

GLOBAL CONSUMER TRENDS

THE URGENT FIGHT AGAINST CLIMATE CHANGE



REPORT OVERVIEW

Global Consumer Trends: The Urgent Fight Against Climate Change

With these words reverberating around the world, leaders of the United Nations will come together for the COP26 climate change conference in Scotland for two weeks of meetings, presentations and discussions focused on the urgent fight against climate change. Attending countries and their leaders will be asked to join in this fight for our planet's future through the mobilization of scientific, environmental, financial and political resources – with the eyes of the world watching intently.

For many consumers, COP26 and other global climate conferences featuring government and business leaders are seen as a necessity if the world is to effectively fight climate change. After all, many of us have been taking measures in our own lives – making more eco-friendly purchasing decisions, improving household energy efficiencies, or donating/volunteering with climate change organizations – to do our part in the fight, but we feel there is more we can do if we mobilize together. This call to action is the inspiration for the latest report in Dynata's Global Consumer Trends research series – Global Consumer Trends: The Urgent Fight Against Climate Change – exploring the opinions and attitudes of global consumers on the current and future involvement of, and actions by, governments, businesses and individuals in the effort to slow or stop climate change around the world.

Using the responses of more than 12,000 consumers from 12 countries – including the USA, Canada, the UK, France, Spain, Germany, Italy, The Netherlands, China, Japan, India and Australia – Dynata's Global Consumer Trends: The Urgent Fight Against Climate Change sought to uncover and understand the feelings of climate change believers on the most meaningful actions governments, businesses and individuals should take in response to the urgent climate change threat. The report reveals opinions on who should lead the fight – and whom they should join with – as well as the urgency to make the meaningful choices and actions that demonstrate the depth of commitment required to make an impact. Finally, it explores the opportunities that taking that action can bring, including the chance to emerge as a leader on the world stage.

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"The decisions we make
[on climate change] in the
next years and the actions
we take by 2030 are basically
going to set the trajectory
for future generations."

ALOK SHARMA

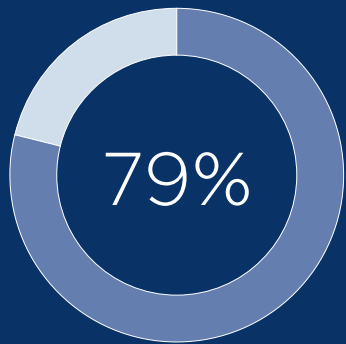
**PRESIDENT OF THE 26TH U.N. CLIMATE CHANGE
CONFERENCE OF THE PARTIES (COP26)**

”

KEY FINDINGS

1

Globally, people believe countries need to come together to work toward shared goals to solve climate change.



OF PEOPLE BELIEVE WE NEED TO GLOBALLY WORK TOGETHER

2

Belief in climate change is high, and many believers think it is happening now.

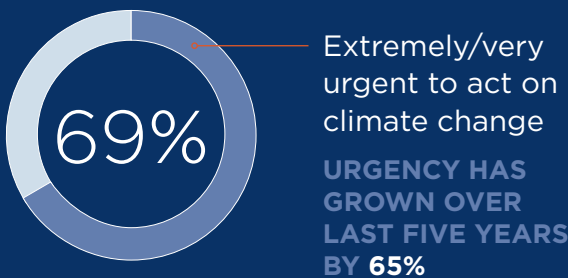
84% BELIEVE IN CLIMATE CHANGE



climate change believers think it is already happening

3

People feel an urgency to combat climate change, and that urgency has grown in priority over the last five years.



Extremely/very urgent to act on climate change
URGENCY HAS GROWN OVER LAST FIVE YEARS BY 65%

4

Yet even with that urgency, 4 in 10 feel that climate change will affect them personally.



KEY FINDINGS

5

Governments can lead the climate change fight, and call upon businesses and individuals to have greater impact.



1/2 of climate change believers see potential in public-private partnerships (governments & businesses)

6

Those believing in climate change want to see the private sector invest in sustainable businesses, institute responsible business practices, and hold governments accountable on climate change response.

60%
INVEST IN
CLEAN ENERGY/
SUSTAINABLE
BUSINESSES

35%
HOLD
GOVERNMENTS
ACCOUNTABLE

7

Climate change believers are willing to make changes at home, in their communities and in their buying behaviors to help in the fight.

77% THINK GREENER BUYING DECISIONS WILL HELP



4 in 10

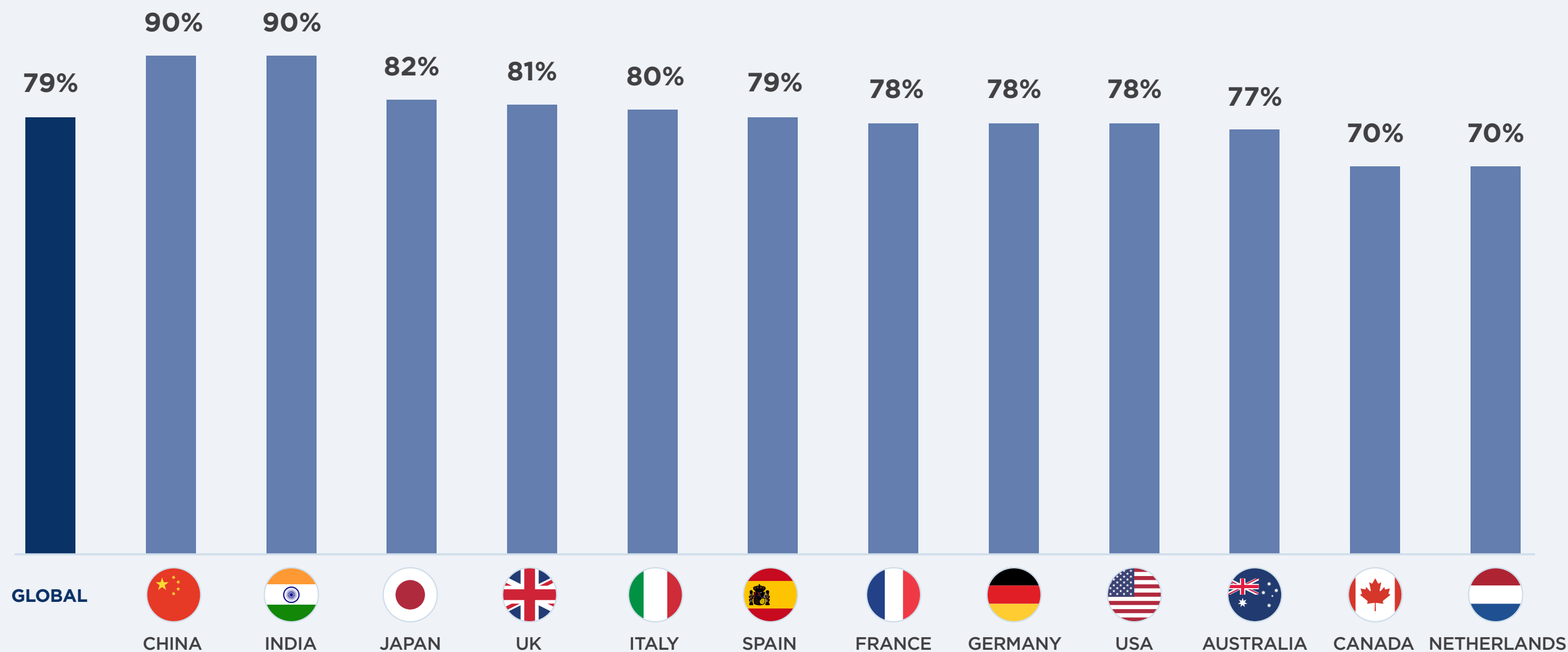
advocate for action to influence climate change policy



Globally, people believe countries need
to come together to work toward
shared goals to solve climate change

