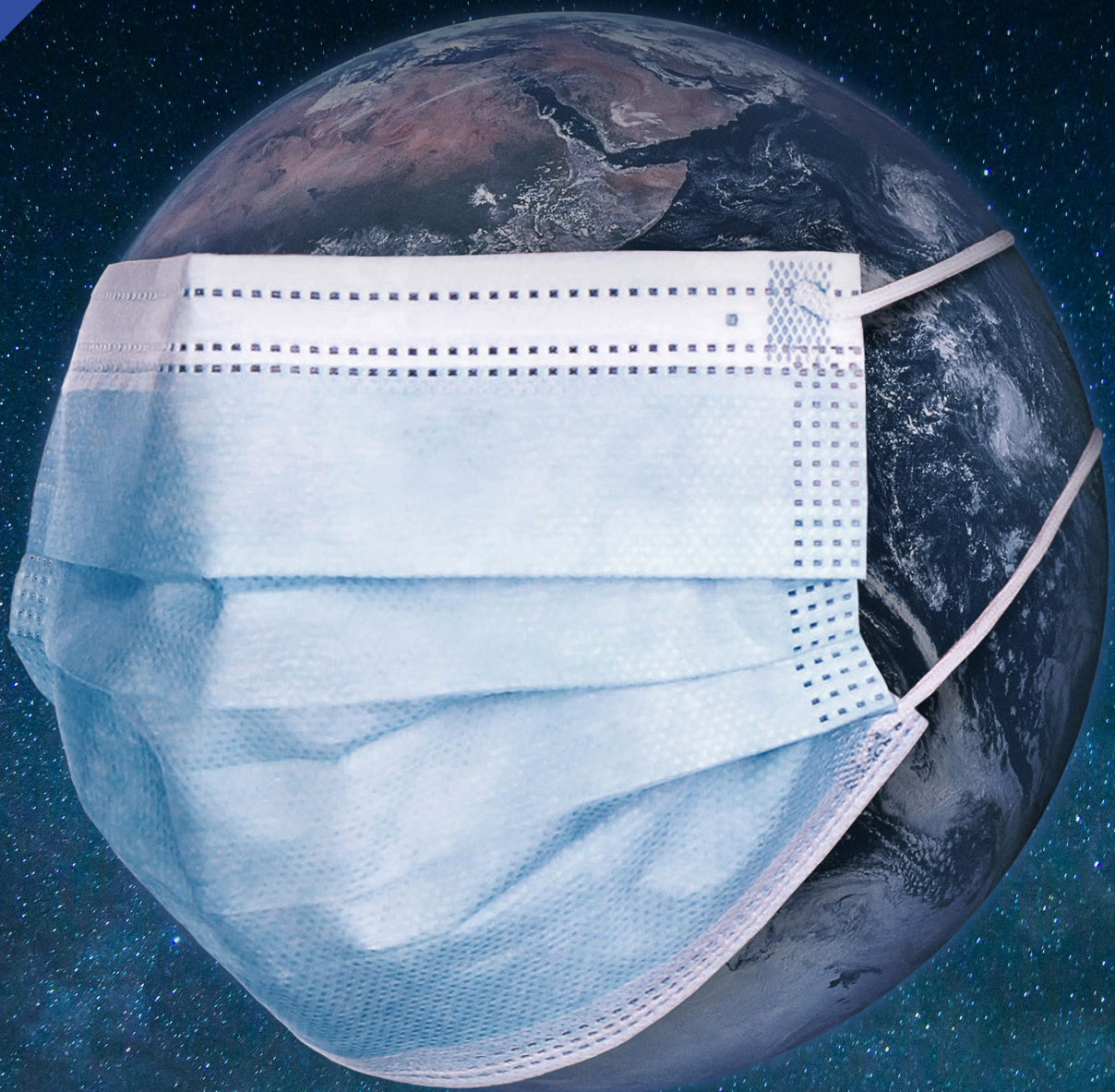


NOW WHAT?

CLIMATE CHANGE & CORONAVIRUS

by Jessica Long, Lizzie Gordon, Ruth Townend
June 2020



GAME CHANGERS





1
2
3
4
5
6
7
8

EXECUTIVE SUMMARY

Ipsos Global Trends, our study of 33,000 people every three years, recently found climate emergency to be the strongest common value that unites us worldwide. Eighty percent globally think we are heading for environmental disaster unless we change our habits quickly. Months later, the world stands united towards a different, more immediate crisis: COVID-19.

In a matter of weeks, COVID-19 has brought the global economy to its knees and the lives we once knew as 'normal' have been turned on their head. Climate change discussions and decision-making have been put on hold while governments, industry and people everywhere come together to combat a global pandemic.

Recent Ipsos Earth Day data found that concern over climate change is still high globally, despite attention being focused on the more urgent crisis at hand. Seventy one percent of the world feels climate change is as significant a threat as COVID-19 in the long term.¹

In the midst of this upheaval, we ask what, if anything, can COVID-19 teach us about the climate crisis?

1. The trajectory of climate crisis concern in the months preceding COVID-19
2. Analogous learnings between both crises from experts
3. The influence of the pandemic on public attitudes and behaviours around climate change
4. Support for a greener economic transition following the pandemic
5. Implications and recommendations for key industry players moving forward



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71%

Agree climate change is just as important in the long term as COVID-19



PRIOR TO COVID-19, CLIMATE CHANGE WAS THE VALUE THAT UNITED US MOST

Over the last decade, concern about climate change has nearly doubled. Four in five people across the globe now agree we are headed for a climate disaster if we don't act fast.² Ipsos Global Trends found that 'climate emergency' was the strongest common global value in the months preceding the pandemic. Seventy-seven percent of the global population believe that the climate change we are currently seeing is a direct result of human activity.³

The scientific consensus around climate change is clear, and the humanitarian implications are stark. It is estimated that climate change will force more than 100 million people into extreme poverty by 2030, and conservative estimates suggest it will lead to 250,000 deaths per year between 2030 and 2050.⁴

The impacts of climate change are already disrupting lives. 2019 saw unprecedented wildfires in Australia, the Amazon and the United States. A violent cyclone season saw widespread devastation in Mozambique and the east coast of Africa.

The 'climate change movement' itself is now most loudly championed by younger generations. The global

youth climate strike movement has captured attention of both the public and governments, and propelled teenage climate activist Greta Thunberg to 'world famous' status.

Climate change has become such a hot topic for younger generations that many are actively mentioning it on online dating apps. 'Thunberging' is now a coined term by online dating sites who have seen a 240% increase in the words 'climate change' on people's profiles. Young people are increasingly seeking partners who share a 'concern for climate change' as a key value.⁵

Despite these signals, the consensus behind climate emergency is far from complete. A significant proportion of people say they are 'tired of the fuss being made about environmentalism'.⁶

As the world puts one crisis on hold so it can urgently respond to another, debate ensues on the connection between the two.

Seventy-one percent of the global public feel that climate change is just as significant an issue in the long term as COVID-19.⁷ What, if anything, can COVID-19 teach us about the climate crisis?

“I hope there’s a return to listening to experts”



LESSONS LEARNED FOR CLIMATE CHANGE

Many experts have identified COVID-19 as having analogous learnings for climate change

The reframing of climate change from an ‘issue’ to an ‘emergency’ was perhaps the defining feature of 2019.⁸ Despite this, many activists feel the pace of change remains slow.

Ann Stevenson, a climate change and circular economy researcher at Cardiff University, argues that the ‘climate emergency’ is not felt as deeply in western established nations. She said: “With COVID-19, it’s your neighbour, it’s somebody in your family, it’s a real threat. Climate change is still seen as something a long way away and nothing to do with ‘me’.”

