

# **SUSTAINABILITY:**

**What we know & how you can act  
in Switzerland – 2022 & beyond**



## **Switzerland Report**

**June 2022**

**GAME CHANGERS**





# IPSOS IN SWITZERLAND



■ Largest Market Research Agency in Switzerland

■ Focus on global projects as an **international Ipsos Hub** and local projects in **Switzerland**

■ Strong collaboration with our **global network (Ipsos Global Thought Leaders)** and external partners



**120+ EMPLOYEES IN SWITZERLAND**  
**20+ NATIONALITIES**

## Customer Experience & Employee Research

Audience Measurement	Market Measurement
Brand Health Tracking	Mystery shopping
Clinics and Mobility Labs	Market Strategy and Understanding
Creative Excellence	
Corporate Reputation	Public Affairs
Healthcare	Observer
Ipsos UU	Quality Management
Ipsos MMA	Social Intelligence Analytics
Innovation	

# IPSOS THOUGHT LEADERSHIP ABOUT «SUSTAINABILITY»

[The Sustainability Imperative | Ipsos](#)



[Earth Day 2022: few can correctly identify actions which are best at cutting carbon emissions](#) & [Earth Day 2022: awareness of government actions to combat climate change is low in most countries despite high level of concern](#)

## Ipsos in Switzerland Earth Day Webinar 2022 with a global focus



[Sustainability: What we know and how you can act in 2021 & beyond \[WEBINAR RECORDING\]](#)



[The Rewired Consumer - Tetra Pak Index 2021](#)



[Link to White Paper](#)



[Link to White Paper](#)



[Link to White Paper](#)





# **AGENDA**

**LEVEL OF CONCERN ABOUT CLIMATE CHANGE**

**POSSIBILITY OF SIGNIFICANT CHANGES IN THE NEXT  
10 YEARS**

**KEY ACTORS TO DRIVE CHANGE**

**ACTIONS OF CONSUMERS**



## B2C Study among Swiss Consumers



- 31 markets around the world via the Ipsos Online Panel system
- Total base: **23'577 online adults aged 16-74** across 31 markets, including **500 interviews in Switzerland**
- Fieldwork dates: February 18 to March 4, 2022
- The markets reporting herein are Argentina, Australia, Belgium, Brazil, Canada, mainland China, Chile, Colombia, France, Great Britain, Germany, Hungary, India, Ireland, Italy, Japan, Malaysia, Mexico, the Netherlands, Norway, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Spain, Sweden, **Switzerland**, Turkey and the United States of America.



# LEVEL OF CONCERN ABOUT CLIMATE CHANGE

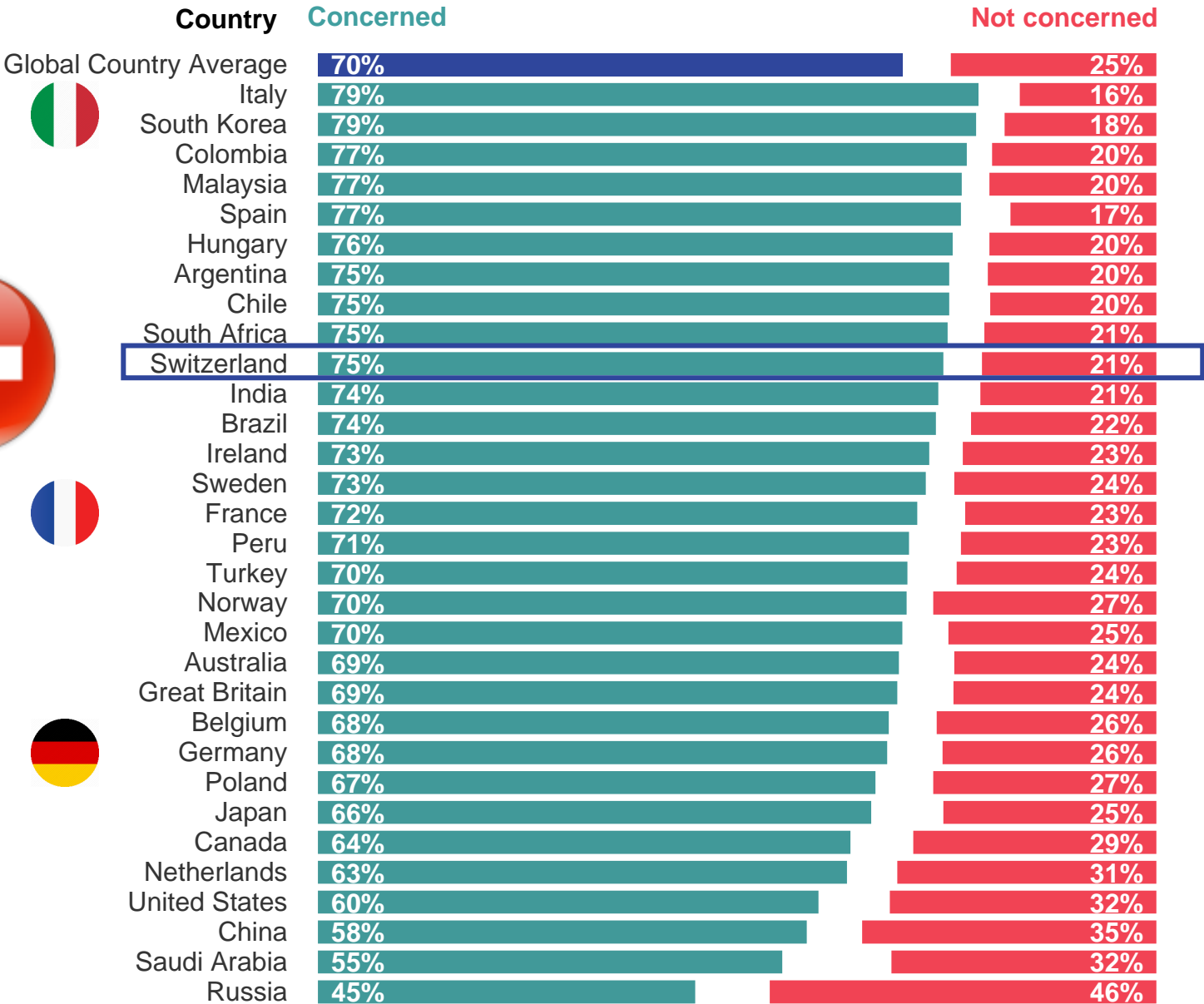
# Swiss population is one of the most concerned about the impact of climate change abroad...

**+** Swiss citizens above 35 years are more concerned (78%) than people under 35 (67%)



## Country data

Q. How concerned are you, if at all, about the impacts of climate change that are already being seen in **other countries** around the world?



Base: 23,577 online adults across 31 countries, 18 Feb – 4 Mar 2022. NB surveyed adults aged 16-74 in 30 countries, adults aged 16-99 in Norway.