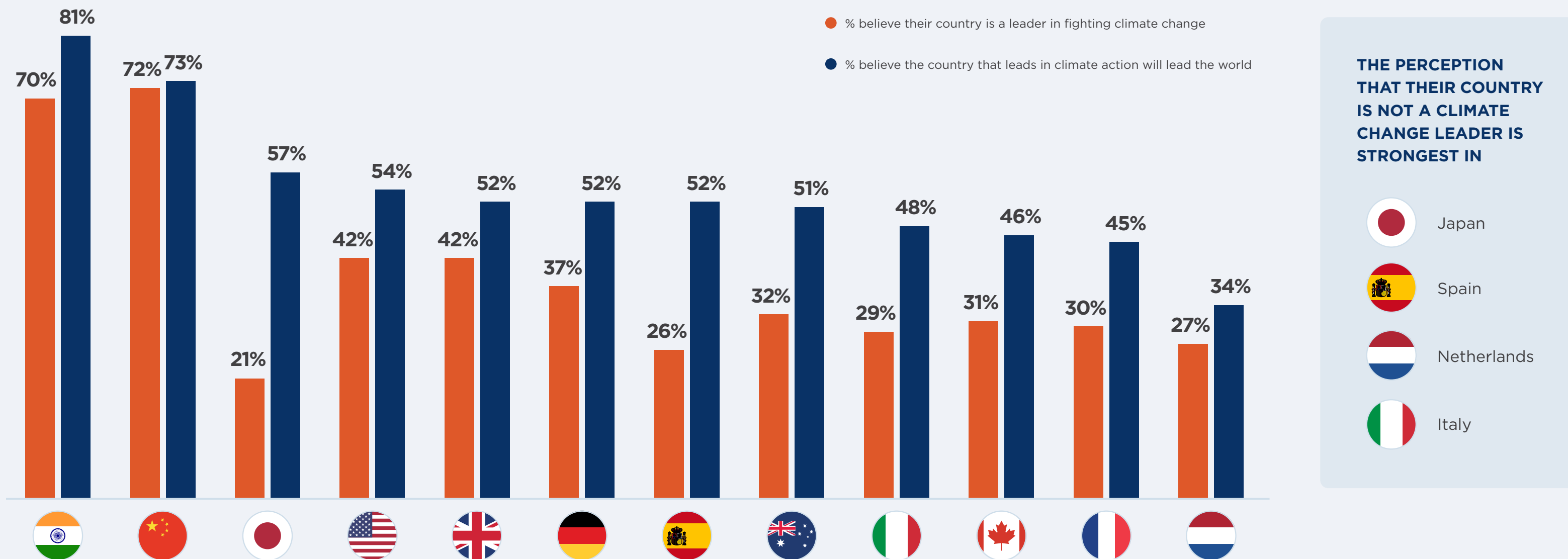
IN EVERY COUNTRY, PEOPLE BELIEVE THAT **NATIONS MUST WORK TOGETHER TO SOLVE CLIMATE CHANGE**

% AGREE THAT "TO SOLVE CLIMATE CHANGE, NATIONS MUST UNITE TO TAKE ACTION TOGETHER, AND HOLD EACH OTHER ACCOUNTABLE TO SHARED GOALS"



MANY BELIEVE THE COUNTRY THAT LEADS ON CLIMATE CHANGE WILL LEAD THE WORLD, BUT FEWER SEE THEIR COUNTRIES AS CLIMATE LEADERS

% AGREE THAT “TO SOLVE CLIMATE CHANGE, NATIONS MUST UNITE TO TAKE ACTION TOGETHER, AND HOLD EACH OTHER ACCOUNTABLE TO SHARED GOALS”





Governments can lead the response to
climate change, and call upon businesses
and individuals for greater impact

GLOBALLY, PEOPLE BELIEVE **GOVERNMENTS HAVE GREATEST POTENTIAL TO IMPACT CLIMATE CHANGE** - BUT ALL CAN PLAY A ROLE

WHO HAS THE MOST POTENTIAL TO SLOW DOWN OR STOP CLIMATE CHANGE?

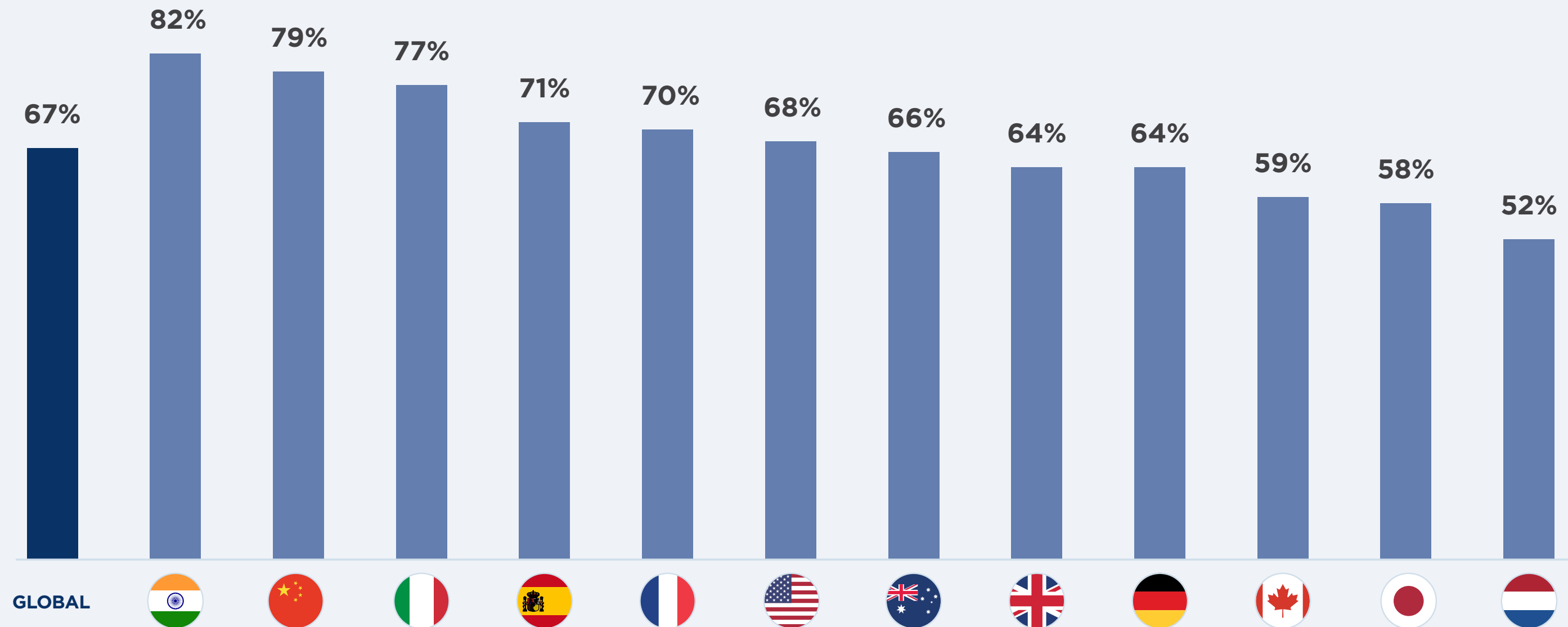
Among those who believe climate change is a reality



