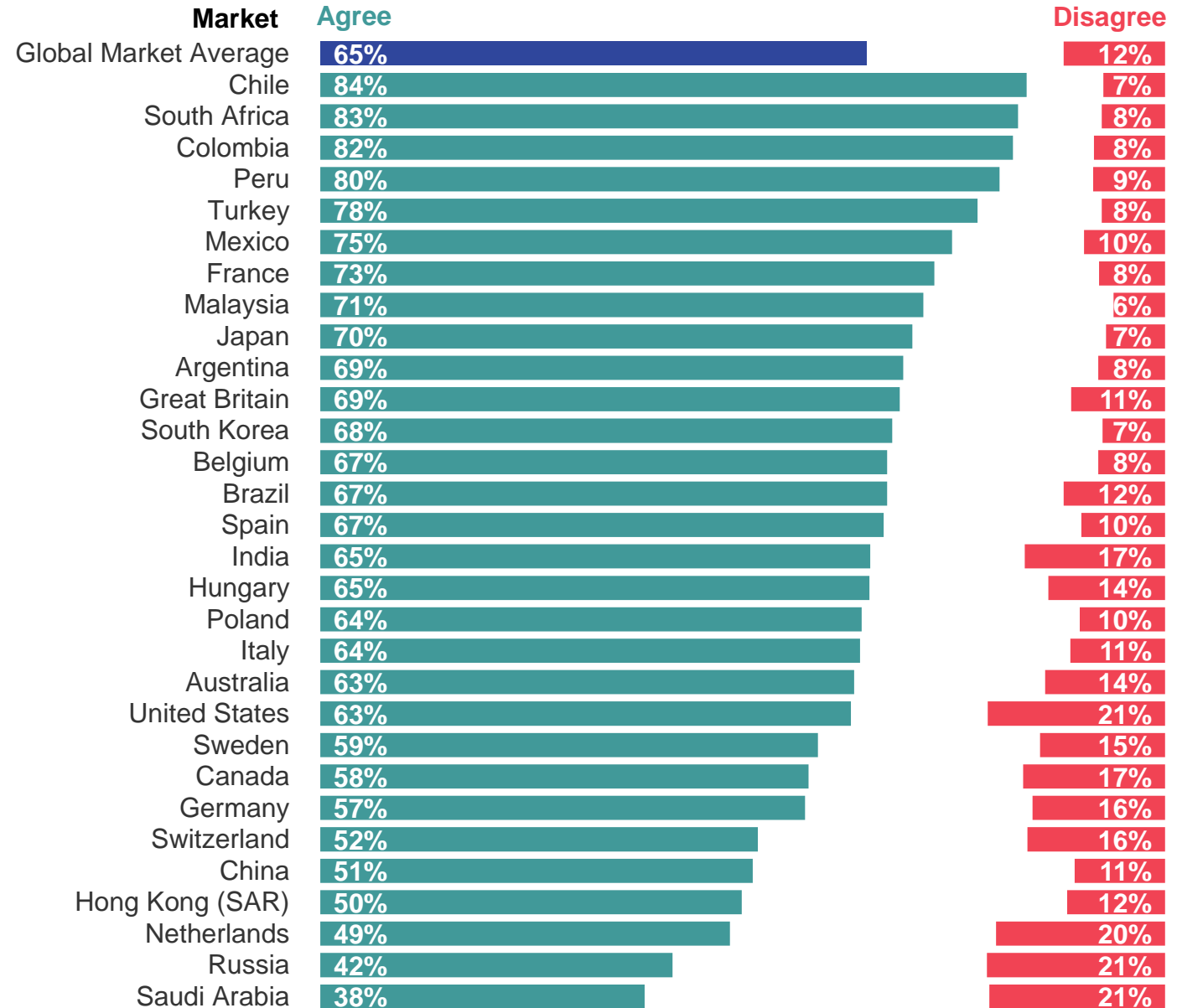
Base: 6,502 online adults aged 16-74 across 30 markets, 19 Feb – 5 Mar 2021. Source: Energy & Climate Intelligence Unit, 2020. Net Zero tracker: Net Zero Emissions Race. Available here: <https://eciu.net/netzerotracker>

There is strong agreement that governments will be failing citizens if they do act now on climate change

Market data

Q. To what extent do you agree or disagree with the following:

If [MARKET]'s government does not act now to combat climate change, it will be failing the people of [MARKET]

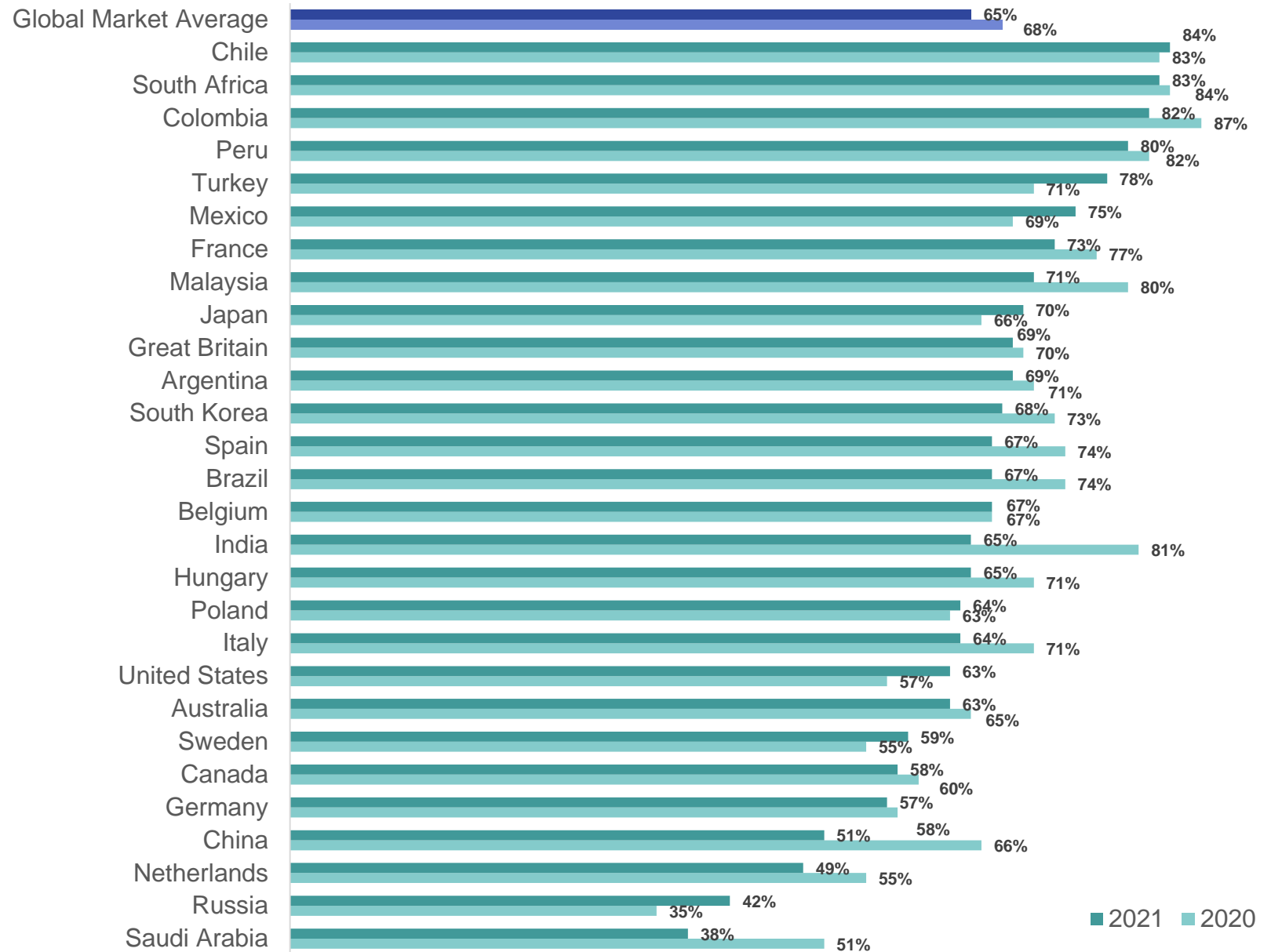


Despite a turbulent year of competing priorities, perceptions of government responsibility are broadly stable on average

Market data – trended (Agree)

Q. To what extent do you agree or disagree with the following:

If [MARKET]'s government does not act now to combat climate change, it will be failing the people of [MARKET]



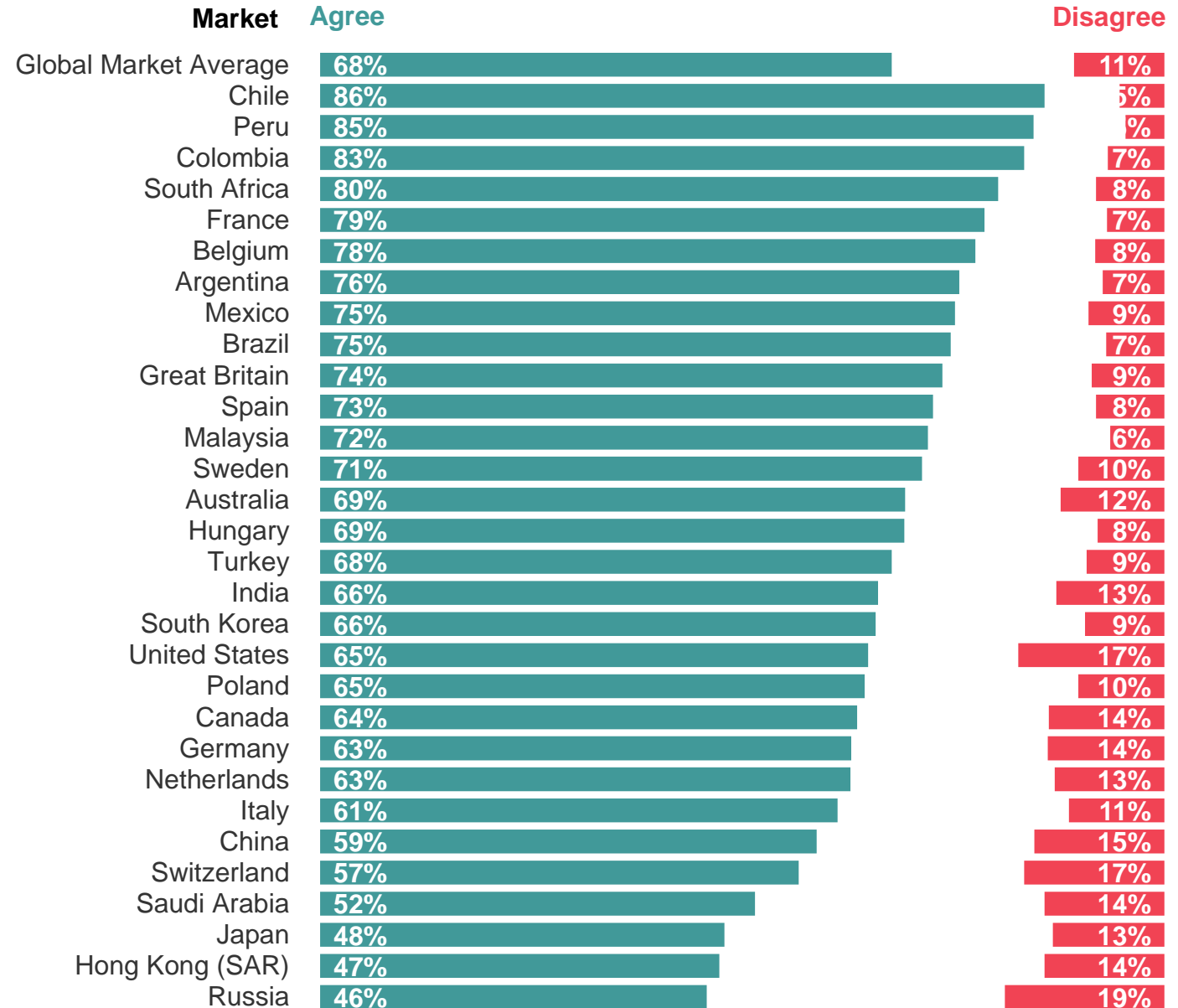
Base: 2021: 20,011 online adults aged 16-74 across 28 markets; 2020: 20,031 online adults aged 16-74 across 28 markets; Fieldwork dates: 21 Feb – 6 Mar 2020, 19 Feb – 5 Mar 2021. Comparator markets are those that have been asked this question in 2021 and 2020: Argentina, Australia, Belgium, Brazil, Canada, China, Chile, Colombia, France, Great Britain, Germany, Hungary, India, Italy, Japan, Malaysia, Mexico, the Netherlands, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Turkey and the United States of America

The public mandate for corporate action is similar to the mandate for government action

Market data

Q. To what extent do you agree or disagree with the following:

If businesses in [MARKET] do not act now to combat climate change, they will be failing their employees and customers

