

EARTH DAY 2021

Public opinion on and action on climate change: GB and the world

IPSOS GLOBAL ADVISOR



GAME CHANGERS

Ipsos MORI



British 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. The UK holds the **presidency of COP26**, placing it in a position of global leadership on climate change, ahead of the Glasgow summit in November.



Yet **despite high public interest and concern**, their low awareness of climate change plans suggests they could be **more effectively included and engaged** to play their part. Just 28% in GB **agree the government has a clear plan in place** for how government, businesses and people are going to work together to tackle climate change, while 33% disagree.



The UK, like most nations included in our research has **signed the Paris Agreement and submitted and published an initial NDC, or plan to tackle climate change**. Part of the role of the UK as COP26 president is to push all countries to make these plans more ambitious.

68% in GB agree that if the UK government **does not act now to combat climate change, it will be failing its citizens** (65% Global Market Average). 73% in GB agree that if individuals do not act now to combat climate change they will be failing future generations (72% Global Market Average).

What is the plan?

Who should act to combat climate change?



Just 28% in GB agree the UK government **has a clear plan in place** for how government, businesses and people are going to work together to tackle climate change.

Despite the UK's leadership role as president of COP26, agreement that the UK government has a plan is **no higher** than the Global Market Average of **31%**.

The GB public perceive combatting climate change as a shared responsibility

In Great Britain, as in most countries across the world, the public believe that governments, companies and individuals need to play their part, or risk failing others.



73% in GB agree that if **individuals** do not act now to combat climate change they will be failing future generations. Global Market Average agreement is 72%.



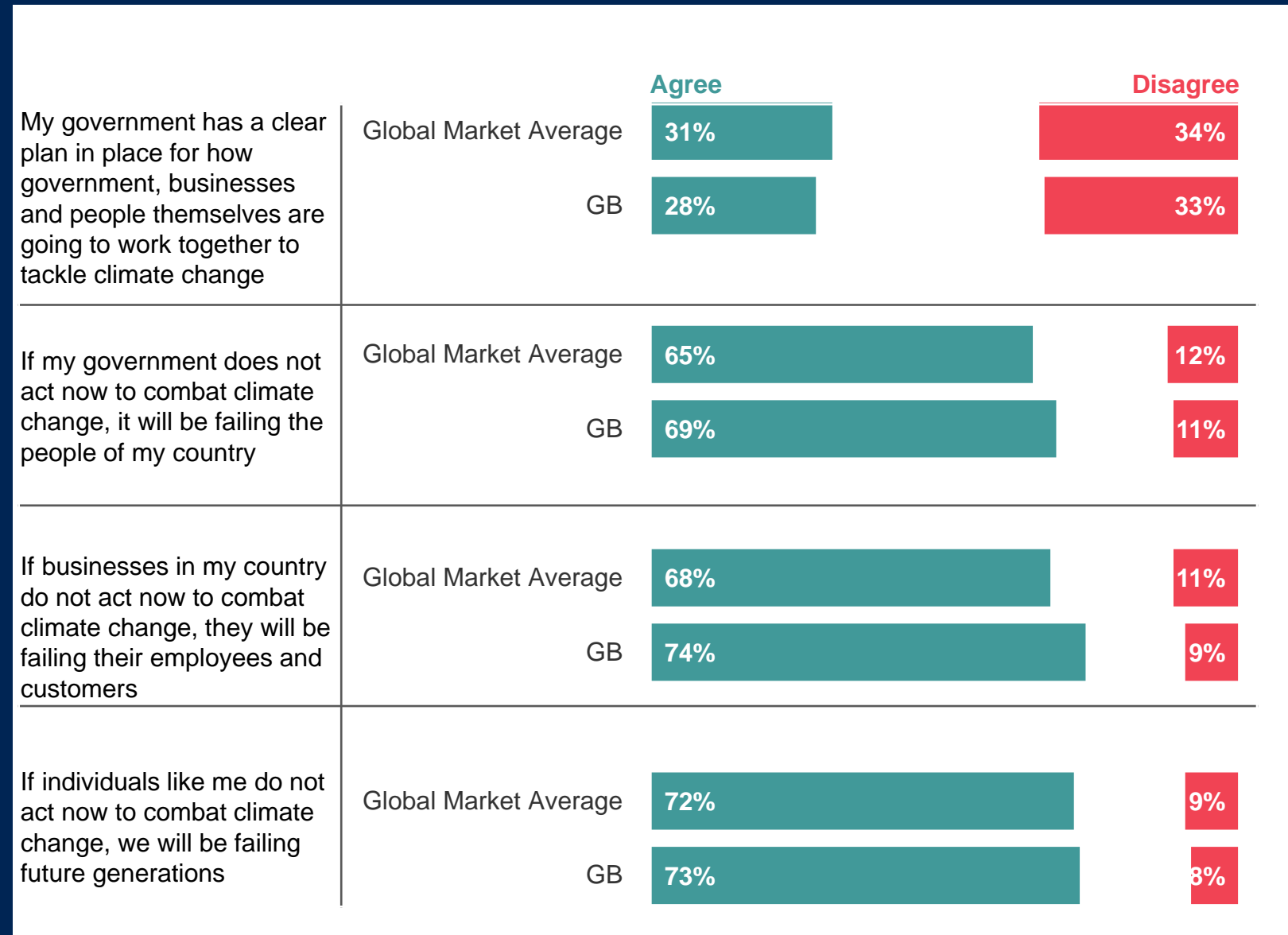
74% in GB say that if **businesses** do not act now to combat climate change then they are failing their employees and customers. Global Market Average agreement is 68%.



67% say that if **their national government** does not act now to combat climate change then it is failing citizens. Global Market Average agreement is 65%.

Summary: Global Market Averages vs GB on plans and responsibility

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

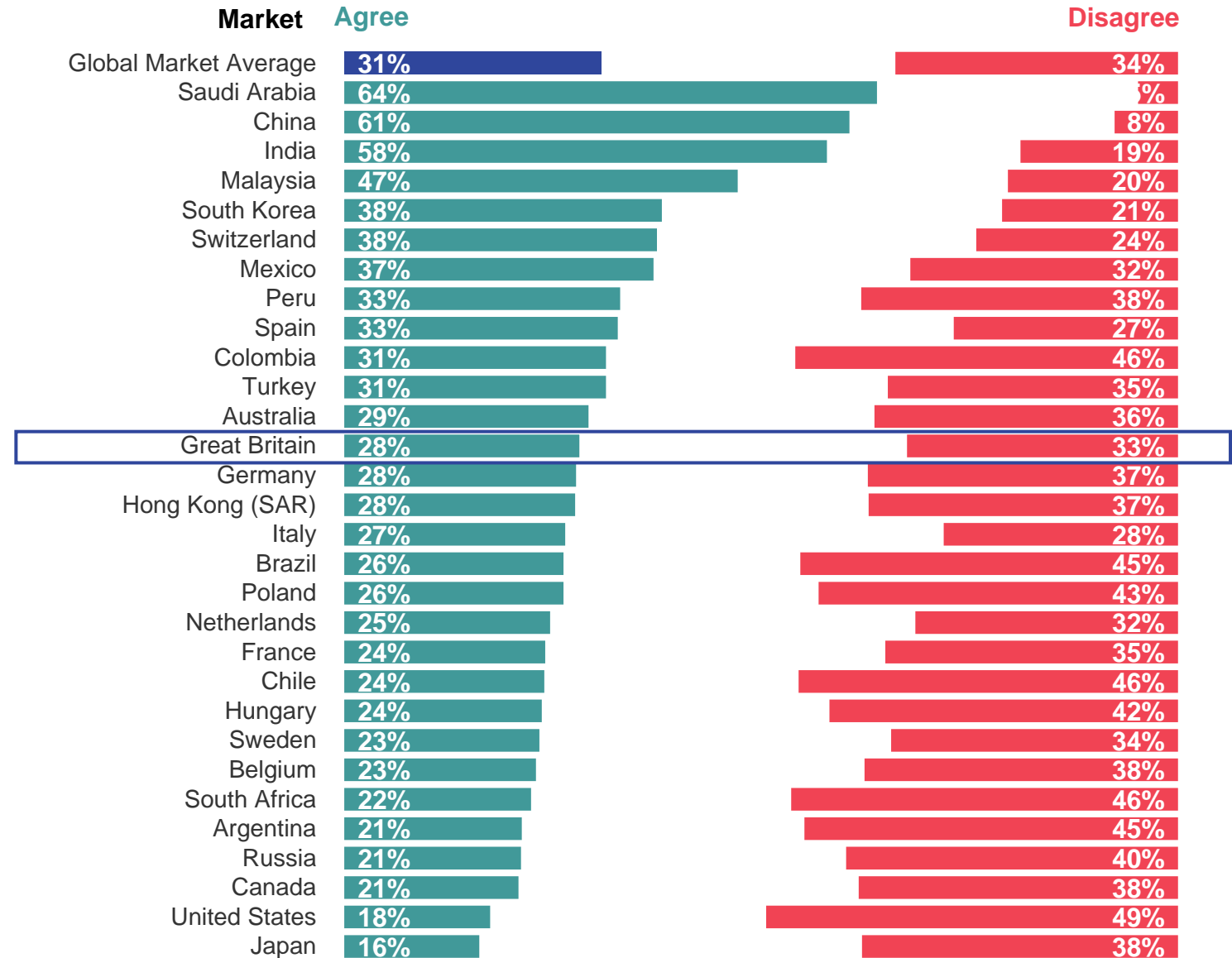


Awareness of government plans to tackle climate change is generally low

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

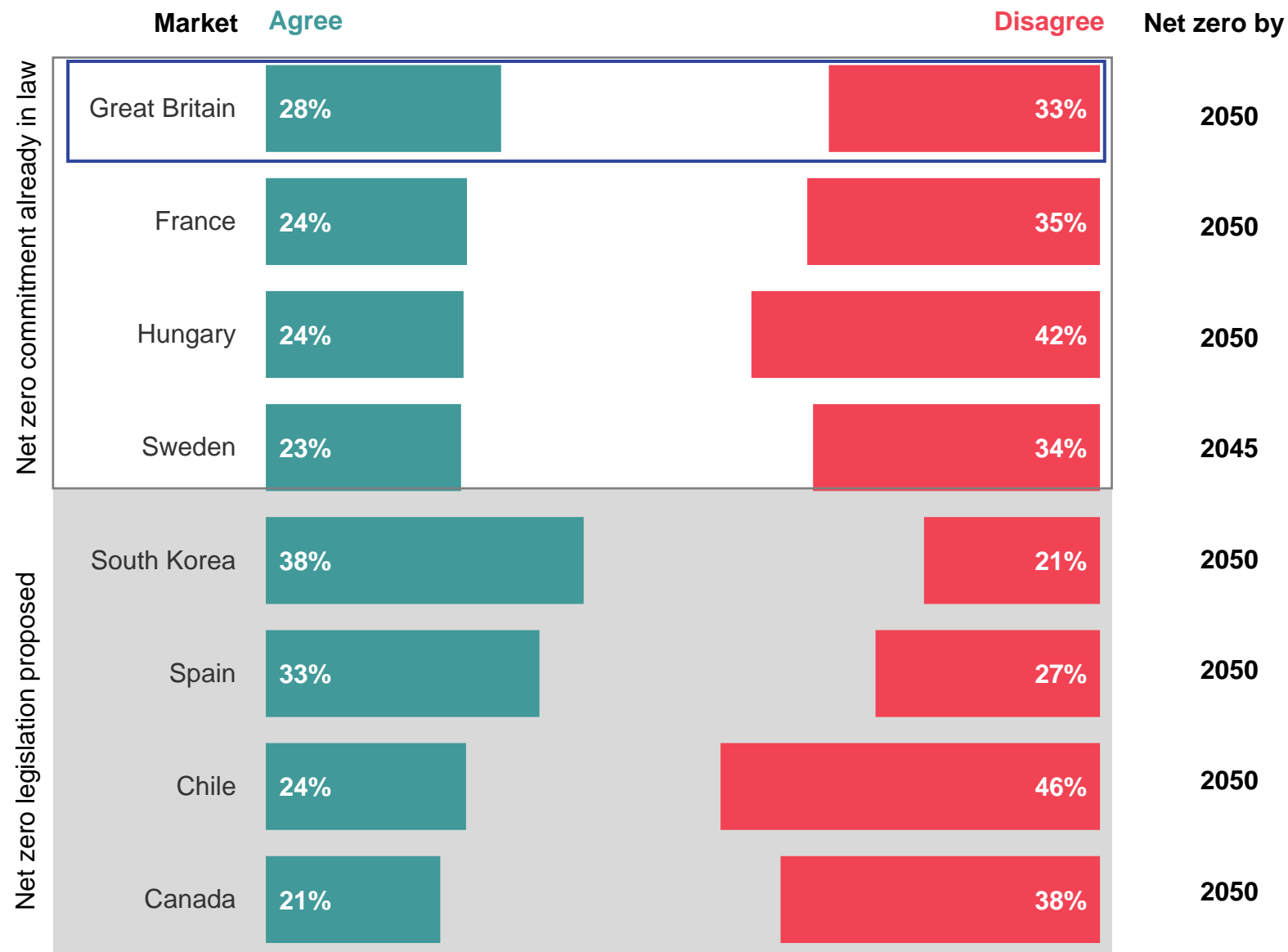


Legally binding net zero commitments do not correlate with higher awareness of a government's plans

