PERILS OF PERCEPTION

Environmental Perils GB findings April 2021







These are the latest findings from Ipsos' Perils of Perception survey. The survey was conducted in 30 markets and asked people about what individuals can do to tackle climate change. This deck presents findings for Great Britain only.

For the purpose of this study, the main sources of 'actual' data for impacts of individual actions on climate change can be found at the end of the report.



Summary

Despite <u>high concern</u> and <u>high confidence</u> among Britons we know what to do in our own lives to combat climate change, misperceptions are rife and many often just don't know.

On average, Britons <u>underestimate</u> the most impactful climate actions they can take, such as having fewer children and <u>overestimate</u> some less impactful ones, such as recycling Awareness of the climate change impacts we are already seeing is low. Few knew <u>how</u> <u>warm</u> recent years have been, or how many lives are <u>already impacted</u> by climate change

Climate action messaging can <u>confuse</u>: many think it's better to <u>eat local</u> meat rather than imported plants, when the reverse is true: <u>vegetarianism</u> is far more impactful



In Great Britain, over 7 in 10 agree:

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

But do we really?



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

In almost every market, a majority agree they understand what action they need to take to tackle climate change.

But do we really?

Market	Agree	Disagree
Global Market Average	69%	8%
Peru	85%	7%
Colombia	83%	%
Mexico	82%	7%
Chile	82%	5%
South Africa	77%	7%
Hungary	76%	6%
Sweden	76%	8%
Argentina	76%	7%
Turkey	75%	9%
India	73%	11%
France	72%	7%
Great Britain	71%	9%
Spain	71%	6%
Malaysia	71%	%
Belgium	70%	6%
Italy	<u>69%</u>	10%
Switzerland	<u>69%</u>	10%
Netherlands	<u>69%</u>	8%
Brazil	68%	<u>6%</u>
Poland	<u>67%</u>	10%
Australia	<u>66%</u>	8%
Germany Canada	<u>66%</u>	8%
United States	<u>65%</u>	9%
China	65% 64%	8% 8%
South Korea	63%	6%
Hong Kong	63%	9%
Saudi Arabia	53%	11%
Russia	41%	18%
Japan	40%	17%

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

Behavioural perceptions

How do we reduce our climate change impact?

Looking at well-known 'green' actions, how does the public rank potential greenhouse gas savings from each?



From this list of options, which three do you think would most reduce the greenhouse gas emissions of an individual living in one of the world's richer countries?

Global Market Average vs GB

While all actions can make a difference, the most impactful actions are ranked too low, and the least impactful actions ranked too high in the public's estimations of carbon savings.

Global Market Average vs GB		Actual rank	CO ₂ saved (tonnes)
Recycling as much as possible	59% 55%	7	0.2
Buying energy only from renewable sources (e.g. wind power, hydro-electric)	49% 45%	4	1.5
Replacing a typical car with an electric car or hybrid	41% 39%	5	1.1
Avoiding one long-distance flight (lasting six hours or more)	21% 29%	3	1.6
Not having a car	17% 24%	2	2.4
Eating a plant-based diet	14% 21%	6	0.8
Replacing traditional incandescent lightbulbs with low energy compact fluorescent (CFL) or LED lightbulbs	36% 21%	9	0.1
Hang-drying their clothes, instead of using an electric or gas dryer	26% 20%	8	0.2
Having one fewer child	11% 19%	1	58.6*

Global Market Average GB

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 *Source: Institute of Physics, 2017. The most effective individual steps to tackle climate change aren't being discussed. Available here: https://phys.org/news/2017-07-effective-individual-tackle-climate-discussed.html



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NB: Emissions saved from having one fewer child is calculated by quantifying future emissions of descendants based on historical rates, based on heredity

From this list of options, which three do you think would most reduce the greenhouse gas emissions of an individual living in one of the world's richer countries?