PUBLIC/PRIVATE PARTNERSHIPS RANKED #1 IN USA AND GERMANY

A MAJORITY IN ALL COUNTRIES **WANT THEIR GOVERNMENT TO PRIORITIZE CLIMATE CHANGE**

% WOULD LIKE THEIR COUNTRY'S GOVERNMENT TO MAKE CLIMATE CHANGE A HIGHER PRIORITY

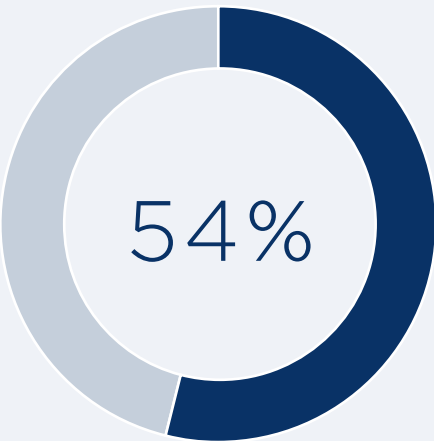
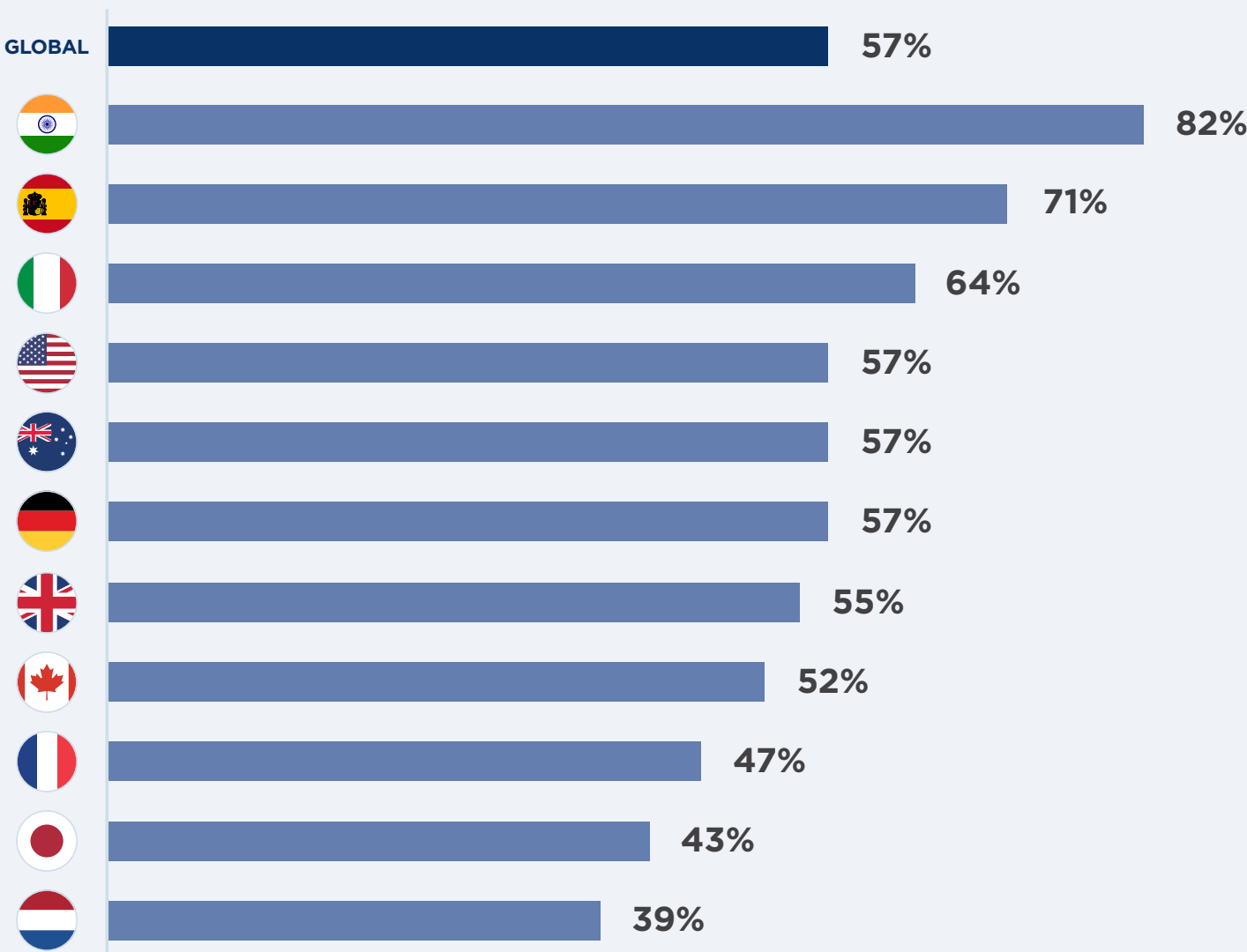


PEOPLE SEE CLIMATE CHANGE AS A PRIORITY POLITICAL ISSUE

- BUT BELIEVE THAT POLITICIANS' CLIMATE PROMISES DON'T MATCH THEIR ACTIONS

WHEN MAKING DECISIONS ABOUT POLITICAL CANDIDATES TO VOTE FOR,
HOW IMPORTANT ARE THEIR RECORD AND POSITIONS ON CLIMATE ACTION?

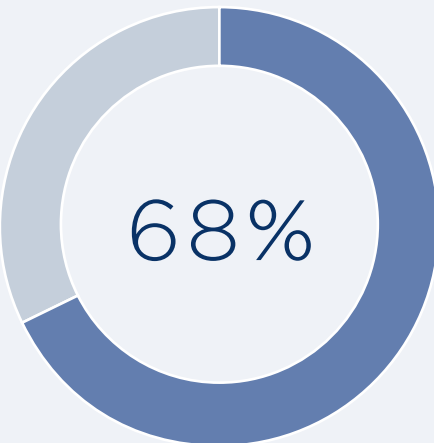
Extremely or very important



of people globally believe a politician's track record on climate is one of the top 3 most important issues



Politicians are not perceived as sincere



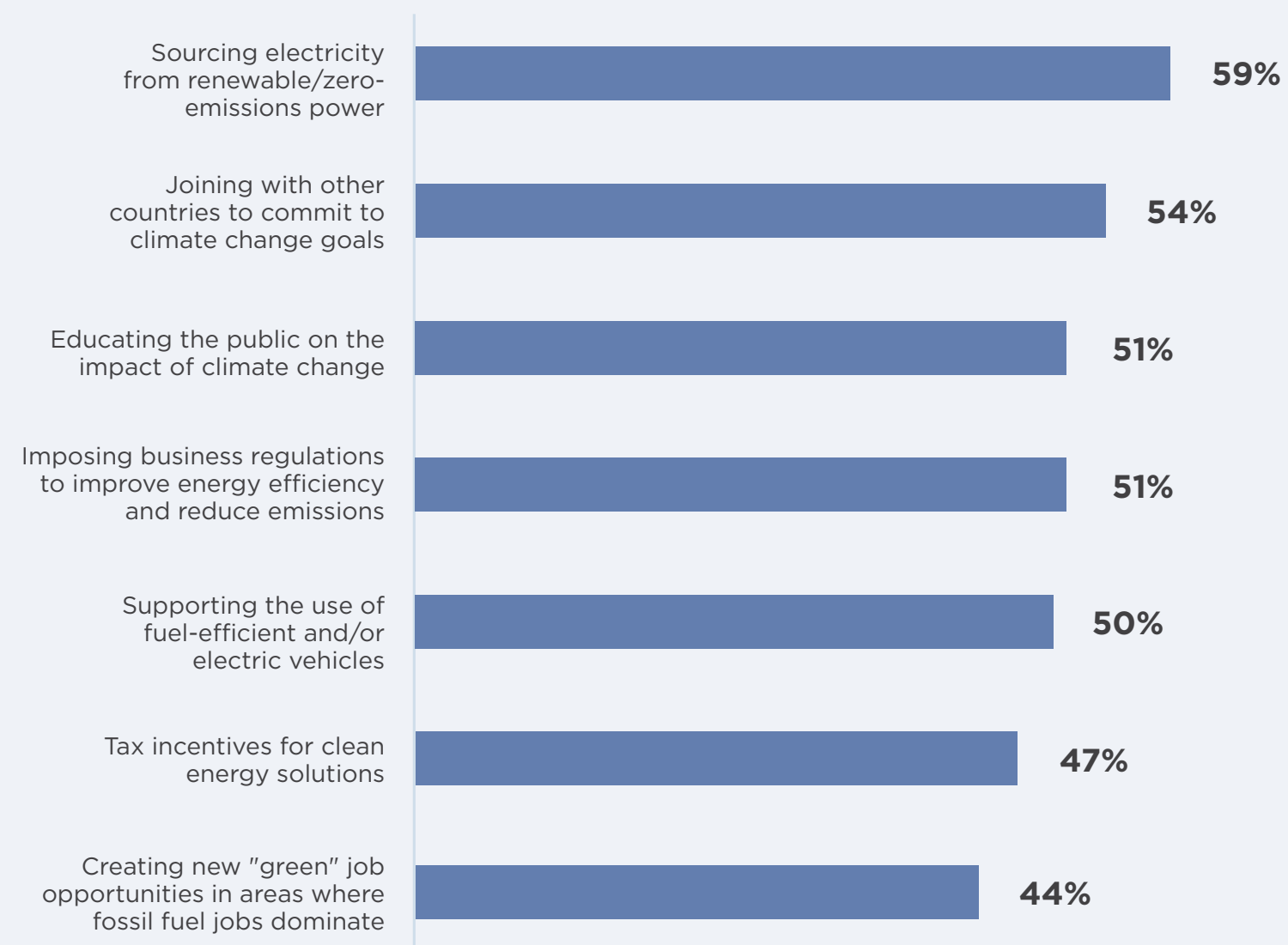
of people globally believe that politicians say they care about the environment, but their actions fall short of their words