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>



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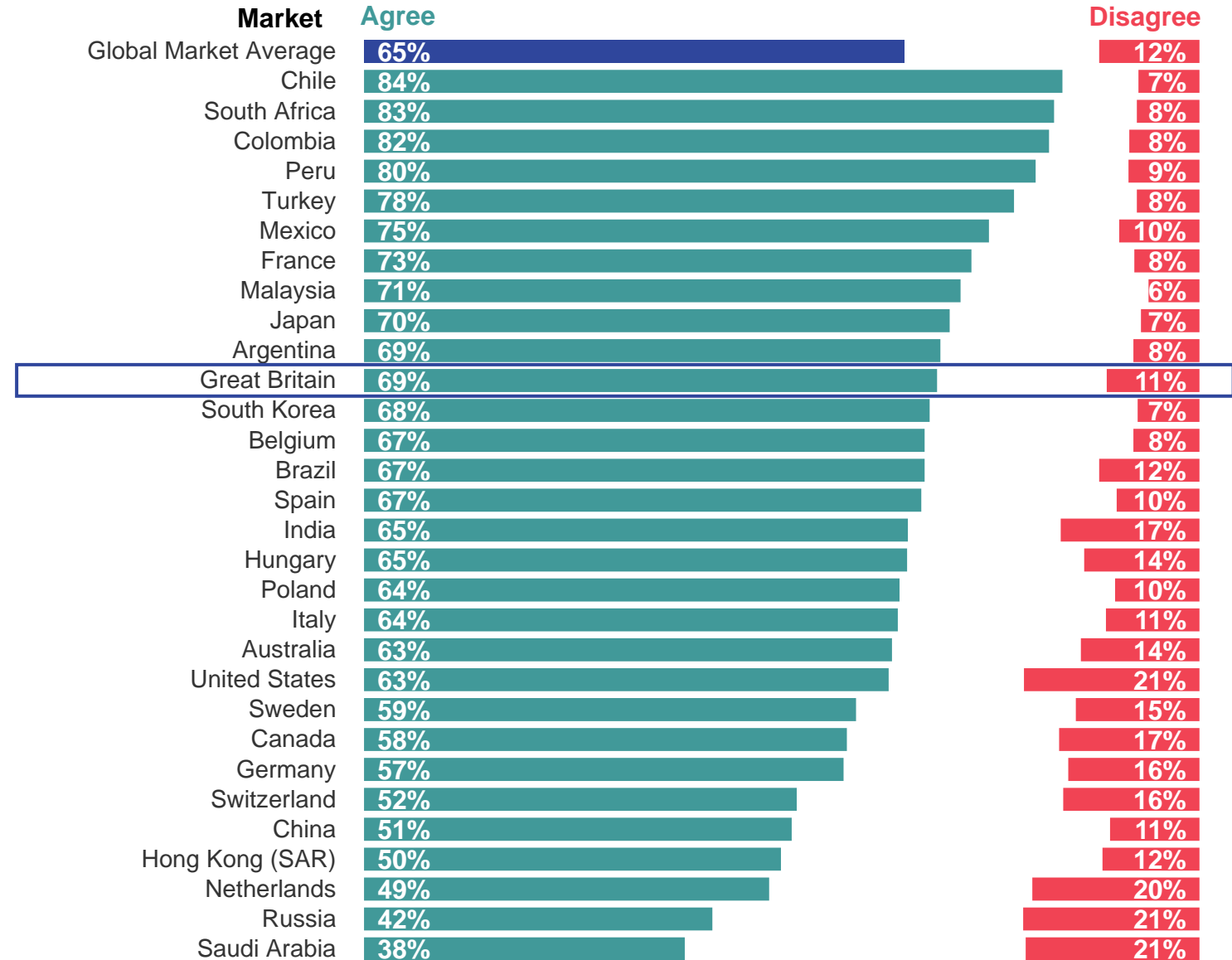


There is strong agreement that governments will be failing citizens if they do not act now on climate change

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]



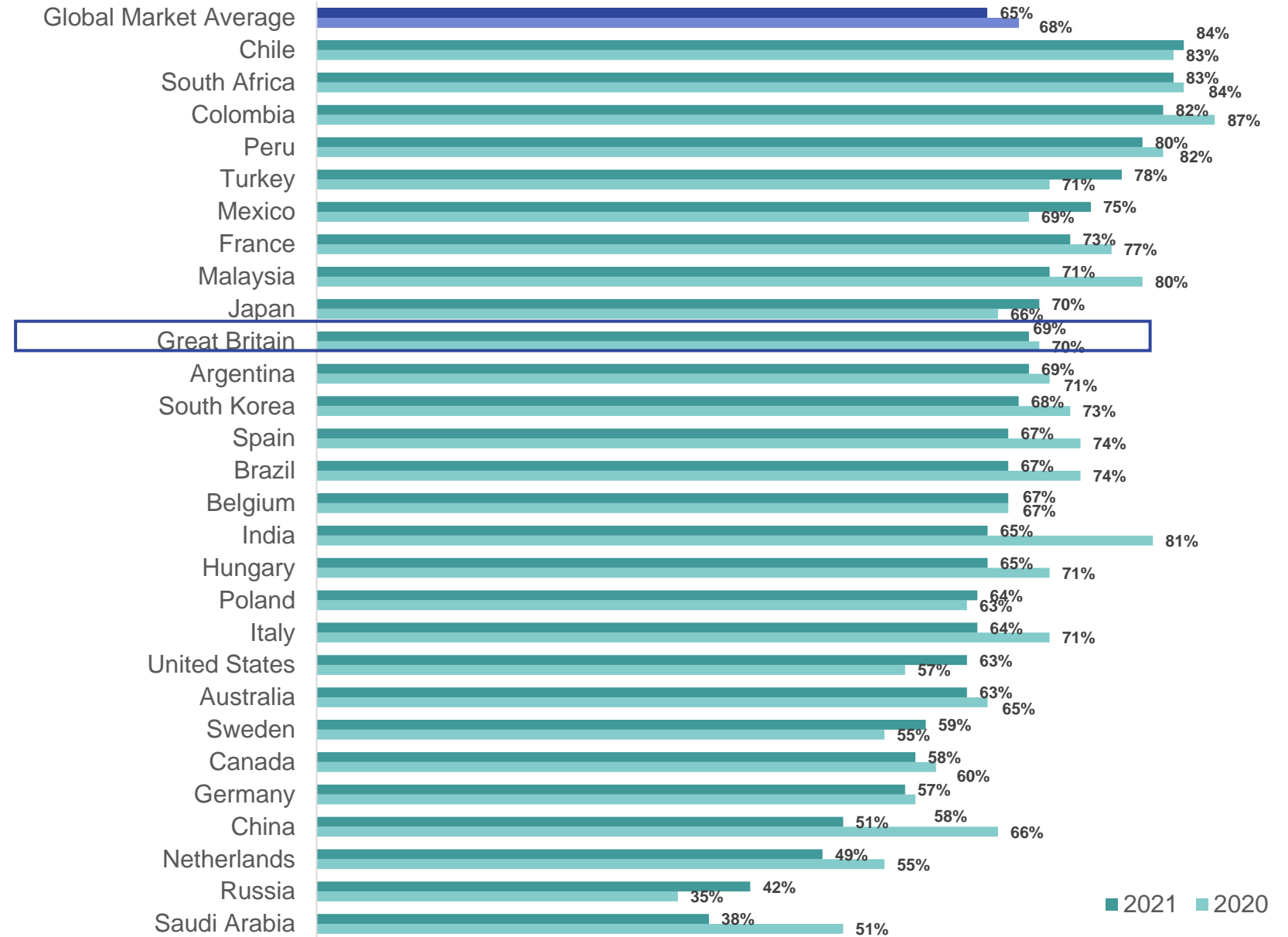
Base: 21,011 online adults aged 16-74 across 30 markets, 19 Feb – 5 Mar 2021

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 were asked this question in 2021 and 2020: Argentina, Australia, Belgium, Brazil, Canada, China, Chile, Colombia, France, Great Britain, Germany, India, Italy, Japan, Malaysia, Mexico, Netherlands, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Turkey and the United States of America



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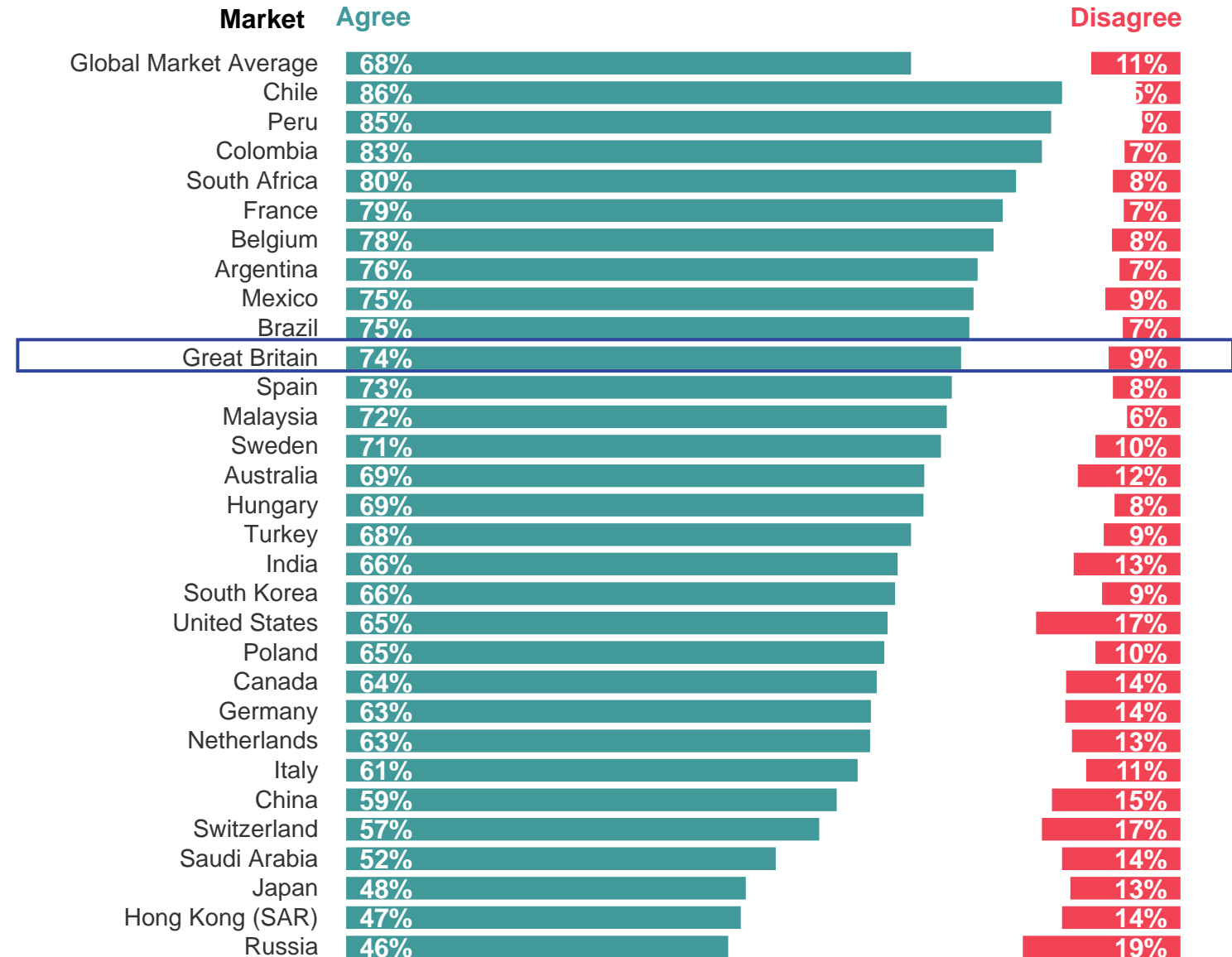


The public mandate for corporate action is similar to the mandate for government action

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

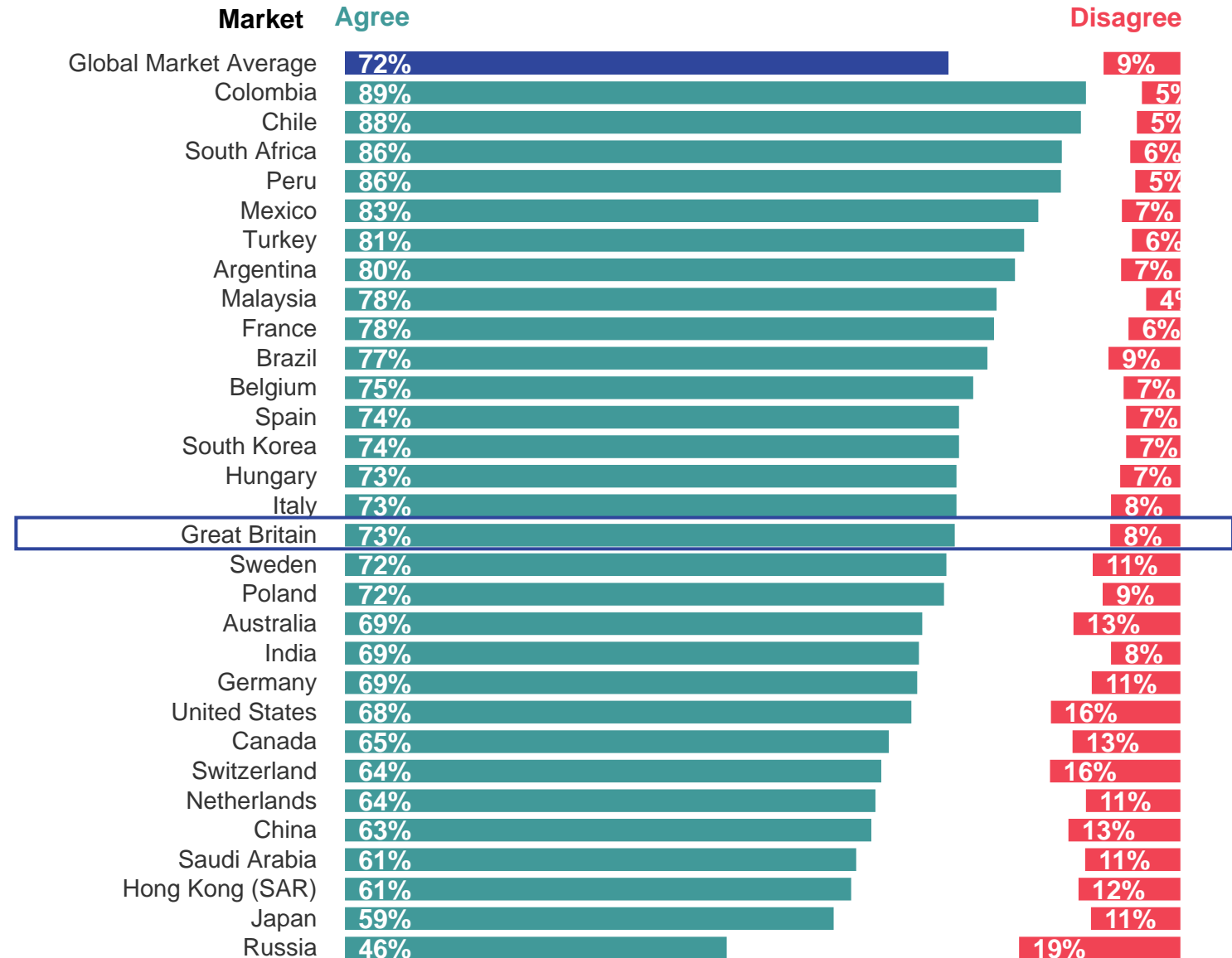


Individuals feel the burden of responsibility on their own shoulders too

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. In GB, 38% believe climate change should be a priority in the economic recovery (Global Country Average 35%), while 35% believe it should not (Global Market Average 36%).