Ipsos’ recent Earth Day data supports this. In Colombia, South Africa, Chile, Peru, India and Malaysia specifically, 80% or more agree that if their government does not act now on climate change, it will be failing them. In Germany, the US, Sweden and the Netherlands, this is less than 60%.⁹

While there are a number of lessons that can be extracted, many climate change experts are determined to not suggest that COVID-19 – as an immediate threat to public health – is anything less than the priority, and also that an austere approach that limits public liberties such as that seen with COVID-19 is appropriate for climate change progress.

Libby Peake, Head of Policy Resource at Green Alliance, said: “What frustrates me is that it gives the impression that this kind of shutdown is what a successful green transition looks like or what the green movement wants. And this is not what the green movement wants. And this is not what it would look like if it were successful in combatting climate change. The key thing to remember is that this is a really short term, acute crisis that requires quite swift and drastic action, we still have a few years for climate change.”

However, experts still argue that there are analogous learnings for climate change that should not go unaddressed.

In speaking to global climate experts, Ipsos has identified five applicable learnings from COVID-19 for climate change:

1. A need to listen to the experts
2. Preventative measures are as important as a mitigated response
3. Society must come together to protect the most vulnerable
4. Cross-sector collaboration is paramount to success
5. The public needs clear, tangible communications and direction

1. A need to listen to expert advice

Many argue that experts have been warning about both crises for years. But while Ipsos research found significant global concern over climate emergency in 2019, in the same survey just 4 in 100 expressed concern about a global pandemic.¹⁰

Doctors and scientists are the two most trusted professions in the world.¹¹ However, 42% globally feel scientists ‘don’t really know what they’re talking about when it comes to the environment.’¹¹

“I hope there’s a return to listening to the experts,” said Peake. “Experts know we’re at risk of further pandemics and we’re at risk of catastrophic climate change if we don’t change fast.”

2. Preventative measures are as important as a mitigated response

While 2019 was the year of global concern for the climate crisis, 2020 is the year of COVID-19. When asked about the most important issues facing their country today, 61% of respondents across all countries cite COVID-19, with the highest scores seen in Malaysia (85%), Great Britain (77%) and Australia (74%).¹²

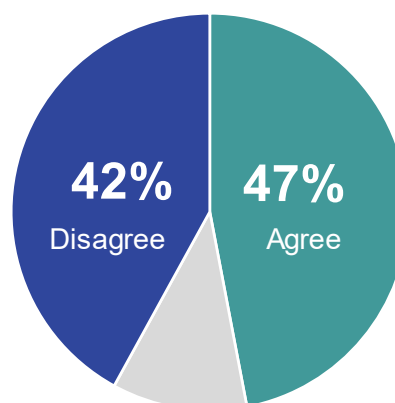
The compounded social impacts of COVID-19, such as housing, food, employment, economic and healthcare security have pervaded every aspect of our lives. Social impacts of climate change risk doing the same.

COVID-19 has shown the scale of global action required to solve the climate crisis. As global healthcare systems buckle, it has also shown us that prevention is key. With climate change, we are witnessing the unravelling of a crisis in slow motion.

Experts had warned of a pandemic decades ago – prevention was not prioritised. In Britain, two in three feel the Government acted too late in implementing stricter lockdown measures.¹³ Many experts feel we cannot afford to make the same mistake again with climate change.

FIGURE 1. To what extent do you agree or disagree with the following statement? Even the scientists don’t really know what they are talking about on environmental issues

Consumers have reservations when it comes to trusting experts



Source: Ipsos Global Trends
Base: 22,614 adults aged 16-74 across 33 countries, interviewed June – July 2019

3. Society must come together to protect the most vulnerable

While we are told that COVID-19 ‘does not discriminate’, we know the virus disproportionately affects the poor and those with compromised immune systems. In the US, UK and other countries, black and ethnic minority people are disproportionately affected.¹⁴

Climate change affects the social and environmental determinants of health – clean air, safe drinking water, sufficient food and secure shelter.¹⁵ Similar to the impact of mass pandemics, nations with weak health infrastructure will be the least prepared to address the impacts of climate change. Once again, the poor and those with compromised immune systems are among those most negatively affected.¹⁶

4. Cross-sector collaboration is paramount to success

COVID-19 has prompted swift coordination and communication across government, industry and the public – drawing comparisons to other global crises such as World War II, the 2008 economic recession and the Spanish Influenza pandemic of 1918. While these responses have been far from perfect in many places, the will to respond is clear.

On the brink of a global recession of ‘record dimensions’,¹⁷ many governments find themselves in ongoing discussions over corporate bailouts and public stimulus plans to keep industry and public welfare afloat.

The world coming together

- As supermarkets were ravaged, we were unprepared for public stockpiling of staple foods and toilet paper. In response many have adjusted their opening hours to accommodate the schedules of key workers.
- The ‘Clap for Carers’ campaign goes global as people join together to support those on the frontlines risking their lives.
- Where government funding has failed to ensure healthcare workers have adequate Personal Protective Equipment (PPE) – industries and members of the public have come up with clever solutions in an attempt to meet the demand.

“I think what has been really nice is that when it is an emergency – the community comes together.”



Cross-sector collaboration is also at the centre of the climate change agenda, and deemed essential to delivering against the Sustainable Development Goals.¹⁸ Many experts argue that expectations cannot be on the shoulders of one faction of society alone, but instead must be shared fairly with everyone.¹⁹

The UK public agrees that responsibility should be shared when it comes to tackling specific environmental issues such as reducing unnecessary packaging.²⁰

5. The public needs clear, tangible communications and direction

The role of the public in following government advice on ‘lockdown’ or ‘sheltering in place’ has been critical in the fight against COVID-19.

Cardiff University’s Ann Stevenson said: “I think what has been really nice is that when it is an emergency, the community comes together. If we can learn how communities come around and work together and see a bigger picture in terms of social cohesion – that could really help with climate change, too.”

This coming together has taken different forms; from the encouraging – rainbows in windows and postcards offering help through neighbours’ doors – to the punitive – social shaming and even online reporting of rule-breaking in some countries.

Overall, Ipsos data shows the strategy of self-isolation has become well accepted by populations in 14 of 15 countries surveyed.²¹ Not only are governments implementing the measures, but their citizens are mostly complying and staying home.²²

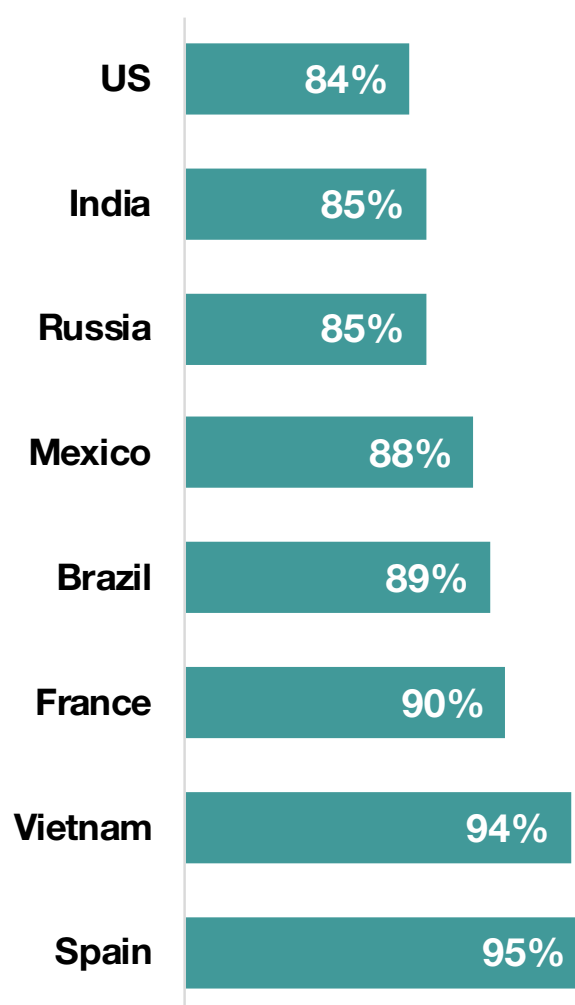
Public compliance with self-isolation and mask wearing has largely been a result of governments offering tangible, clear action points for people to take. This echoes the clear, actionable asks of successful eco-movements such as the UK’s plastic bag levy, and proposed plastic straw ban.