THE MOST SUPPORTED GOVERNMENT INITIATIVES ARE **SOURCING CLEAN ENERGY AND COMMITTING TO CLIMATE GOALS WITH OTHER COUNTRIES**

WHICH CLIMATE ACTIONS DO YOU THINK YOUR GOVERNMENT SHOULD BE TAKING?

Among those who believe climate change is a reality

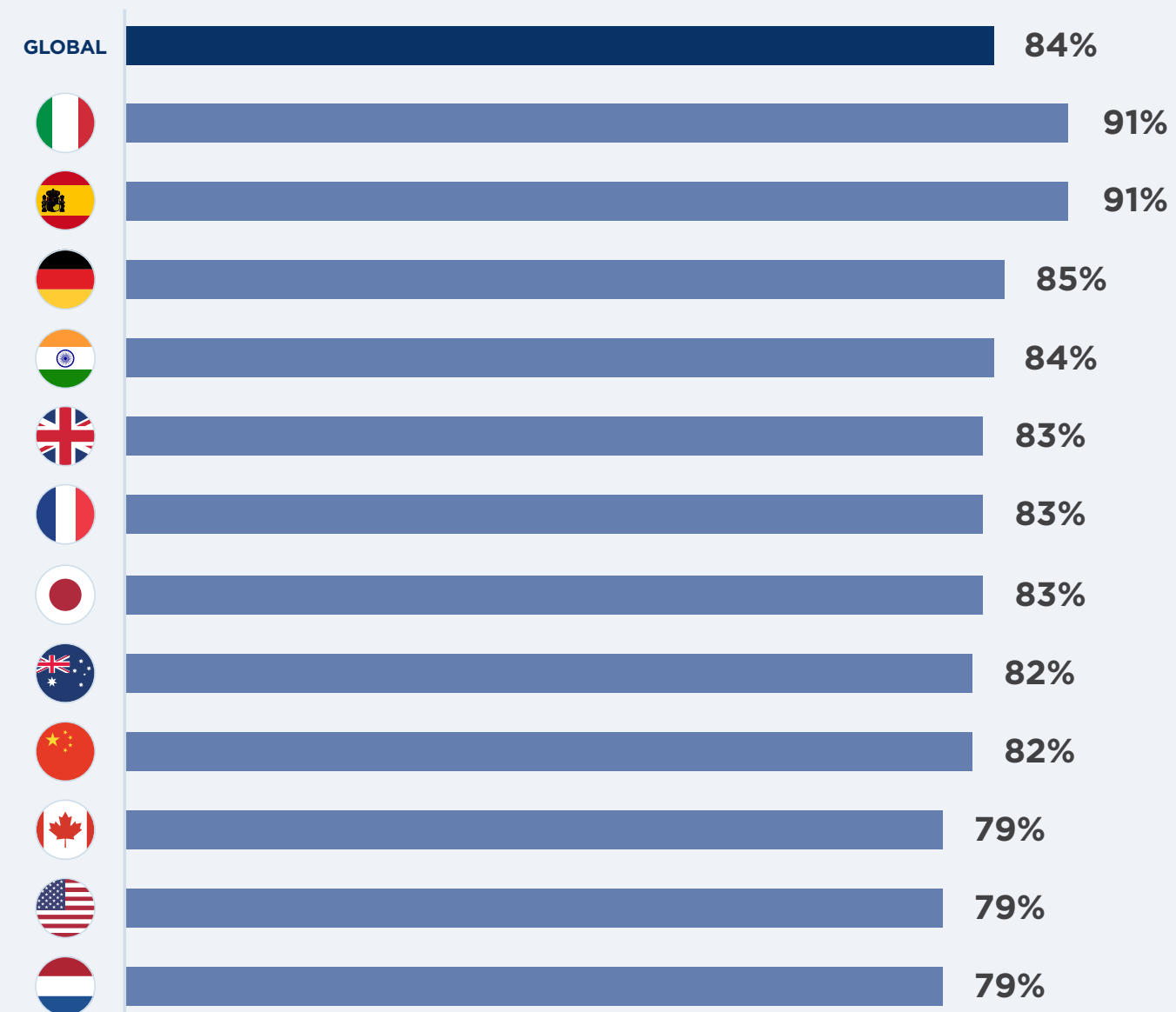




Most people believe climate change
is real, affecting the world now,
and requires urgent action