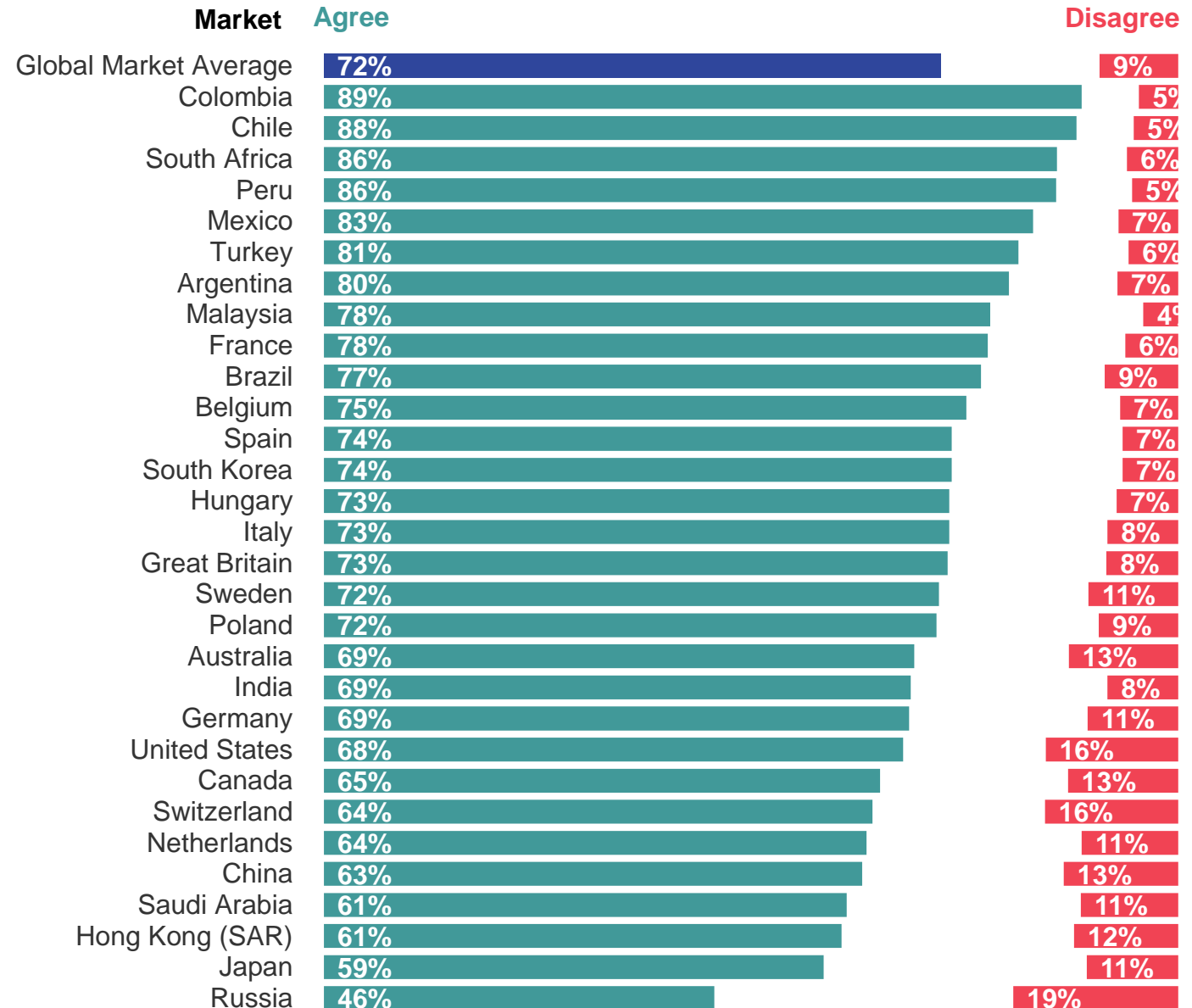


Individuals feel the burden of responsibility on their own shoulders too

Market data

Q. To what extent do you agree or disagree with the following:

If individuals like me do not act now to combat climate change, we will be failing future generations





Climate change after COVID-19

How willing are citizens to make pro-
environmental behaviour changes
post-COVID19?

COVID-19 and climate change



Opinions are divided on whether tackling climate change should, or should not be a priority in the economic recovery from Covid-19. A Global Market Average of 35% believe climate change should be a priority in the economic recovery, while 36% believe it should not.



COVID-19 and actions to control its spread have restricted the public's ability or willingness to behave in several ways which have a relatively high environmental impact. Some ask if, once restrictions are removed, people will revert to less sustainable behaviours. But this research suggests that in the main, the public do not expect this to happen.



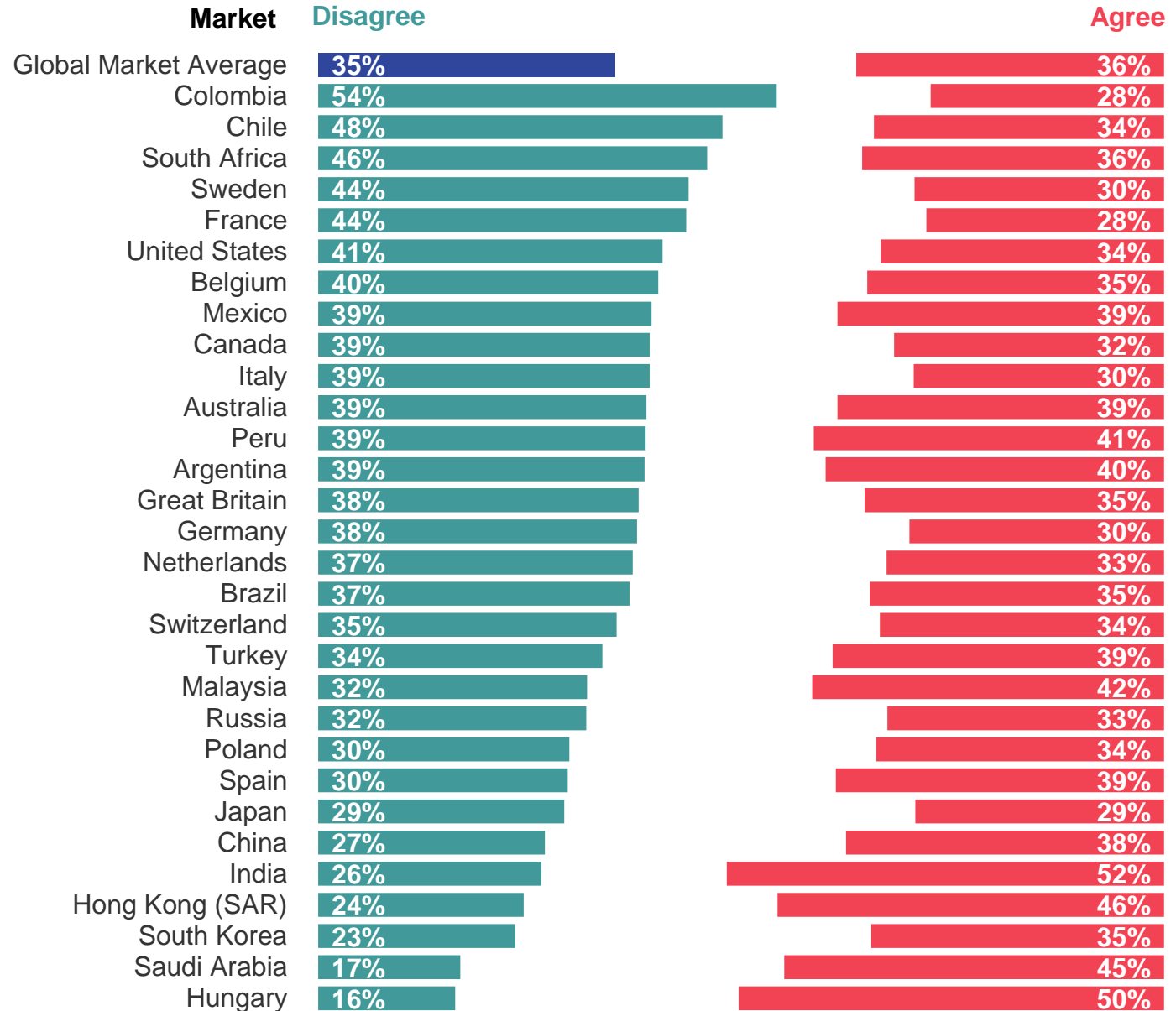
Looking at individuals' behavioural shifts, we see the pandemic's influence on **movement towards pro-environmental behaviours**. Around one in three, on average, expect to do more to reduce food waste, use alternatives to the car, restrict their shopping to just what they really need, or work from home rather than commuting.

The public are divided on prioritisation of climate change in the COVID-19 recovery

Market data

Q. To what extent do you agree or disagree with the following:

Tackling climate change should not be a priority for [MARKET]'s government in the economic recovery from Covid-19

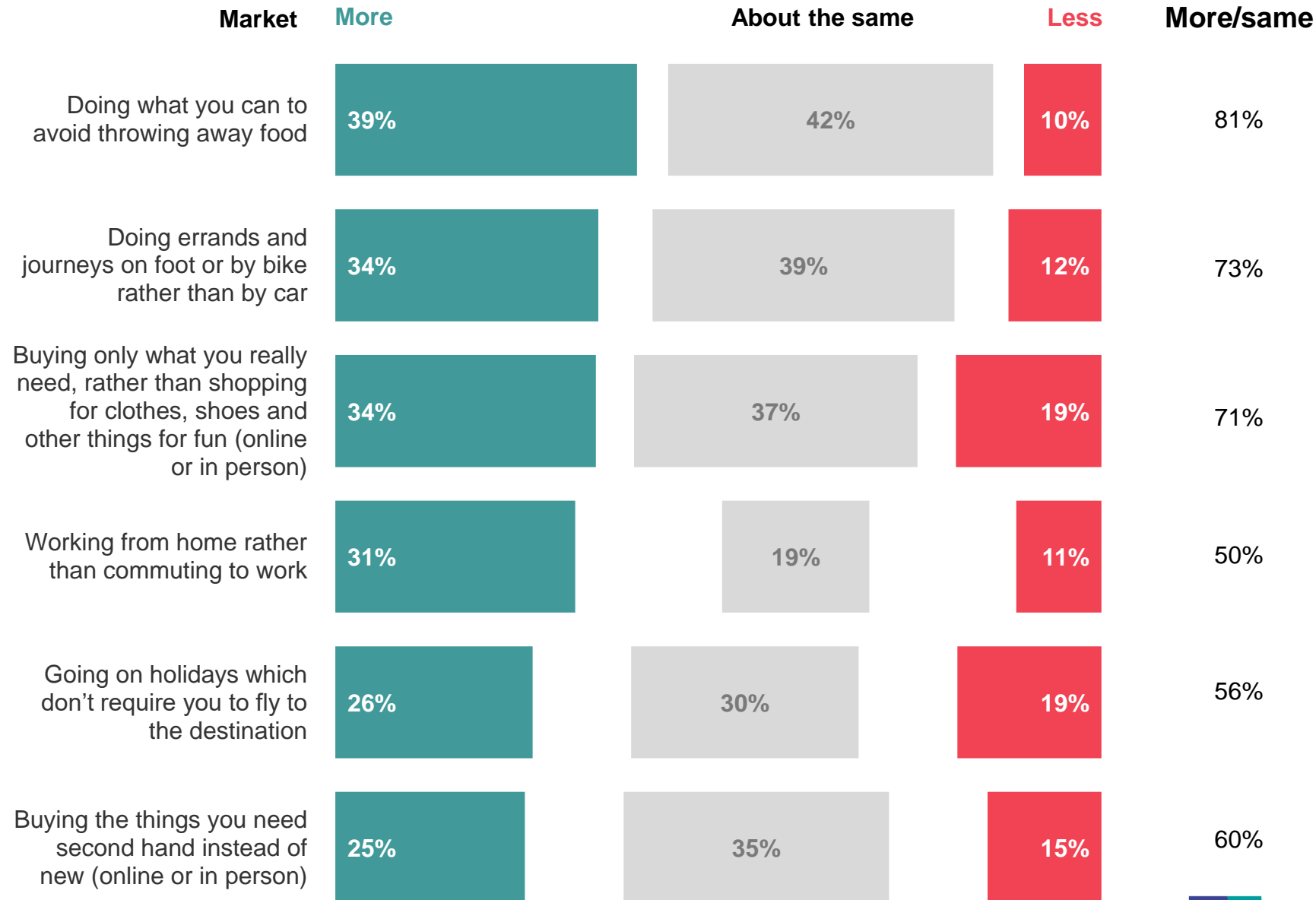


Overall, the public does not expect to revert to less sustainable behaviours when restrictions are removed

Global Market Average

Q. How do you expect your personal behaviours to change once any restrictions on your life because of Coronavirus are removed?

Do you expect to do the following things more, less, or the same amount as you did before the Coronavirus pandemic?



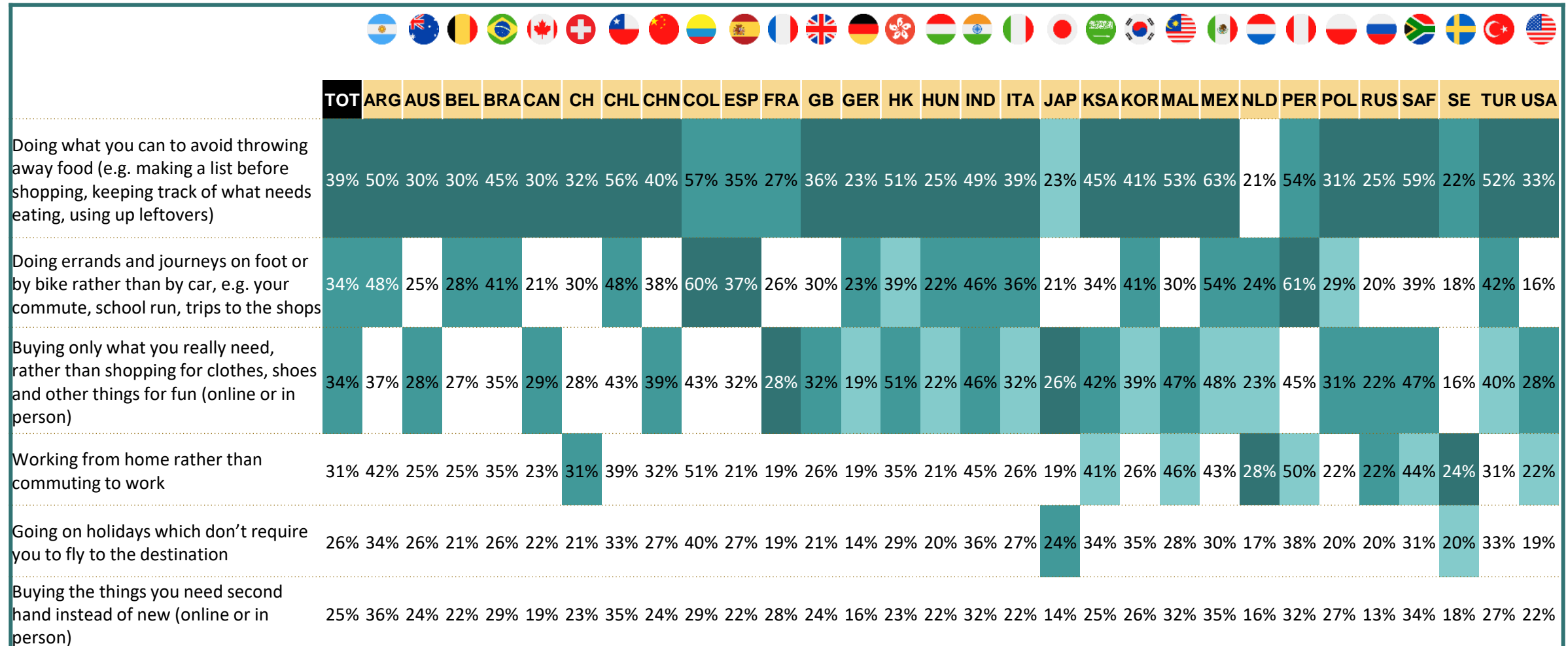
Base: 21,011 online adults aged 16-74 across 30 markets, 19 Feb – 5 Mar 2021