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.



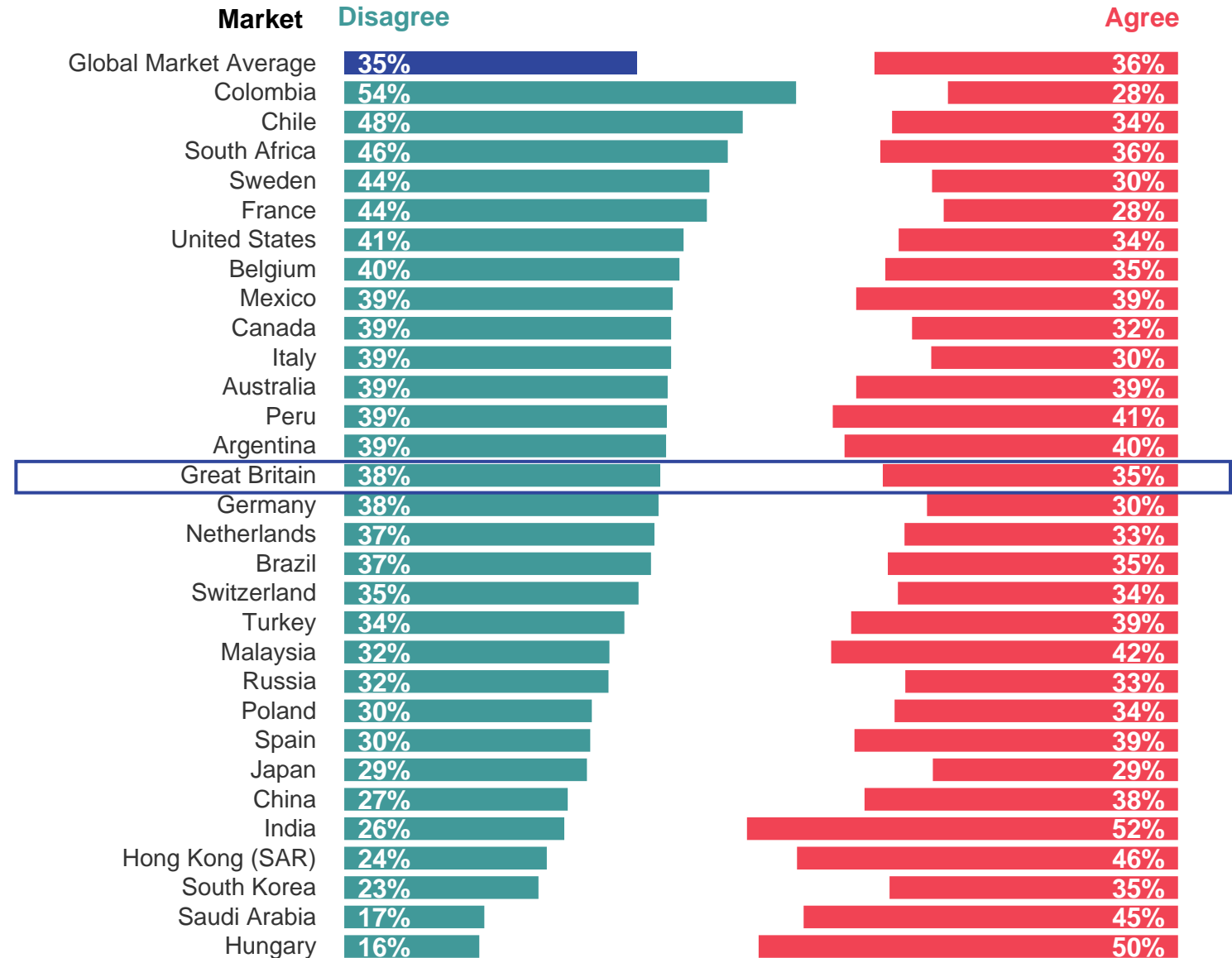
Looking at individuals' behavioural shifts, we see the pandemic's influence on **movement towards pro-environmental behaviours**. In GB the public are most likely to expect to do the following more post pandemic, compared to pre-pandemic: **Avoid food waste (36%), buy only what they really need (32%) and walk or cycle instead of driving (30%).**

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



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

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

Global Market Average vs GB

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	About the same	Less	More/same
Doing what you can to avoid throwing away food	Global Market Average	39%	42%	10%	81%
	GB	36%	51%	5%	87%
Doing errands and journeys on foot or by bike rather than by car	Global Market Average	34%	39%	12%	73%
	GB	30%	46%	7%	76%
Buying only what you really need, rather than shopping for clothes, shoes and other things for fun (online or in person)	Global Market Average	34%	37%	19%	71%
	GB	32%	43%	16%	75%
Working from home rather than commuting to work	Global Market Average	31%	19%	11%	50%
	GB	26%	12%	6%	38%
Going on holidays which don't require you to fly to the destination	Global Market Average	26%	30%	19%	56%
	GB	21%	39%	14%	60%
Buying the things you need second hand instead of new (online or in person)	Global Market Average	25%	35%	15%	60%
	GB	24%	44%	8%	68%

Base: Global Market Average: 21,011 online adults aged 16-74 across 30 markets; GB: 1,000 online adults aged 16-74. Fieldwork dates: 19 Feb – 5 Mar 2021



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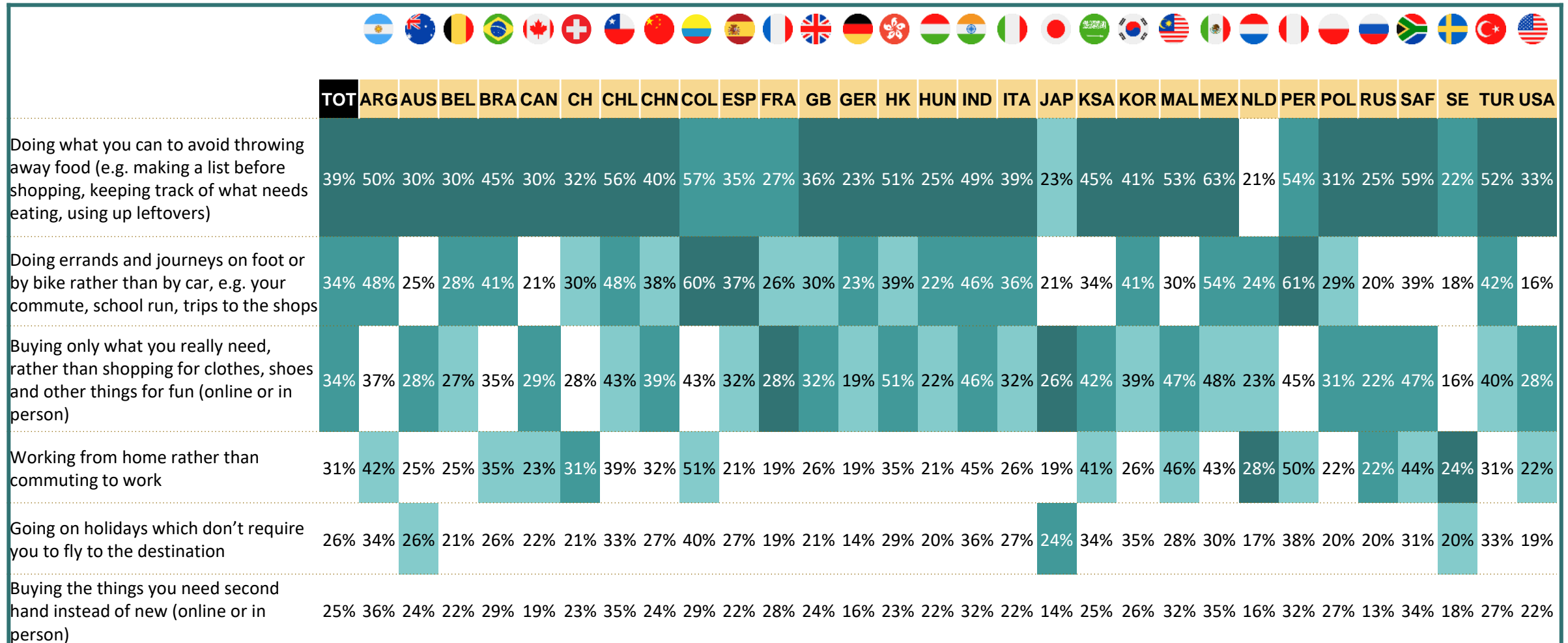


Reducing food waste tops the list of shifted behaviours

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



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



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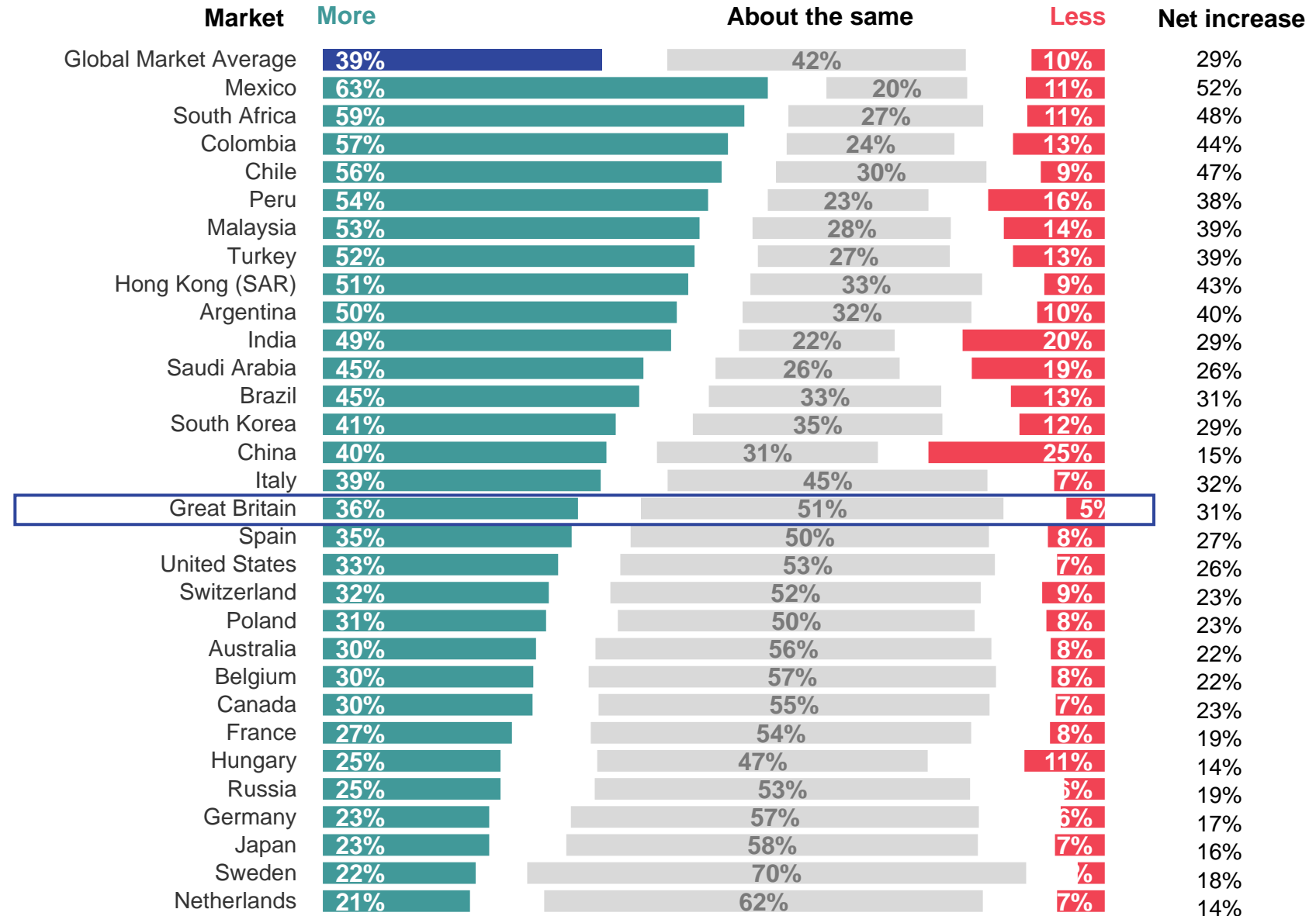
On balance, the public expect to try harder to avoid food waste post-pandemic

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)



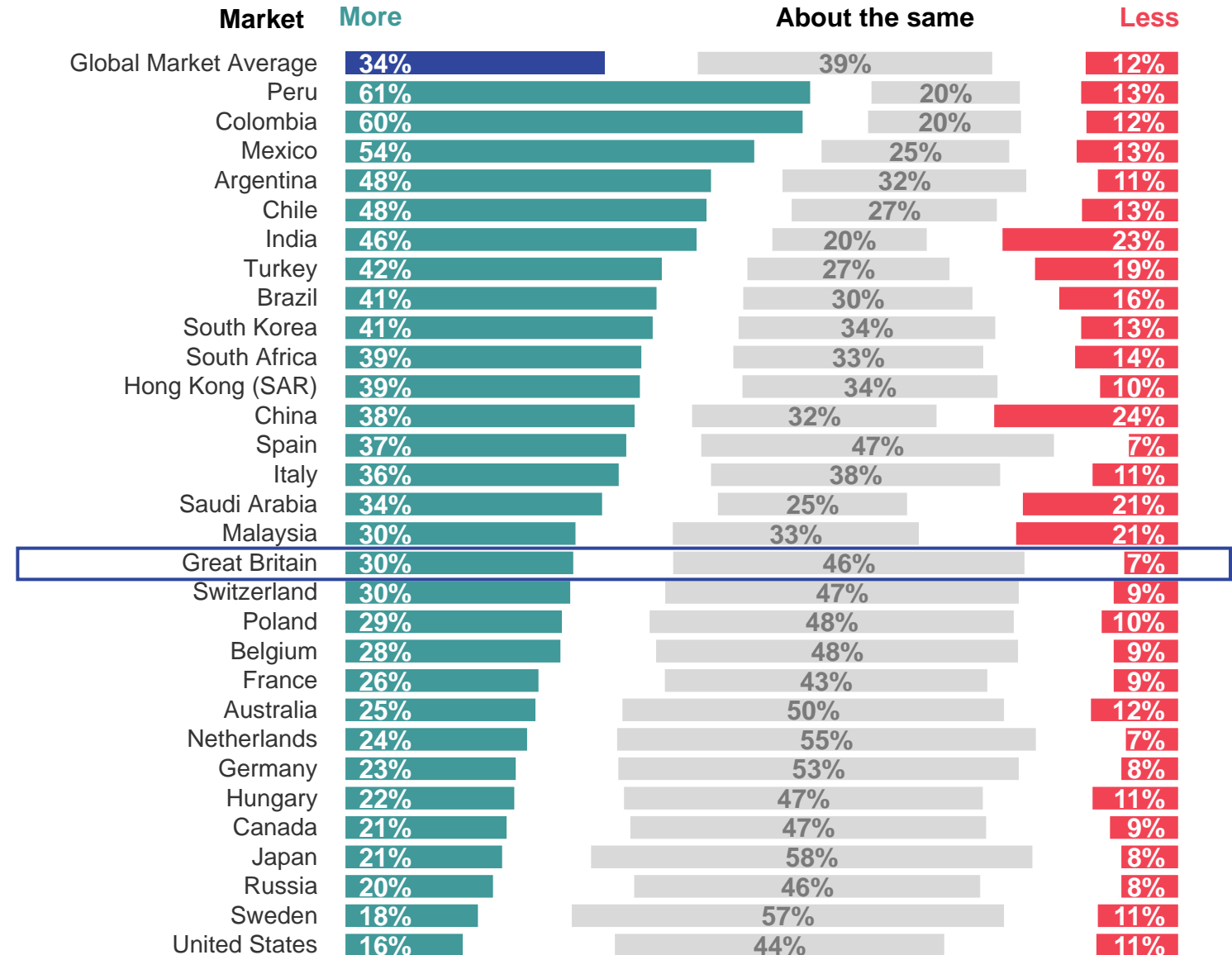
Rolling and strolling are on the up, with more carless journeys here to stay