Great Britain

The difference is clear when ranked by actual order – actions like recycling are over-estimated compared with not having a car at all or avoiding long-distance flights

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Great Britain		Actual rank	saved (tonnes)
Having one fewer child	19%	1	58.6*
Not having a car	24%	2	2.4
Avoiding one long-distance flight (lasting six hours or more)	29%	3	1.6
Buying energy only from renewable sources (e.g. wind power, hydro- electric)	45%	4	1.5
Replacing a typical car with an electric car or hybrid	39%	5	1.1
Eating a plant-based diet	21%	6	0.8
Recycling as much as possible	55%	7	0.2
Hang-drying their clothes, instead of using an electric or gas dryer	20%	8	0.2
Replacing traditional incandescent lightbulbs with low energy compact fluorescent (CFL) or LED lightbulbs	21%	9	0.1

Base: 1,000 online adults aged 16-74, 19 Feb - 5 Mar 2021

*Source: Institute of Physics, 2017. The most effective individual steps to tackle climate change aren't being discussed. Available here: https://phys.org/news/2017-07-effective-individual-tackle-climate-discussed.html



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NB: Emissions saved from having one fewer child is calculated by quantifying future emissions of descendants based on historical rates, based on heredity

CO₂

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Going beyond the (more) obvious, what other actions could we take, and do we understand their potential impact?



Which of the following actions do you think appear in the top 30 ways of reducing our personal climate change impact? Please select up to five.

Global Market Average vs GB

Britons were generally more accurate in selecting actions in the top ways to reduce our climate impact.

However, 3 in 5 believed less packaging (61%) was in the top thirty, with half believing buying less (50%) was highly ranked. This was more than, for example, renovating or refurbishing housing for efficiency (40%).

Global Market Average vs GB

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		True rank
Less packaging	52% 61%	38 th
Buying fewer items, or more durable items	46% 50%	46 th
Growing or producing your own food	37% 44%	23 rd
More energy-efficient cooking equipment, using cleaner fuel or renewable energy	46% 43%	9 th
Refurbishing and renovating housing for efficiency	35% 40%	6 th
Car pooling/sharing	36% 39%	27 th
Fuel efficient driving practices (e.g. using the correct gear, and driving more slowly)	33% 36%	34 th
Green roofs - partially or completely covered with vegetation	26% 17%	57 th
Having smaller living spaces / or co-housing to fill empty rooms	13% 9%	31 st
Not having pets	5° 5°	25 th
■ Global Marke	t Average ■GB	

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

*Source: Ivanova et al., 2020. Quantifying the potential for climate change mitigation of consumption options. Available here: https://iopscience.iop.org/article/10.1088/1748-9326/ab8589/pdf Twise we walk



Which of the following actions do you think appear in the top 30 ways of reducing our personal climate change impact? Please select up to five.

Great Britain

The difference is clearer when ranked by actual order – actions such as buying products with less packaging and buying fewer or more durable items are overestimated compared with refurbishing homes for energy efficiency.

Great Britain

		indo raim
Refurbishing and renovating housing for efficiency	40%	6 th
More energy-efficient cooking equipment, using cleaner fuel or renewable energy	43%	9 th
Growing or producing your own food	44%	23 rd
Not having pets	5%	25 th
Car pooling/sharing	39%	27 th
Having smaller living spaces / or co-housing to fill empty rooms	9%	31 st
Fuel efficient driving practices (e.g. using the correct gear, and driving more slowly)	36%	34 th
Less packaging	61%	38 th
Buying fewer items, or more durable items	50%	46 th
Green roofs - partially or completely covered with vegetation	17%	57 th
1 000 caling adults and 40 74 40 Feb 5 May 2004		

Base: 1,000 online adults aged 16-74, 19 Feb - 5 Mar 2021

*Source: Ivanova et al., 2020. Quantifying the potential for climate change mitigation of consumption options. Available here: https://iopscience.iop.org/article/10.1088/1748-9326/ab8589/pdf **True rank**

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Impacts of climate change



Climate change already displaces more people than conflict, but only a minority know this.