Reducing food waste tops the list of shifted behaviours

Q. How do you expect your personal behaviours to change once any restrictions on your life because of Coronavirus are removed? Do you expect to do the following things more, less, or the same amount as you did before the Coronavirus pandemic? % more

Top three actions:

- #1 in market
- #2 in market
- #3 in market



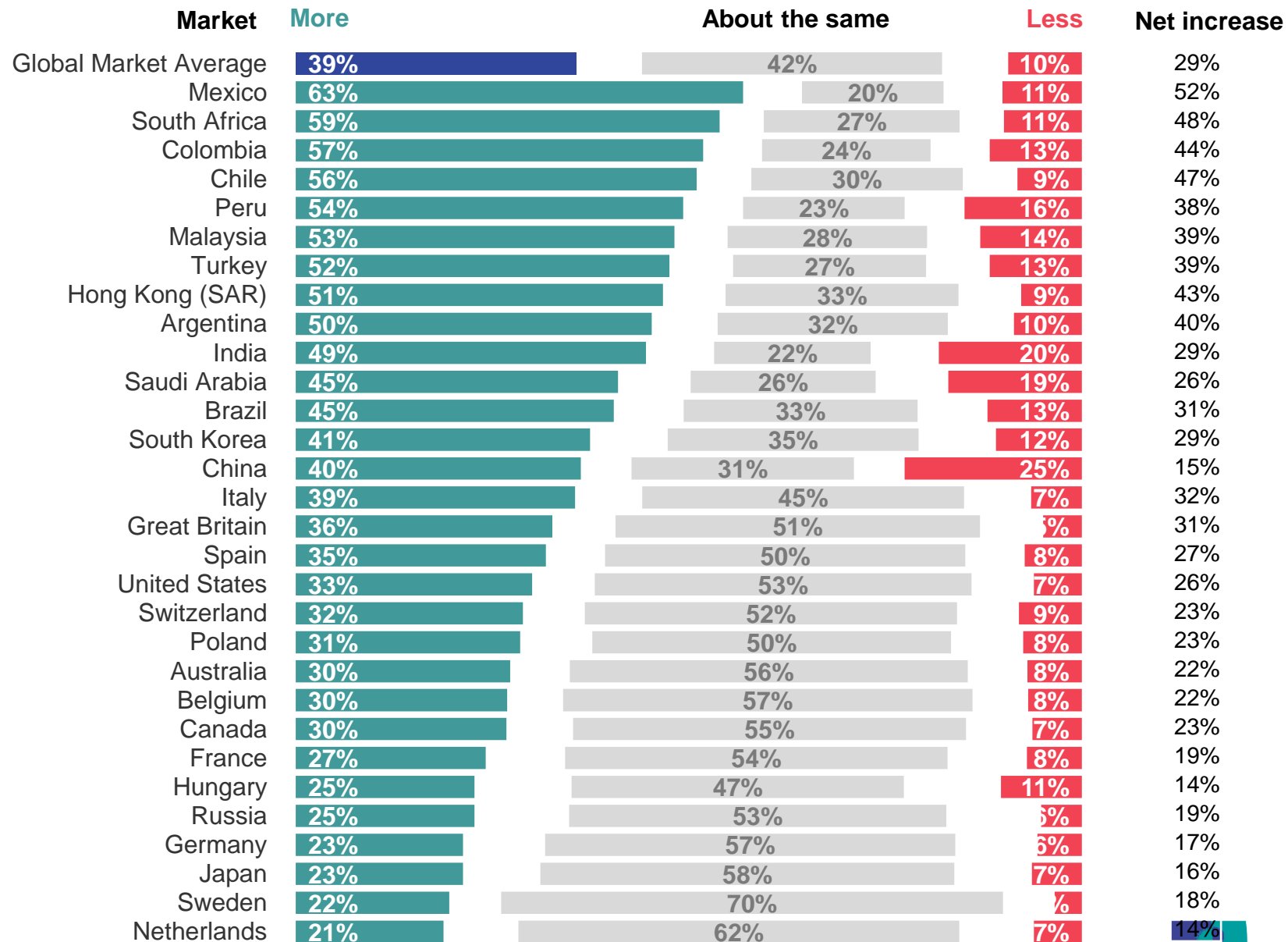
On balance, the public expect to try harder to avoid food waste post-pandemic

Market data

Q. How do you expect your personal behaviours to change once any restrictions on your life because of Coronavirus are removed?

Do you expect to do the following things more, less, or the same amount as you did before the Coronavirus pandemic?

Doing what you can to avoid throwing away food (e.g. making a list before shopping, keeping track of what needs eating, using up leftovers)



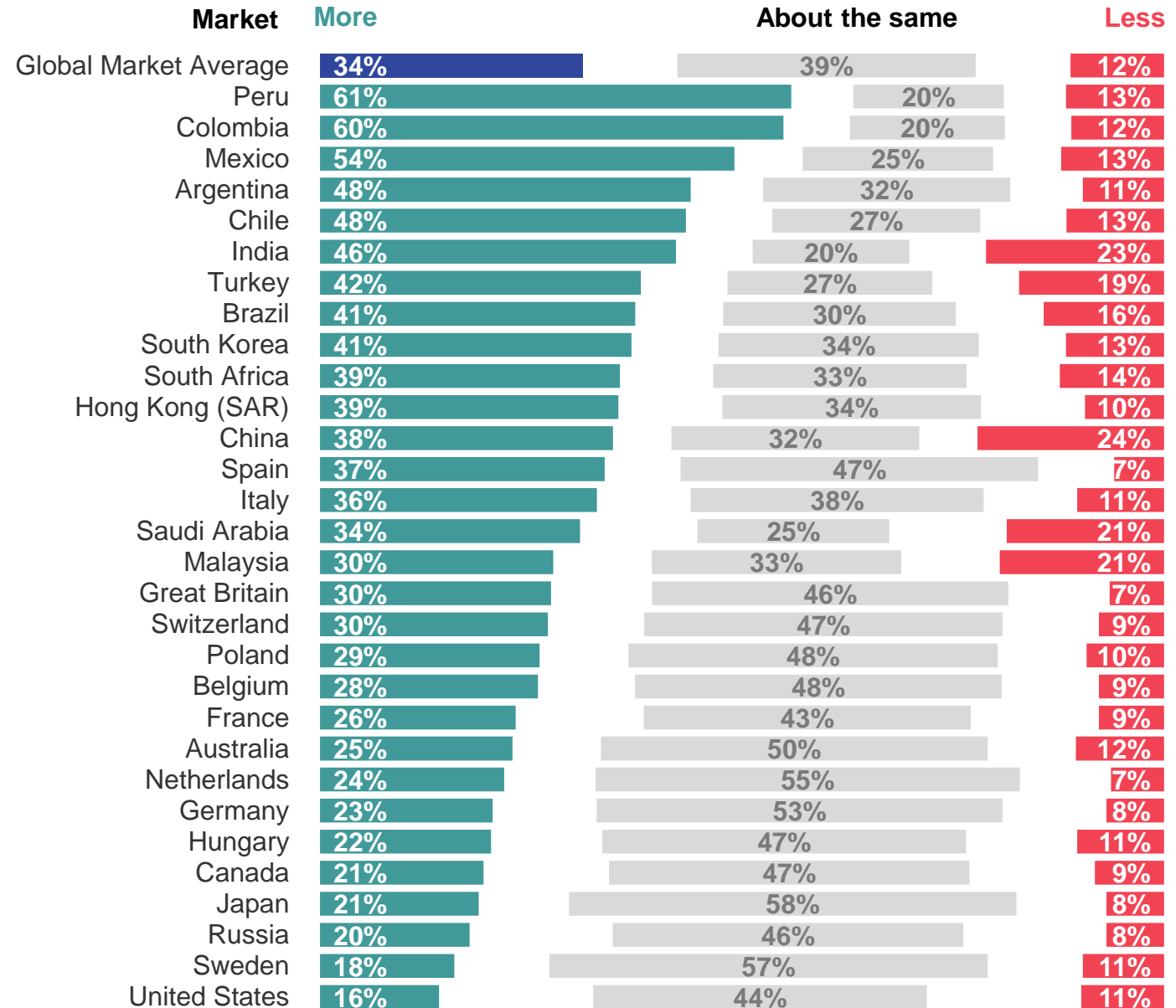
Rolling and strolling are on the up, with more carless journeys here to stay

Market data

Q. How do you expect your personal behaviours to change once any restrictions on your life because of Coronavirus are removed?

Do you expect to do the following things more, less, or the same amount as you did before the Coronavirus pandemic?

Doing errands and journeys on foot or by bike rather than by car, e.g. your commute, school run, trips to the shops



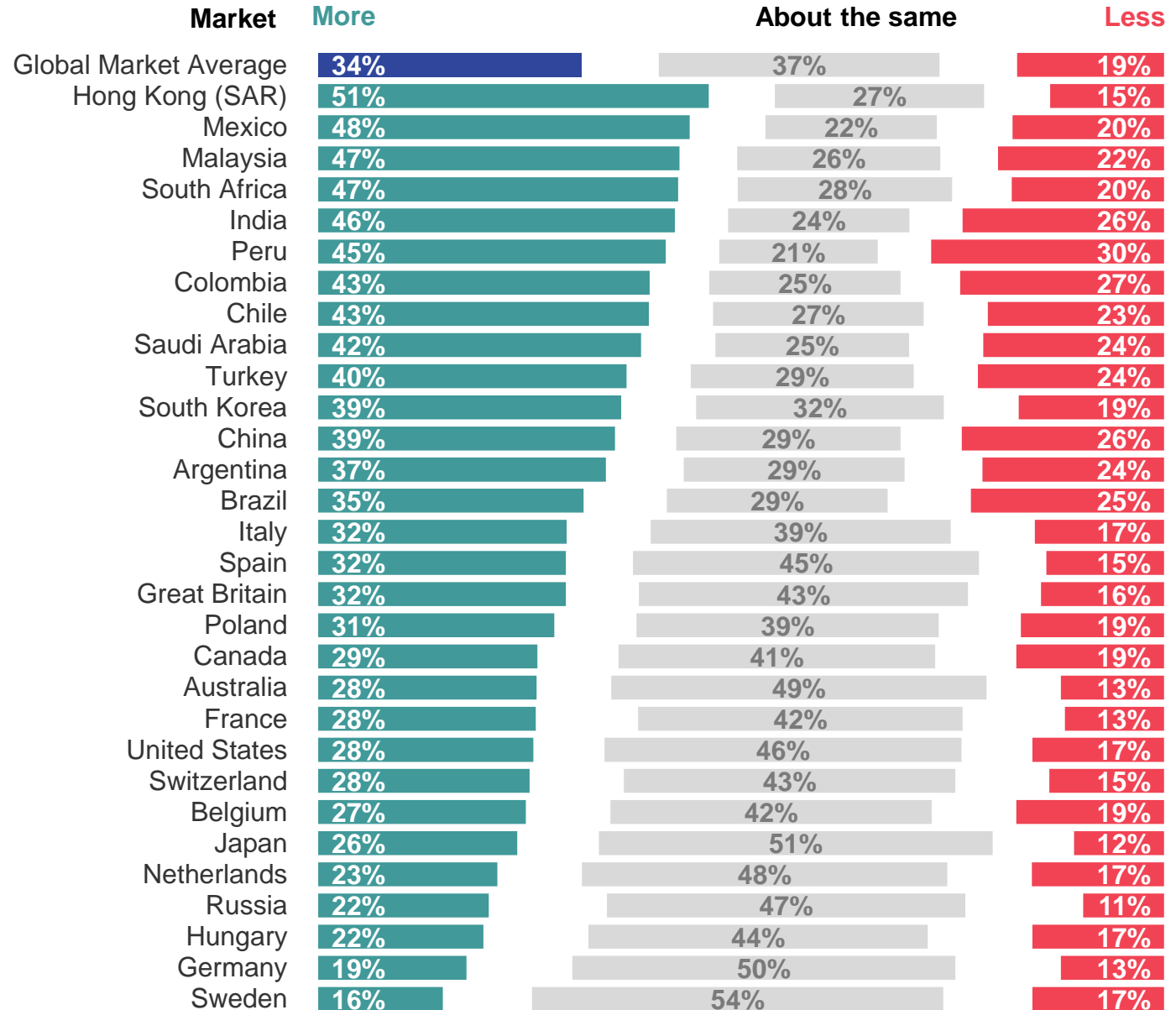
Shopping may be less fun, more functional

Market data

Q. How do you expect your personal behaviours to change once any restrictions on your life because of Coronavirus are removed?

Do you expect to do the following things more, less, or the same amount as you did before the Coronavirus pandemic?