8 OUT OF 10 PEOPLE BELIEVE IN CLIMATE CHANGE

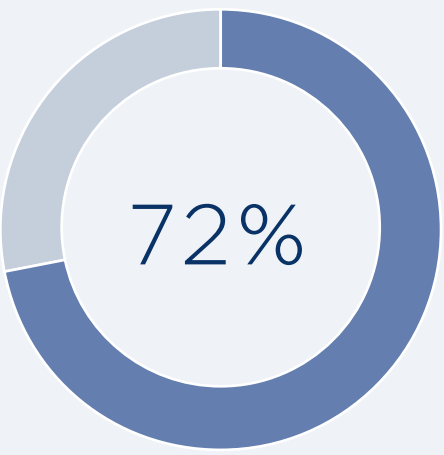
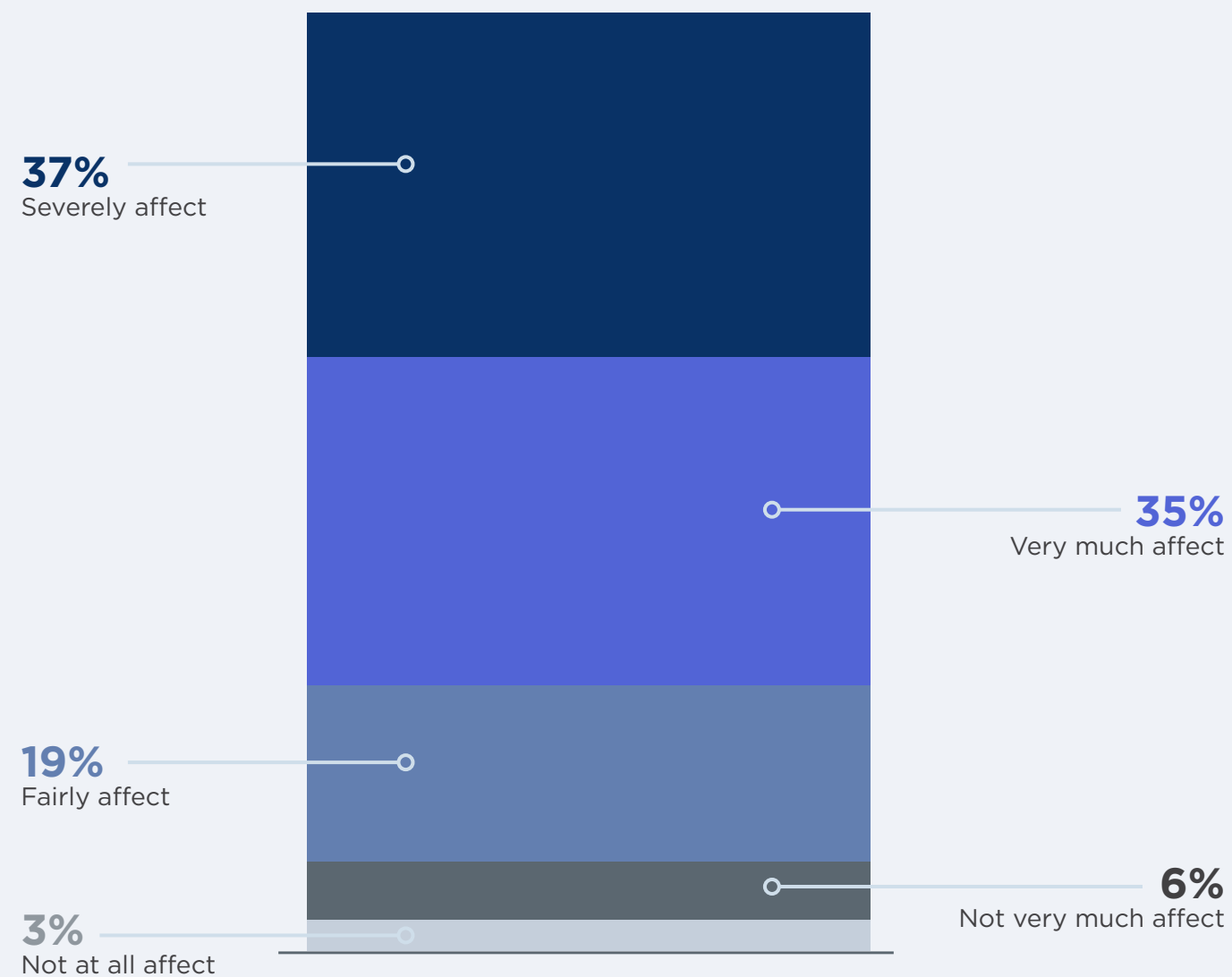
% BELIEVE IN CLIMATE CHANGE



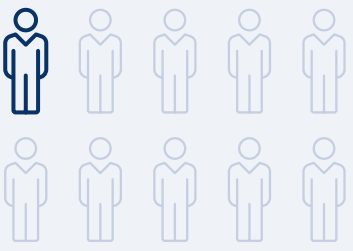
IN ALL COUNTRIES
SURVEYED, AT LEAST
8 OUT OF 10
PEOPLE BELIEVE CLIMATE
CHANGE IS REAL

PEOPLE BELIEVE **CLIMATE CHANGE WILL AFFECT OUR ENTIRE WORLD**

TO WHAT EXTENT DO YOU BELIEVE CLIMATE CHANGE WILL AFFECT THE ENTIRE PLANET?



of people globally expect that the entire planet will be “severely” or “very much” affected by climate change