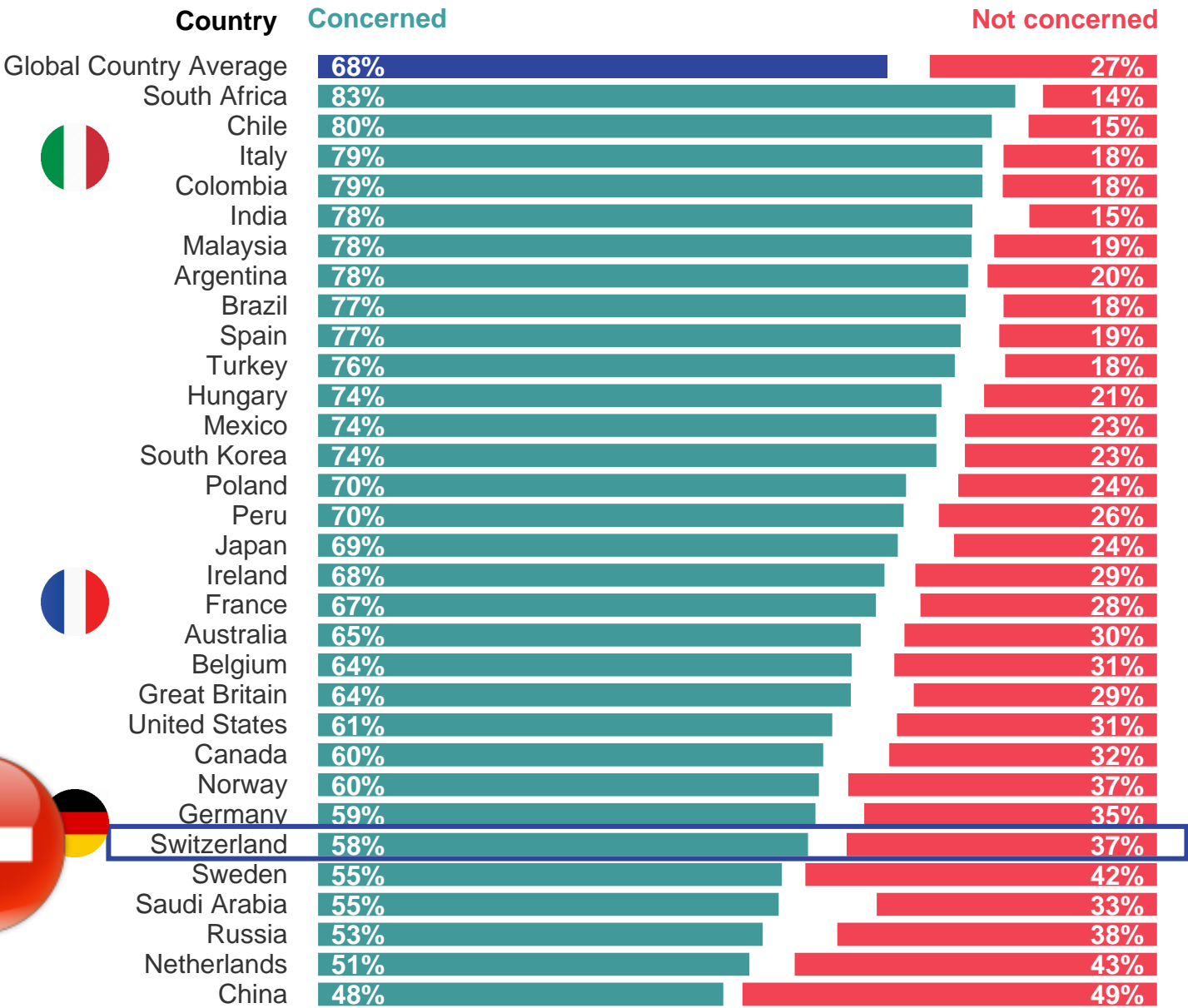
... but when it comes to their own country, it's a different story

**+ More Swiss women (64%) are concerned than Swiss men (53%)**

**Swiss people between 35 and 49 years old (64%) and between 50 and 74 years old (62%) are more concerned than people under 35 (50%)**

Country data

Q. How concerned are you, if at all, about the impacts of climate change that are already being seen in **your country?**



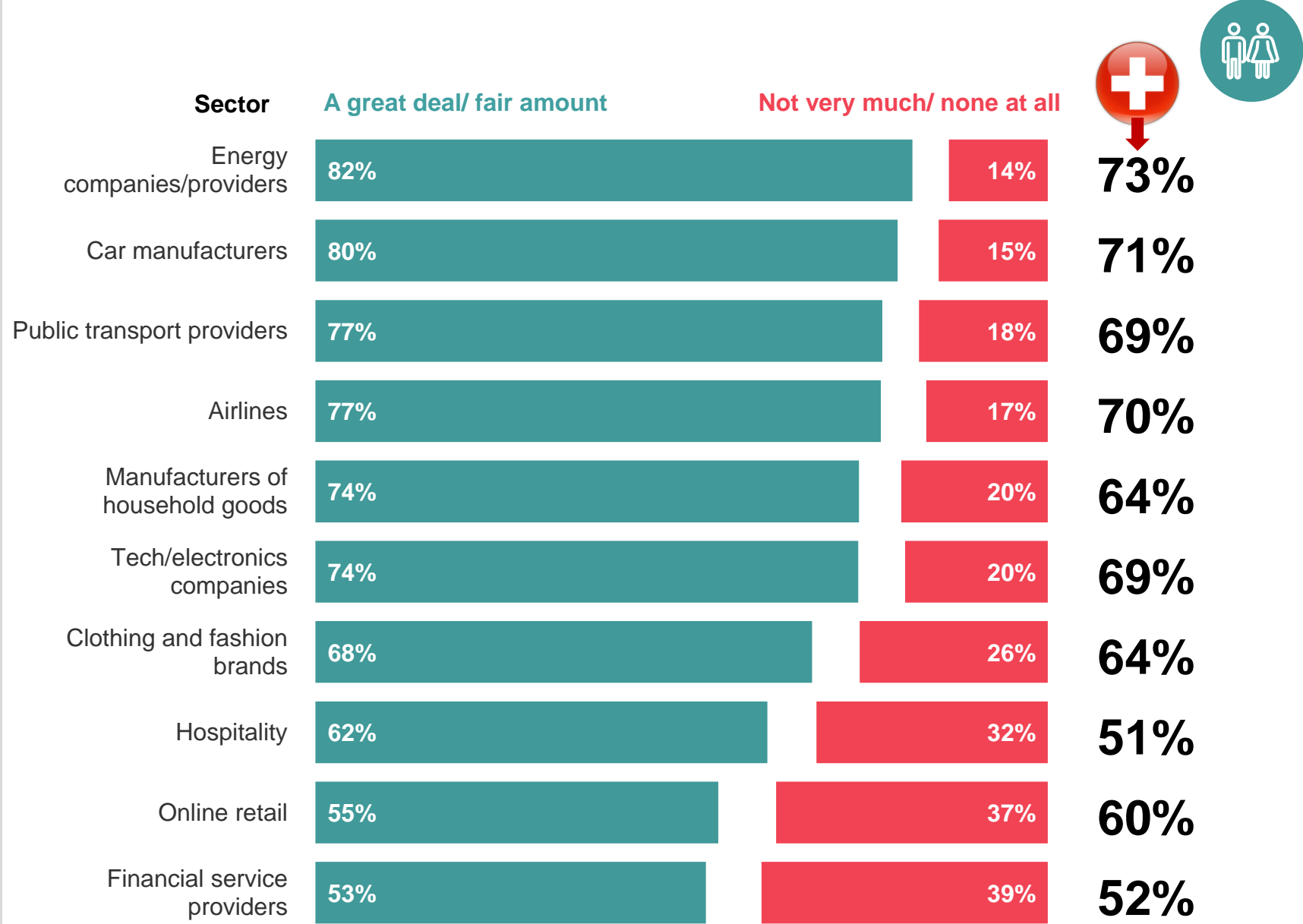
Base: 23,577 online adults across 31 countries, 18 Feb – 4 Mar 2022. NB surveyed adults aged 16-74 in 30 countries, adults aged 16-99 in Norway.



# The public see high-profile carbon emitting sectors, like energy, as having a higher responsibility for reducing their contribution to climate change

## Global Country Average

Q. Now think about some specific business sectors. How much responsibility, if any, do each of the following have to reduce their contribution to climate change by reducing carbon emissions?



Base: 23,577 online adults across 31 countries, 18 Feb – 4 Mar 2022. NB surveyed adults aged 16-74 in 30 countries, adults aged 16-99 in Norway.



# POSSIBILITY OF SIGNIFICANT CHANGES IN THE NEXT 10 YEARS



# **EARTH DAY 2022**



# 33%

of Swiss population believe is unlikely to think that a significant progress in reducing climate change will be done in the next 10 years in Switzerland