Buying only what you really need, rather than shopping for clothes, shoes and other things for fun (online or in person)



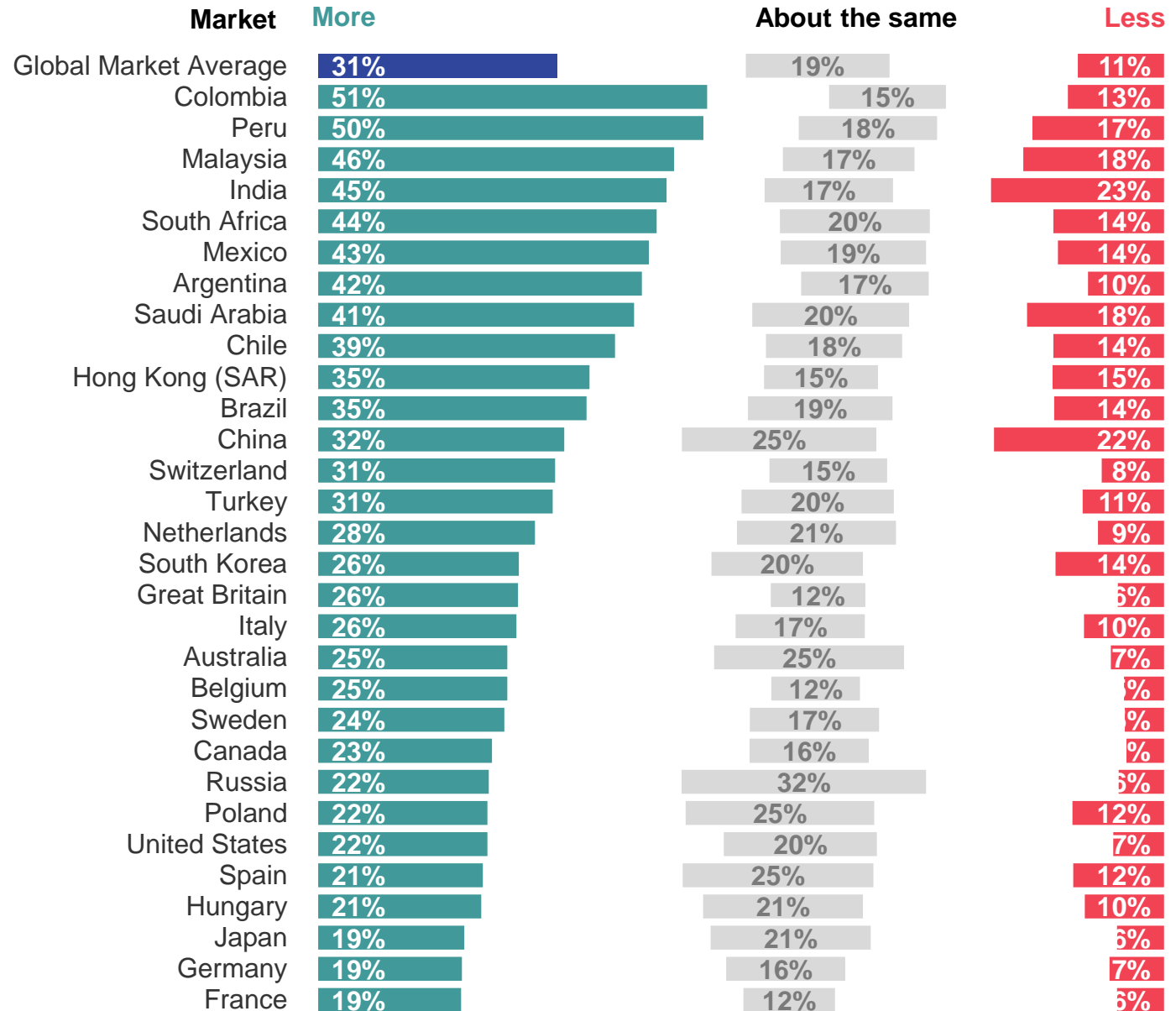
Many expect to work more from home post-pandemic

Market data

Q. How do you expect your personal behaviours to change once any restrictions on your life because of Coronavirus are removed?

Do you expect to do the following things more, less, or the same amount as you did before the Coronavirus pandemic?

Working from home rather than commuting to work



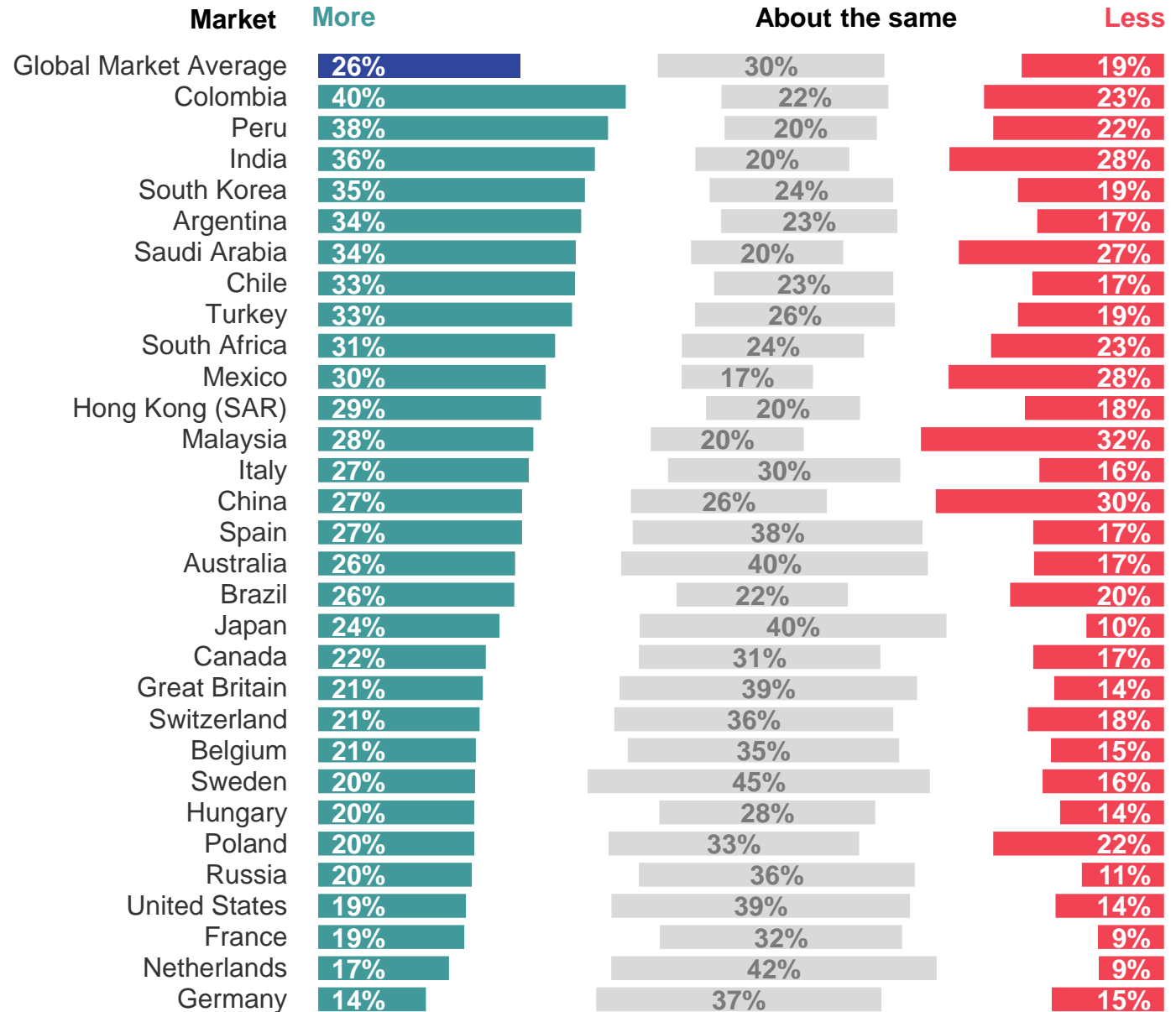
Domestic and no-fly holidays are set to remain as popular

Market data

Q. How do you expect your personal behaviours to change once any restrictions on your life because of Coronavirus are removed?

Do you expect to do the following things more, less, or the same amount as you did before the Coronavirus pandemic?

Going on holidays which don't require you to fly to the destination



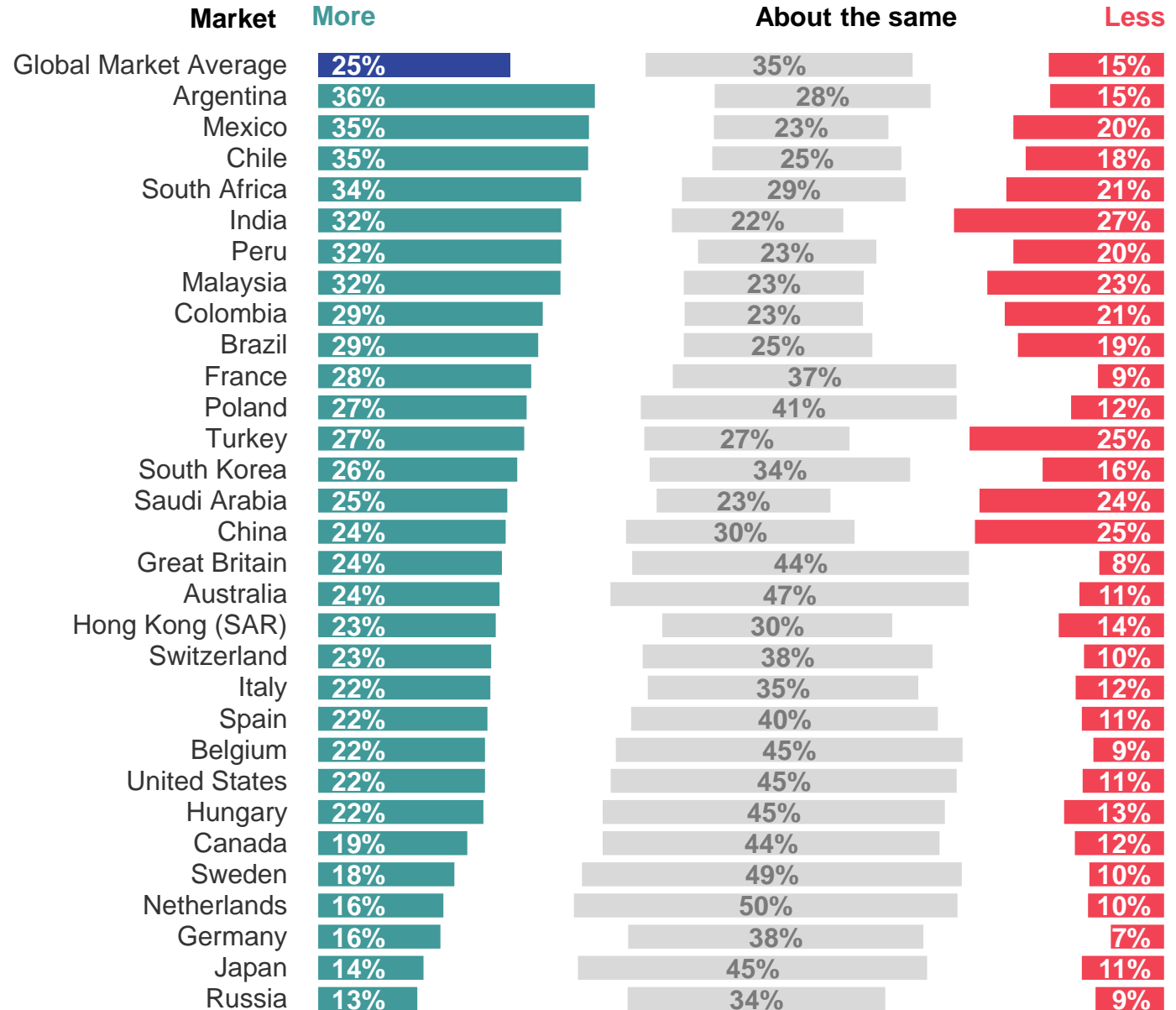
'Old' is the new 'new'? The public predict small change in second-hand consumption

Market data

Q. How do you expect your personal behaviours to change once any restrictions on your life because of Coronavirus are removed?

Do you expect to do the following things more, less, or the same amount as you did before the Coronavirus pandemic?

Buying the things you need second hand instead of new (online or in person)



Will 2021 be the year of mass climate action?

What personal changes do the public expect to make to limit their contribution to climate change?



Summary: public attitudes and understanding



People **feel the burden of responsibility for climate change**, with 72% Global Market Average agreement that if ordinary people do not act now to combat climate change they will be failing future generations.



A Global Market Average of 69% agree 'I understand what action I need to take to play my part in tackling climate change.' Yet Ipsos [Perils of Perception research](#) shows **that this isn't always the case**. We underestimate high-impact actions such as becoming vegetarian and taking flights, and overestimate lower-impact actions such as avoiding excess packaging. While all these actions can make a difference, understanding their relative impact is also vital.

Summary: public action



There is no apparent acceleration of new public climate action in 2021 compared with previous years. Expectation of making pro-environmental changes over the coming year has changed very little since just before the WHO declared the coronavirus pandemic on 12th March 2020, and remains in line with levels seen in 2014.



When asked about what changes they are likely to make in order to combat climate change over the next year, avoiding excess packaging still heads the bill, with 59% expecting to make this change over the coming year (vs 57% in 2020). The public show least intention to change on higher impact actions such as dietary changes, and avoiding flights, though there have been significant increases in expectation to change on these measures since 2020.



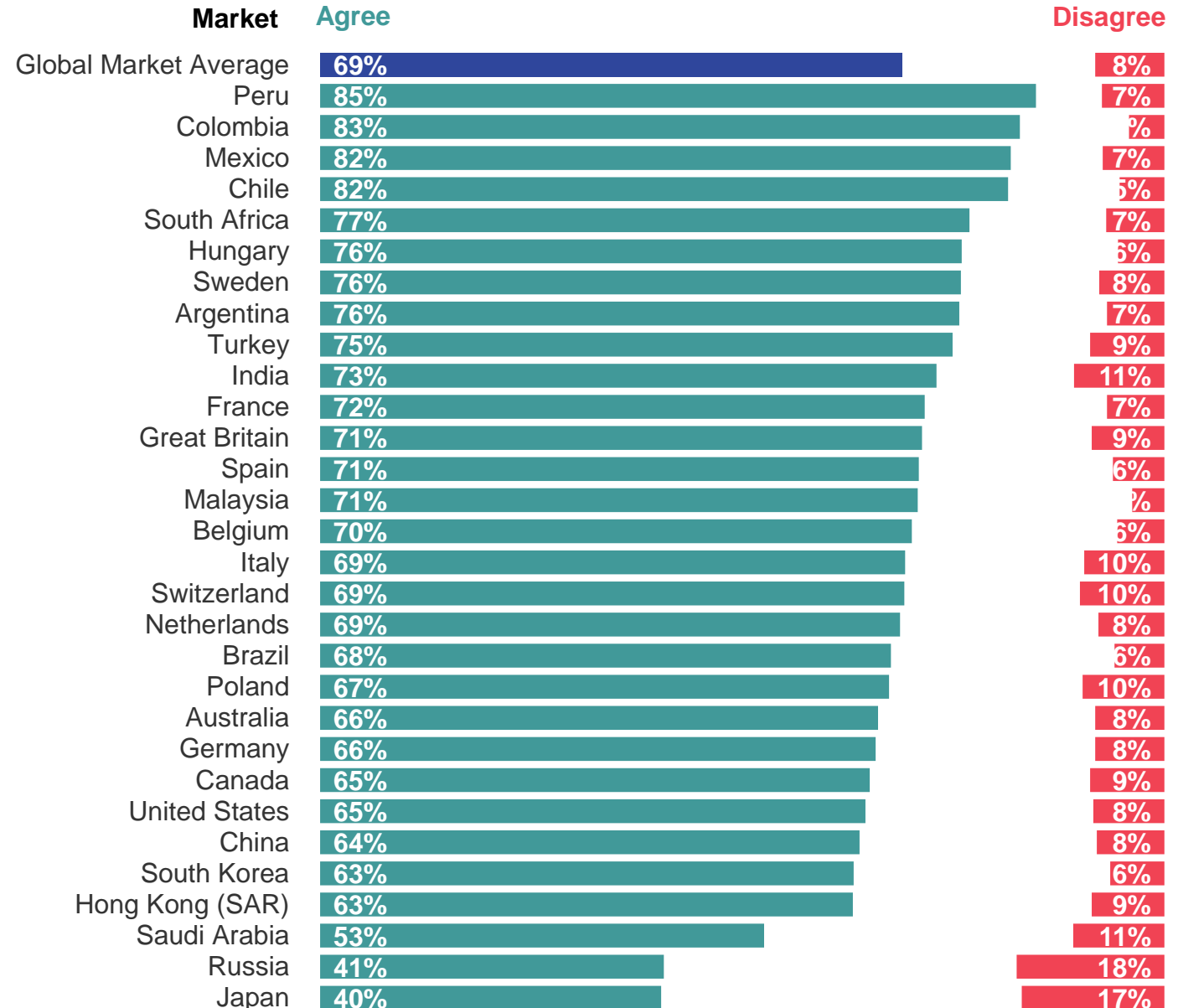
The proportion who feel they are already taking as much action as they can is similar to before COVID-19 in early 2020.