LESS THAN

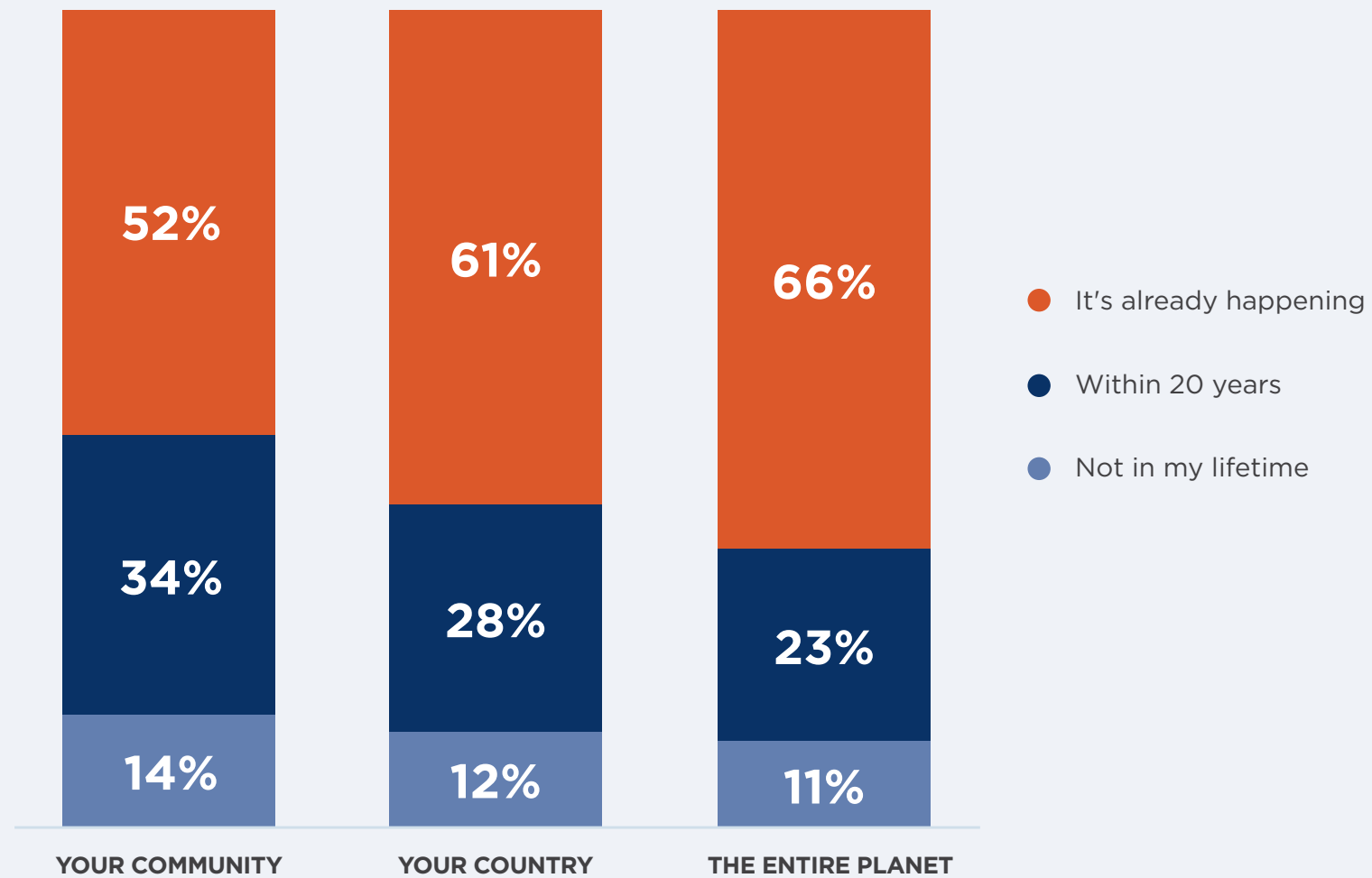
1 in 10

believe the world will be affected not very much or at all

AND THEY THINK **THE EFFECTS OF CLIMATE CHANGE ARE HAPPENING NOW**

WHEN PEOPLE BELIEVE THE EFFECTS OF CLIMATE CHANGE WILL TAKE PLACE

Among those who believe climate change will have at least some effect



AMONG PEOPLE GLOBALLY WHO BELIEVE THAT CLIMATE CHANGE WILL AFFECT THEIR COMMUNITY,

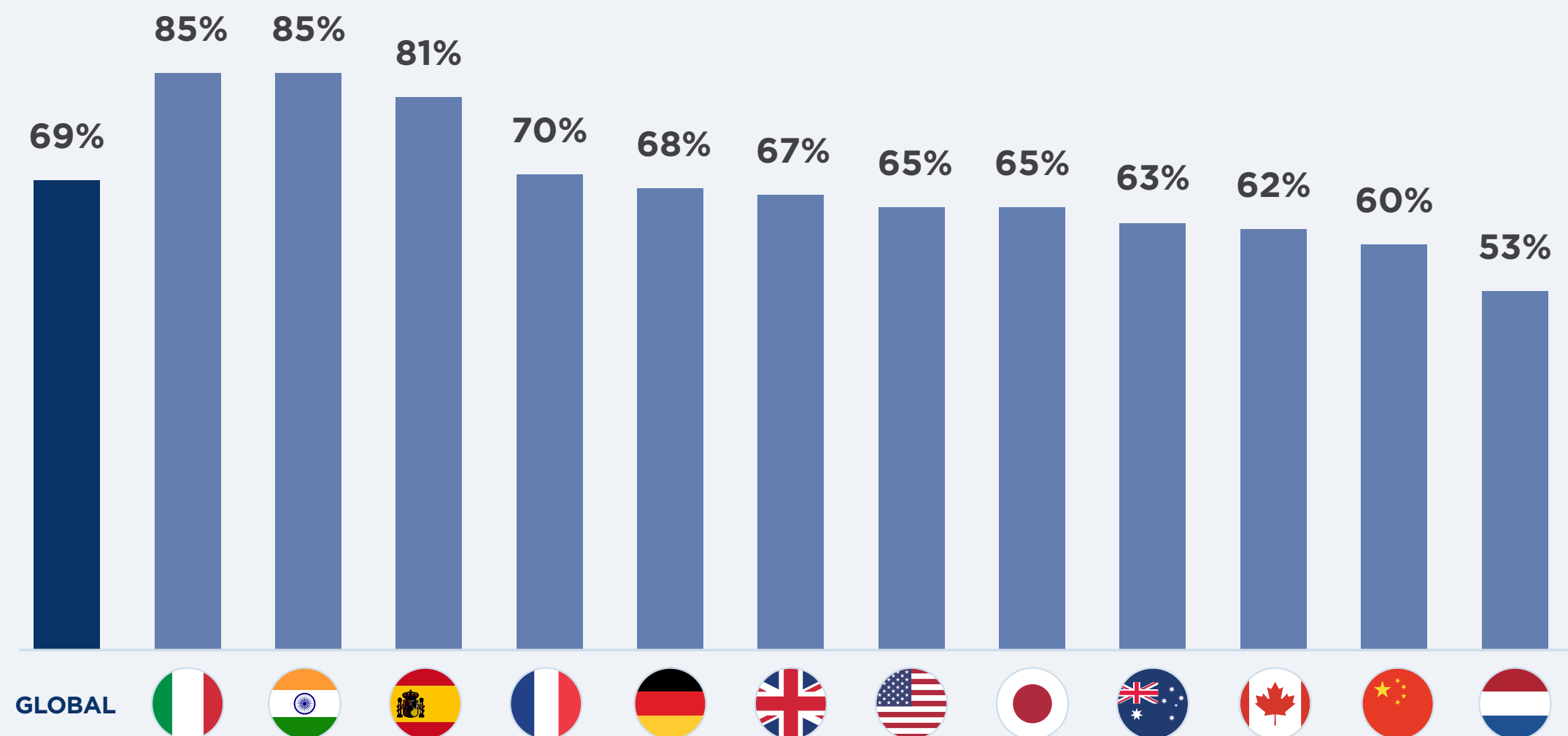
52% THINK IT'S ALREADY HAPPENING



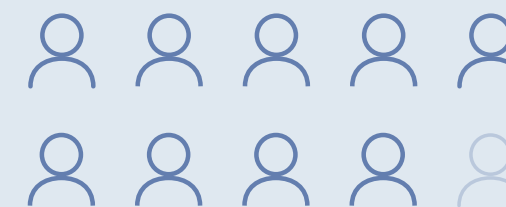
There is a sense that the **EFFECTS OF CLIMATE CHANGE ARE HAPPENING MORE IN OTHER PLACES THAN AT HOME**

7 IN 10 PEOPLE GLOBALLY BELIEVE IT'S EXTREMELY OR VERY URGENT TO ACT

% THINK IT'S "EXTREMELY" OR "VERY" URGENT FOR THE WORLD TO ACT IN PREVENTING CLIMATE CHANGE



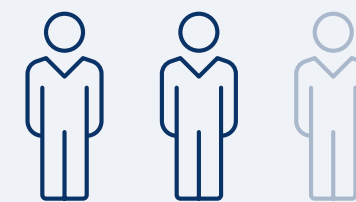
9 OUT OF 10 people globally believe that it's at least "fairly urgent" to address climate change



THE SENSE OF URGENCY IS STRONGEST IN ITALY, INDIA, AND SPAIN.

In the USA, **65%** believe that climate action is extremely or very urgent.

AROUND THE WORLD, **CLIMATE
CHANGE HAS MANY WORRIED**
ABOUT THE FUTURE



2 out of 3

people globally are worried about what life will be
like in the future because of climate change