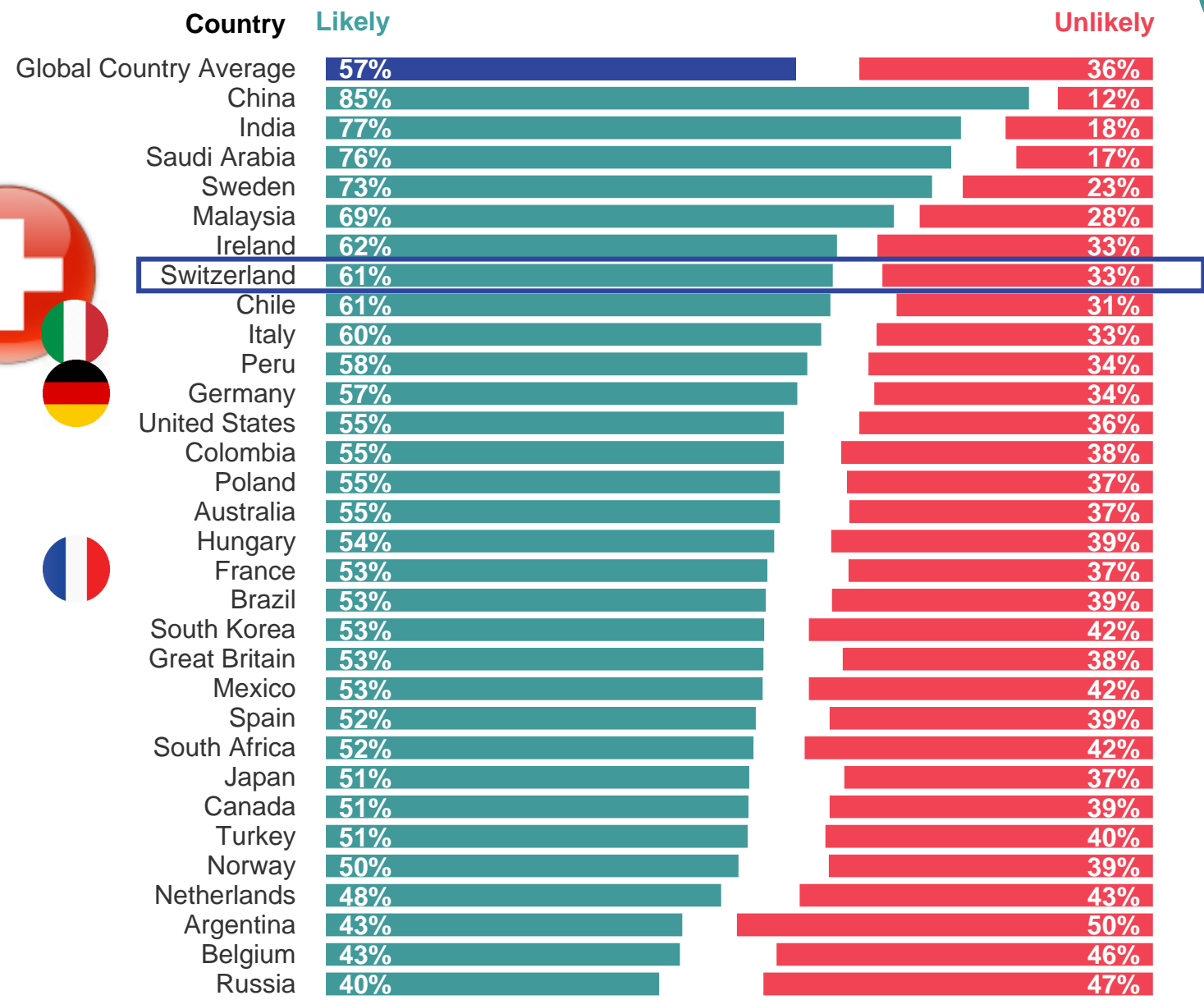
Source: Ipsos Global Earth Day, Study Base: 500 online adults aged 16-74 in Switzerland

# Still the majority of Swiss people believe in progress in reducing climate change in their country...

## Country data

Q. How likely or unlikely do you think it is that each of the following will have made significant progress in reducing climate change in the next 10 years?

## Your country



Base: 23,577 online adults across 31 countries, 18 Feb – 4 Mar 2022. NB surveyed adults aged 16-74 in 30 countries, adults aged 16-99 in Norway.



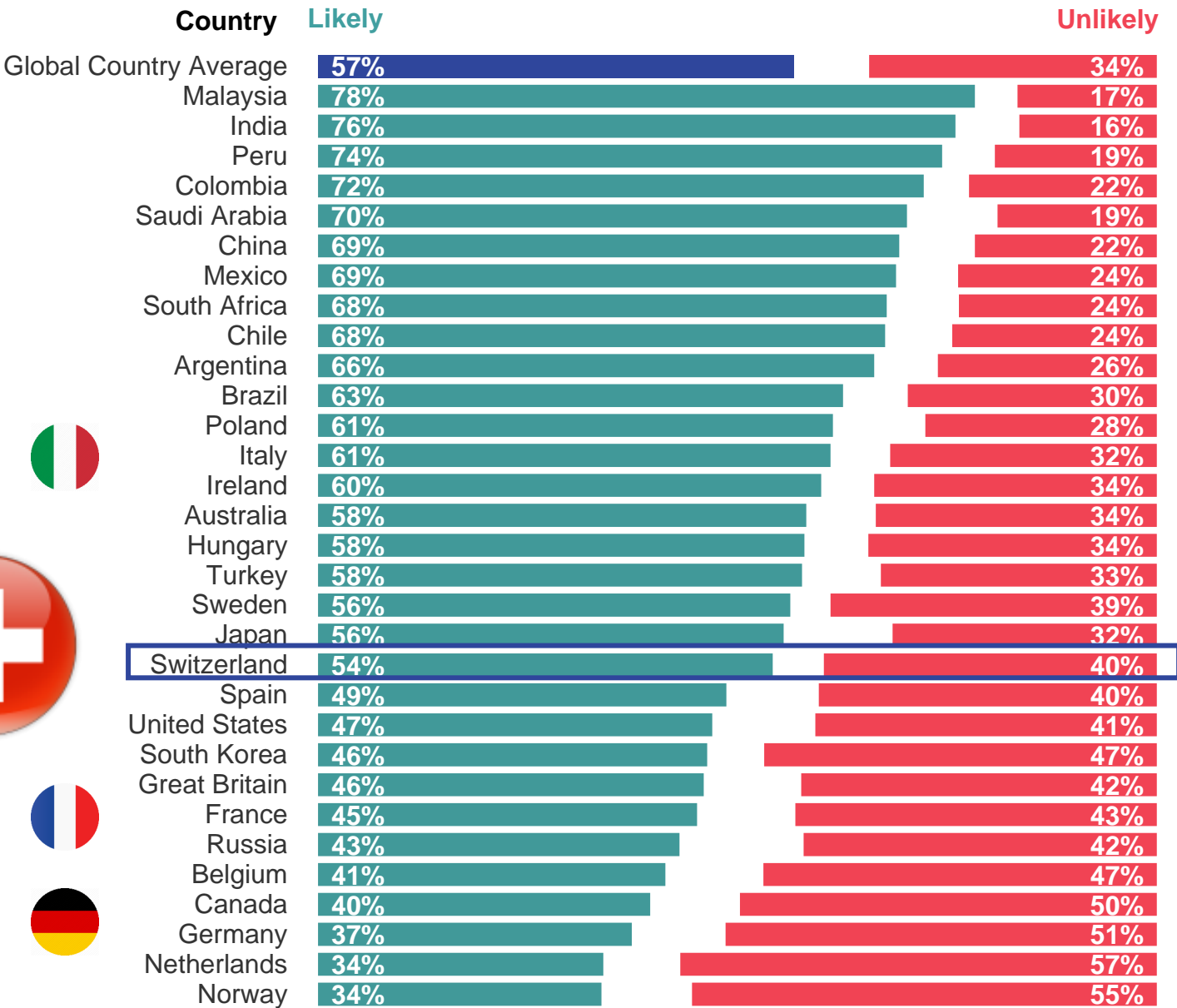


# ... but are less confident for other countries abroad

## Country data

Q. How likely or unlikely do you think it is that each of the following will have made significant progress in reducing climate change in the next 10 years?

## Other countries around the world



Base: 23,577 online adults across 31 countries, 18 Feb – 4 Mar 2022. NB surveyed adults aged 16-74 in 30 countries, adults aged 16-99 in Norway.





# KEY ACTORS TO DRIVE CHANGE





# The public perceive combatting climate change as a shared responsibility



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



64% of Swiss population agree that if individuals do not act now to combat climate change they will be failing future generations.



59% of Swiss population say that if businesses do not act now to combat climate change then they are failing their employees and customers.



56% of Swiss population say that if their government does not act now to combat climate change then it is failing citizens.

# EARTH DAY 2022



# 59%

2021:  
57%

of Swiss population believe that if businesses in Switzerland do not act now to combat climate change, they will be failing their employees and customers...



