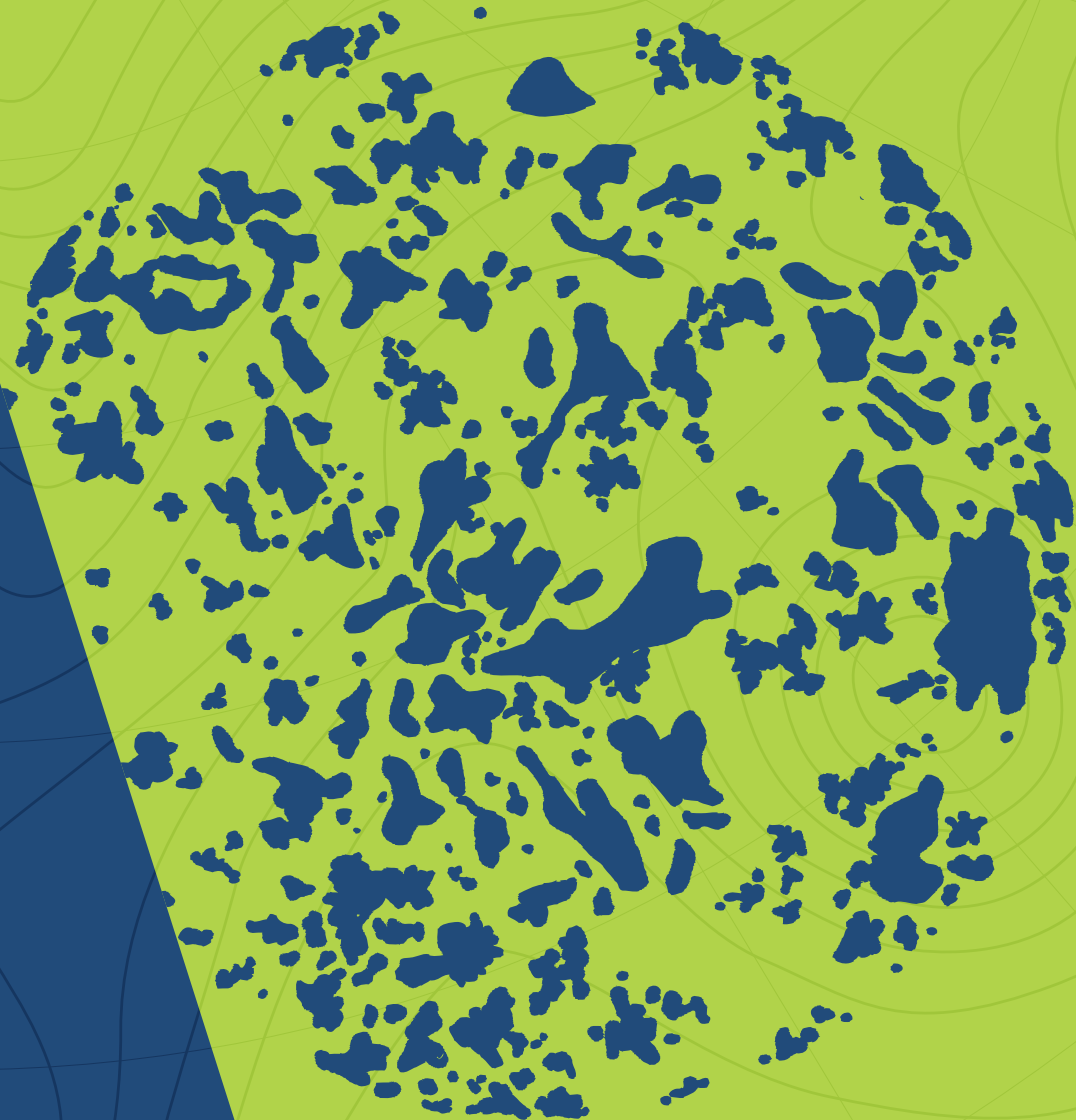




Navigating a year of change in climate policy: what it could mean for the future



Executive summary

December 2021

It's been said that 2021 was the year when the world turned a corner on climate change. A year when a delayed UN summit coincided with a global pandemic, extreme weather events effected people across the world, a new US President entered the White House and a British Prime Minister was eager to project Global Britain on to an international stage. It's been a year that has culminated in an agreement that isn't perfect but that is a big improvement on the last version and a stepping-stone to the next.