With COVID-19, the link between action and impact is clear. We stay at home and maintain social distance and we see the rate of new infections decline.

These tangible wins against a global, amorphous threat such as COVID-19 serve as compelling evidence that all sectors can and will work together when given clear direction.

“With Coronavirus, you know what to do to protect people,” says Anije, 22 from Guyana. “But with climate change, where do you start?”

FIGURE 2. Countries in which more than 4 in 5 people are self-isolating
April 2-4, 2020



Source: Ipsos Weekly COVID-19 Tracker
Base: 28,000 adults across 15 countries from April 2-4, 2020



DISCUSSING THE CONNECTION BETWEEN THE CRISES CAN BE COMPLEX AND CONTROVERSIAL

Despite these learnings, the climate movement is carefully considering how best to respond

Social media feeds have become inundated with before and after images of urban landscapes following the weeks after lockdown.²³ Reduction in emissions, clearer waters and other environmental improvements have been referred to by some as the ‘silver lining’ of the pandemic.

This has upset a number of climate experts – who are concerned that linking the two crises in this way could be both dangerous and offensive.

Professor Tim Benton, Head of Energy, Environment and Resources at Chatham House in the UK said: “We certainly have to be very careful talking about silver-linings because people are dying and a very real harm is being caused.”

Many climate experts are concerned about how some activists may try to use COVID-19 to further the climate agenda – and that this could be seen as a zealous approach.

Fringe theories suggesting the Earth is ‘self-regulating’ and ‘we are the virus’ are largely associated with Eco-fascism. Many climate activists and experts have sought to clearly condemn this narrative.²⁴

But as climate change decision-making is put on hold and large conferences such as COP26 are postponed, many in the climate movement continue to soul-search and think carefully about how best to respond.

One key challenge is how to keep the focus on coming together to solve crises rather than reflect some of the generational and class divides that plague both issues.

While the elderly are typically more at risk for COVID-19 than younger people,²⁵ it is the young people – or the people that will be on the planet for the longest time – who are considered most vulnerable to climate change.

But experts like Stevenson suggest this ‘generational’ narrative creates an ‘us versus them’ dichotomy, which doesn’t replace the movement.

Stevenson explained: “If we change the narrative that governments haven’t done anything – that would resonate with everybody. But it’s too focused on [blaming] people of the past.”

There is also a need for accurate data and sensitivity when discussing climate change.

Controversial filmmaker Michael Moore’s ‘Planet of the Humans’ released in April 2020 has been called ‘dangerous, misleading and destructive’,²⁶ and has now even been removed from YouTube.



The majority of public globally supports a 'green' economic recovery from COVID-19

SUPPORT FOR A GREEN ECONOMIC RECOVERY

The global demand for a greener economy is growing

Until now, governments have lacked a clear and informed mandate from the public to take swift and urgent action to tackle climate change.

The majority (65%) of people across the globe support a green recovery following COVID-19.²⁷

Given 71% globally feel climate change is as serious an issue as COVID-19²⁸ and that 68% believe their government will be failing them by not acting, the question is less when the governments should take action, but *how*.

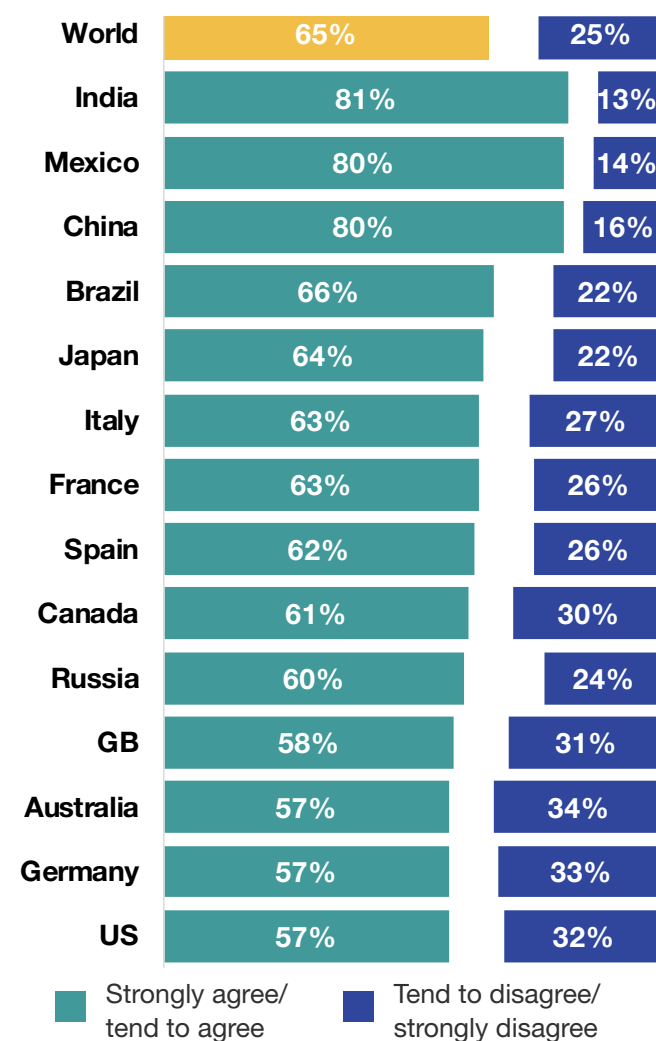
In April 2020, fifteen governments from across the EU issued a statement calling for a green recovery. These included Germany, France, Ireland, Spain, the Netherlands, Austria, Portugal, Sweden, Finland, Greece, Denmark, Slovakia, Italy, Luxembourg and Latvia.²⁹ The statement argues the EU 'needs to scale up investments, notably in the fields of sustainable mobility, renewable energy, building renovations, research and innovation, the recovery of biodiversity and the circular economy.'³⁰

Much of the debate on climate inaction has centred around 'who' should lead – government, business or the general public?

But these figures suggest pressure is mounting for both global and domestic government leadership.

In May 2020, 60 organisations in Britain – including businesses such as Iceland and Ben & Jerry's - signed an open letter to UK Prime Minister Boris Johnson to prioritise a green recovery post-COVID-19.³¹

FIGURE 3. To what extent do you agree or disagree with the following: In the economic recovery after COVID-19, it's important that government actions prioritise climate change



Source: Ipsos weekly COVID-19 tracker
Base: 28,029 online adults aged 16-74: 16-19 April.



SHOULD THE ECONOMY BE PRIORITISED AT EXPENSE OF ENVIRONMENT

The International Monetary Fund (IMF) has warned the world may be entering the worst economic recession since the Great Depression.³² As public stimulus packages begin to dry up and further discussions on industry bailouts ensue – the world is forced to ‘wait and see’ what impact COVID-19 may have on the economy long term.