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



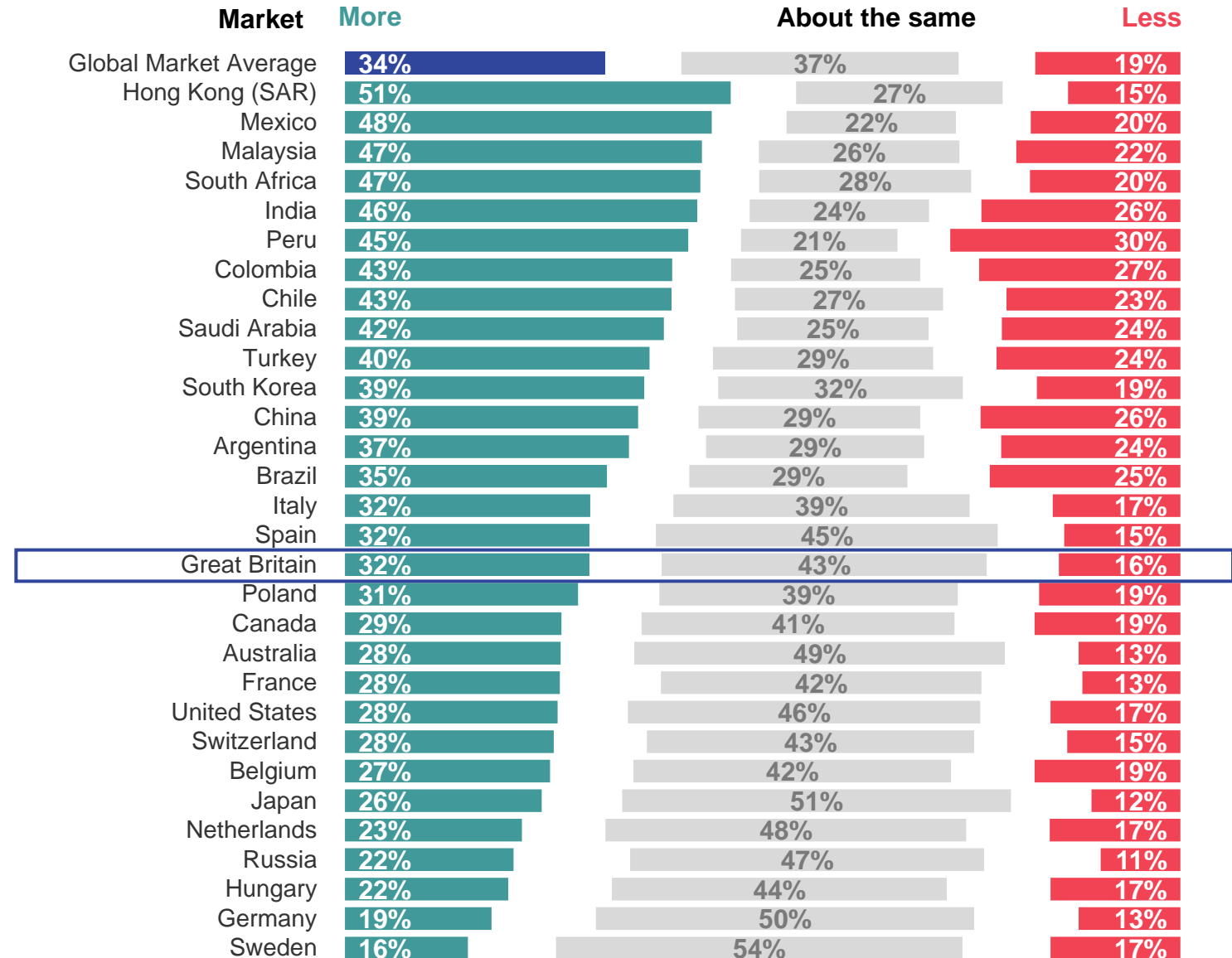
Shopping may be less fun, more functional

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)



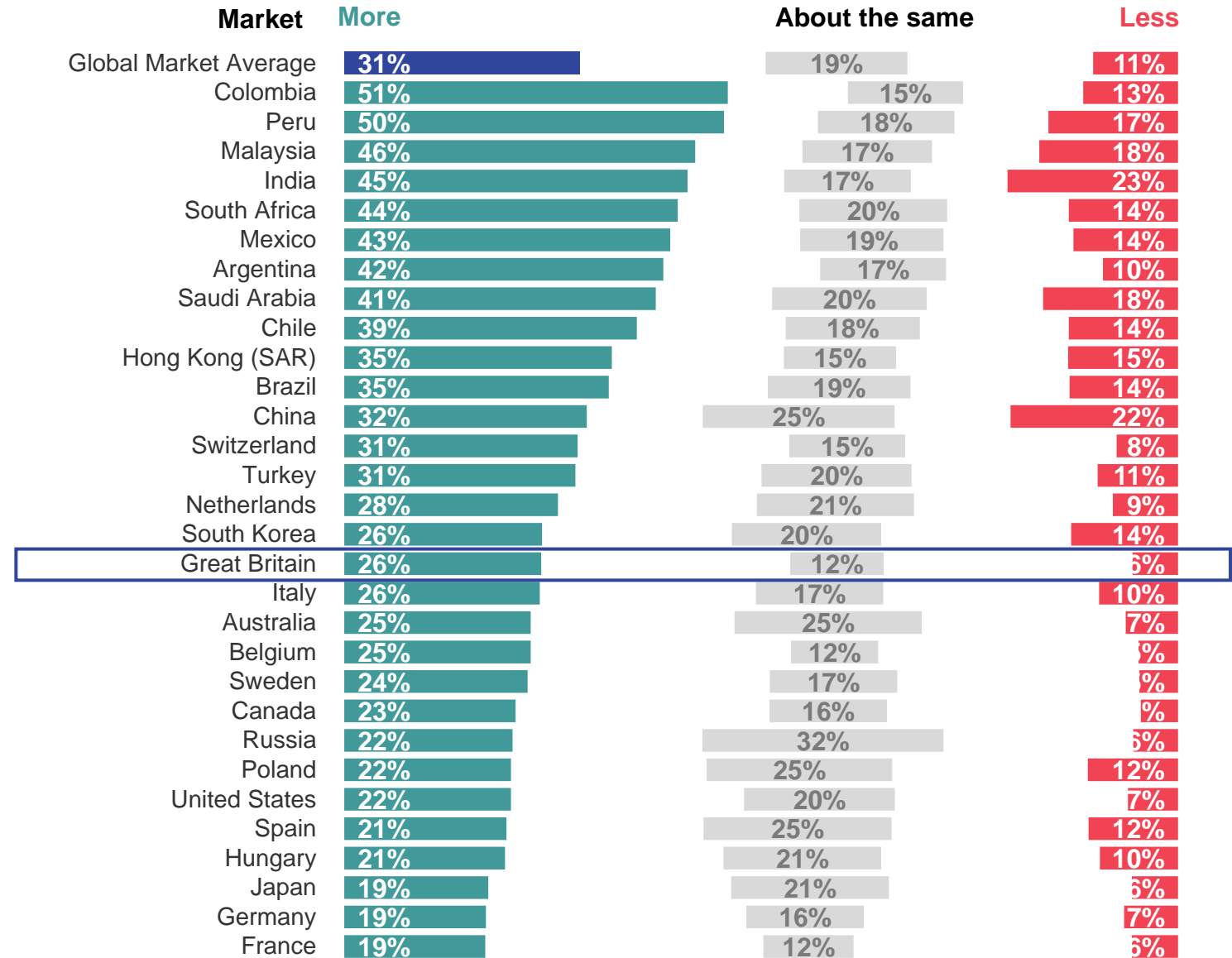
Many expect to work more from home post-pandemic

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



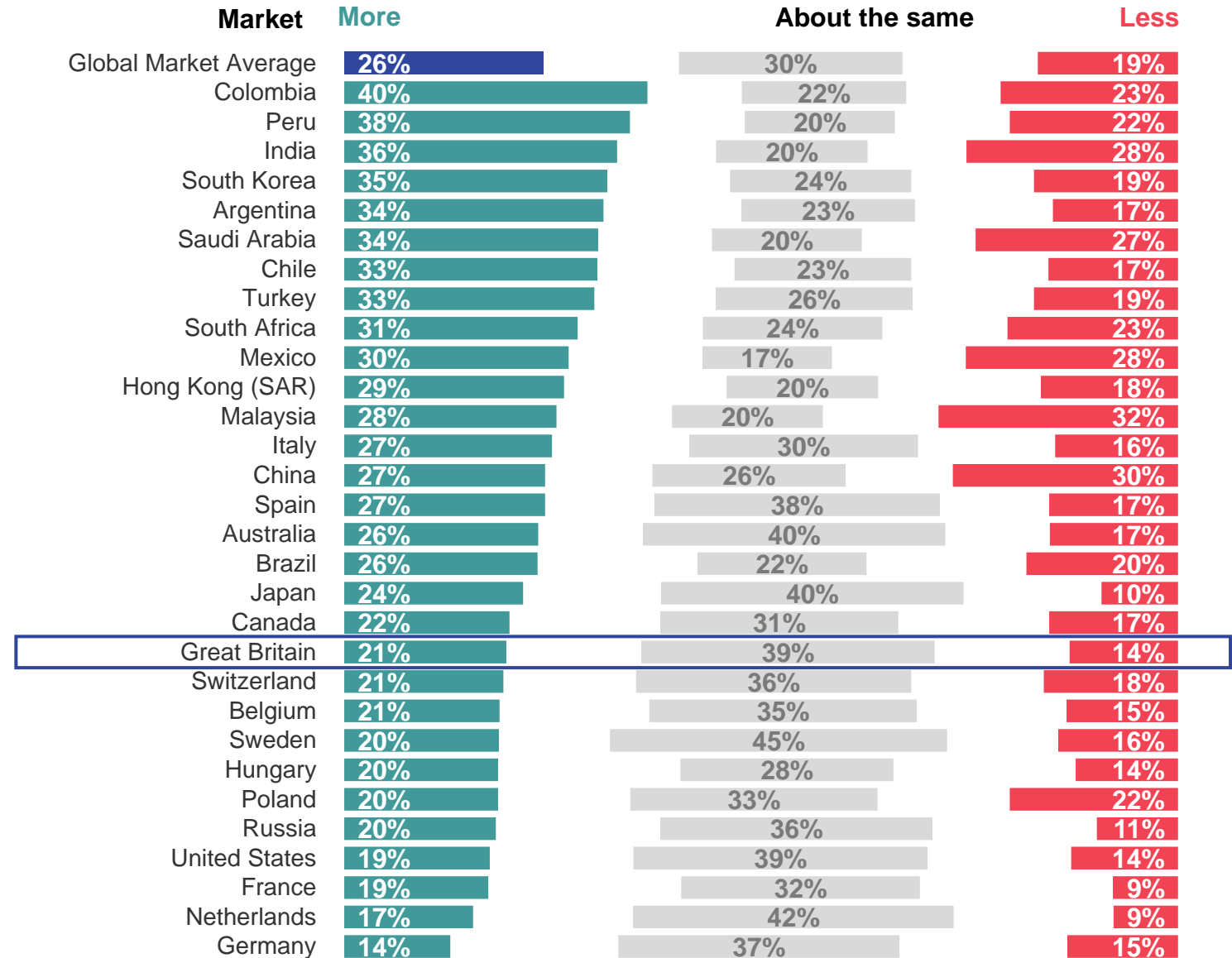
Domestic and no-fly holidays are set to remain as popular