Individuals feel they understand what action they need to take, though Ipsos Perils data shows this is not always true

Market data

Q. To what extent do you agree or disagree with the following:

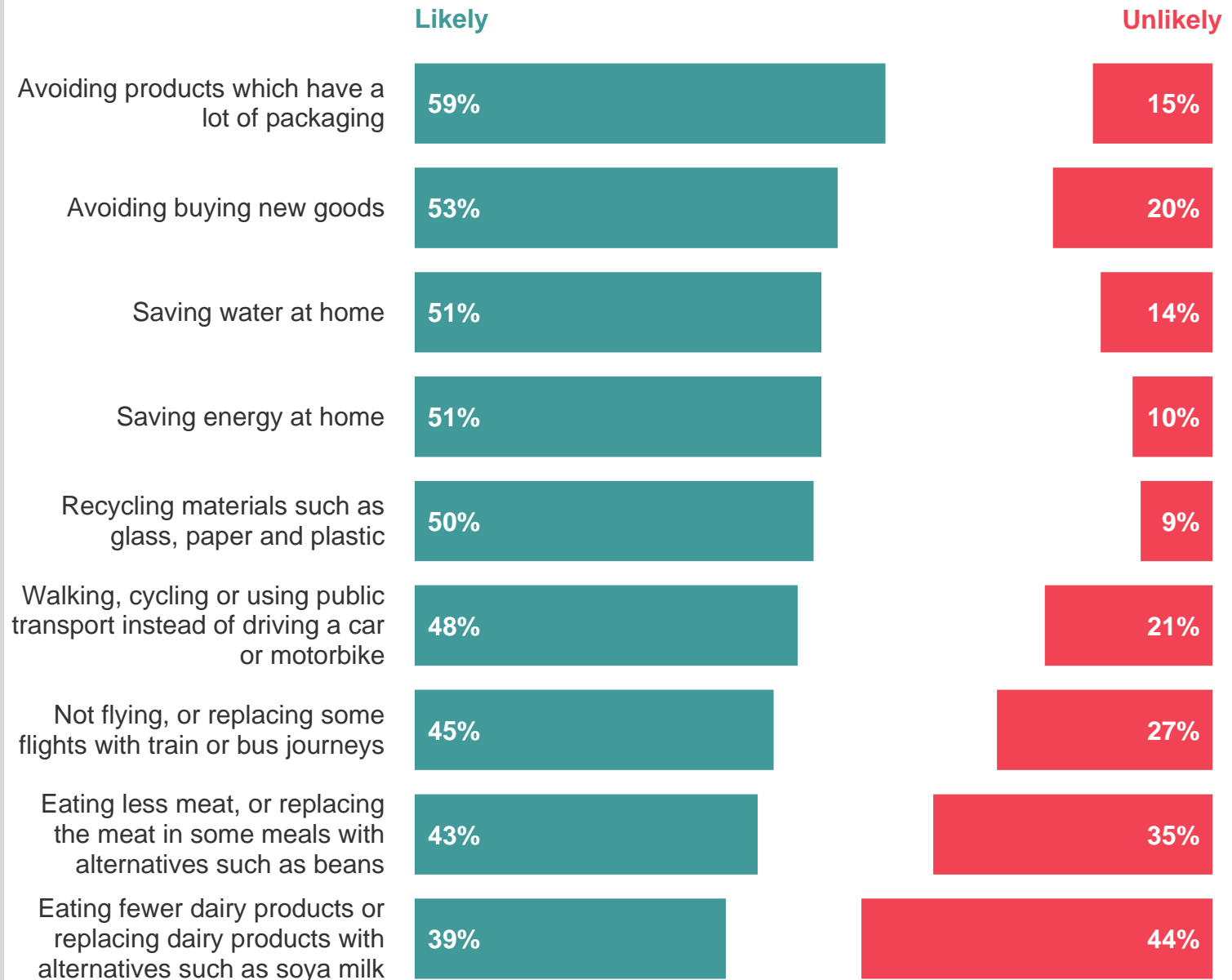
I understand what action I need to take to play my part in tackling climate change



Many feel they are likely to take action in 2021, though lower impact actions are more popular than higher impact actions

Global Market Average

Q. Thinking about things you might do in order to limit your own contribution to climate change, how likely or unlikely would you be to make the following changes within the next year?



Base: 21,011 online adults aged 16-74 across 30 markets, 19 Feb – 5 Mar 2021

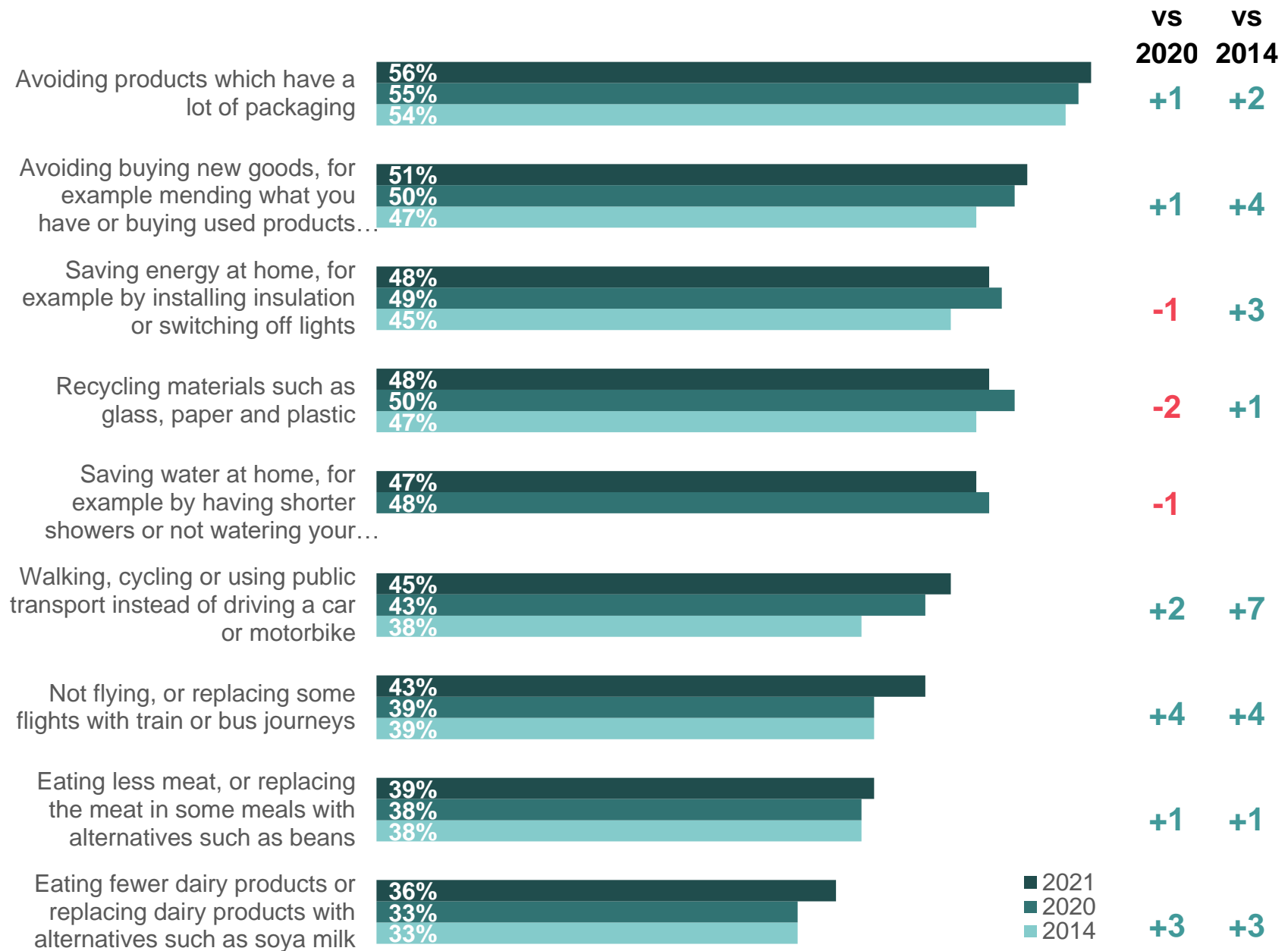
While the public believe they know what action they should take, **higher-impact climate actions are consistently at the bottom of their list.** Ipsos Perils of Perception research shows the public **overestimate low-impact changes and underestimate high impact ones.**

Little change on sustainable behaviours since last year

12 comparator markets – trended

Q. Thinking about things you might do in order to limit your own contribution to climate change, how likely or unlikely would you be to make the following changes within the next year?

Likely

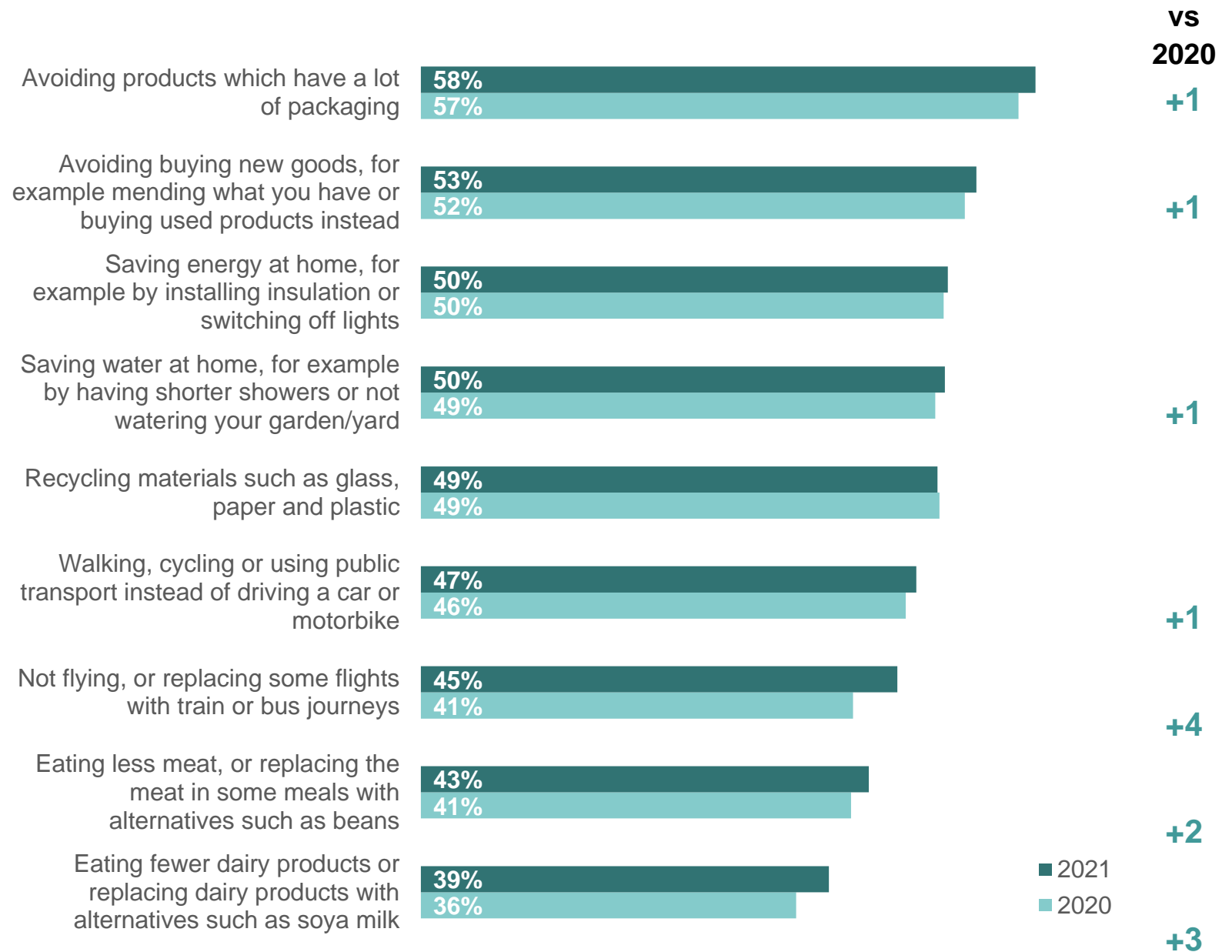


Little change on sustainable behaviours since last year

28 comparator markets – trended

Q. Thinking about things you might do in order to limit your own contribution to climate change, how likely or unlikely would you be to make the following changes within the next year?