Source: Ipsos Global Earth Day, Study Base: 500 online adults aged 16-74 in Switzerland

## GAME CHANGERS



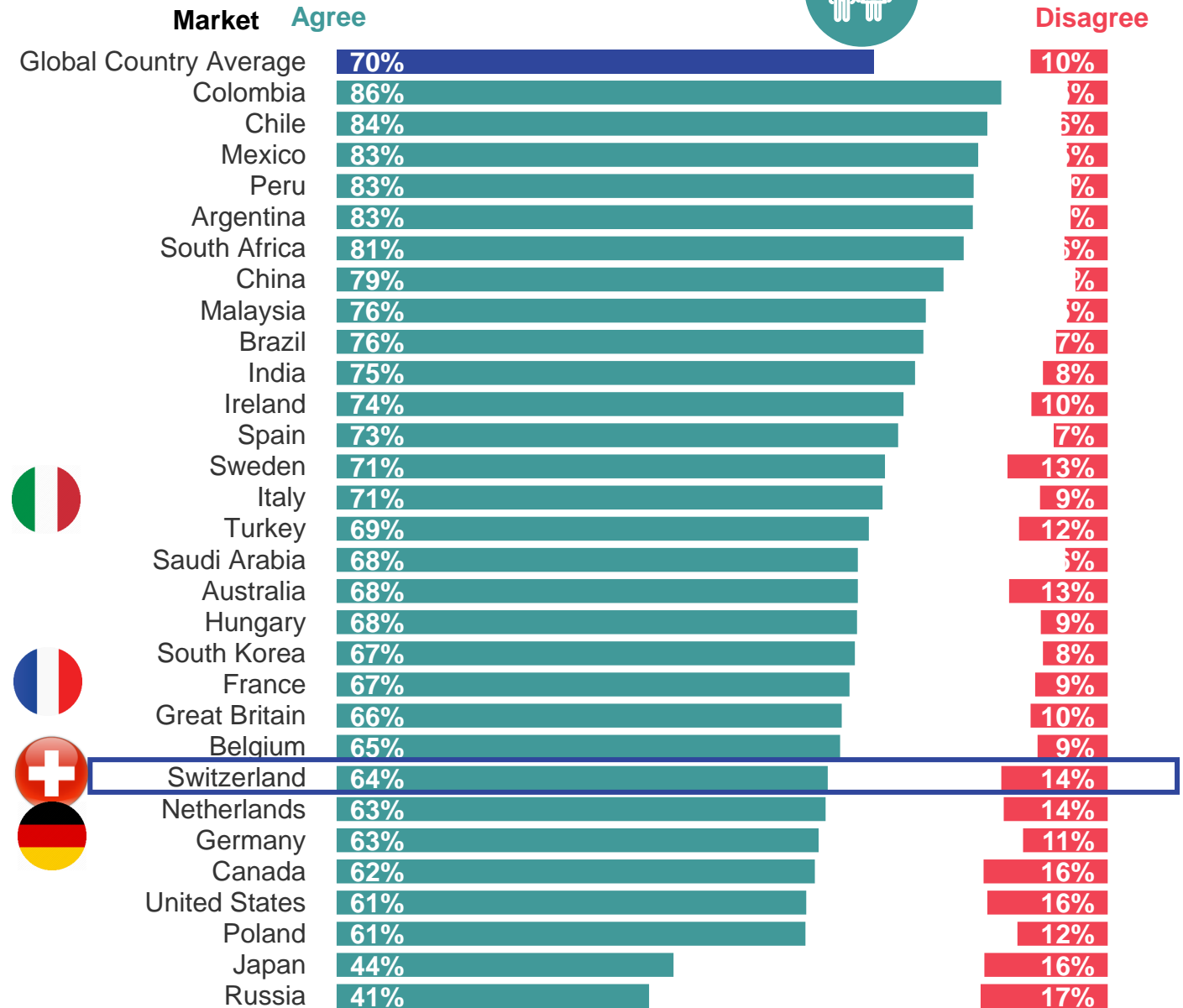


# COMPARED TO OTHER COUNTRIES LESS PEOPLE IN SWITZERLAND FEEL RESPONSIBLE ABOUT CLIMATE CHANGE

*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*

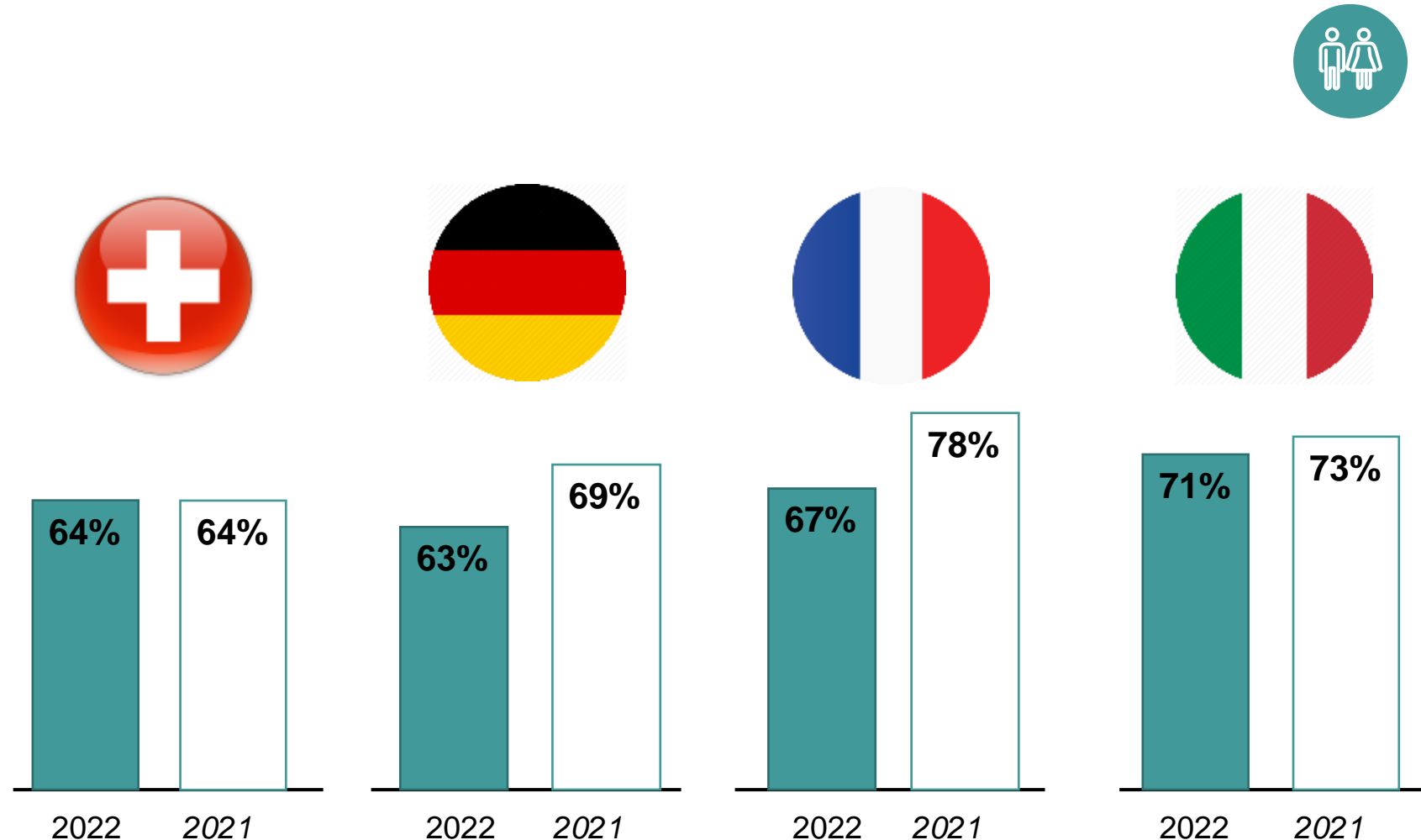
Same along all demographic groups



# ... AND IT HAS NOT CHANGED IN TIME

*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*



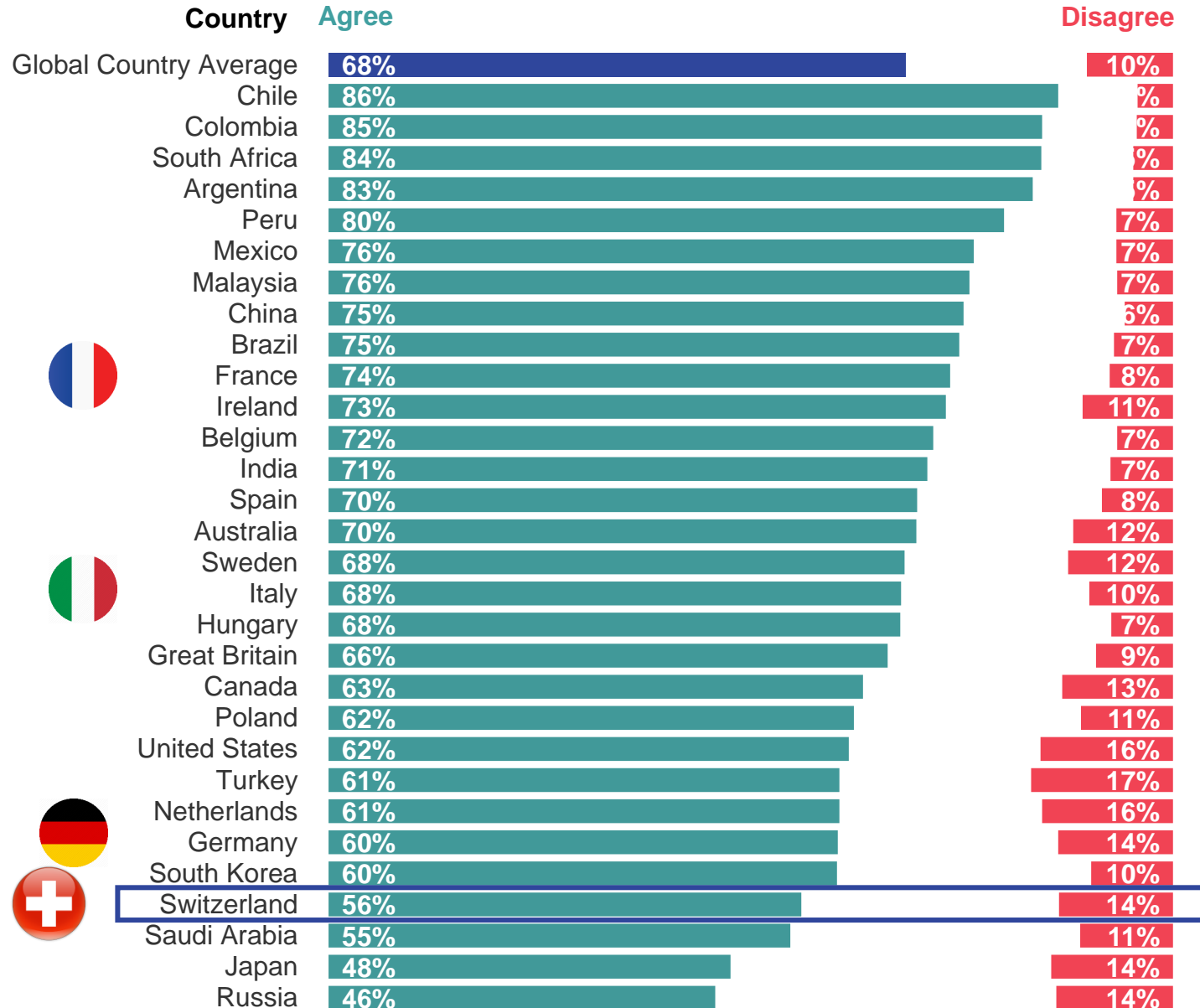


# THERE IS STRONG AGREEMENT THAT IF GOVERNMENTS DON'T TACKLE CLIMATE CHANGE NOW THEY WILL BE FAILING THEIR CITIZENS

## Country data

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

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



Base: 22, 534 online adults across 30 countries, 18 Feb – 4 Mar 2022. NB excludes Norway due to methodological differences in how question was asked.



# ONLY SMALL CHANGES IN THE PERCEPTION OF SWISS GOVERNMENT RESPONSIBILITY

2022



**If my government does not act now to combat climate change, it will be failing the people of my country**



2021