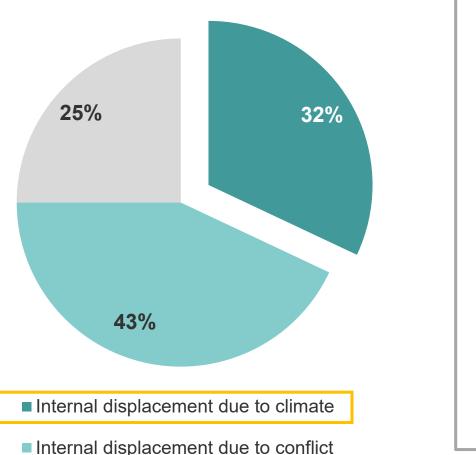
In 2020, do you think more people suffered internal displacement as a result of conflict (such as war, criminal and political violence) or as a result of climate and weather-related disasters (such as hurricanes, storms and flooding)?

Global Market Average

Two in five (43%) believe conflict to be the greater cause of internal displacement, while a third (32%) chose climate and weather-related disasters.

The true cause (climate and weather) accounted for two thirds (67%) of new displacements in the first six months of 2020.

Global Market Average

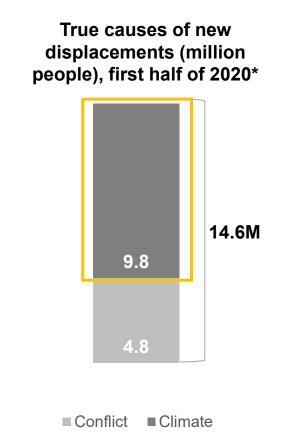


Don't know

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

*Source: GRID, 2020. 2020 Mid-Year Update. Available here: <u>https://www.internal-</u>

displacement.org/sites/default/files/publications/documents/2020%20Mid-year%20update.pdf





In 2020, do you think more people suffered internal displacement as a result of conflict (such as war, criminal and political violence) or as a result of climate and weather-related disasters (such as hurricanes, storms and flooding)?

In GB, 2 in 5 (39%) perceived conflict as being the greater cause of internal displacement, with a third (32%) correctly believing climate/weather to be the greater cause.

This is broadly in line with the Global Market average.

Market	Conflict	Climate/weather-related
Global Market Average	43%	32%
Turkey	68%	24%
Colombia	67%	22%
Chile	58%	28%
Hong Kong	57%	27%
Saudi Arabia	55%	20%
Mexico	54%	33%
Peru	51%	37%
Hungary	49%	31%
Germany	47%	25%
Sweden	44%	34%
India	44%	40%
Malaysia	44%	38%
Switzerland	43%	32%
Argentina	43%	33%
Spain	43%	26%
South Korea	42%	39%
South Africa	40%	41%
Netherlands	40%	24%
Brazil	39%	39%
Great Britain	39%	32%
Italy	38%	29%
Australia	37%	30%
Belgium	37%	30%
Canada	34%	31%
Poland	33%	31%
Russia	31%	35%
United States	31%	43%
France	29%	39%
China	26%	40%
Japan	23%	41%



Feeling hot, hot, hot? Only one in twenty-five of the public know that all of the last six years were among the hottest on record.



The World Meteorological Organization collects annual global temperatures, to see whether they are rising or falling across the world. Records begin in 1850.Since 2015, how many years have been the warmest year on record?

Global Market Averages

Nearly all respondents either underestimated (22%) or were unsure (73%) of how many years since 2015 have been the warmest on record.

Only one in twenty-five (4%) correctly stated that the 6 years since 2015 have been the warmest on record.