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



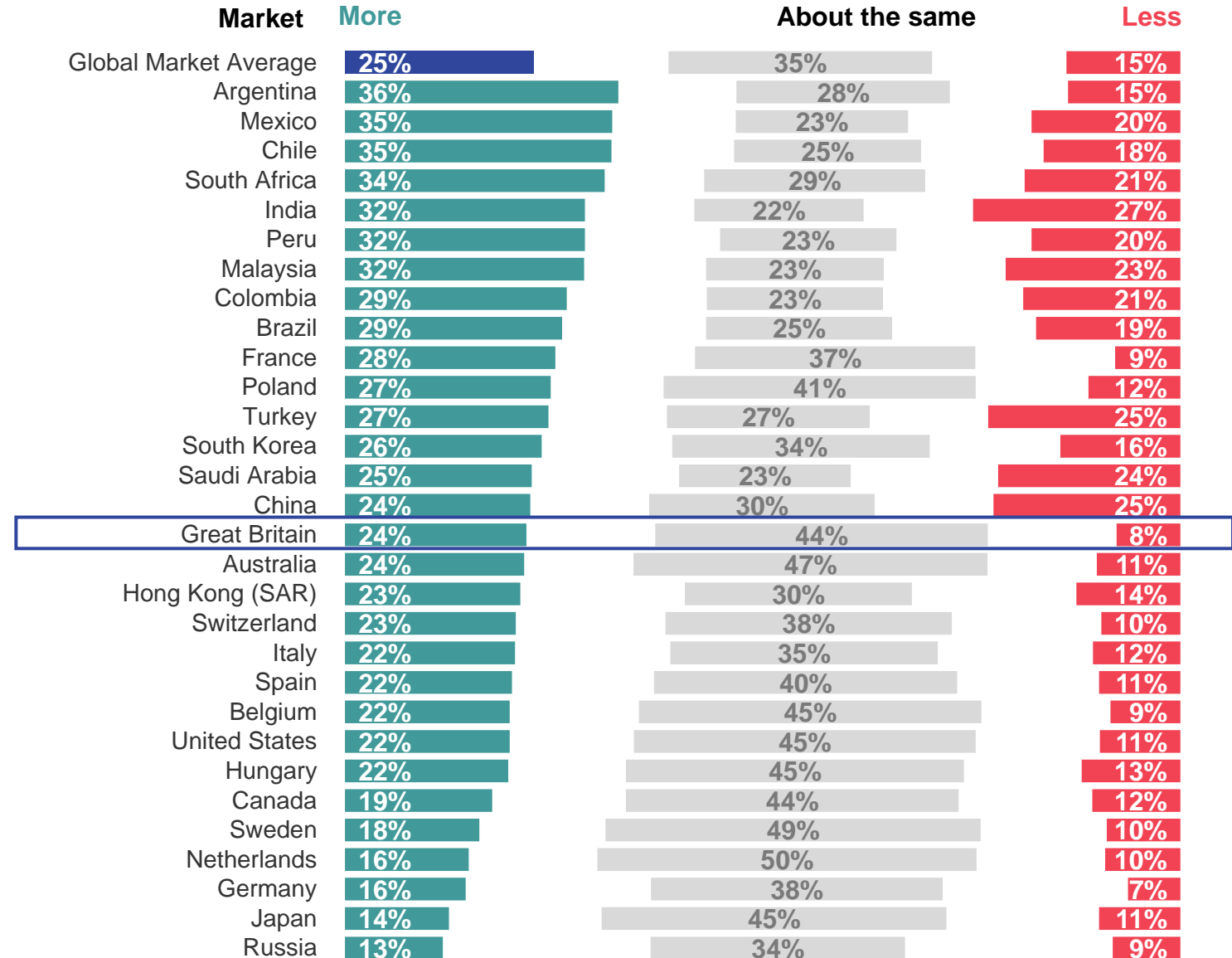
'Old' is the new 'new'? The public predict small change in second-hand consumption

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



Britons **feel the burden of responsibility for climate change**, with 73% agreeing that if ordinary people do not act now to combat climate change they will be failing future generations – in line with the Global Market Average (72%)



In GB, 71% agree 'I understand what action I need to take to play my part in tackling climate change.' This is similar to the Global Market Average of 69%. Yet **Ipsos Perils of Perception research shows that this isn't always the case.** Most people 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 55% in GB expecting to make this change over the coming year (59% Global Market Average). The British 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.



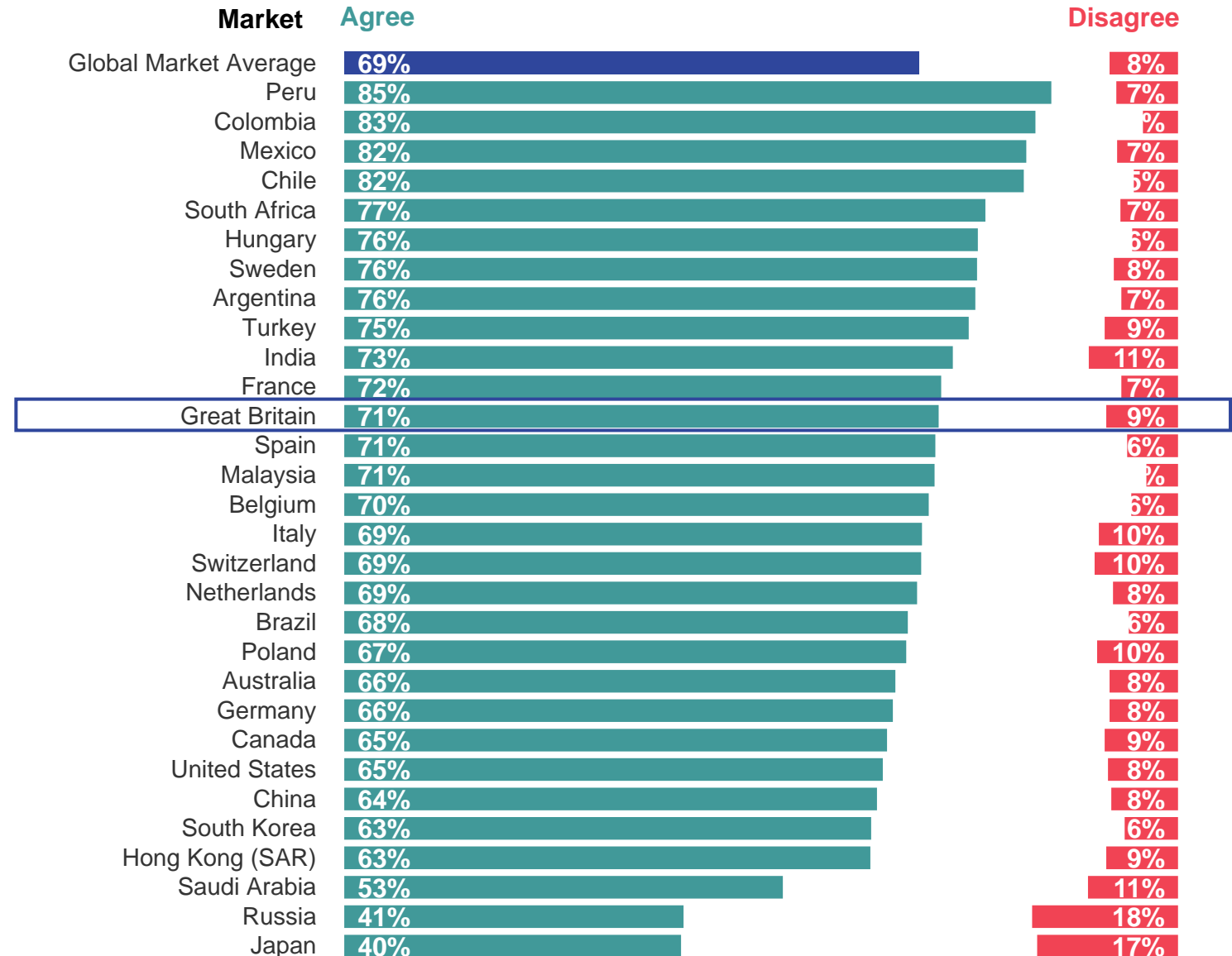
The proportion who feel they are already taking as much action as they can is similar to before COVID-19 began to have widespread lifestyle impacts globally, in early 2020.

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?



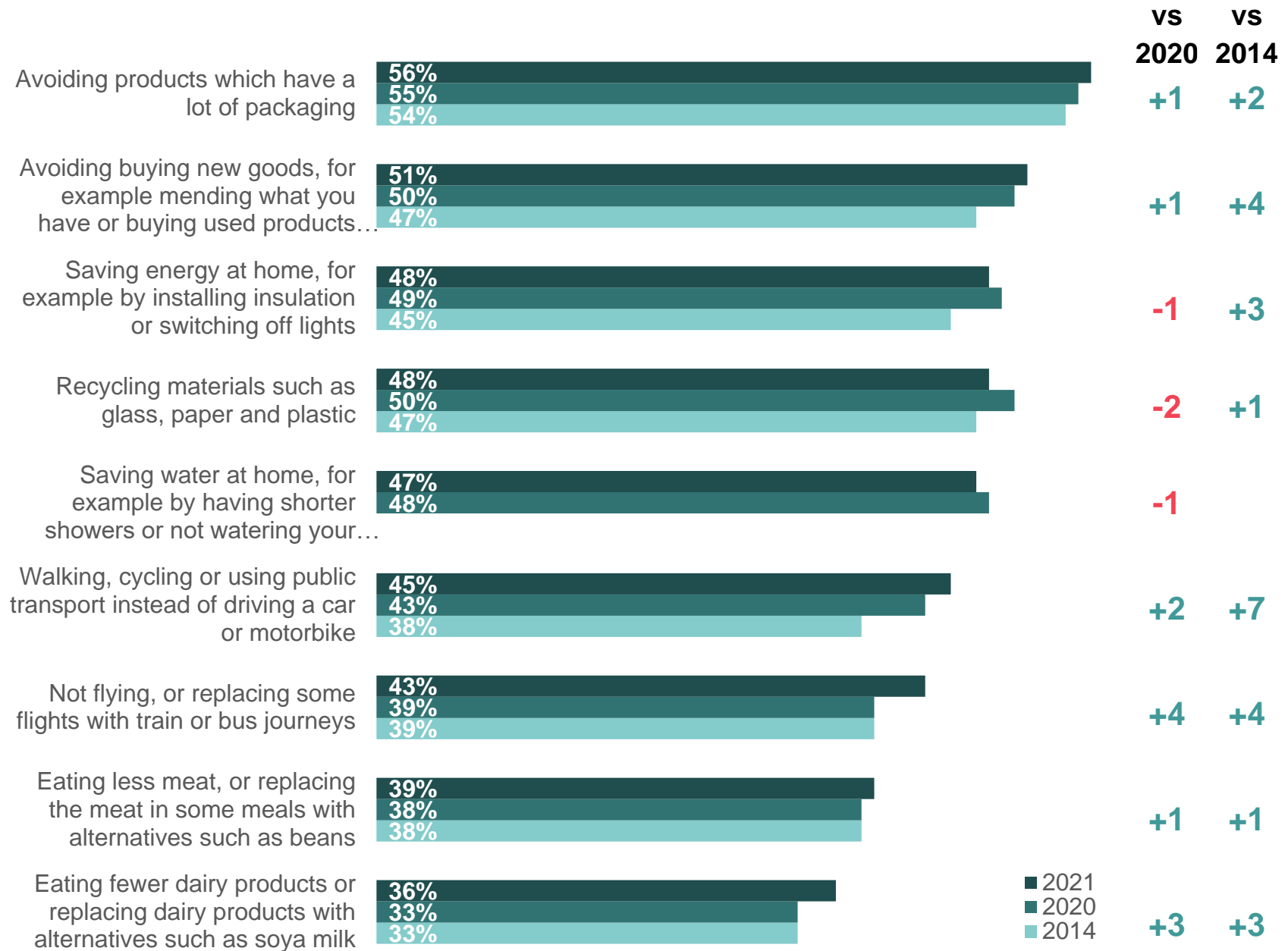
While the public believe they know what action they should take, **higher-impact climate actions are consistently at the bottom of their list.** Ipsos Perils of Perception research shows the public **overestimate low-impact changes and underestimate high impact ones.**

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



Base: 2021: 10,005 online adults aged 16-74 across 12 markets; 2020: 10,504 online adults aged 16-74 across 12 markets; 2014: 12,135 adults aged 16-74 across 12 markets. Fieldwork dates: 19 Feb – 5 Mar 2021; 21 Feb – 6 Mar 2020; 26 Sep – 10 Oct 2014. Comparator markets were asked this question in 2021 and 2020: Brazil, China, France, Germany, Great Britain, India, Italy, Japan, Poland, Russia, South Africa and the United States.



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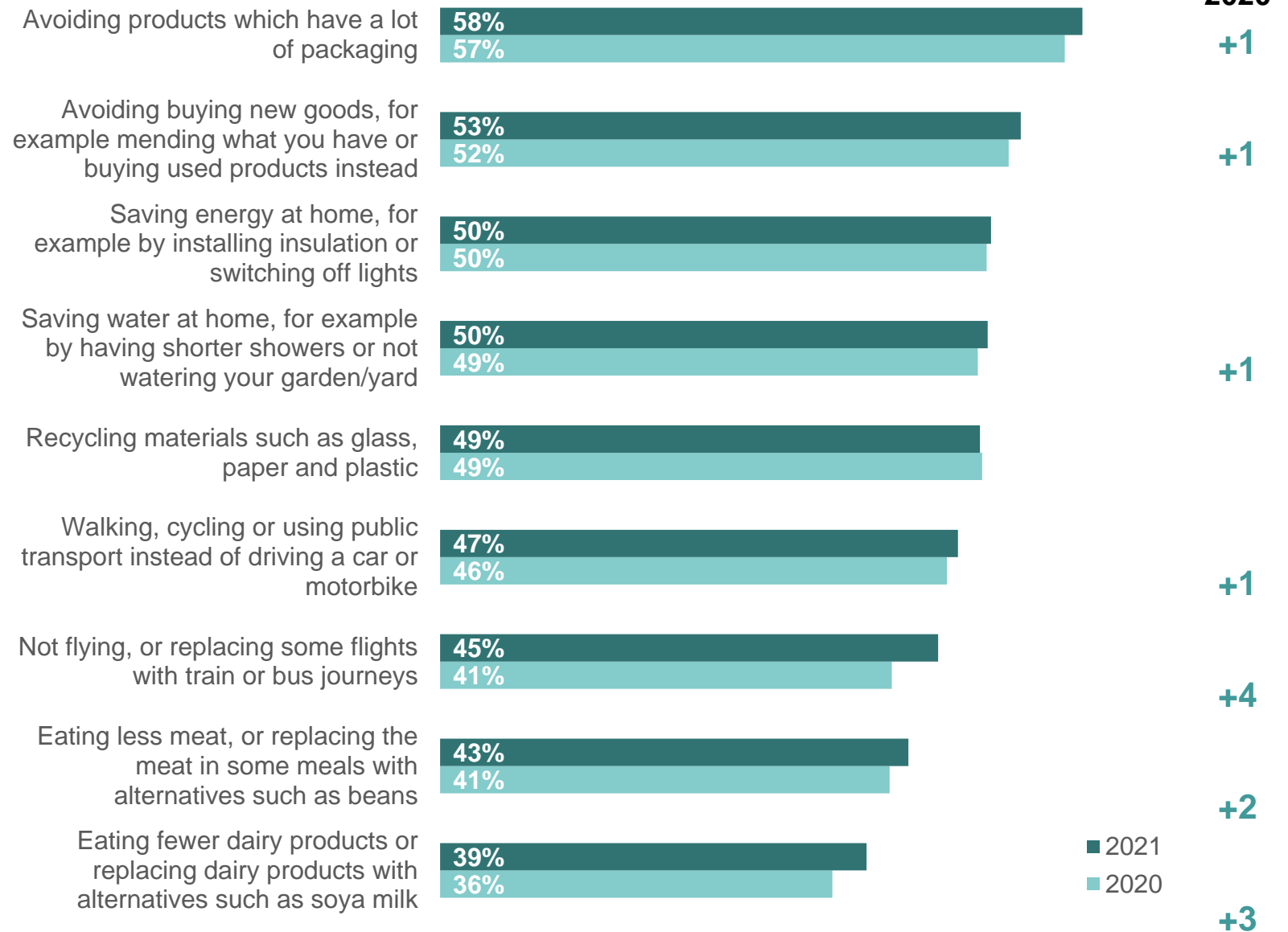


Little change on sustainable behaviours since last year

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 were 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.