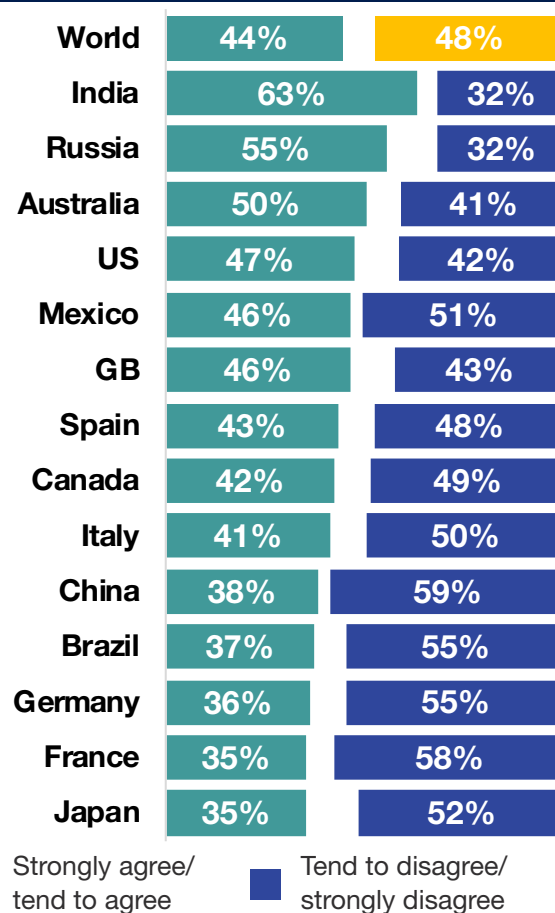
Ipsos’ COVID-19 tracker shows the world is largely split on whether to prioritise the environment at the economy’s expense.

However, the economy and the environment do not have to be competing priorities. According to a recent report by the International Renewable Energy Agency, renewable energy investments following COVID-19 could generate GDP gains of nearly \$100tn (£80tn) and reduce CO₂ emissions by 70% between now and 2050.³³

Not everyone is considering green economic opportunities. President Trump has been criticised for continued environmental rollbacks during COVID-19.³⁴ Many climate experts fear bailouts will also perpetuate the problem.

“Worldwide, governments and central banks are already bailing out polluting industries and providing stimulus to restart consumption. That dwarfs greener spending. After this pandemic is over, we will see a surge in carbon emissions.” explained Jem Bendell, Professor of Sustainability at the University of Cumbria in the UK.

FIGURE 4. To what extent do you agree or disagree with the following: Government should focus on helping the economy to recover first and foremost, even if that means taking some actions that are bad for the environment



Source: Ipsos weekly COVID-19 tracker, base: 28,029 online adults aged 16-74; Fieldwork dates: Thursday 16 to Sunday 19 April.

“We have a holiday booked for the end of July, I am still hoping we can go.”
Annie, 32, UK



MIND THE SAY-DO GAP

Concern emissions will rebound to normal levels after COVID-19

The say-do gap has been a key challenge for the climate movement in demonstrating public conviction.

For example, while 65% of consumers say they want to buy purpose-driven brands that advocate sustainability, only 26% actually do.³⁵

With COVID-19, we are seeing forced behaviour change as people reduce their carbon footprint not out of hope for the environment but out of compliance with the government in a world health crisis.

Although carbon emissions have dropped to record levels,³⁶ many experts do not anticipate sustained change. The 2008 financial crisis saw a sharp reduction of global emissions that quickly rebounded in 2010 to an all-time high of 9.1bn tonnes of carbon.³⁷ Many look to this as an indicator of what will follow COVID-19.

An Ipsos survey to understand people’s behavioural intentions following COVID-19 found three in five people globally (59%) will likely go back to all the things they did before the crisis, including vacations and travel.³⁸

There are also indications that people will increase use of personal vehicles and avoid public transit in the months following the lockdown lift.³⁹

Citizens are split as to whether living sustainability is practical, and any reduction in waste and consumption as a result of COVID-19 may be short-lived for many.

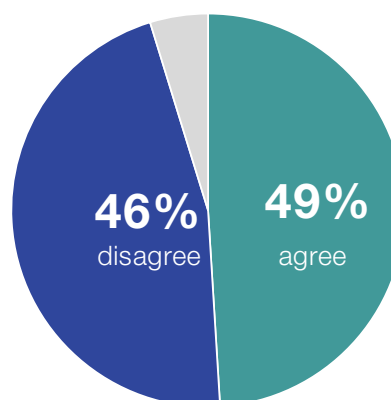
While public intention to live a more sustainable lifestyle remains high, it has not changed significantly in the last 6 years.⁴⁰

So why do consumers struggle to follow through with their intended actions?

The climate crisis sits in a very different place in consumer minds than more urgent crises like COVID-19. This is because the climate change crisis faces three key challenges:

1. Short-term trade-off for long-term benefit
2. Understanding of a complex and non-linear issue
3. A more cohesive strategy to tackle the issue

FIGURE 5. In theory, I want to live more sustainably but it is simply not practical (US)



Source: Global Advisor (US only)
 Base: Unweighted base size of 1,000, 21 February-6 March 2020

3 KEY CHALLENGES TO CLIMATE ACTION



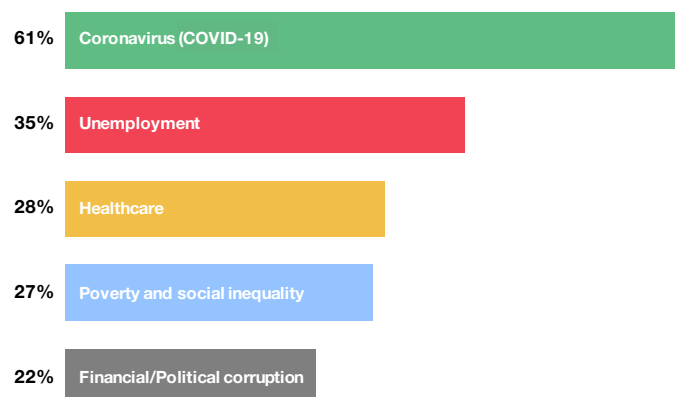
1. Climate change requires short-term trade-off for long-term benefits

Calculating the trade-off between short-term trade-off and long-term benefits is difficult for the general public, particularly when more pressing needs are at play. COVID-19 has only strained this trade-off.

A recent Ipsos survey has found that virus is the largest global concern (61%), with its subsequent impact on livelihoods following behind: unemployment (35%), healthcare (28%), poverty and social inequality (27%) and financial/political corruption (22%).⁴¹

FIGURE 6. Which three of the following topics do you find the most worrying in your country?

THE TOP FIVE GLOBAL CONCERNS



Source: Ipsos Global Advisor
Base: Adults aged 16-64 in 28 countries, c. 19,000 per month, April 2020

The world is now focused on the short term, and long-term considerations have largely been postponed.

However, if the impacts of our actions are not carefully considered in addressing immediate crises like COVID-19 can have devastating long-term consequences.

Spain has been among the hardest hit nations with COVID-19, with a death toll of around 24,000 people at the time of writing.⁴² In an attempt to keep children emerging from lockdown safe from the virus, Spanish authorities have sprayed an entire beach with bleach and destroyed an ecosystem of marine and beach life. They have since issued a public apology.

2. Climate change is complex and non-linear

Research has shown that warming trends are not linear – and that they are accelerating.⁴³ There are also multiple factors that exacerbate the climate crisis. While 77% of global public agree that human activity contributes to climate change,⁴⁴ there is still considerable confusion, particularly when it comes to monitoring your carbon footprint.