1/2

**MORE THAN HALF OF PEOPLE IN ALL
COUNTRIES SURVEYED ARE WORRIED**

**PEOPLE IN INDIA, ITALY, AND SPAIN
ARE MOST CONCERNED**

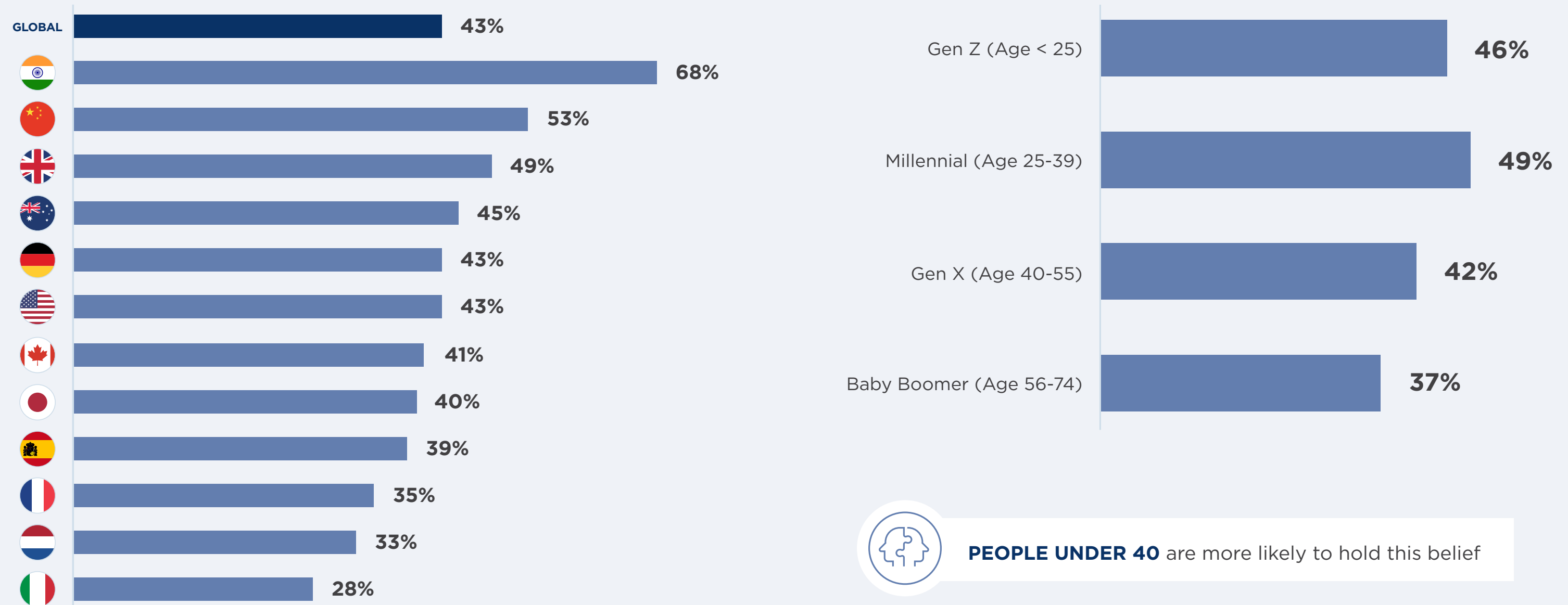


**THOSE IN THE NETHERLANDS,
FRANCE, GERMANY, AND CANADA ARE
LESS WORRIED THAN ELSEWHERE**



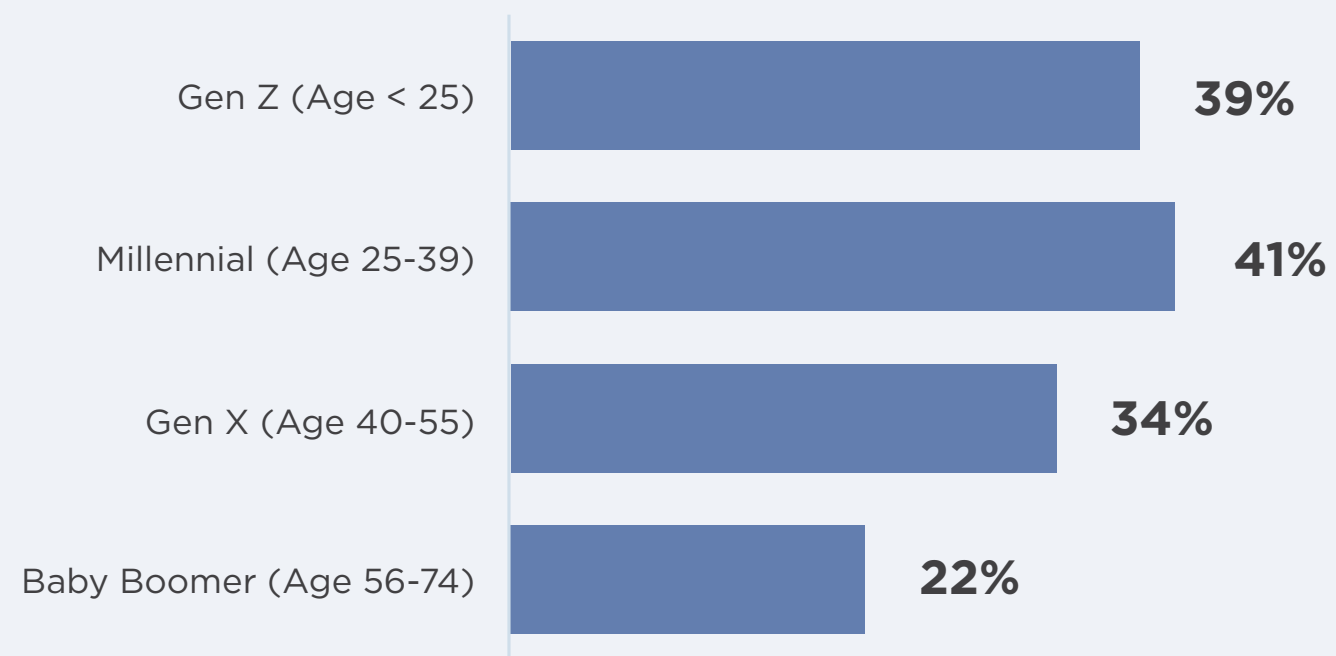
YET EVEN WITH THAT URGENCY, **MANY FEEL THAT CLIMATE CHANGE WON'T AFFECT THEM PERSONALLY**

% AGREE "CLIMATE CHANGE WILL AFFECT OTHER PEOPLE MORE THAN IT WILL AFFECT ME"



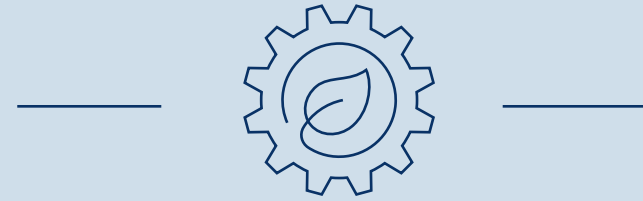
YOUNGER GENERATIONS ARE MORE LIKELY TO FEEL IT'S ALREADY TOO LATE

% BELIEVE IT'S ALREADY TOO LATE TO TAKE ACTION ON CLIMATE CHANGE



GEN Z AND MILLENNIALS HOLD A MORE PESSIMISTIC VIEW about the potential for climate action than Gen X and Boomers





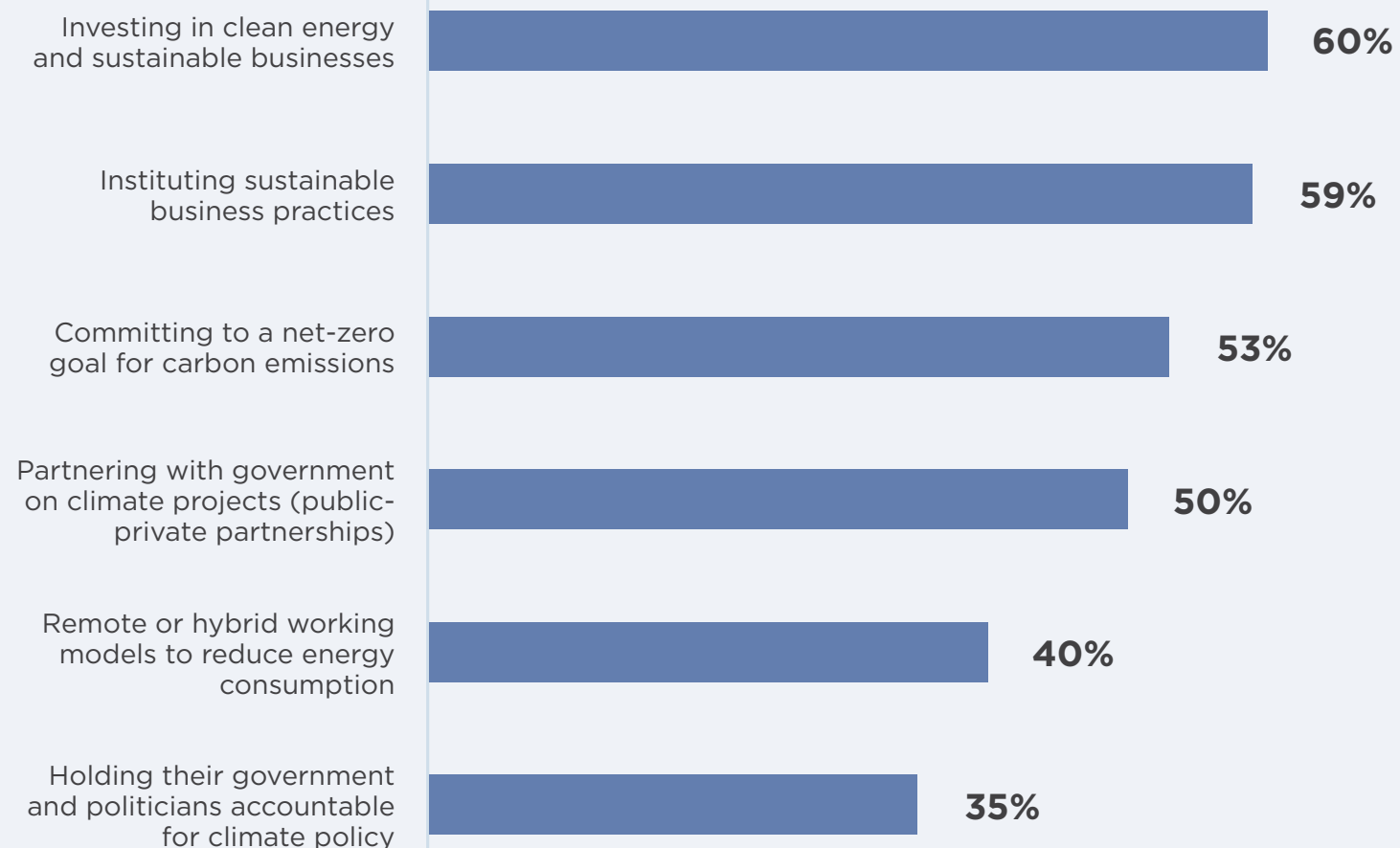
Climate change believers want
businesses to take meaningful action
toward sustainability and advocacy