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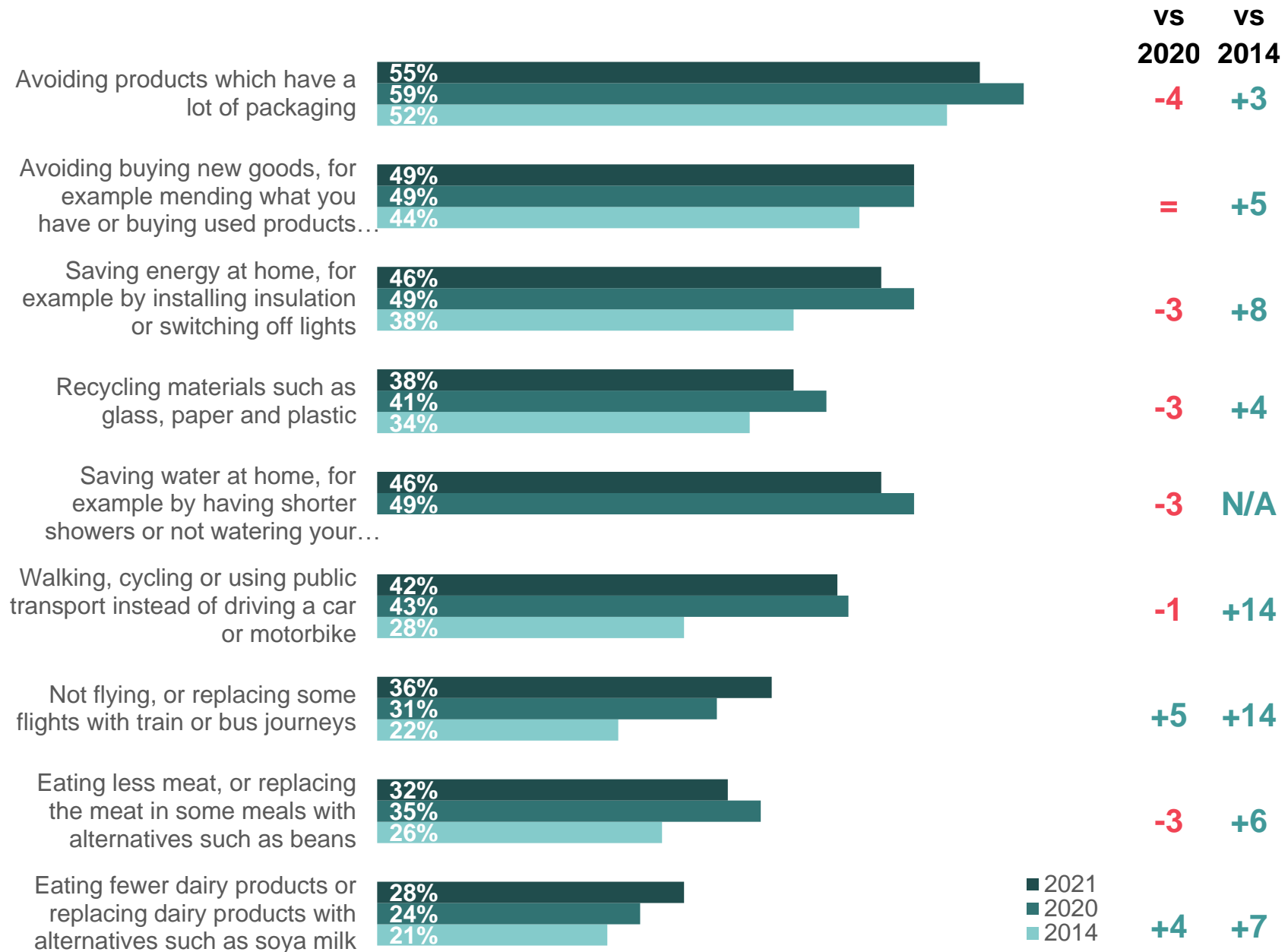


Britons have made bigger changes on more impactful climate behaviours

GB Market - 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: 1,000 online adults aged 16-74; 2020: 1,000 online adults aged 16-74.
2014: 1,040 online adults aged 16-74. Fieldwork dates: 19 Feb – 5 Mar 2021; 21 Feb – 6 Mar 2020. 26 Sep – 10 Oct 2014.

Intention to avoid flights and dairy products are the two behaviours for which we see the clearest upward trends in GB.

Gains on these behaviours **in the last year alone** are similar in scale to gains seen in the **six years** between 2014 and 2020.

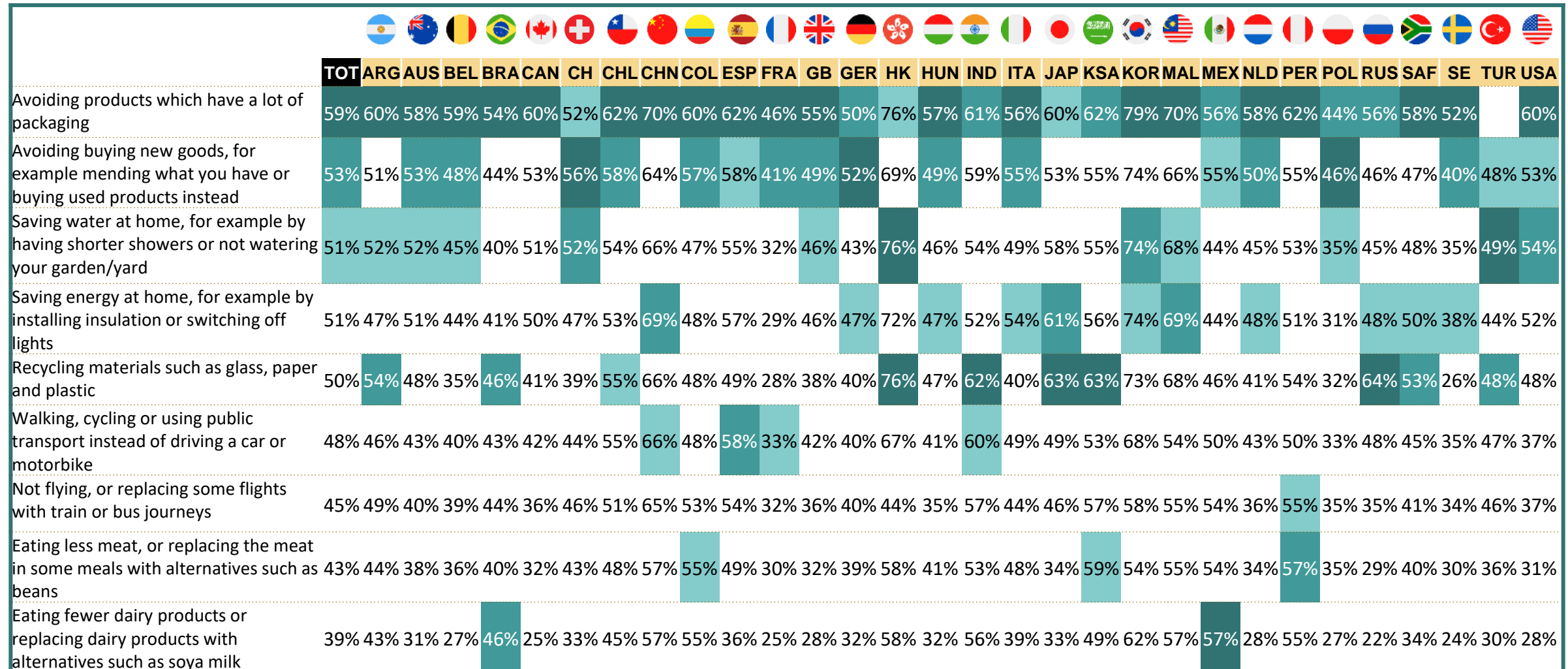


Likelihood to take action on climate change 2021 across markets

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



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



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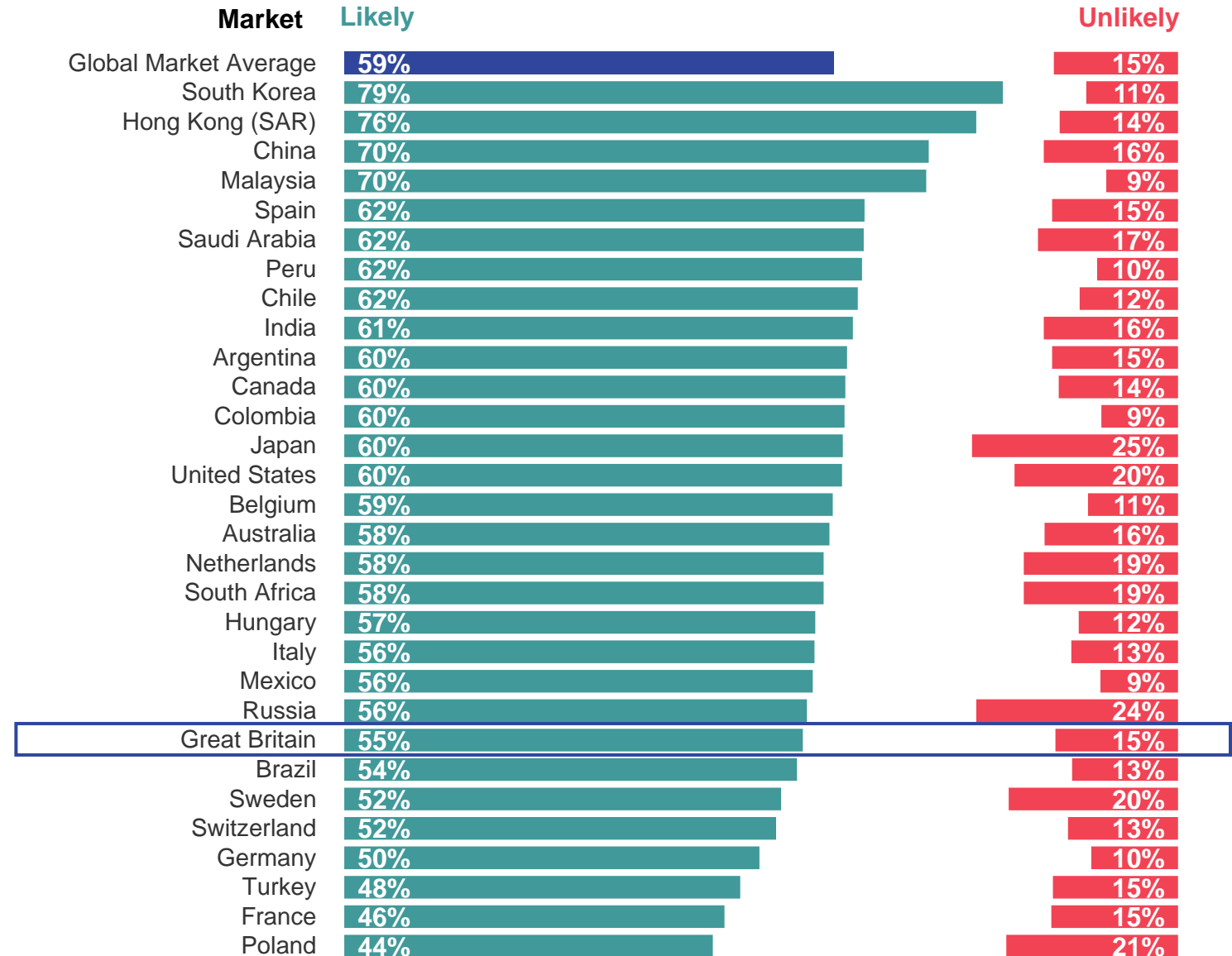