In 2018, UK grocery outlet Morrisons took the plastic off their cucumbers as part of a plastic reduction scheme.⁴⁵ However, the carbon impact of using plastic to cover cucumbers is far lower than the impact of the spoilage that is created between production and delivery to the consumer if the plastic film is not used.⁴⁶

3. Climate change movement lacks a cohesive strategy to tackle the issue

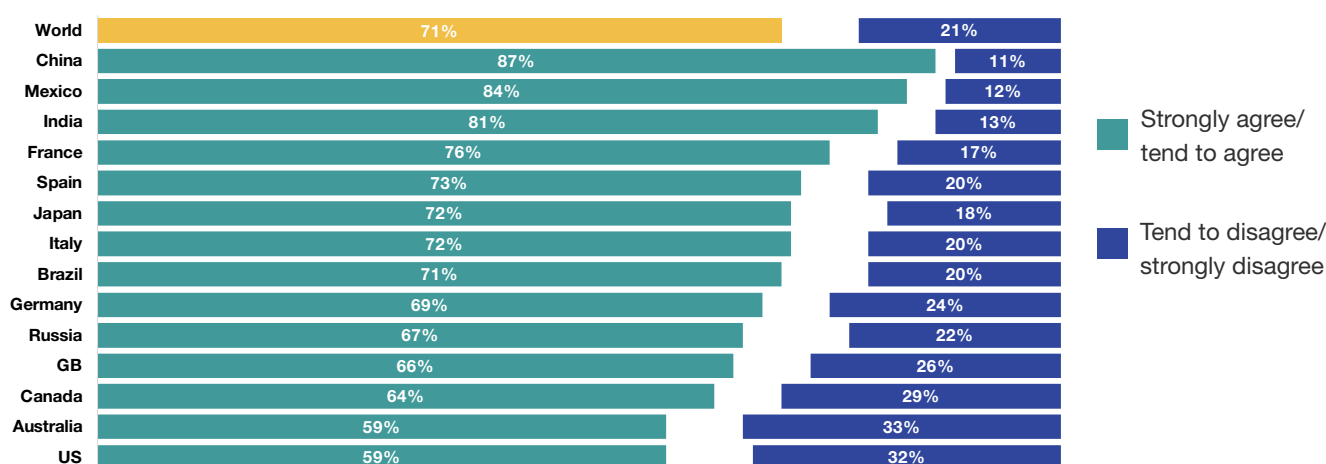
Emerging economies are most vulnerable to climate change.⁴⁷ It is therefore not surprising to see that countries that face the biggest threat are most likely to care about the issue, as illustrated by the diagram below.

The effects of climate change are felt at a local level and therefore different countries are likely to prioritise different issues.

Emerging and transitional economies like those in Sub-Saharan Africa, southern Asia and Latin America are more likely to prioritise issues such as deforestation and water pollution, where European countries are more likely to prioritise overpackaging of consumer goods.⁴⁸

This also translates into the behaviours that a country's citizens are willing to take on climate change. Finding a cohesive strategy to address climate change becomes even more difficult.

FIGURE 7. In the long term, climate change is as serious a crisis as COVID-19

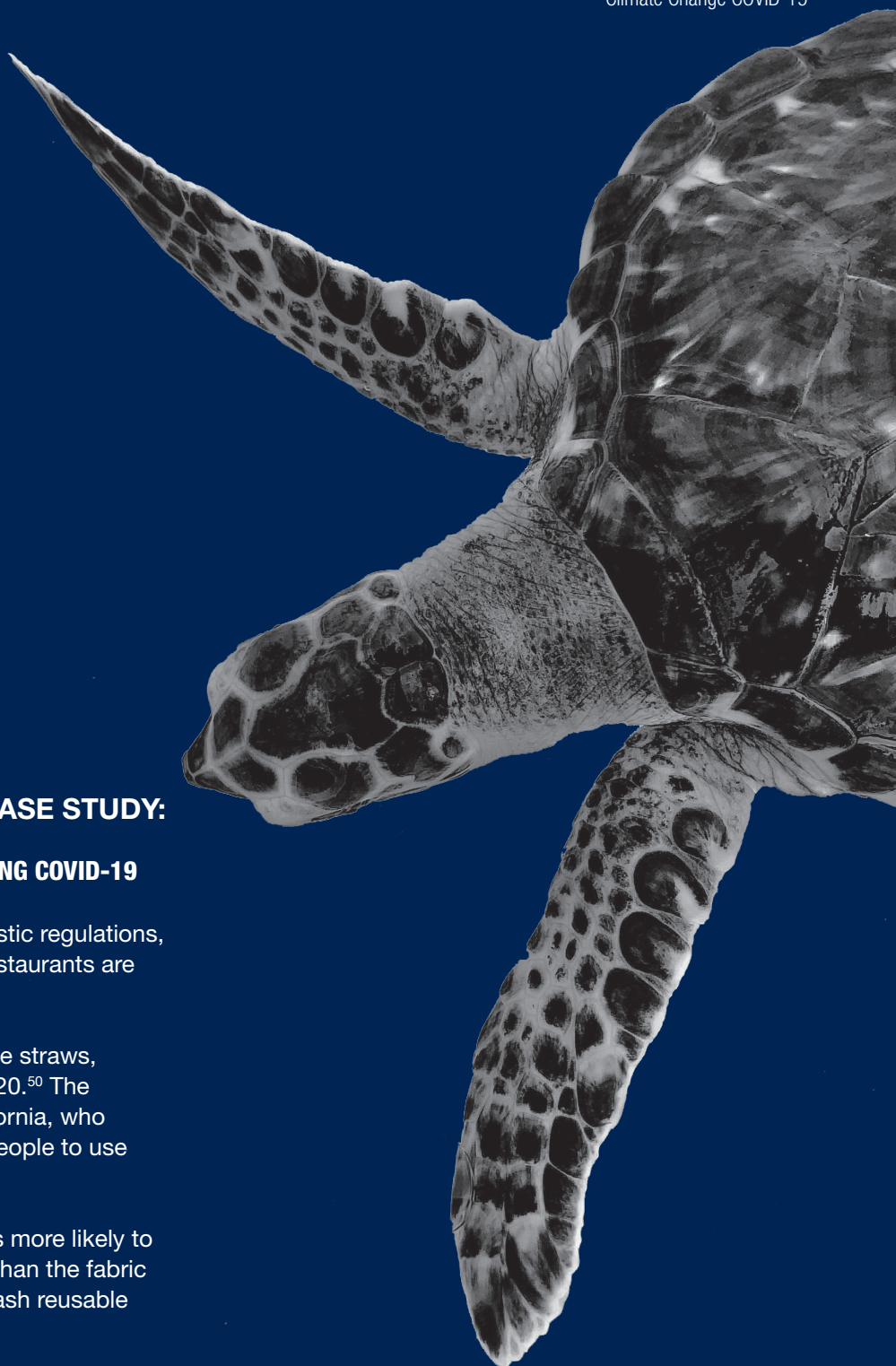


Source: Ipsos weekly COVID-19 tracker; Base: 28,029 online adults aged 16-74, 16-19 April 2020

FIGURE 8. Thinking about things you might do in order to limit your own contribution to climate change, how likely would you be to make the following changes within the next year

% Certain to/very likely/fairly likely	World 12 countries	China	India	South Africa	Italy	Brazil	Germany	GB	Japan	Poland	Russia	France	US
Avoiding products which have a lot of packaging	55%	71%	60%	60%	58%	56%	54%	59%	49%	45%	55%	46%	50%
Recycling materials such as glass, paper and plastic	50%	74%	59%	60%	42%	52%	40%	41%	57%	37%	65%	27%	44%
Avoiding buying new goods, mending what you have or buying used products instead	49%	59%	54%	53%	53%	49%	52%	49%	47%	41%	45%	41%	51%
Saving energy at home, for example by installing insulation or switching off lights	49%	69%	52%	52%	48%	47%	48%	49%	55%	37%	47%	32%	51%
Saving water at home, for example by having shorter showers or not watering your garden	49%	66%	51%	51%	51%	44%	47%	49%	50%	41%	43%	34%	46%
Walking, cycling or using public transport instead of driving a car	43%	64%	54%	39%	50%	45%	42%	43%	44%	32%	42%	32%	27%
Not flying, or replacing some flights with train or bus journeys	39%	59%	53%	37%	40%	45%	42%	31%	35%	33%	34%	31%	26%
Eating less meat, or replacing the meat in some meals with alternatives such as beans	38%	58%	47%	38%	45%	43%	39%	35%	23%	38%	28%	32%	27%
Eating fewer dairy products or replacing dairy products with alternatives such as soya milk	33%	59%	54%	33%	31%	44%	35%	24%	24%	29%	19%	23%	23%

Source: Ipsos Global Advisor; Base: 10,504 online adults aged 16-74, 12 countries, 21 February-6 March 2020



PROTECTION VS POLLUTION CASE STUDY:

THE RISE OF SINGLE-USE PLASTICS DURING COVID-19

Governments are delaying single-use plastic regulations, stores are banning reusable bags, and restaurants are turning to single-use plastic utensils.⁴⁹

The UK has delayed the ban on single-use straws, stirrers and cotton buds until October 2020.⁵⁰ The US has also seen certain states like California, who introduced a bag ban in 2007, allowing people to use them for a period of 60 days.⁵¹

However, studies suggest that the virus is more likely to live longer on hard surfaces like plastics than the fabric used in a reusable bag.⁵² The ability to wash reusable bags is also key.