Q: To what extent do you agree or disagree with the following:  
Source: Ipsos Global Earth Day, Study Base: 500 online adults aged 16-74 in Switzerland, 18 Feb – 4 Mar 2021





BUT NOT EVERYBODY THINKS THAT THE  
+ GOVERNMENT HAS A CLEAR PLAN



2022

**44%**  
Agree

2021

**38%**  
Agree

**My government has a  
clear plan in place  
for how government,  
businesses and people  
themselves are going to  
work together to tackle  
climate change**

**22%**  
Disagree

**24%**  
Disagree

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

Source: Ipsos Global Earth Day, Study Base: 500 online adults aged 16-74 in Switzerland, 19 Feb – 5 Mar 2021



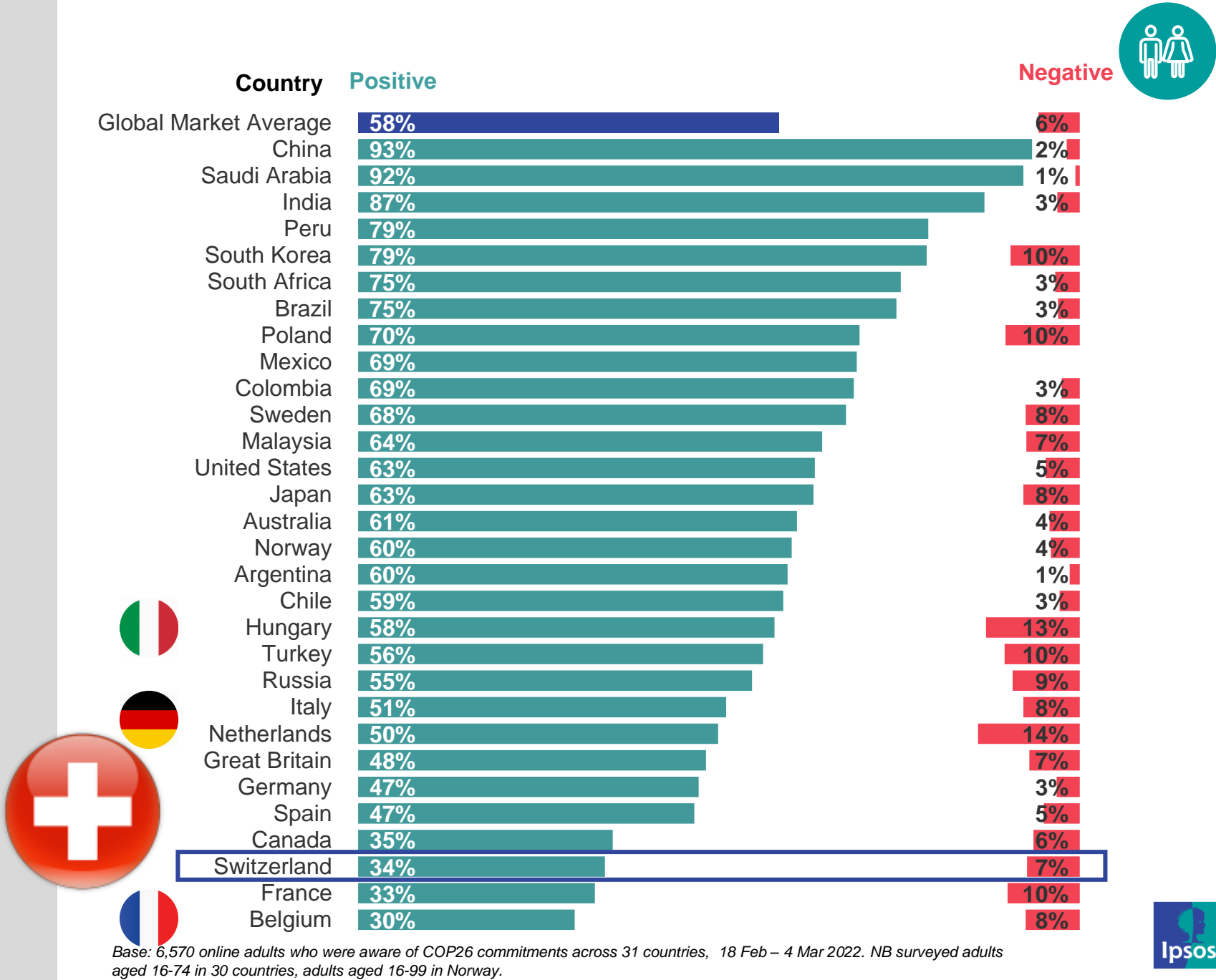
# WHAT WAS THE IMPACT OF COP26?



# SWISS POPULATION IS FAR MORE PESSIMISTIC ABOUT COP 26 THAN OTHERS COUNTRIES

## Country data

Q. Do you think the commitments made by countries to tackle climate change at COP26 will have a positive or negative impact on climate change around the world, or will it make no difference?