Likelihood to avoid products with a lot of packaging

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

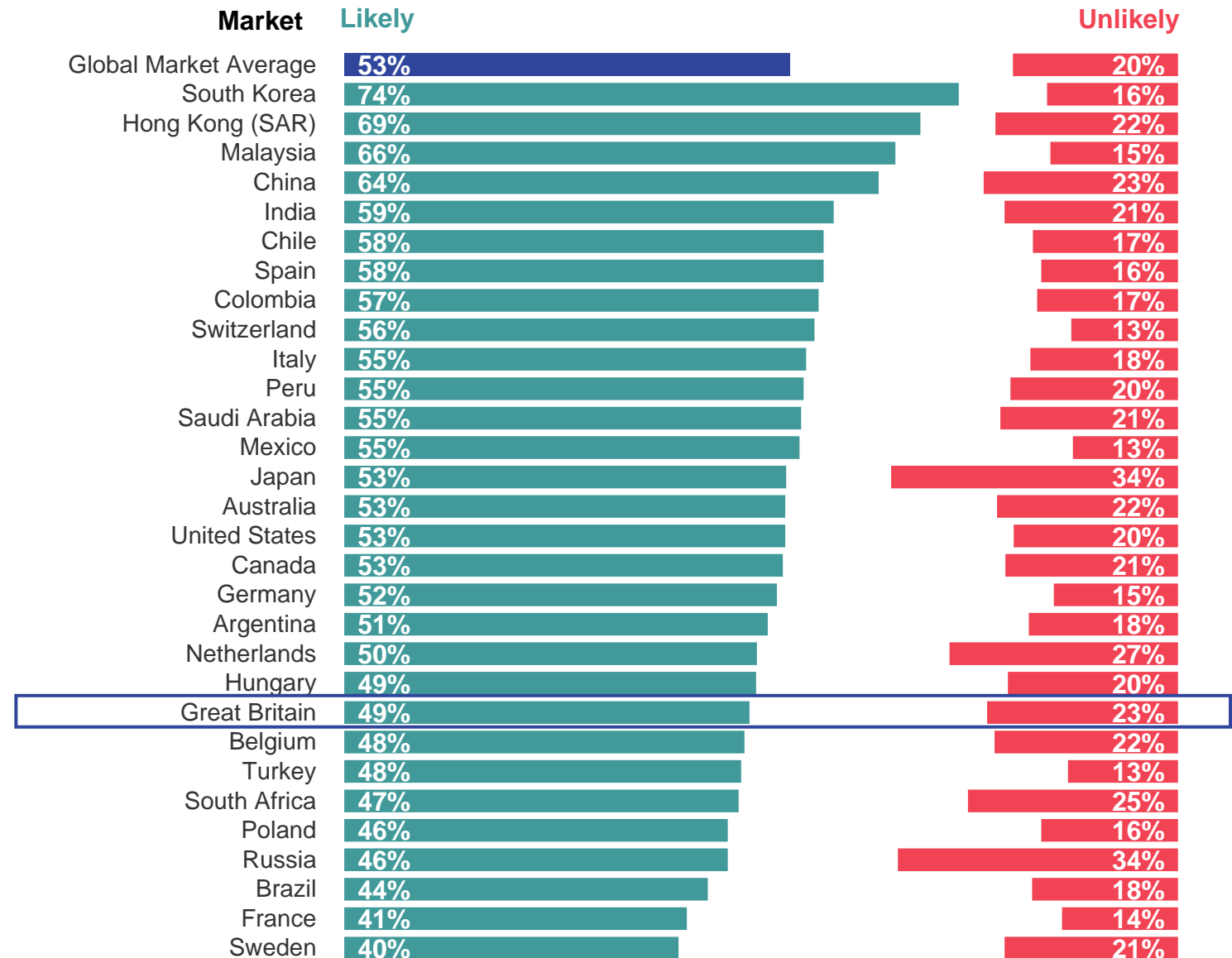


Likelihood to buy second hand and mend broken items

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

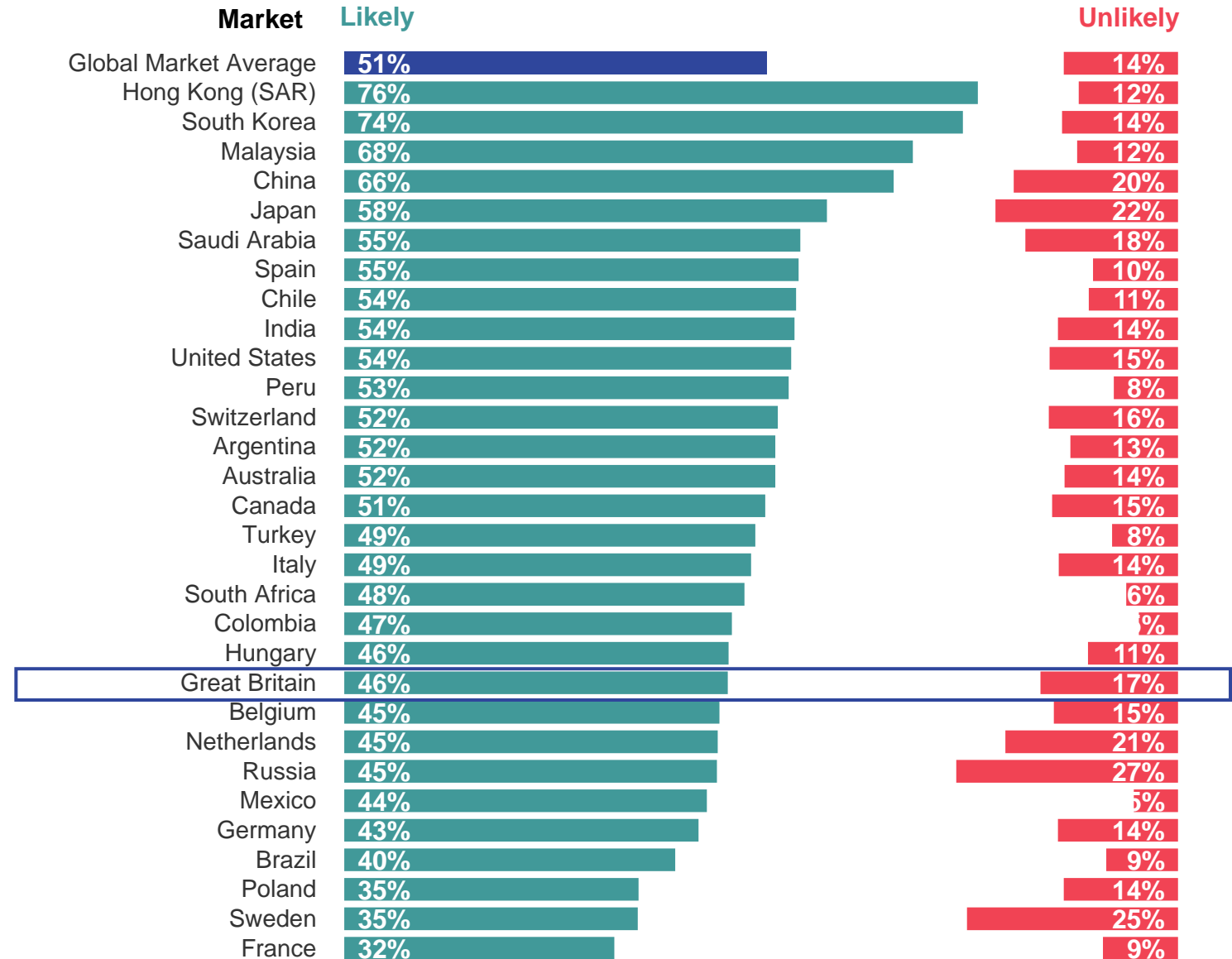


Likelihood to save water at home

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

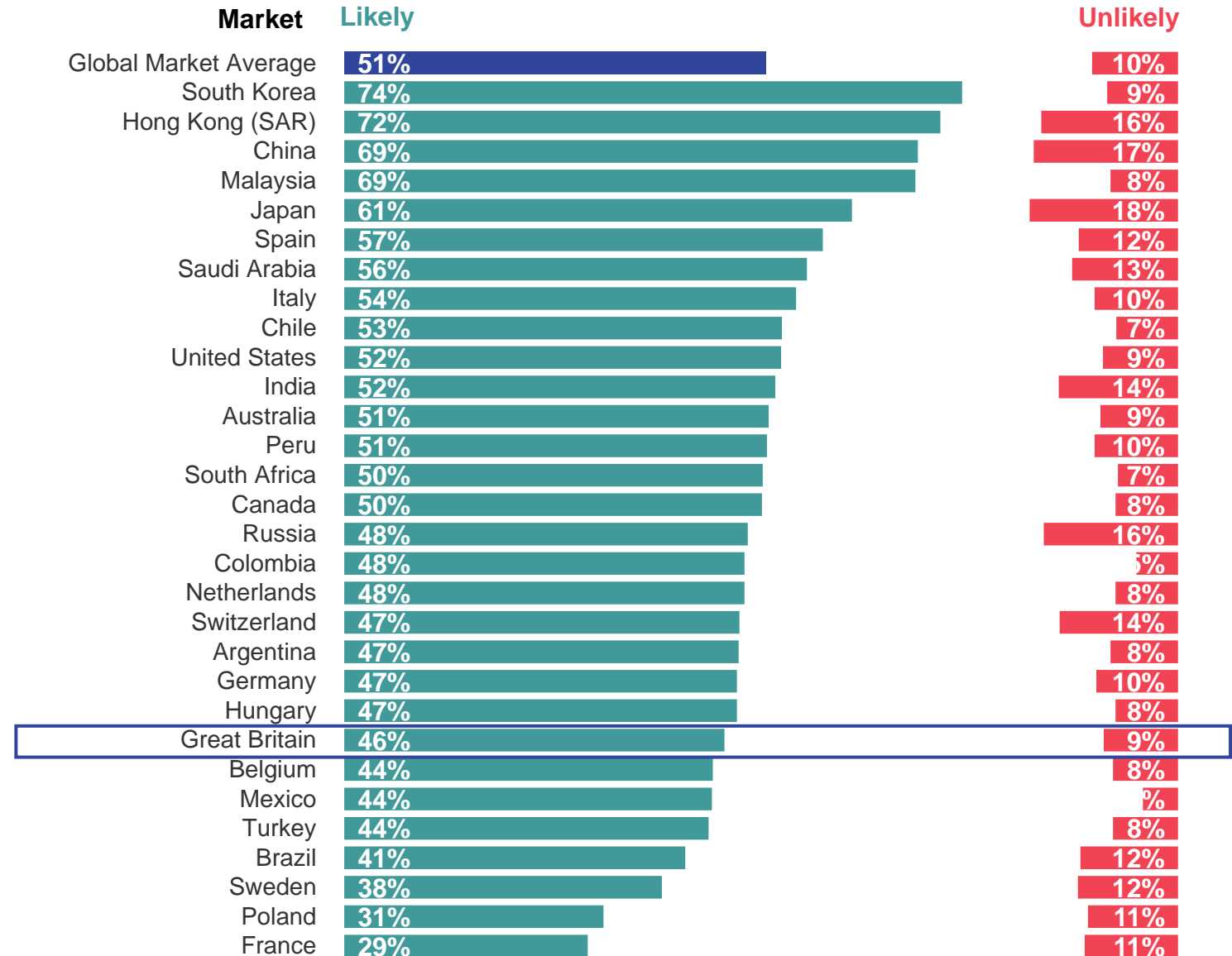


Likelihood to save energy

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

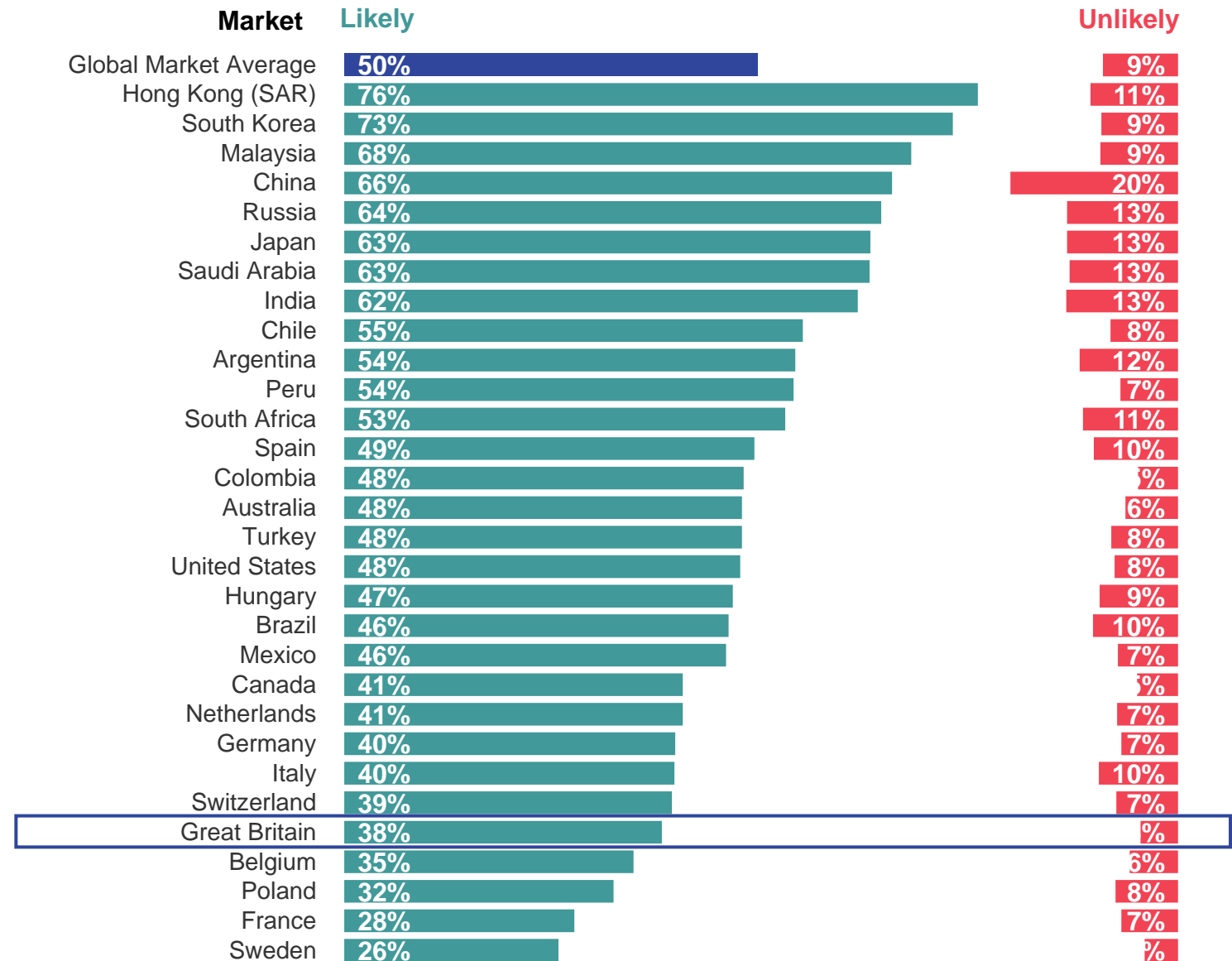


Likelihood to recycle

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

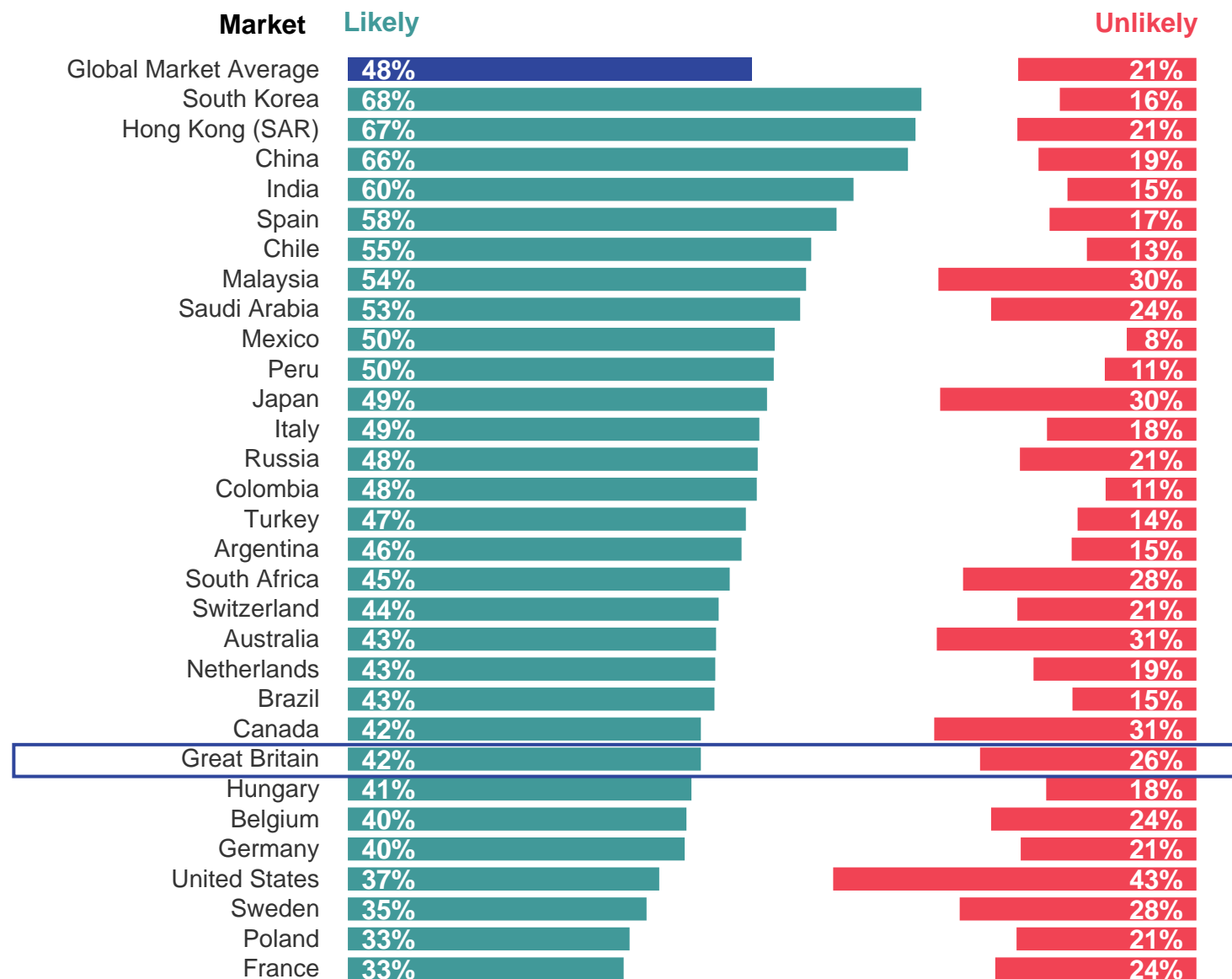


Likelihood to change daily travel

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

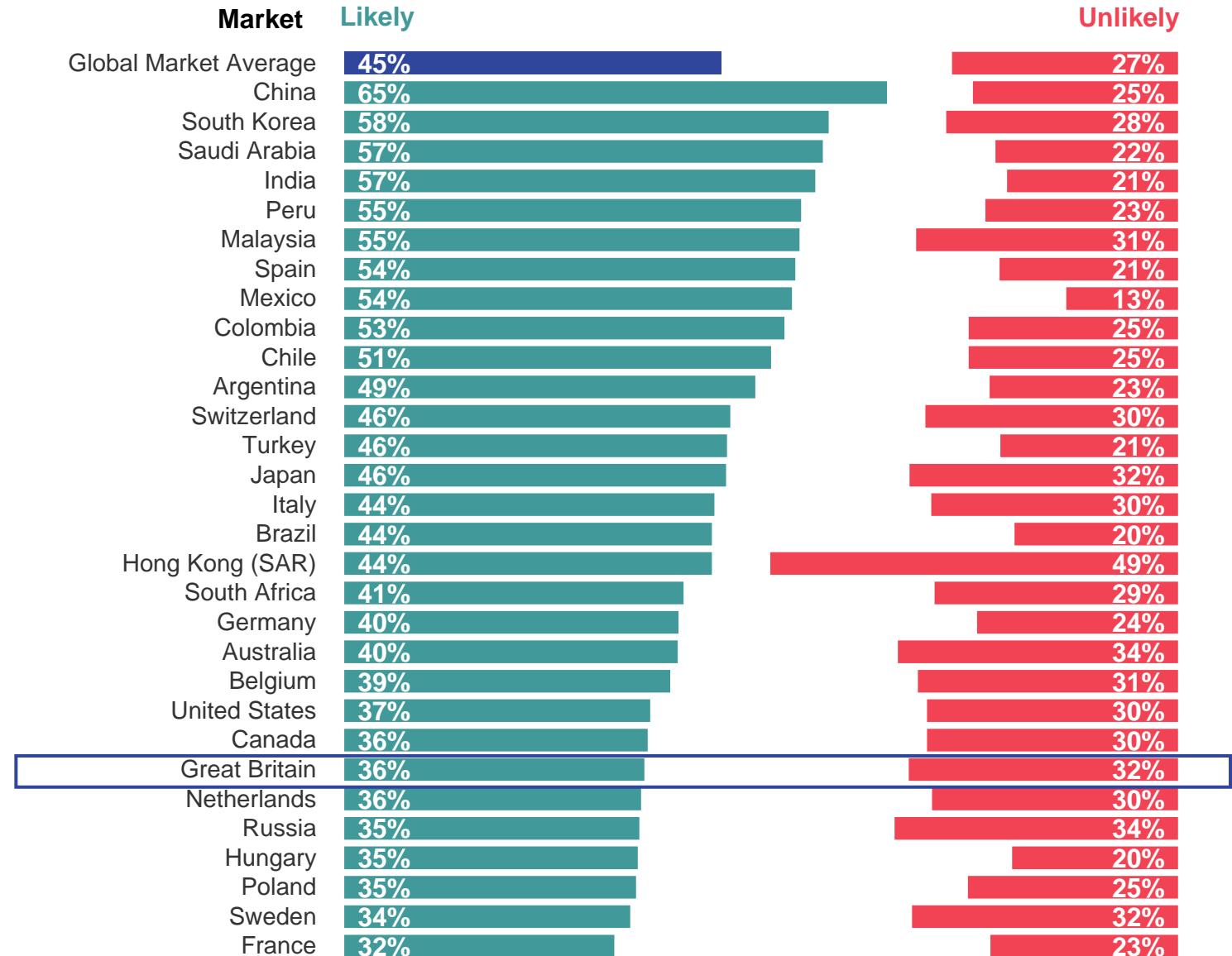


Likelihood to avoid flying