People are also consuming more packaged goods and takeaways than before. Sales for loose products such as cooked meats (-45.8%) and cheese (-15.2%) have dropped between 4 March-4 April 2020 compared to the same time period in 2019. While purchases of pre-packed equivalents have soared.⁵³

Many climate experts argue that this has paved the way for plastic lobbyists and threatens the progress that is being made on single-use plastic reduction.

WHAT WILL BE THE 'NEW NORMAL'? IMPLICATIONS FOR INDUSTRY PLAYERS



Customer closeness is more important than ever

The world population is expected to increase to 8 billion by 2023,⁵⁴ putting unprecedented pressure on ecosystems and global supply chains. With this comes continued global scrutiny on the role businesses play in harming or protecting our fragile planet.⁵⁵

However, in times of uncertainty such as this, we often see Darwinian principles emerge. People revert to survivalist behaviour, e.g. stockpiling basic goods – with a focus on security for the immediate future. Aspirational and leisure spending is often put on hold, causing devastating impacts to long-established business models and industry players.

This is particularly true for the travel and tourism sectors and many bricks and mortar operations like restaurants and retailers.

Despite this, people expect brands to take the initiative and lead in the fight against COVID-19.

People want brands to help them on a day-to-day basis by adapting products and services as well as communicating how they will work with them for a better future moving forward.⁵⁶ Now more than ever, brands are asked to do their part in helping society solve real issues.

When it comes to climate change, Ipsos found at least two-thirds (67%) of people in nearly every country feel companies do not pay enough attention to the environment. Renewable energy, reduced plastic and meat consumption, shorter supply chains and reforestation top people's concerns.⁵⁷

COVID-19 has also increasingly forced different factions to become even more digital.

In the UK, one in ten are buying groceries online for the first time.⁵⁸ In China, people are twice as likely to buy the products they need via e-commerce platforms than shopping malls (46% vs 25%).⁵⁹

As more people turn to online banking and digital finance apps, there is an argument that COVID-19 will encourage traditional banks and startup fintechs to collaborate more, as previous offerings prove no longer fit-for-purpose.⁶⁰

There are further suggestions that airlines might not recover from COVID-19 crises for the next five years.⁶¹

Ipsos has identified five key industries (Automotive and Transport, Fashion and Retail, Finance, Food & Drink, and Travel & Leisure) that are linchpins in the move towards a greener economic transition after COVID-19.

Examples of industry support during COVID-19⁶²

- Louis Vuitton and pub chain BrewDog have partnered to make hand sanitisers amid shortage fears. These will be given away to health authorities and local charities.
- Amazon has released free children's audio books to help parents educate and entertain children during lockdown.
- Zara has converted its factories to produce cotton face masks and protective equipment for hospitals that face shortages.
- Guinness has donated £1,000,000 to support bar industry workers who cannot work as a result of the lockdown.

2 IN 3 GLOBALLY PLAN TO USE THEIR VEHICLE MORE THAN PUBLIC TRANSPORT



Automotive and public transport

In the weeks preceding COVID-19, we saw 46% globally claim they intended to walk, cycle or use public transport more in order to limit their impact on climate change.⁶³ By mid-April, two in three globally (64%) say they plan to use their own vehicle over public transport more than they did before COVID-19.⁶⁴

However, many European cities and countries are looking to curb this through better cycling and walking infrastructure, and awareness and incentivisation schemes.

“Of course we want to reopen the economy,” Marco Granelli, deputy Mayor of Milan told the Guardian. “But we want to do it on a different basis than before.”⁶⁵

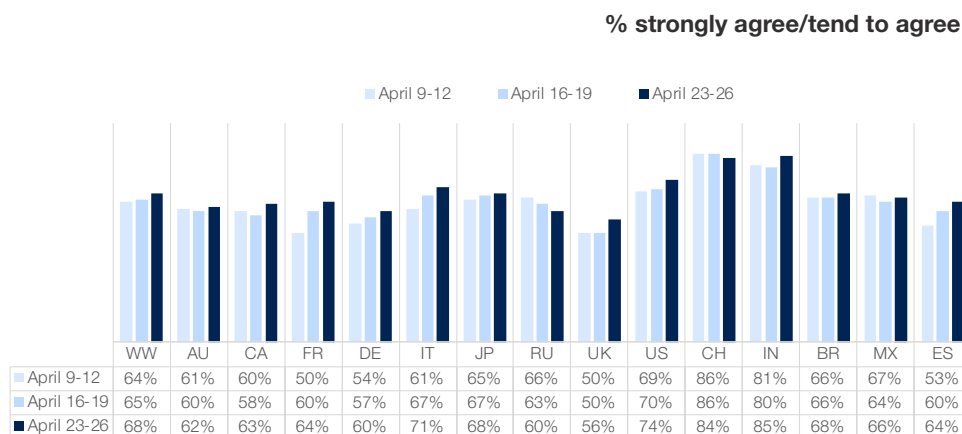
As oil prices plummet into negative figures for the first time in history, global sales of electric vehicles (EV) are estimated to drop by 43% in 2020.⁶⁶ Post-pandemic, the 2021 projection for new EV models is estimated to be 34% less than the pre-pandemic estimation.⁶⁷

In April, a tweet by Tesla CEO Elon Musk, claiming Tesla stocks were ‘too high’, saw shares plummet by 10%.⁶⁸

- France is encouraging people to cycle through a £17m (\$21.7m) initiative that allows everyone £45 (\$55) worth of bike repairs at registered mechanics.⁶⁹
- Milan has announced a plan to repurpose 35km (22mi) of streets to reduce car use and encourage the public to walk and cycle more after lockdown.⁷⁰
- A district in Berlin has approved a scheme to temporarily widen two bike lines to improve cycling safety. 133 other German cities have submitted similar pop-up bike proposals.⁷¹

FIGURE 9. I will avoid public transport and use my car or other vehicle more than I did before

Source: Ipsos weekly COVID-19 tracker
Base: 28,000 adults aged 18-74, 15 countries, 23-26 April 2020



RENEWABLES FORECASTED TO OVERTAKE COAL FOR FIRST TIME IN US



Energy and utilities

Energy and utilities companies across the globe continue to be prioritised during the pandemic in efforts to provide safe, reliable and accessible forms of electricity and natural gas to the public.