Likely



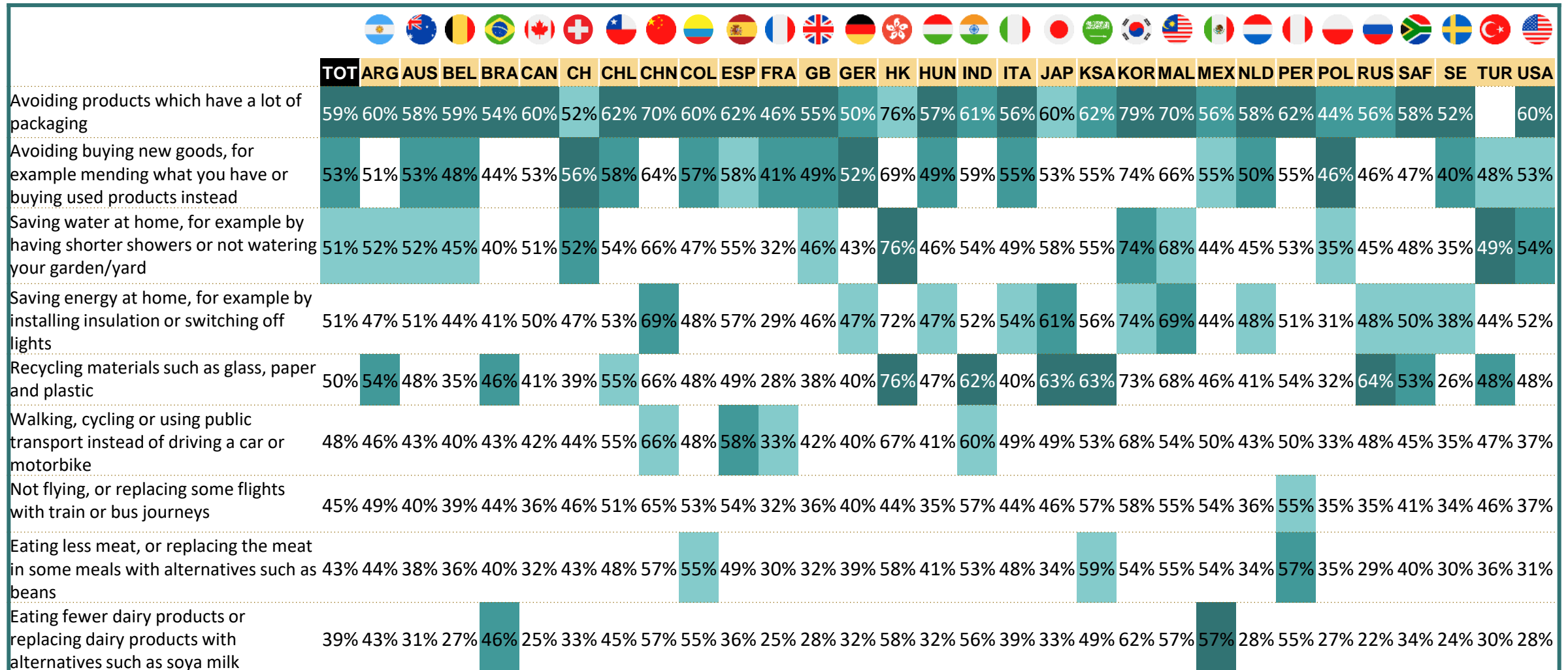
Base: 2021: 20,011 online adults aged 16-74 across 28 markets; 2020: 20,031 online adults aged 16-74 across 28 markets. Fieldwork dates: 19 Feb – 5 Mar 2021; 21 Feb – 6 Mar 2020. Comparator markets are those that have been asked this question in 2021 and 2020: Argentina, Australia, Belgium, Brazil, Canada, China, Chile, Colombia, France, Great Britain, Germany, Hungary, India, Italy, Japan, Malaysia, Mexico, the Netherlands, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Turkey and the United States of America.

Likelihood to take action on climate change 2021 across markets

Q. Thinking about things you might do in order to limit your own contribution to climate change, how likely or unlikely would you be to make the following changes within the next year? % likely

Top three actions:

- #1 in market
- #2 in market
- #3 in market

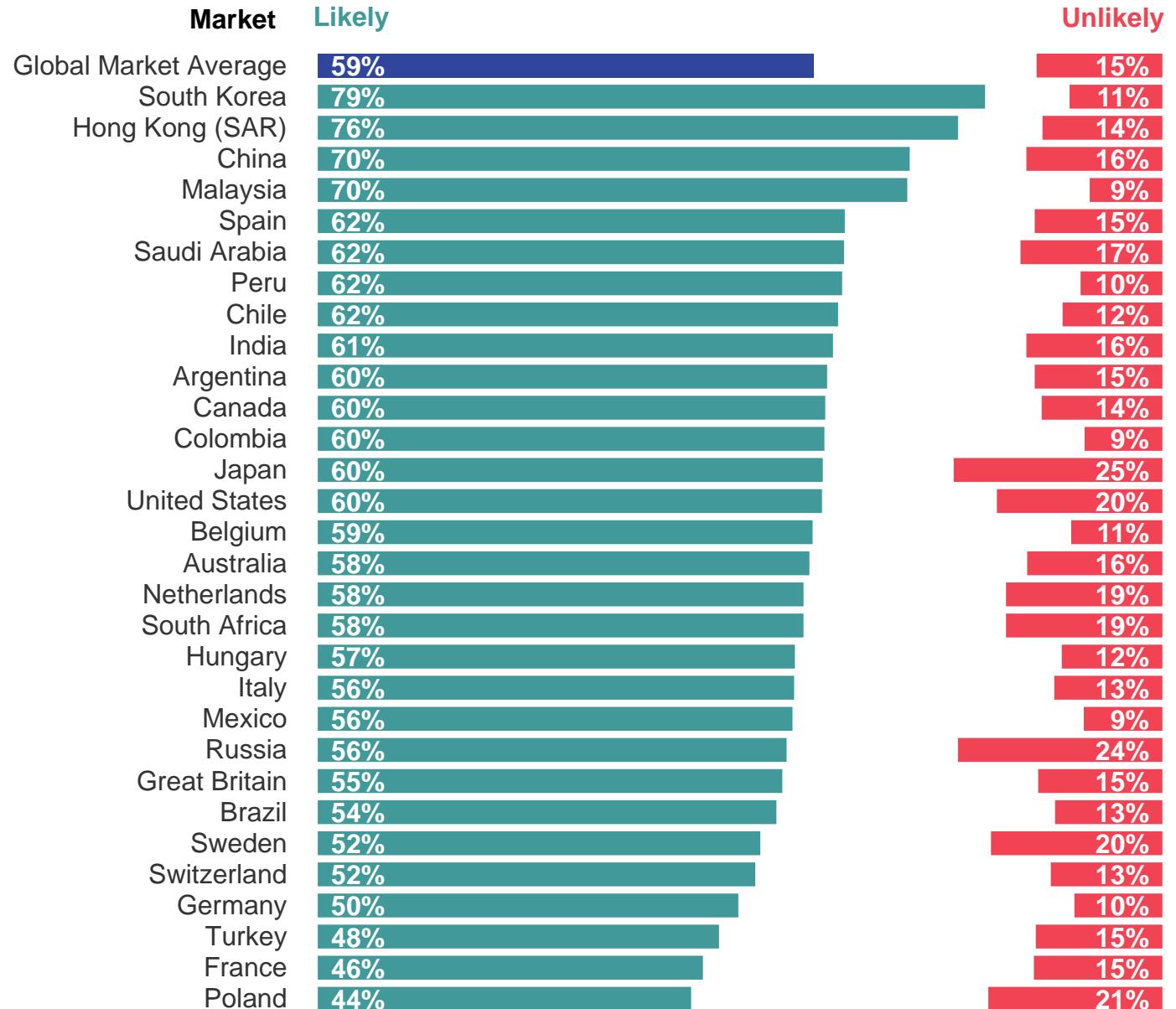


Likelihood to avoid products with a lot of packaging

Market data

Q. Thinking about things you might do in order to limit your own contribution to climate change, how likely or unlikely would you be to make the following changes within the next year?

Avoiding products which have a lot of packaging

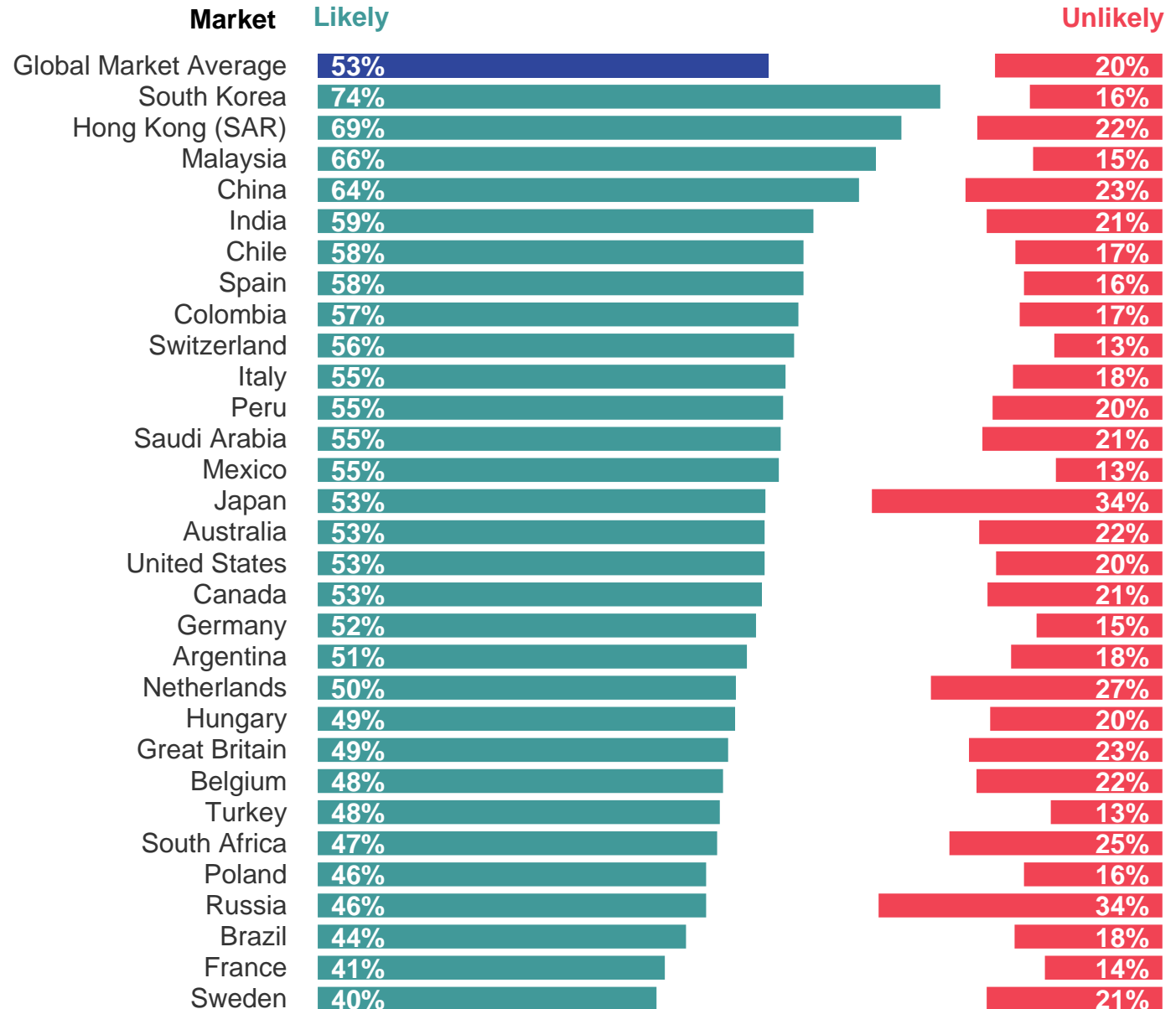


Likelihood to buy second hand and mend broken items

Market data

Q. Thinking about things you might do in order to limit your own contribution to climate change, how likely or unlikely would you be to make the following changes within the next year?

Avoiding buying new goods, for example mending what you have or buying used products instead

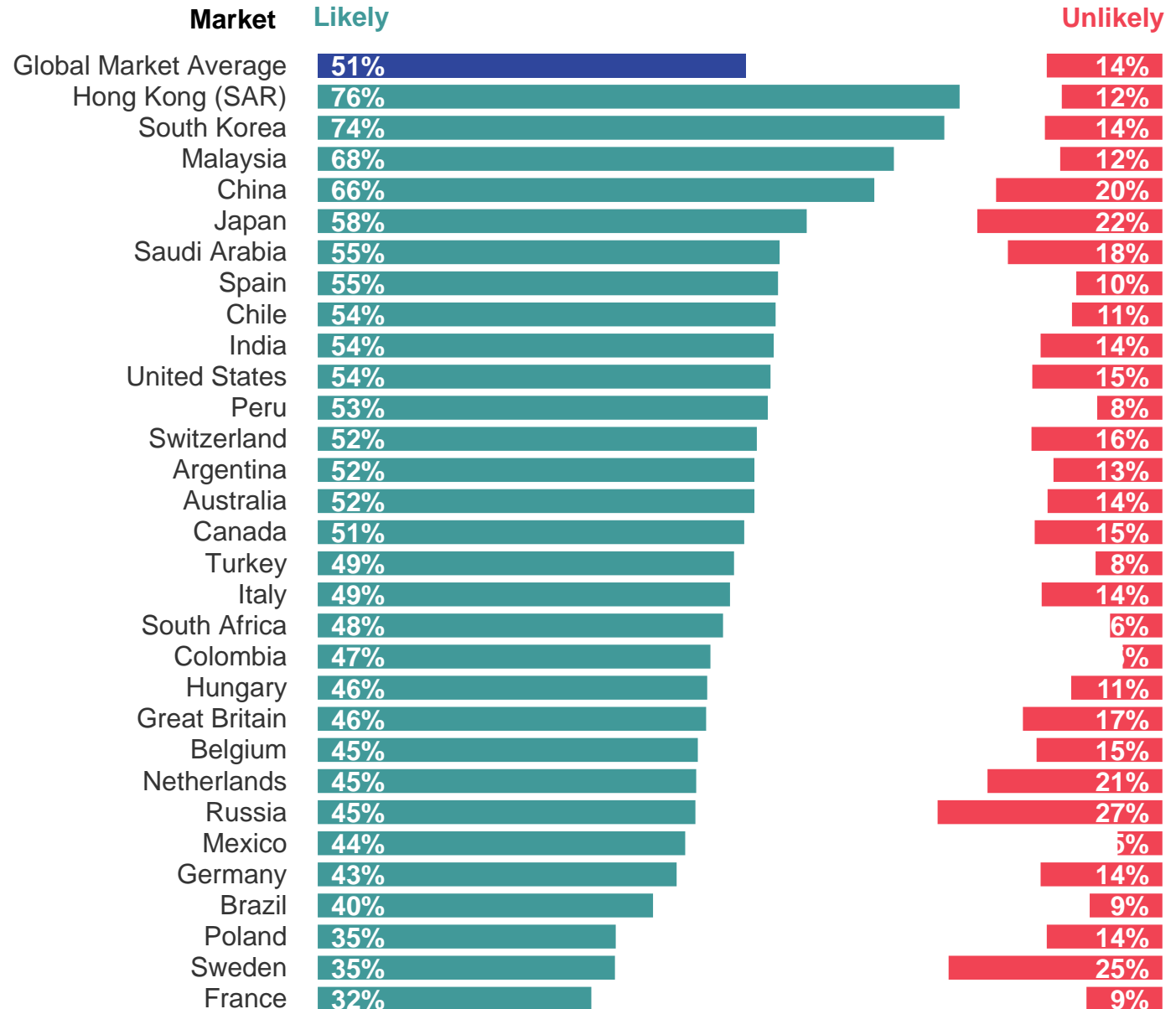


Likelihood to save water at home

Market data

Q. Thinking about things you might do in order to limit your own contribution to climate change, how likely or unlikely would you be to make the following changes within the next year?