CONSUMERS WANT BUSINESSES TO INVEST IN GREEN BUSINESSES, INSTITUTE SUSTAINABLE PRACTICES, AND PURSUE CLIMATE-FOCUSED PUBLIC-PRIVATE PARTNERSHIPS

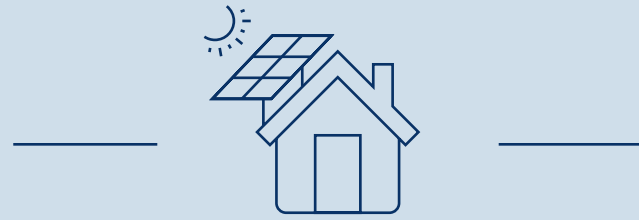
WHICH CLIMATE ACTIONS DO YOU THINK BUSINESSES SHOULD BE TAKING?

Among those who believe climate change is a reality



BUSINESSES SHOULD TAKE NOTE OF WIDESPREAD SKEPTICISM:

66% of global consumers believe that companies say they care about the environment, but their actions fall short of their words



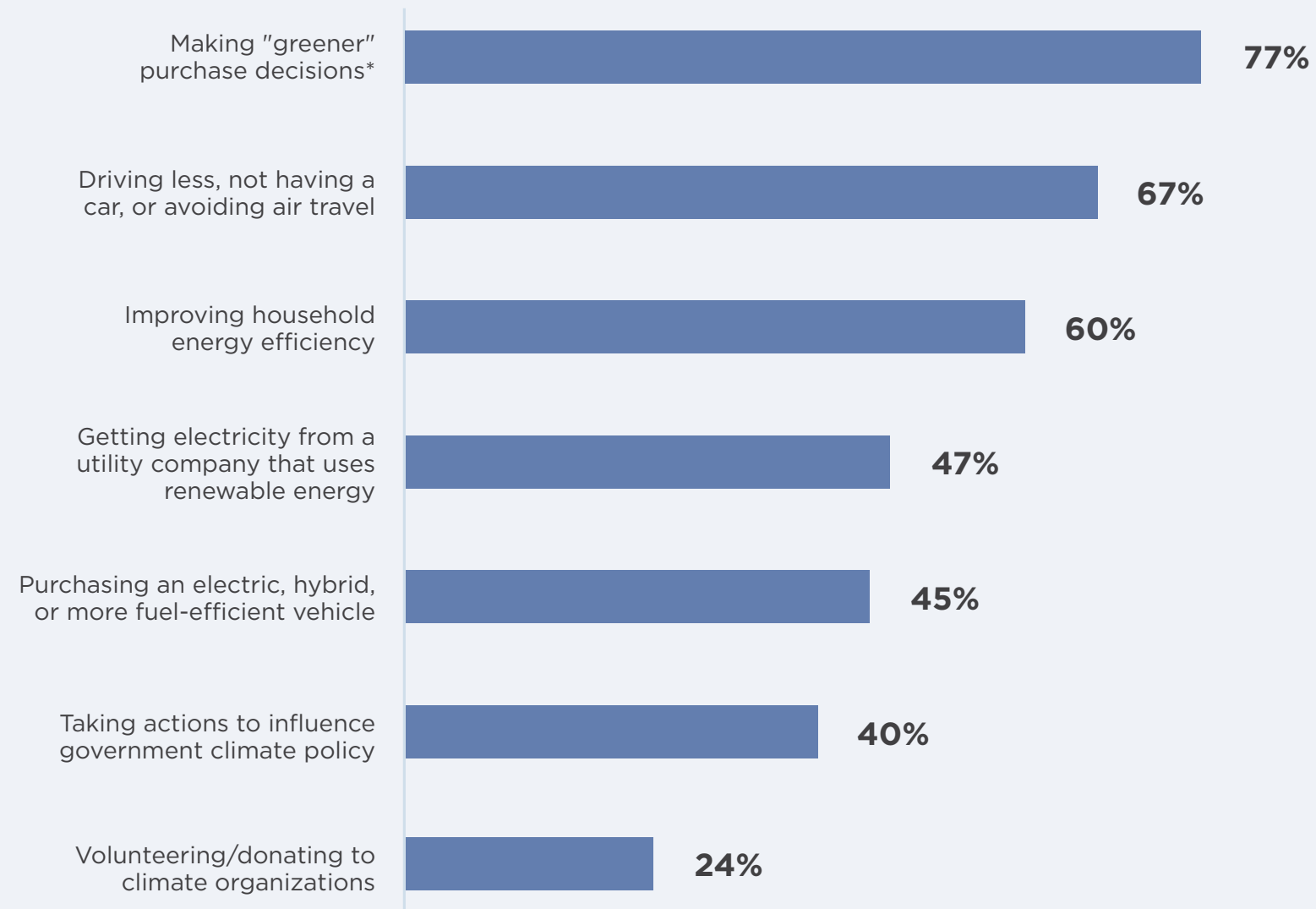
Climate change believers are willing
to make changes at home, in their
communities and in their buying
behaviors to help in the fight



CLIMATE CHANGE BELIEVERS
WANT PEOPLE TO **MAKE MORE
ECO-FRIENDLY PURCHASES,
TRANSPORTATION CHOICES
AND IMPROVE THEIR HOME
ENERGY EFFICIENCY**

WHICH CLIMATE ACTIONS AND LIFESTYLE CHANGES DO YOU THINK INDIVIDUALS SHOULD BE TAKING?

Among those who believe climate change is a reality



* "Greener" purchase decisions = buying less "stuff," not buying from companies with poor environmental practices, or spending more on products/services that use sustainable practices

WHILE CONSUMERS ARE OPEN TO SPENDING MORE ON ENVIRONMENTALLY FRIENDLY PURCHASES, HIGH COSTS ARE A BARRIER FOR SOME

CONSUMERS CONSIDER THE ENVIRONMENT WHEN DECIDING HOW TO SPEND THEIR MONEY



68%

say that if they have a choice, they prefer to buy products and services from companies that are environmentally responsible



58%

believe it's worth it to pay more for environmentally-friendly or energy-efficient products and services



53%

try not to support businesses whose practices contribute to climate change

HOWEVER, NOT EVERYONE CAN AFFORD TO SPEND MORE



54%

say that products and services that are environmentally-friendly or energy-efficient are too expensive for their budget



METHODOLOGY

Dynata's *Global Consumer Trends: The Urgent Fight Against Climate Change* survey covered the USA, Canada, the UK, France, Spain, Germany, The Netherlands, Italy, China, Japan, India and Australia from September 28 to October 5, 2021. Participants were selected across all Dynata's research panel assets, and the samples quota-controlled to reflect the population on Age, Gender and Region. Generations were broken out as follows: Gen Z - age 16-24; Millennial - 25-39; Gen X - 40-55; and Baby Boomer - 56-74. Sample sizes were USA (1,029), Canada (1,001), UK (1,064), Spain (1,000), France (1,000), Germany (1,001), The Netherlands (1,000), Italy (1,000), China (1,000), Japan (1,001), India (1,000) and Australia (1,000) – Total 12,096. The margin of error (at the 95% confidence level) is +/- 3% at the country level, +/-1% at the total level.



For more information, please visit **www.dynata.com**
or contact **info@dynata.com**.

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