For the first time ever, the US is forecasted to produce more electricity from renewable energy than coal this year.⁷² This largely follows patterns of slow changes in energy consumption in the country, growing climate change movement and the profound circumstances of COVID-19. For example, coal generation in the UK dropped by 35% in March.⁷³

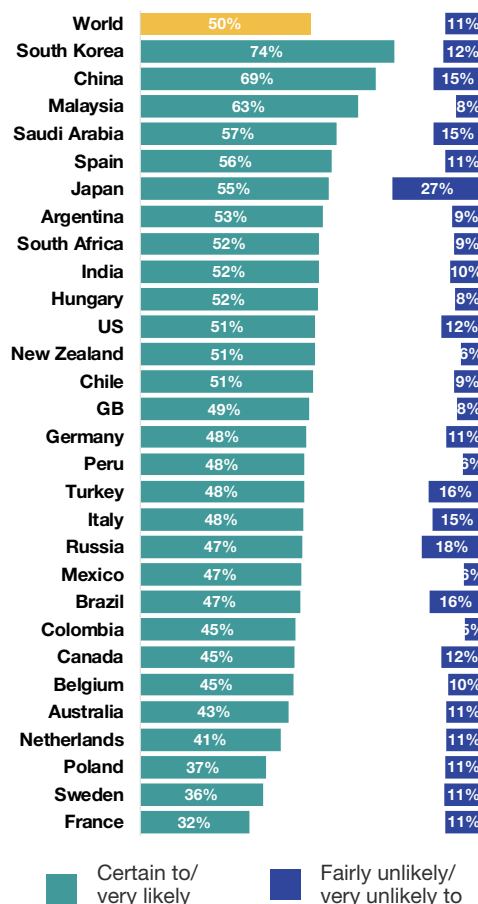
After ten years of uninterrupted growth, demand for fossil fuels is expected to drop by 5% this year. Coal is expected to drop by 8% in 2020 compared with 2019.⁷⁴

In terms of public willingness to save energy in the home, we see Asian countries largely leading the way.

- Britain rapidly phasing out coal; breaks record for coal-free power generation.⁷⁵
- Israel pledges £1.5 billion GBP (\$2 billion) for 2 GW of new solar generation capacity as part of COVID-19 recovery.⁷⁶
- Portugal set a new coal-free record as a result of the pandemic.⁷⁷
- Clean energy firms in Mexico, Turkey and Bangladesh are seeking greater support.⁷⁸

FIGURE 10. Thinking about things you might do in order to limit your own contribution to climate change

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



Source: Ipsos Earth Day Survey
Base: 20,590 online adults aged 16-74, 21 February-6 March 2020

52% globally say they will avoid buying new goods and try to mend what they have



Fashion and retail

COVID-19 has had catastrophic effects on the fashion industry. Extended lockdown will put more than 80% of fashion players in Europe and North America at financial risk.⁷⁹

But how will shopping for non-essential goods (e.g. clothes and beauty products) look post-pandemic?

Ending overconsumption and fast fashion were growing trends in 2019, gaining traction in early 2020.⁸⁰ A recent Ipsos survey⁸¹ found that two in five people worldwide had already purchased second-hand fashion items, including clothes, shoes and accessories.

In the months leading up to the crisis, 72% of the global public thought clothing brands should be responsible for what happens in their manufacturing process and

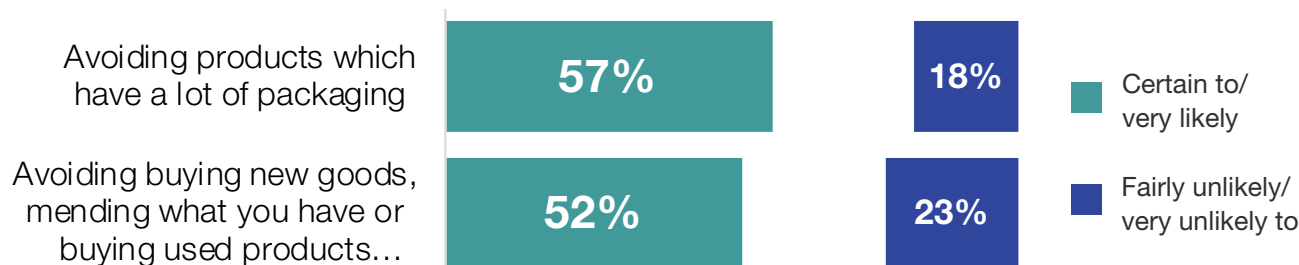
should take measures to ensure that the clothes are manufactured in environmentally friendly way.⁸²

56% said they would be put off buying from a brand that was associated with pollution in its manufacturing process.⁸³


Avoiding products with lots of packaging was also the leading action global consumers were willing to take against climate change in the early weeks of the pandemic.⁸⁴ There is speculation this trend will only continue post-pandemic.⁸⁵

Many are also seeking to reduce and reuse. As of April, 52% globally said they would avoid buying new goods or mend what they have.⁸⁶ There is some suggestion that consumers will be looking for 'investment' pieces – minimalist, timeless staples – rather than the latest trends.⁸⁷

FIGURE 10. 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?



Source: Ipsos Earth Day Survey, Base: 20,590 online adults aged 16-74, 21 February- 6 March 2020

A close-up photograph of a hand dropping a US dollar coin into a white piggy bank. The coin is held between the thumb and index finger, just above the slot of the piggy bank. The piggy bank is white and glossy, with a small black eye and a pink snout. The background is a solid dark blue.

More than half of people globally say there is a high threat to their job

Finance

A recent poll found rising anxiety concerning personal finance, with many seeing the epidemic as a greater threat to their finances than to their health.⁸⁸ Three in four (76%) globally agree the coronavirus pandemic will have a financial impact on them personally and more than half (51%) say there is a high threat to their job or business from the COVID-19 outbreak.⁸⁹ This sentiment has jumped by double-digits in most developed economies.

The International Labour Organization (ILO) anticipated in April 2020 a loss of up to 25 million jobs globally in a worst-case scenario.⁹⁰

While sustainable investing has grown exponentially in recent years, there has been concern among portfolio managers and investors alike on performance during COVID-19. However, since the crisis began, sustainability funds have outperformed their peers in both developed and emerging markets.⁹¹

Many experts anticipate that small to medium businesses (SMBs) will be among those hit hardest.⁹² Ipsos' UK ethnography team found that while some SMBs are able to offer remote services, if they cannot quickly sort out secure, remote payment methods, their cashflow will continue to suffer. Lots of small business owners are embarking on the quick and steep learning curve of how to do secure online orders. As business owners are forced to work from home and shift to more digital models, many may emerge from this crisis with a more sustainable business model and new revenue streams, as well.

This is also true for gig economy workers like Jenny, a London-based yoga teacher. "I used to run around the city to teach classes at various yoga studios," she said. "Since the crisis, I realise I can teach most of my classes online, and have students pay into my PayPal account directly."

As consumer and SMB financial management needs are pushed digitally across markets and generations, some experts hypothesise that traditional banks and fintechs will need to learn to collaborate quickly and effectively. There is a scope here to innovate and supply more fit-for-purpose digital finance platforms.⁹³

Massive uptake of meal kits and subscription food services



Food and drink

Food systems play a crucial role in environmental sustainability, and disruption to the global food system as a result of COVID-19 has already been substantial. From flour shortages to farmers being forced to dump rivers of milk as the public forgoes flat whites for freeze-dried,⁹⁴ the changes seen so far may well be the tip of the iceberg.

The World Food Programme estimates that 265 million people from low and middle-income countries could be pushed into acute food insecurity by COVID-19.⁹⁵ Meanwhile, current food systems result in 1.3bn tonnes of waste per year.⁹⁶

The pandemic is exacerbating food shortages in east Africa specifically, which is already facing challenges of locust infestation and heavy flooding brought on by climate change.⁹⁷

In the UK, furloughed workers are encouraged to sign-up as fruit pickers, as the flows of labour that normally keep our food system moving grind to a halt. Food banks have also seen demand soar around the world.⁹⁸

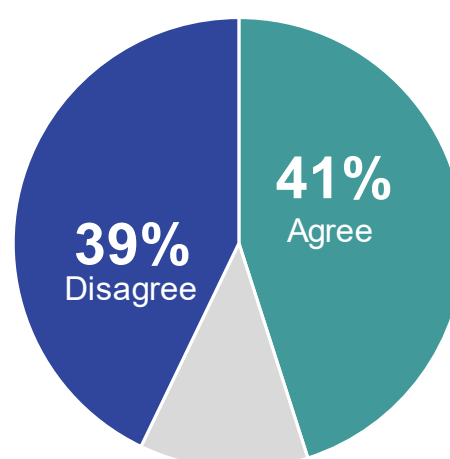
With options in many countries now limited to takeaways or home cooking, and purses feeling more pinched, many people are cooking at home much more than they previously did.