Saving water at home, for example by having shorter showers or not watering your garden/yard

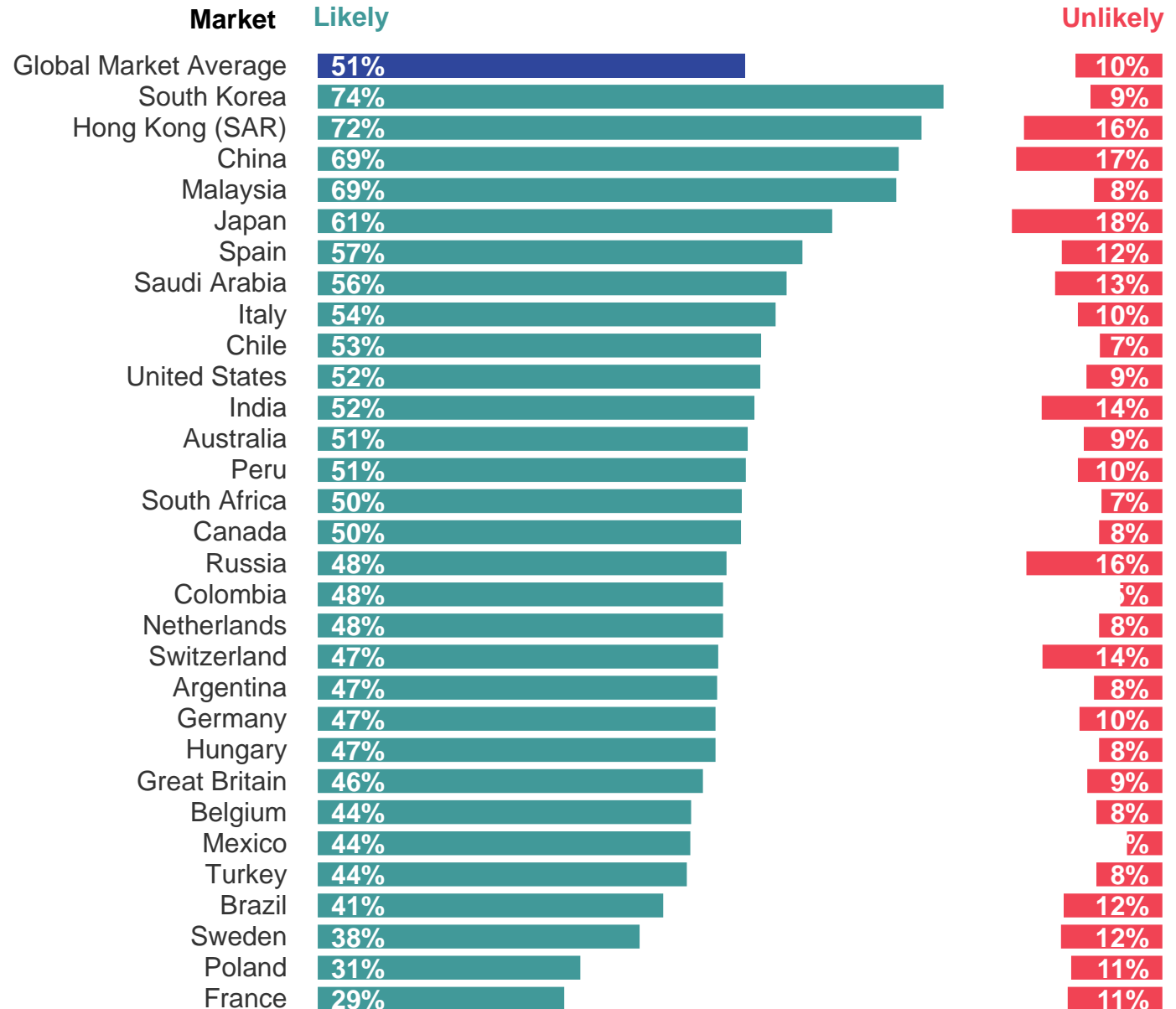


Likelihood to save energy

Market data

Q. Thinking about things you might do in order to limit your own contribution to climate change, how likely or unlikely would you be to make the following changes within the next year?

Saving energy at home, for example by installing insulation or switching off lights

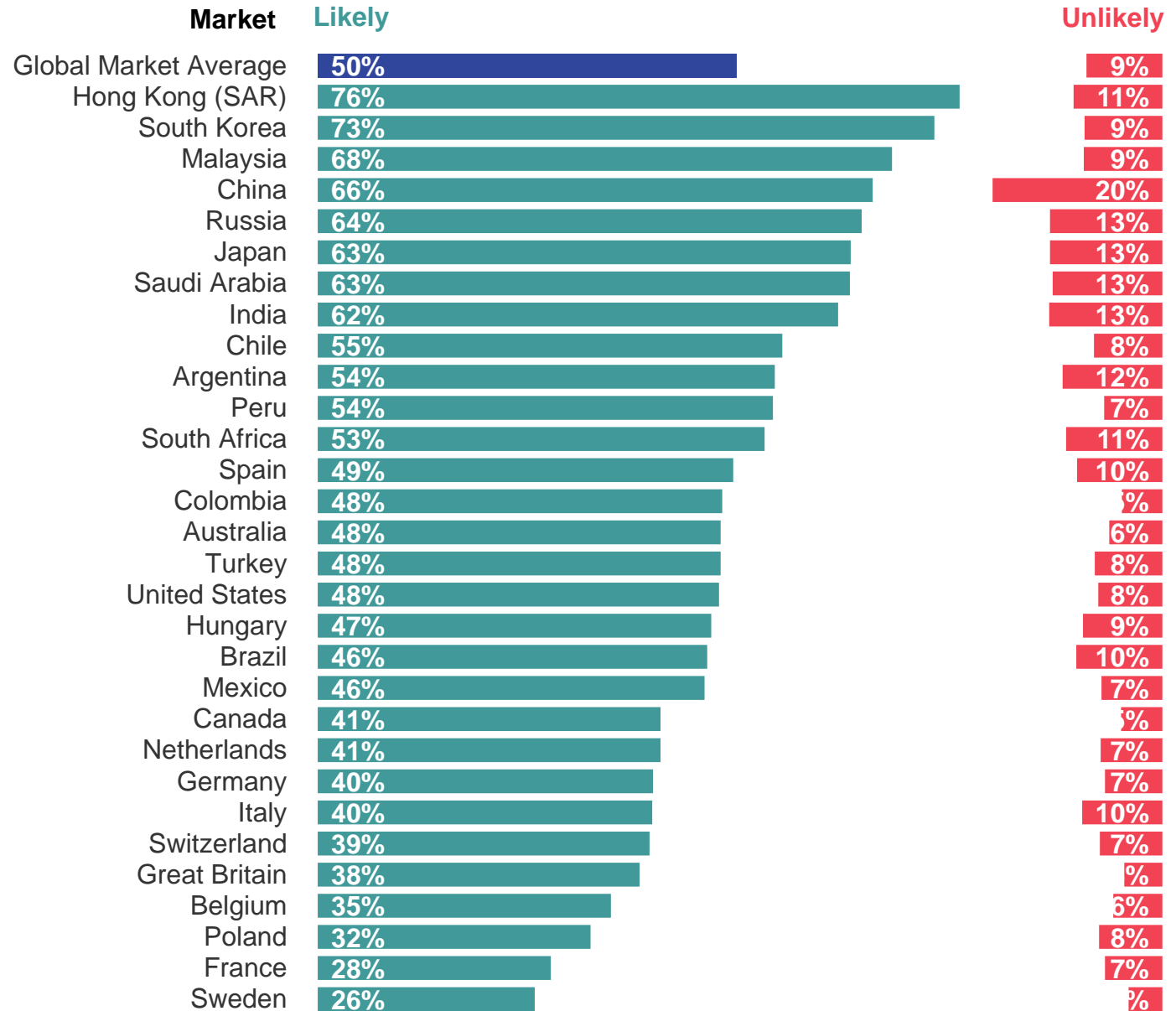


Likelihood to recycle

Market data

Q. Thinking about things you might do in order to limit your own contribution to climate change, how likely or unlikely would you be to make the following changes within the next year?

Recycling materials such as glass, paper and plastic

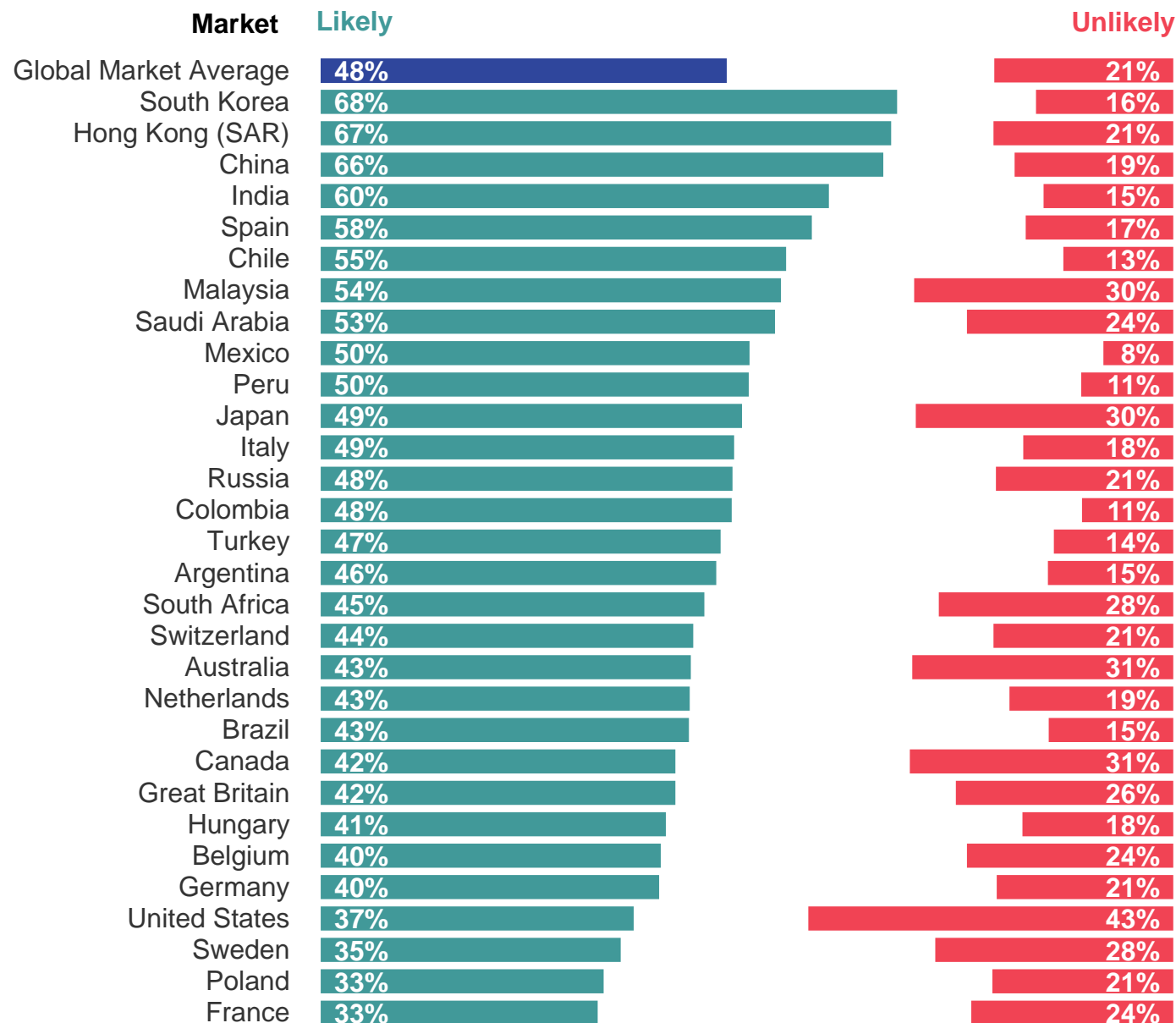


Likelihood to change daily travel

Market data

Q. Thinking about things you might do in order to limit your own contribution to climate change, how likely or unlikely would you be to make the following changes within the next year?