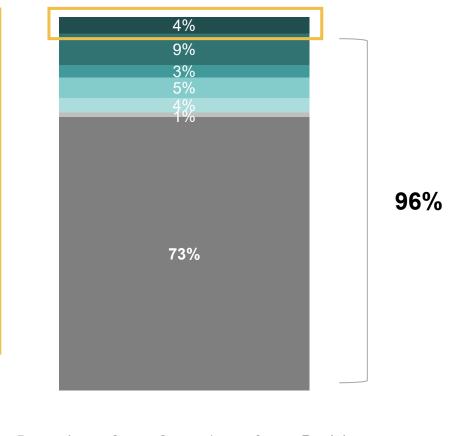
Global Market Average

Average response among those giving an answer:

Since 2015, 4 years have been the warmest on record

Actual data:

Since 2015, **6 years** have been the warmest on record



■6 ■5 ■4 ■3 ■2 ■1 ■0 ■Don't know

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

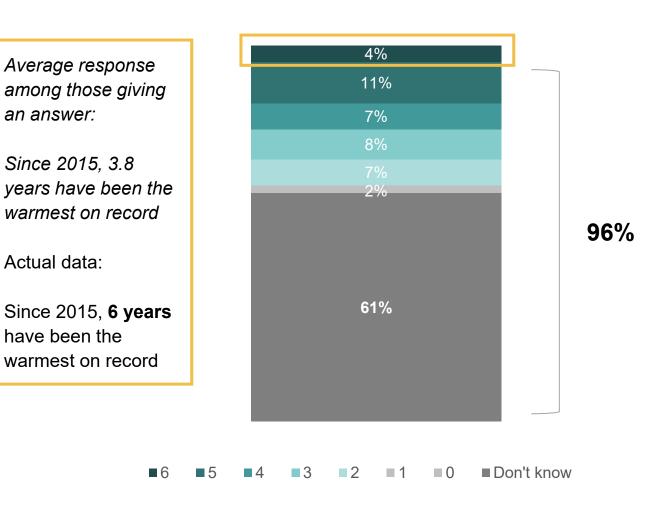
*Source: The World Meteorological Organisation, 2021. 2020 was one of three warmest years on record. Available here: https://public.wmo.int/en/media/press-release/2020-was-one-of-three-warmest-years-record 18

The World Meteorological Organization collects annual global temperatures, to see whether they are rising or falling across the world. Records begin in 1850.Since 2015, how many years have been the warmest year on record?

Great Britain

As with the Global Market Average, the vast majority of respondents were unable to or incorrectly stated how many years since 2015 have been the warmest on record.

Only one in twenty-five (4%) correctly stated that the 6 years since 2015 have been the warmest on record.



Great Britain

Base: 1,000 online adults aged 16-74, 19 Feb – 5 Mar 2021

*Source: The World Meteorological Organisation, 2021. 2020 was one of three warmest years on record. Available here: https://public.wmo.int/en/media/press-release/2020-was-one-of-three-warmest-years-record



Climate change and diet





Going <u>plant-based</u> makes more of a difference to your carbon footprint than <u>eating local</u>, but the public guess this is the other way around.



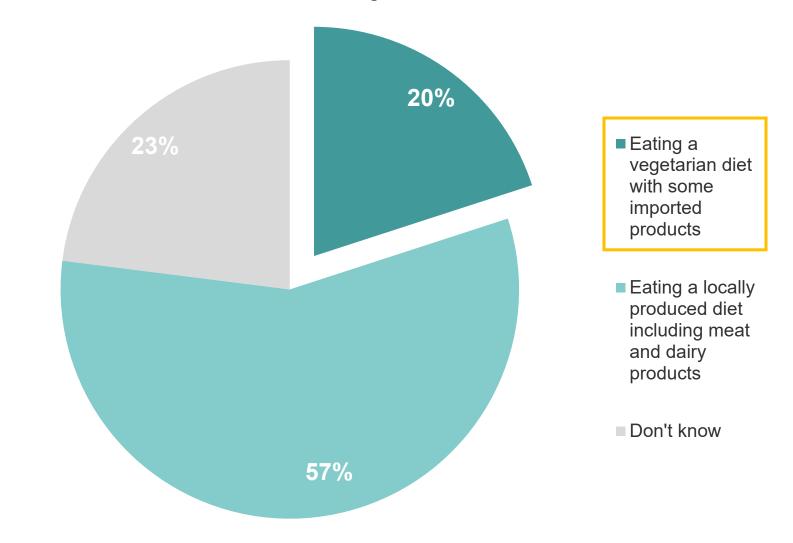
And which of these two actions do you think would most reduce an individual's greenhouse gas emissions?