# ACTIONS OF CONSUMERS

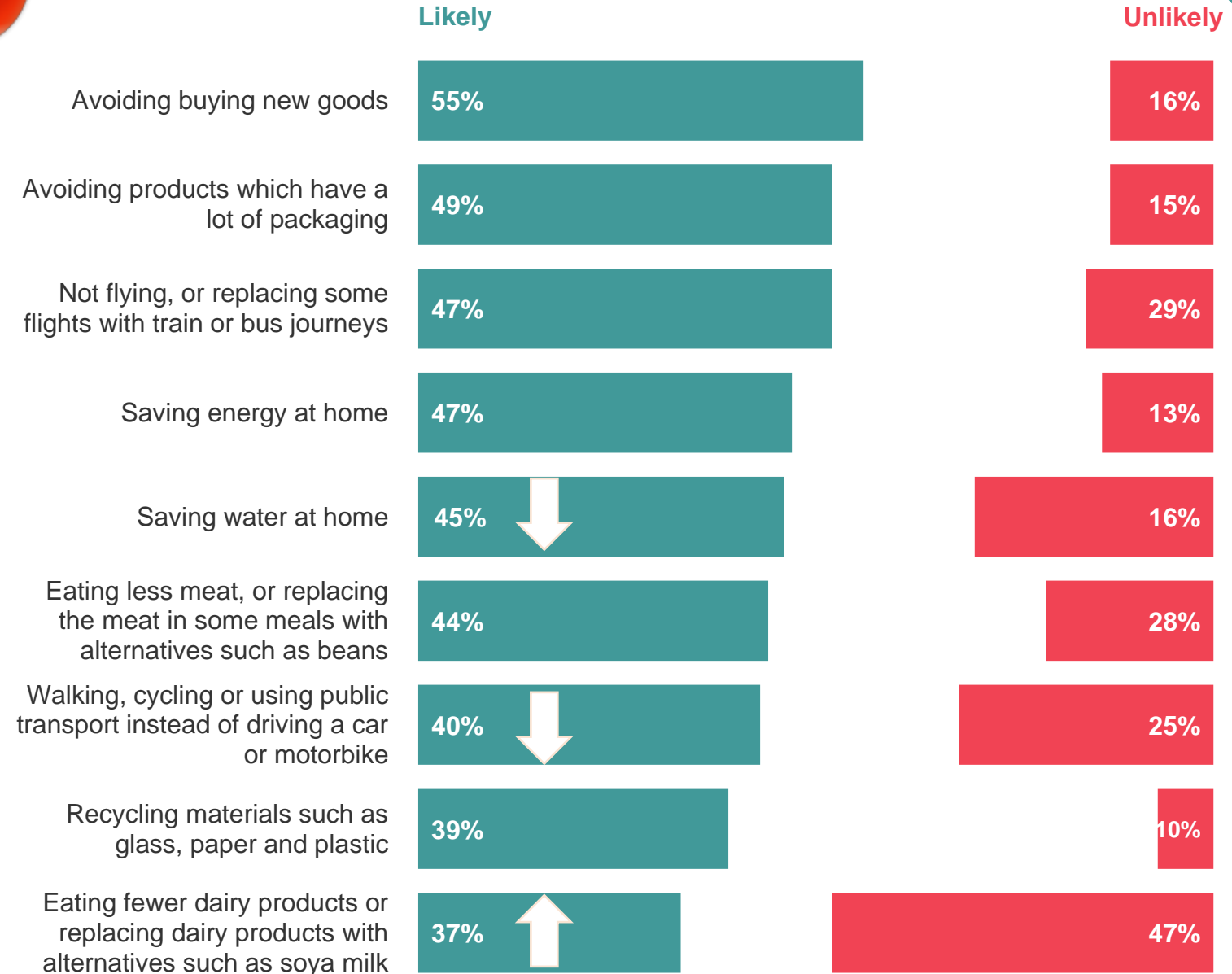
A photograph of two women sitting at a table, engaged in a conversation. The woman on the left is wearing a beige turtleneck sweater and holding a white coffee cup. The woman on the right is wearing a white shirt and a dark vest, holding a pen. The background is a plain, light-colored wall.



# Swiss consumers are ready to change their behaviour



*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: 23,577 online adults aged 16-74 across 31 markets incl. 500 from Switzerland, 18 Feb – 4 Mar 2022



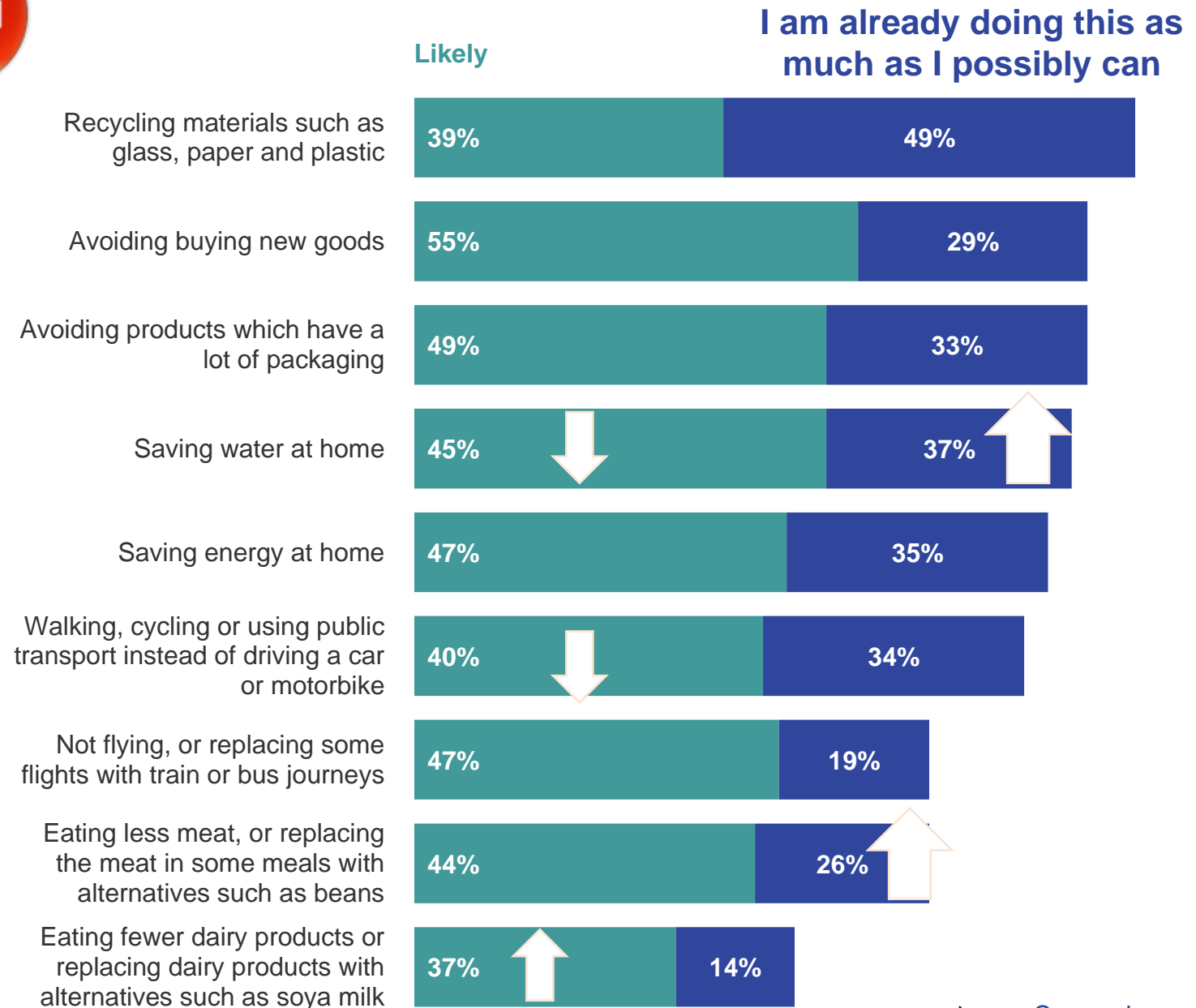
Comparison  
2022 vs. 2021  
>3% difference



... but, also a lot of Swiss claim that they “already doing this as much as they possibly can”



*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?*





# COMPANIES SUPPORT THE CONSUMER NEED TO AVOID PRODUCTS WITH A LOT OF PACKAGING



## Consumer Need

**49%** *52% in 2021*

of Swiss population would like to avoid products which have a lot of packaging even more in the future

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: 23,577 online adults aged 16-74 across 31 markets incl. 500 from Switzerland, 18 Feb – 4 Mar 2022

# Eat less meat: kind of a big deal for Swiss population



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?