Walking, cycling or using public transport instead of driving a car or motorbike

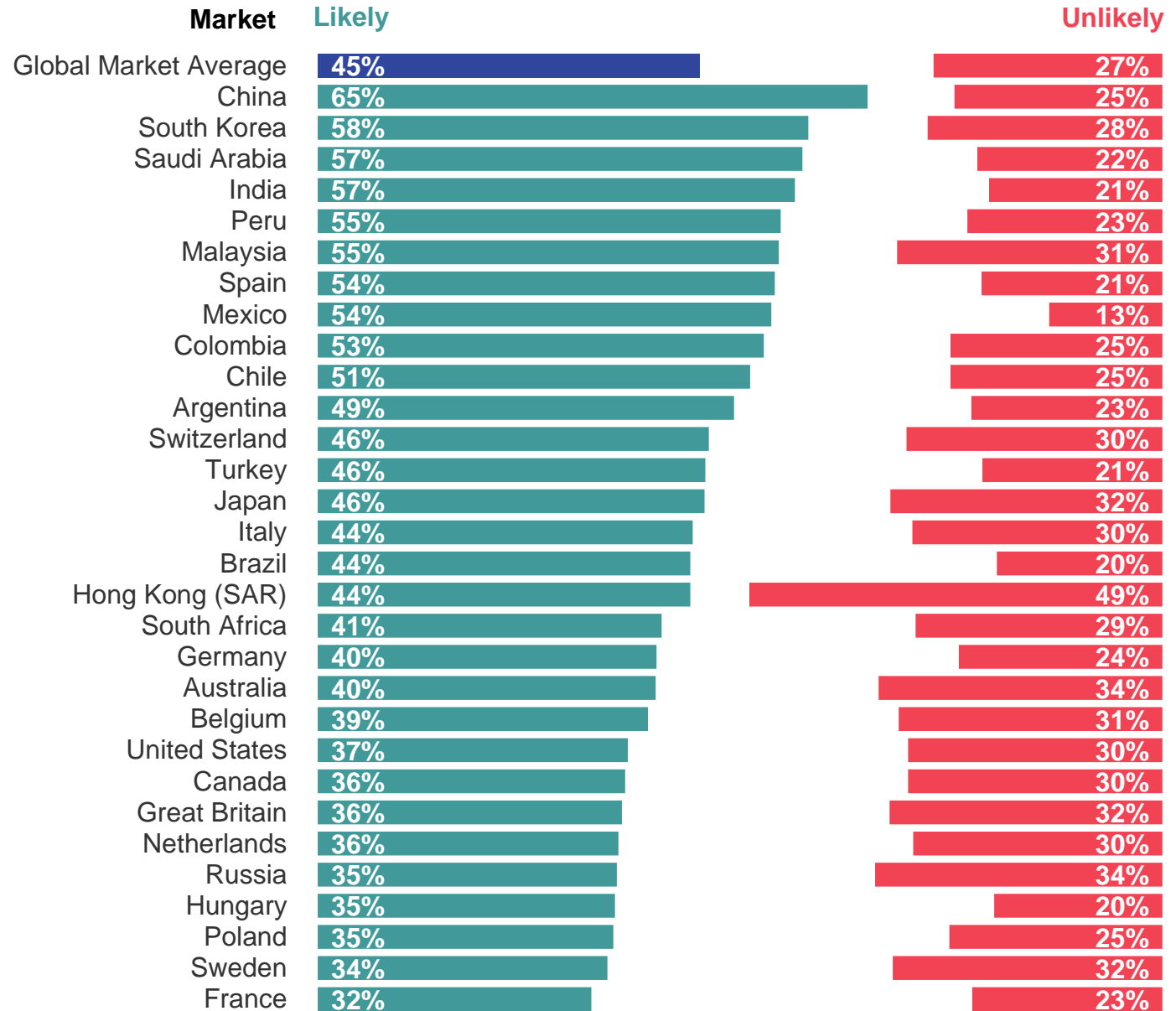


Likelihood to avoid flying

Market data

Q. Thinking about things you might do in order to limit your own contribution to climate change, how likely or unlikely would you be to make the following changes within the next year?

Not flying, or replacing some flights with train or bus journeys

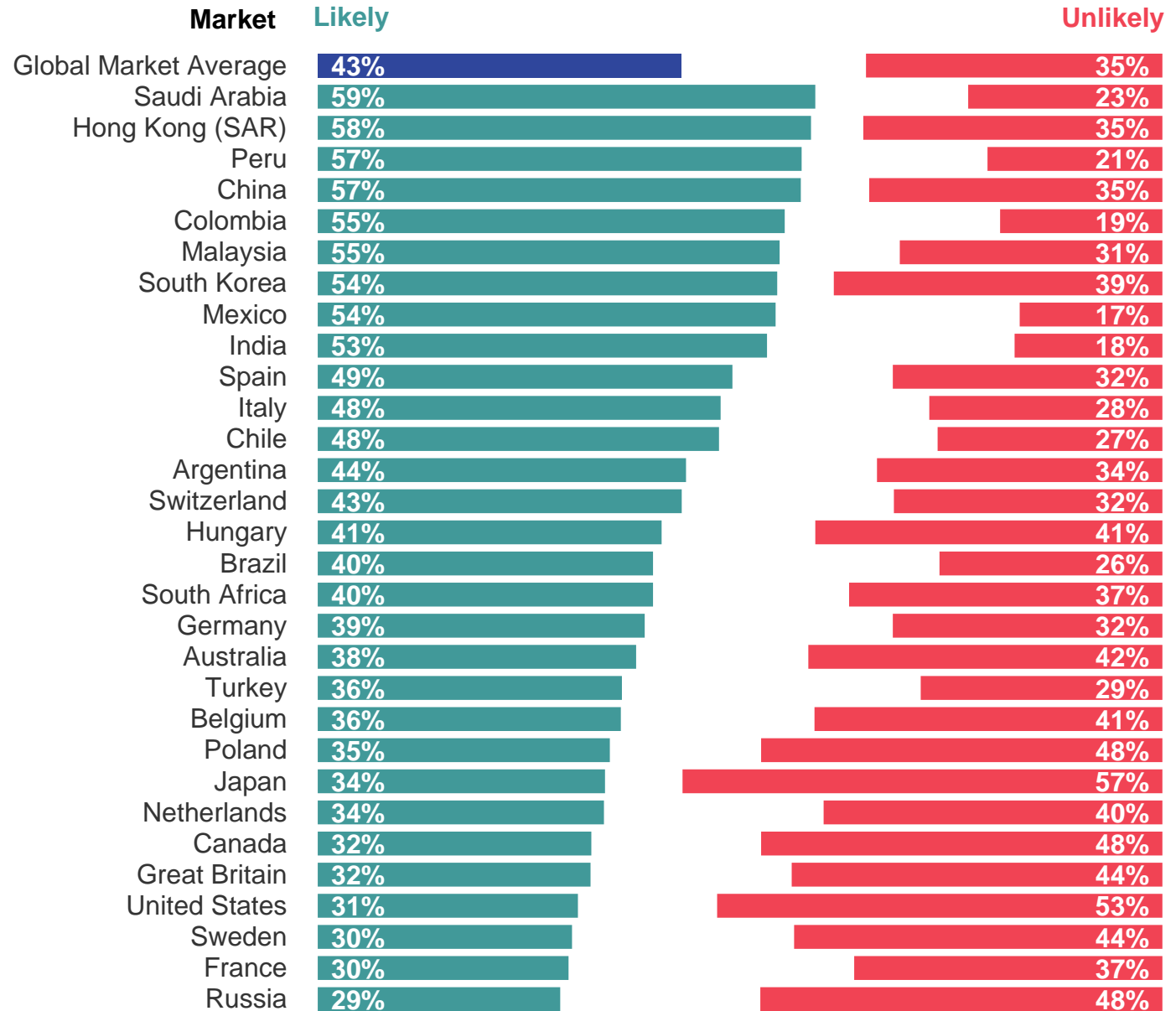


Likelihood to eat less meat

Market data

Q. Thinking about things you might do in order to limit your own contribution to climate change, how likely or unlikely would you be to make the following changes within the next year?

Eating less meat, or replacing the meat in some meals with alternatives such as beans

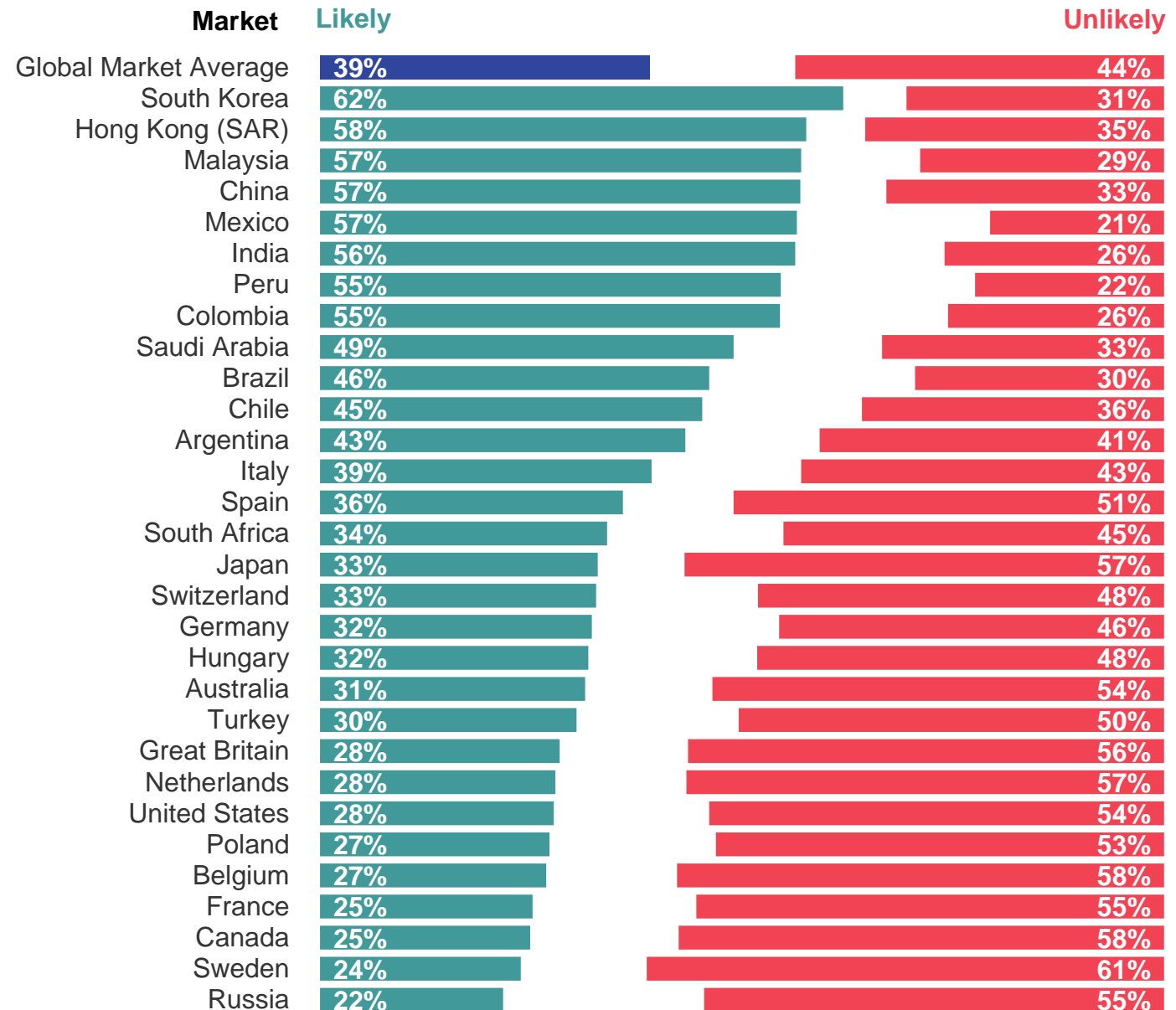


Likelihood to eat and drink fewer dairy products

Market data

Q. Thinking about things you might do in order to limit your own contribution to climate change, how likely or unlikely would you be to make the following changes within the next year?

Eating fewer dairy products or replacing dairy products with alternatives such as soya milk



These are the findings of the *Global Advisor* wave 152 (GA 152) an Ipsos survey conducted between February 19 and March 5, 2021.

The survey instrument is conducted monthly in 30 markets around the world via the Ipsos Online Panel system.

The markets reporting herein are Argentina, Australia, Belgium, Brazil, Canada, China, Chile, Colombia, France, Great Britain, Germany, Hungary, Hong Kong, India, Italy, Japan, Malaysia, Mexico, the Netherlands, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Switzerland, Turkey and the United States of America.

For the results of the survey presented herein, an international sample of 21,011 adults aged 18-74 in the US, Canada, Hong Kong, Malaysia, South Africa, and Turkey, and age 16-74 in all other markets, were

interviewed. Approximately 1000+ individuals participated on a market by market basis via the Ipsos Online Panel with the exception of Argentina, Chile, Colombia, Hong Kong, Hungary, India, Malaysia, Mexico, the Netherlands, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Sweden, Switzerland and Turkey, where each have a sample approximately 500+. The precision of Ipsos online polls are calculated using a credibility interval with a poll of 1,000 accurate to +/- 3.5 percentage points and of 500 accurate to +/- 5.0 percentage points. For more information on the Ipsos use of credibility intervals, please visit the Ipsos website.

17 of the 29 markets surveyed online generate nationally representative samples in their markets (Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, the Netherlands, Poland, South Korea, Spain, Sweden, Switzerland and United States).

The samples in Brazil, Chile, mainland China, Colombia, Hong Kong, India, Malaysia, Mexico, Peru, Russia, Saudi Arabia, South Africa and Turkey are more urban & educated, and/or more affluent than the general population. We refer to these respondents as “Upper Deck Consumer Citizens”. They are not nationally representative of their market.

This report contains findings from four sample sets:

1

Worldwide 30 market study 2021

30 markets around the world via the Ipsos Online Panel system. Total base: 21,011 online adults aged 16-74 across 30 markets. Fieldwork dates: Friday, February 19 to Friday, March 5, 2020. The markets reporting herein are Argentina, Australia, Belgium, Brazil, Canada, China, Chile, Colombia, France, Great Britain, Germany, Hungary, Hong Kong, India, Italy, Japan, Malaysia, Mexico, the Netherlands, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Switzerland, Turkey and the United States of America.

2

Worldwide 29 market study 2020

29 markets around the world via the Ipsos Online Panel system. Total base: 20,590 online adults aged 16-74 across 29 markets. Fieldwork dates: Friday, February 21 to Friday, March 6, 2020. The markets reporting herein are Argentina, Australia, Belgium, Brazil, Canada, China, Chile, Colombia, France, Great Britain, Germany, Hungary, India, Italy, Japan, Malaysia, Mexico, Netherlands, New Zealand, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Turkey and the United States of America.

3

12 market online study 2014

A 12 market online study, conducted via the Ipsos Online Panel system between 26th September and 10th October 2014. Total base: 12,135 online adults aged 18-65 across 12 markets. The markets reporting herein are Brazil, China, France, United Kingdom, Germany, India, Italy, Japan, Poland, Russia, South Africa and the United States of America.

NOTE: The sample in 2014 includes the United Kingdom of Great Britain and Northern Ireland.

4

Subsets of the 2021 and 2020 worldwide studies

For some charts within this deck, subsets of the 30 and 29 market worldwide studies conducted in 2021 and 2020 have been used. These include:

- A 12 market sub-set of the 30 markets in the 2021 worldwide study;
- A 28 market sub-set of the 30 markets in the 2021 worldwide study;
- A 12 market sub-set of the 29 markets in the 2020 worldwide study; and
- A 28 market sub-set of the 29 markets in the 2020 worldwide study.

Please consult the base notes of comparator charts for a full list of the markets included therein.

THANK YOU.

Ruth Townend

Details:

Ruth.Townend@ipsos.com

Tel: +44 7791 578 864

Gideon Skinner

Details:

Gideon.Skinner@ipsos.com

Tel: +44 2073473260

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GAME CHANGERS

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So that our clients can act faster, smarter and bolder.
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You act better when you are sure.