Global Market Average

Eating local does not necessarily mean eating greener, as switching to a vegetarian diet including some imported fruit and vegetables more effectively reduces an individual's greenhouse gas emissions.

However, three in five (57%) perceived eating a locally produced diet that includes some animal foodstuffs as being the more environmentally friendly diet.

Global Market Average



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

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And which of these two actions do you think would most reduce an individual's greenhouse gas emissions:

Eating a diet that is mostly locally produced, including locally produced meat and dairy products?

Eating a vegetarian diet, even if some of the fruit and vegetables have been imported from other countries?

In GB, 3 in 5 respondents (62%) perceived a locally produced diet to have lower emissions – 5 points higher than the Global Market Average (57%)

Market	Locally produced	Vegetarian
Global Market Average	57%	20%
Hungary	77%	11%
Switzerland	73%	15%
France	70%	7%
Belgium	68%	14%
Sweden	66%	18%
Germany	64%	14%
Great Britain	62%	18%
Canada	62%	10%
Mexico	62%	19%
South Africa	62%	22%
Japan	62%	10%
Australia	60%	17%
Italy	60%	18%
Spain	59%	14%
Netherlands	59%	23%
Hong Kong	56%	29%
Turkey	56%	16%
Saudi Arabia	55%	24%
United States	55%	13%
South Korea	53%	18%
Russia	52%	12%
Poland	51%	11%
China	51%	20%
Peru	51%	29%
Malaysia	50%	25%
Argentina	50%	26%
Chile	46%	30%
Colombia	45%	37%
India	44%	47%
Brazil	41%	31%



The true meaning of food miles? Public understanding of relative impact of meat and miles is low. We have little idea of how burgers compare to carbon emissions from driving.



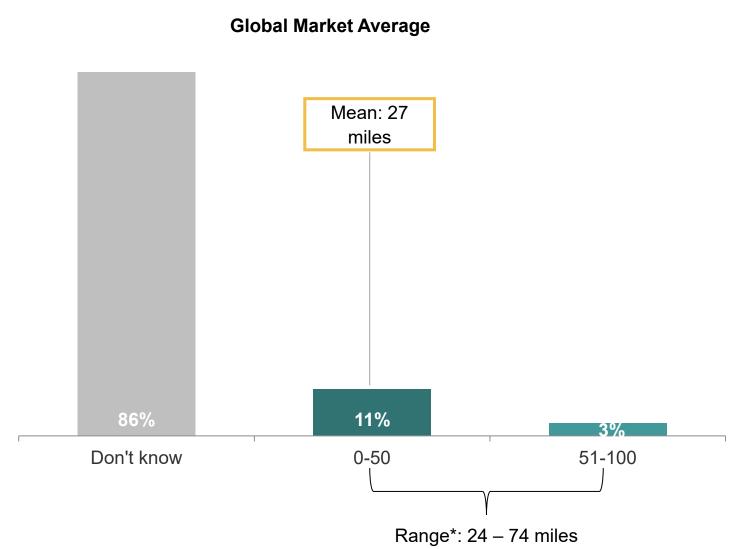
The amount of carbon dioxide released into the atmosphere as a result of making one beef burger is equivalent to driving how far in a car?

Global Market Average – mean in miles

The majority of respondents (86%) could not say how many miles of driving a beef burger was equivalent to. Of those who answered, 1 in 10 (11%) believed this to be 50 miles or less.

The true journey range is between 24 and 75 miles, depending on car efficiency. The average answer (27 miles) came just within the lower end of this range.