Meal kits and subscription services like veg boxes have seen demand and profits soar.⁹⁹ Their direct links to supply chains have helped them navigate supply chain disruption. Despite issues around packaging, meal kits are likely to reduce waste, both directly (as ingredients are portioned) and indirectly, as they improve people's cookery skills.

One of the most significant trends towards more sustainable diets is the change in intended meat and dairy consumption. Ipsos Earth Day data found 41% globally say they are likely to eat less meat in 2020 while, a similar proportion (39%) say they are unlikely to do this.

A third (35%) say they are likely to eat fewer dairy products, but half (49%) say they are unlikely to do this.¹⁰⁰ The market for vegan and vegetarian products is growing.

FIGURE 10. Eating less meat, or replacing the meat in some meals with alternatives such as beans



Source: Ipsos Earth Day Survey
Base: 20,590 online adults aged 16-74, 21 February-6 March 2020

Just 15% of the UK would be comfortable booking a leisure trip in coming weeks



Travel and leisure

Arguably, travel and leisure is one of the hardest hit industries as a result of COVID-19.¹⁰¹

Ipsos Earth Day data found 41% globally say they are likely to avoid flying in the next year to limit their personal contribution to climate change.

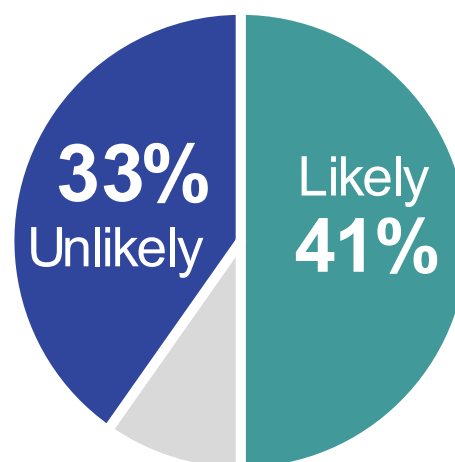
For the immediate future at least, there is significant hesitation to fly or travel for the remainder of 2020.

While three in five people (59%) say they will likely go back to all the things they did before the crisis, including vacations and travel, this may not be for some time.¹⁰²

In the UK, only 15% of people feel comfortable booking at least one leisure trip or staying in another city in their country.

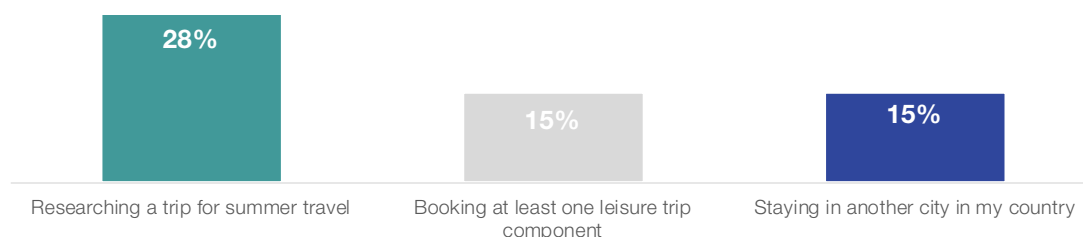
This could also have detrimental impact on overseas travel to areas that have been worse hit by the crisis. More than three-quarters of the UK public believe that people will be less likely to travel to China (77%), while three in five think that major international events such as the Olympics could be in jeopardy (60%).¹⁰³

FIGURE 12. 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



Source: Ipsos Earth Day Survey, Base: 20,590 online adults aged 16-74, 21 February-6 March 2020

FIGURE 13. How comfortable would you be doing each of the following in the next few weeks? (UK)



Source: Ipsos Earth Day Survey, Base: 20,590 online adults aged 16-74, 21 February-6 March 2020

WHAT NOW?

Government and industry have clear mandate for a greener economy

These are what we see as key considerations for policymakers in governments and industry to focus on.

1. Stress that this is about growing the 'Green Economy', and growth generally, not restricting growth

The global public strongly supports a green recovery following the pandemic. However, as the impacts of the economic downturn play out, we will likely see a greater shift to short-term thinking and quick economic wins. Currently, the public remains divided as to whether a quick economic turnaround should be prioritised at the expense of the environment.

An investment in green jobs and initiatives that have clear and timely economic returns should take precedence. Communications on a green recovery should prioritise the short and long-term economic advantages of such an approach.

2. Government and industry should give the public clear, tangible actions that make a difference

Climate change is complex and long term. Motivating the public to act will require 'breaking down' the issue into small, distinct and clear calls to actions (e.g. straw ban). Governments and industry should communicate easy, tangible wins that are achievable for people. The public must feel government and industry are equally pulling their weight and acting proactively in these efforts; they want to know that everything that can be done to achieve reduced pollution and carbon emissions is already being done, and that burdens are being shared fairly between consumers and industry.

3. Brands should seek to clearly communicate and tailor green brand positionings

The public expects brands to play an active role in helping society during a crisis. At the same time, they are more sensitive to 'greenwashing' than ever before. As the

climate crisis rises on the global agenda, there will be more pressure on brands to own their own impact and tailor their positioning. Brands should not seek to be 'all things to all people'. Clear, transparent, ownable positions that demonstrate real impact will help to increase consumer closeness and emotional connections.

4. There must be space and opportunity for everyone to 'do their part'

While the public still cares about climate change, it has largely taken a back seat to the more urgent issue of COVID-19. Spontaneous concern has fallen as concern about the virus and the economy has risen. This may exacerbate the 'say-do' gap, as people opt to drive cars instead of using public transport for safety reasons.

While interest in living more sustainably remains high, government and industry need to follow the lead of many cities – for example encouraging cycling and walking by provision of wider pavements and cycle lanes – that let people do what they need to do in a more environmentally friendly way.

The pandemic and the massive response to it is inspiring in the sense that faced with a clear and present danger, people are prepared to make dramatic changes to their lifestyle and consumption. It has shown how things that normally take years can happen in weeks when the case is clear, and that government, academia and industry can collaborate rapidly to a common goal. The question is how to frame the much slower march of climate change as something as immediate as COVID-19.

Initiatives that build on cross-sector collaboration, that are seen as 'fair' will be most successful. The regulatory and tax regime that saw the UK become a world leader in renewable energy production without requiring consumers to do anything is the sort of example we should focus on.

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***Qualitative research conducted as a part of this study**

Ipsos undertook a series of six 1-hour depth interviews with climate experts around the world, half of which were based in the UK during March and April 2020. Ipsos conducted 10 x 30 min depth interviews with consumers from Guyana, UK, USA, Switzerland and South Africa.

NB: In established markets with a higher level of internet penetration (more than 60% online), the results can be taken as representative of the general working-age population. In markets where internet penetration is lower, the results should be viewed as representative of a more urban, affluent and ‘connected’ population.

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ABOUT IPSOS GREEN ECONOMY

Ipsos Green Economy leverages cross-sector expertise in sustainability, environment and climate change research to inform decision-making at the forefront of the green economy.

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ABOUT IPSOS

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 a true understanding of society, markets and people.

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You act better when you are sure.

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