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

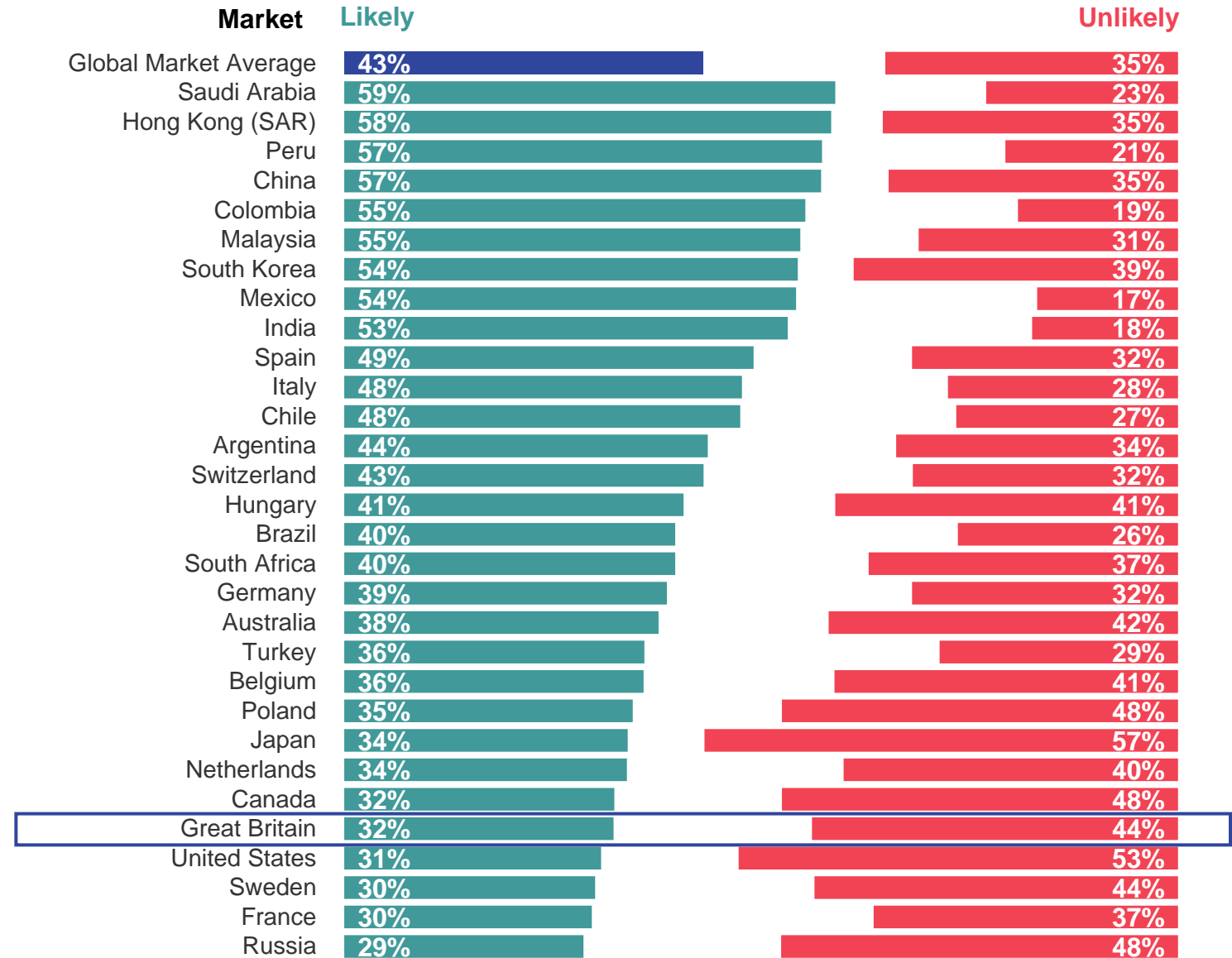


Likelihood to eat less meat

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

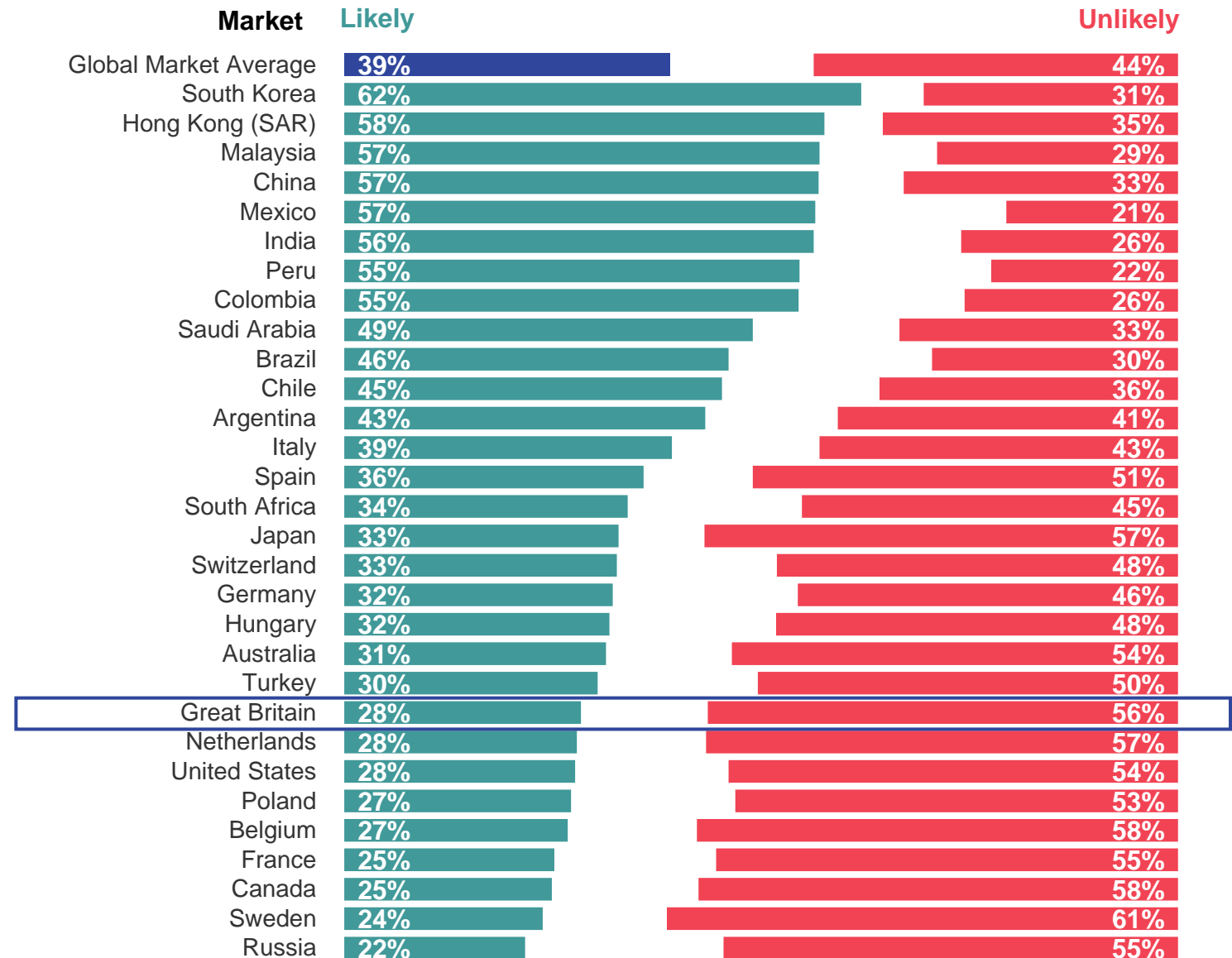


Likelihood to eat and drink fewer dairy products

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 30 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, 2021. 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 20 7347 3260

Sophie Thompson

Details:

Sophie.Thompson2@ipsos.com

Tel: +44 20 3059 5361

ABOUT IPSOS

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

Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques.

“Game Changers” – our tagline – summarises our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

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 for 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.