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

*Source: Our World in Data, 2020. You want to reduce the carbon footprint of your food? Focus on what you eat, not whether your food is local. Available here: <u>https://ourworldindata.org/food-choice-vs-eating-local</u>; IEA 2021. Tracking Transport 2020. Available here: <u>https://www.iea.org/reports/tracking-transport-2020/rail#abstract</u>. Quarter pounder burger patty weight of 113.4g is assumed.

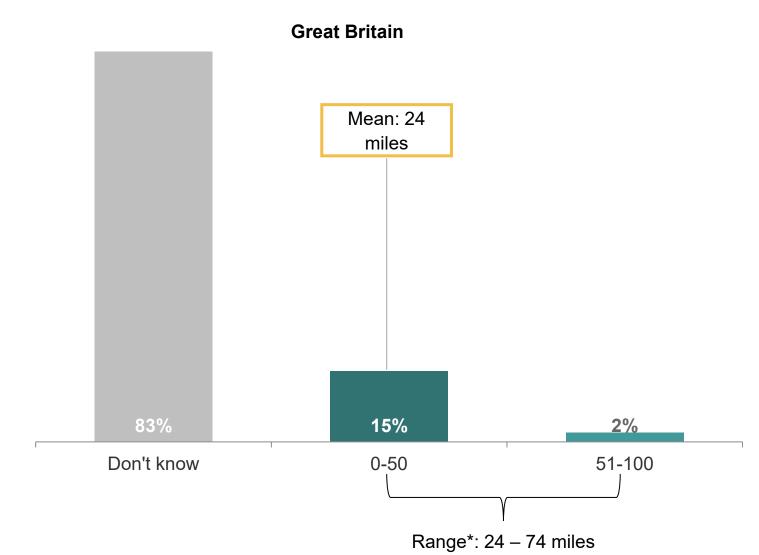


The amount of carbon dioxide released into the atmosphere as a result of making one beef burger is equivalent to driving how far in a car?

Great Britain – mean in

As with the Global Market Average, most Britons (83%) could not say how many miles of driving a beef burger was equivalent to. Of those who answered, 15% believed this to be 50 miles or less.

The average answer (24 miles) was at the bottom end of the true range.



Base: 1,000 online adults aged 16-74, 19 Feb – 5 Mar 2021

*Source: Our World in Data, 2020. You want to reduce the carbon footprint of your food? Focus on what you eat, not whether your food is local. Available here: <u>https://ourworldindata.org/food-choice-vs-eating-local</u>; IEA 2021. Tracking Transport 2020. Available here: <u>https://www.iea.org/reports/tracking-transport-2020/rail#abstract</u>. Quarter pounder burger patty weight of 113.4g is assumed.



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,

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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 countries (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.



Summary of sources for actual data

A range of data sources were used to derive the 'true' values referenced in this deck. Details of each source and any assumptions made are included on the relevant slides. The full list of sources is included below:

GRID, 2020. 2020 Mid-Year Update. Available here: <u>https://www.internal-</u> <u>displacement.org/sites/default/files/publications/documents/2020%20Mid-year%20update.pdf</u>

IEA 2021. Tracking Transport 2020. Available here: https://www.iea.org/reports/tracking-transport-2020/rail#abstract

Institute of Physics, 2017. *The most effective individual steps to tackle climate change aren't being discussed*. Available here: <u>https://phys.org/news/2017-07-effective-individual-tackle-climate-discussed.html</u>

Ivanova et al., 2020. *Quantifying the potential for climate change mitigation of consumption options*. Available here: <u>https://iopscience.iop.org/article/10.1088/1748-9326/ab8589/pdf</u>

Our World in Data, 2020. You want to reduce the carbon footprint of your food? Focus on what you eat, not whether your food is local. Available here: <u>https://ourworldindata.org/food-choice-vs-eating-local</u>

The World Meteorological Organisation, 2021. 2020 was one of three warmest years on record. Available here: https://public.wmo.int/en/media/press-release/2020-was-one-of-three-warmest-years-record

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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.**