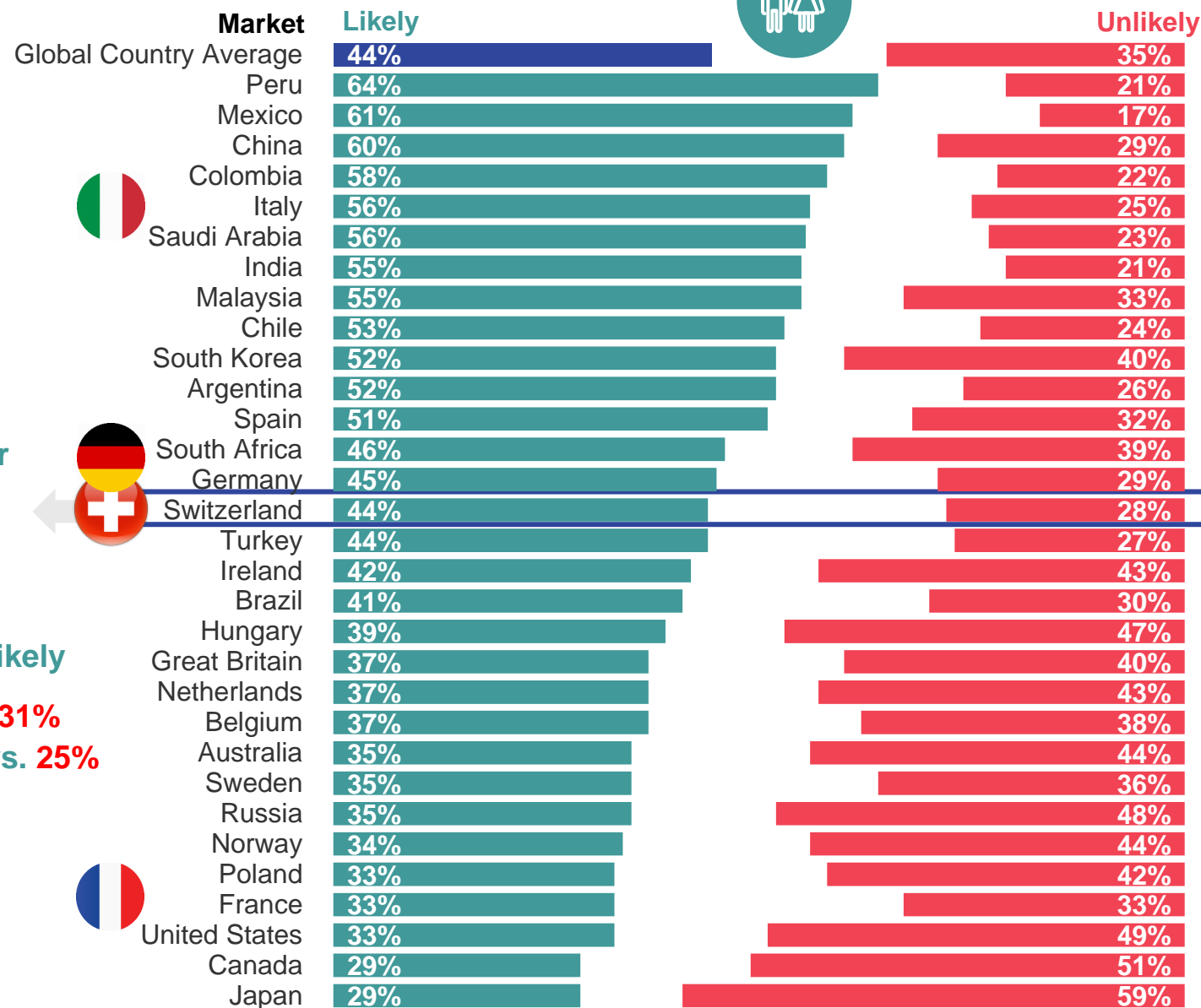
Eating less meat, or replacing the meat in some meals with alternatives such as beans

Strong gender differences in Switzerland

Likely vs. Unlikely

Male 46% vs. 31%

Female 41% vs. 25%



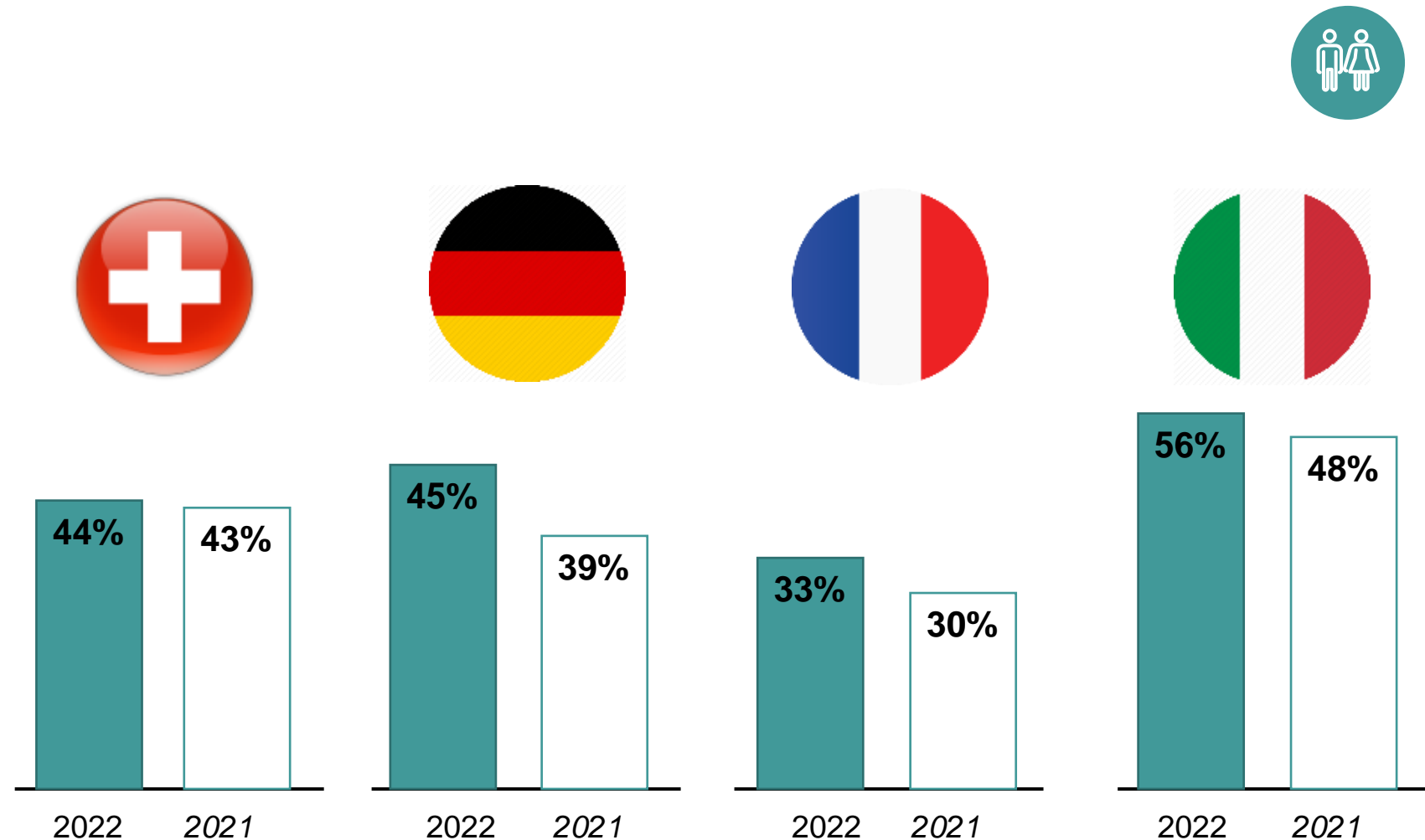


Switzerland is less ready to change their meal regarding other countries, but Swiss people are still more to do it than other nationalities and this since 2021



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



... as well as the likelihood to eat and drink fewer dairy products



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?