With the dust having settled, WA has asked 'so what?' What impact did the last several weeks of wall-to-wall coverage have on peoples' attitude towards climate change and net zero? What could this mean for how government develops policy and how business responds? We conducted a survey of over a thousand people across the country to find out.



Our polling found that people

- ▶ Are highly engaged in climate change as an issue
- ▶ Are aware that the journey to net zero will be difficult, but still want the country to make it
- ▶ Are committed to playing their part, but think others should typically do more
- ▶ Are watching the actions of government and businesses carefully
- ▶ Are seeing their purchasing decisions influenced by businesses' environmental credentials

Survey details

1,118 UK adults, aged 18+, fieldwork
Friday 19th November 2021.

1

Are people really interested in climate change as an issue and what do they think about moving to net zero?



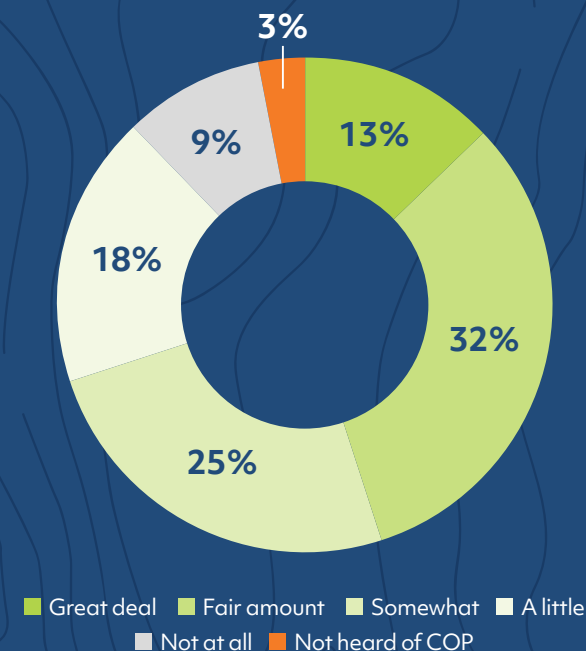
People think the journey to net zero will be challenging because businesses and other people won't change.

We first asked people how much attention they'd paid to coverage of COP26 to help gauge peoples' interest in the issue of climate change. Strikingly, almost three quarters of people said they'd paid at least some attention with almost half saying they'd given a great deal or a fair amount of attention to the global event.

That's not to say people think the fight against climate change is going to be easy. The vast majority (74%) think that achieving net zero will be challenging – a view held across all age groups, though the proportion is higher among older people.

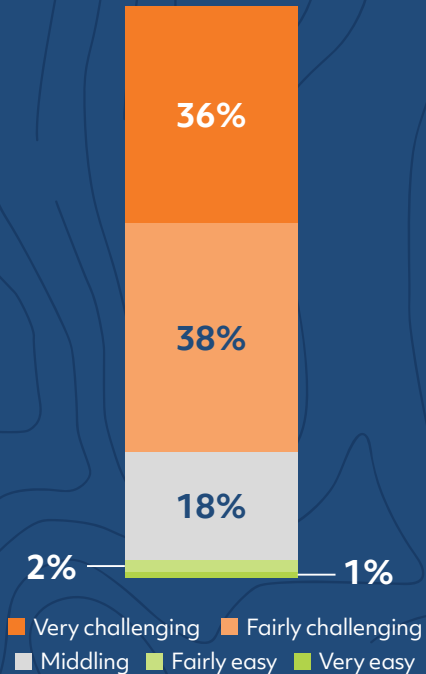
Asked why it is going to be difficult, we can see a consensus of opinion with people identifying the two biggest barriers as: companies not wanting to change/lose profit, and people not wanting to change their behaviour.

How much have you followed events and paid attention to COP26?