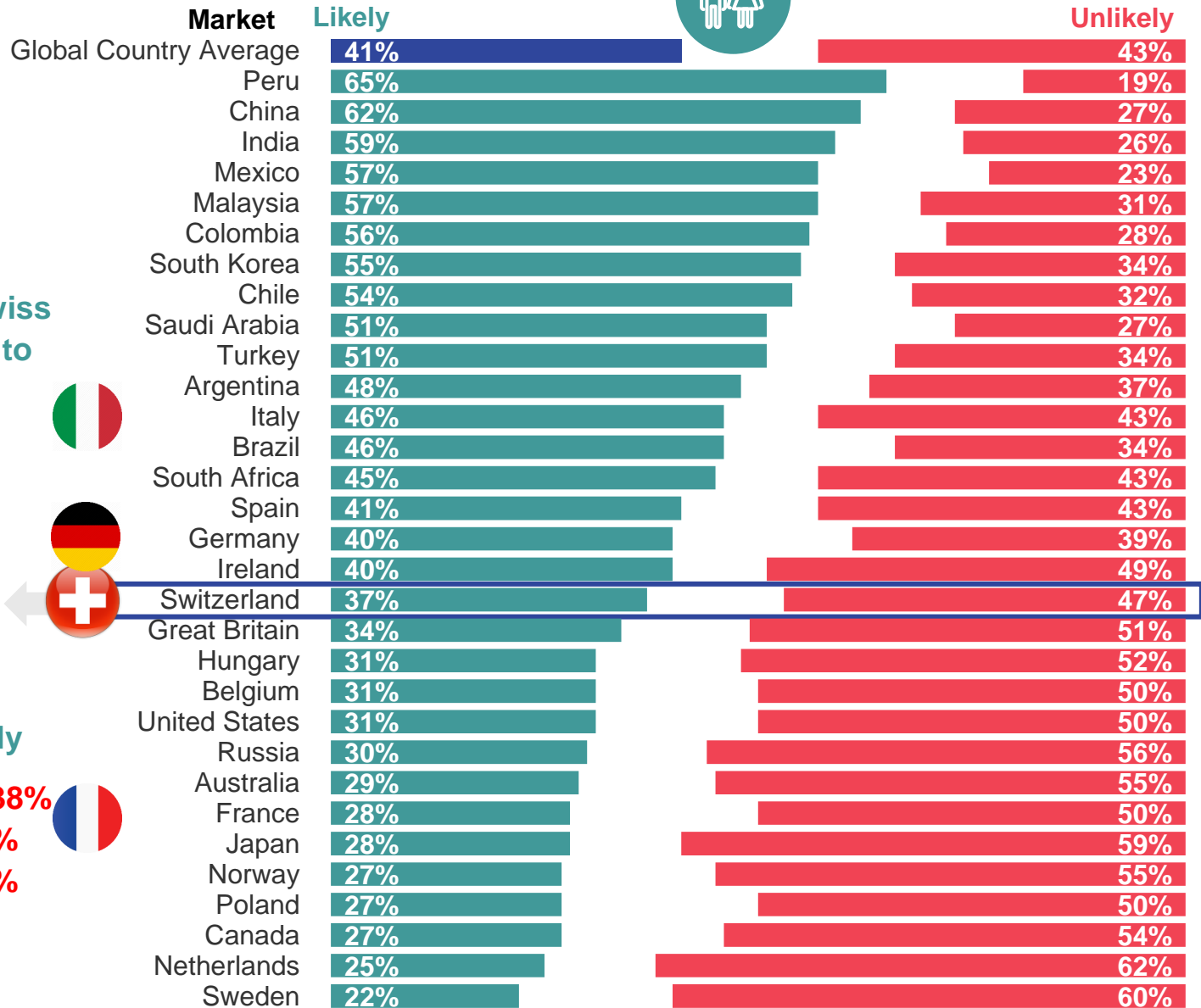
Eating fewer dairy products or replacing dairy products with alternatives such as soya milk

High share of Swiss that do not want to reduce the consumption of dairy products

→ young people are a bit more open to do that

Likely vs. Unlikely

<35 y.o.: 41% v. 38%  
35-49: 38% v. 46%  
50-74: 34% v. 55%



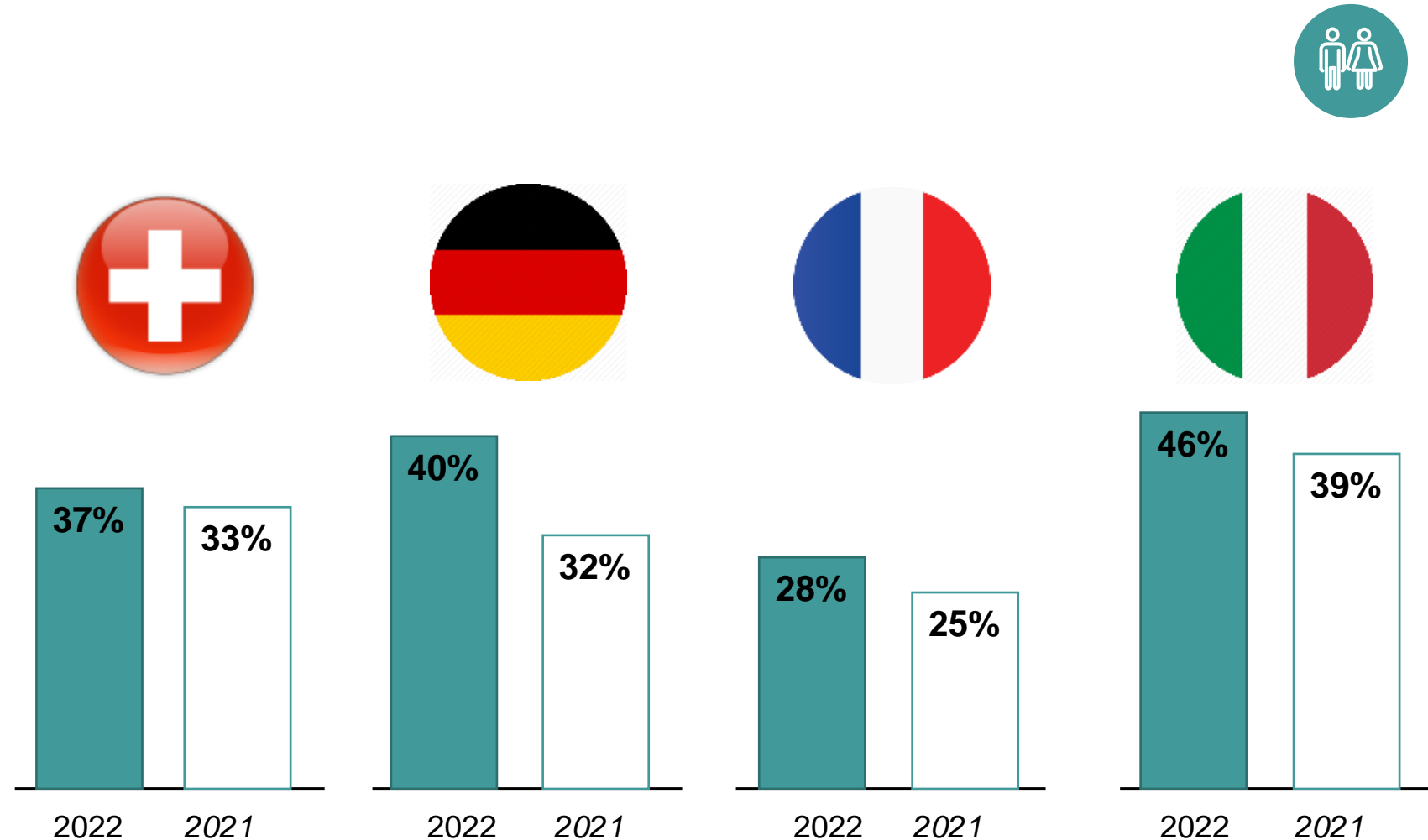


# Likelihood to eat less meat is a polarizing topic among Swiss...



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



# KEY TAKE AWAYS





# KEY TAKE AWAYS – I



- 1. Sustainability remains to be one of the key topics for Consumers**
- 2. Swiss are concerned about the impacts of climate change (even more when thinking about other countries than their own)**
- 3. ... but we see a small or no changes in some aspects like reduction of meat consumption or replacing milk products compared to 2021**
- 4. Swiss Consumers want to contribute as well, e.g. through recycling, less food waste, more working from home, etc. but are also often claiming to already do what they possibly can**

# KEY TAKE AWAYS – II



**5. There is a call to action for the Swiss government by the citizens (although weaker compared to other countries)**

**6. Still a lot of Swiss are not sure if the government has a clear plan on how to tackle climate change and ...**

**7. ... one third does NOT believe that significant progress in reducing climate change will be done in the next 10 years in Switzerland**



# Q&A / YOUR CONTACT



**Martin Fenböck**  
**[martin.fenboeck@ipsos.com](mailto:martin.fenboeck@ipsos.com)**

**Senior Client Director & Regional Division Leader**  
**Ipsos in Switzerland**



# THANK YOU!