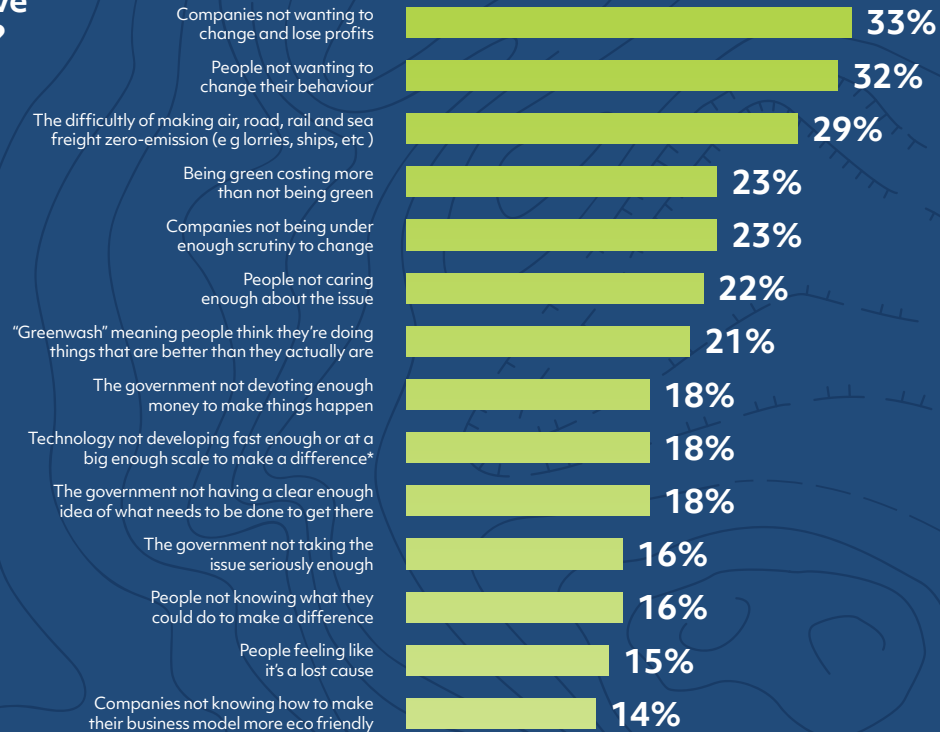


1 continued

Given where we are now, and the plans that are in place, how challenging do you think it will be to achieve net zero in the UK by 2050?



Main challenges that will harm chances of reaching net zero (people chose their top 3)



*(e.g. carbon capture and storage, hydrogen fuel cells, battery technology, etc.)



Businesses still have a job to do in better communicating their commitment to tackling climate change. It is not enough for a business to say what they are doing, they need to say why, and for this motivation to ring true with their public culture.

2

Do people want the country to make what they think will be a difficult journey to net zero?



The public recognises that there is still more to do, collectively, in putting us on track to hit net zero.

Our polling clearly shows that a significant majority believe the country could do more to reduce its impact on the environment. Again, this is the majority opinion across all age groups, but the proportion is highest amongst younger people.

That people are engaged and support action is a great place to start, but we also know that the move to net zero will require a national effort that will start to touch our lives far more than it has ever done before.

Targets can be set, and bans announced but maintaining public support for action will be vital if the government is going to be successful in meeting its goal. This will require regular and repeated communication to keep levels of engagement on the issue high.

As a country, how much more could we be doing in order to reduce our impact on the environment?

23%

A great deal
– we're doing
really poorly

49%

A fair amount – we're
doing fairly poorly

20%

Not very much
– we're doing
fairly well

3%

Nothing at all
– we're doing
really well



As net zero becomes more real for people, they will be looking to government and business to clarify and quantify how certain actions will help solve specific problems, to set out how risks are being identified and managed, and to make sure that the benefits of the transition are felt across the country.

3

Do people think that they could personally do more to help?

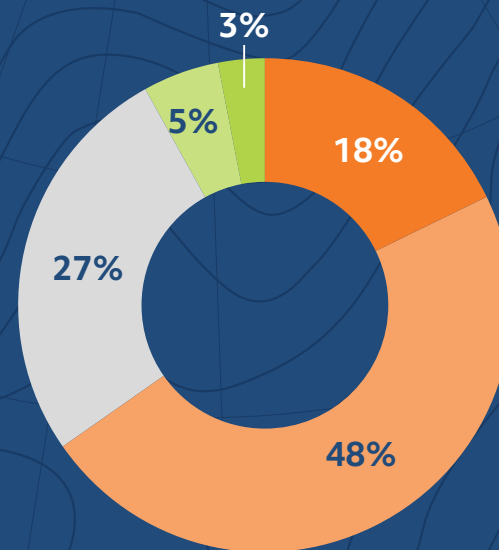


People tend to think it is up to others to do more rather than them personally, with older people the most likely to believe they've done all they can to help the environment.

A sizeable majority of people think that their own household could do more – but, in every age group, the proportion is less than those who think the country could do more.

That there is a difference between collective and personal responsibility is perhaps unsurprising, but as the line graph on the next page shows, the sense of personal responsibility among those that we polled drops significantly at the age of 55. Indeed, 65s and over are eight times more likely than 18-24-year olds to say they could do “nothing at all – we’re doing really well”.

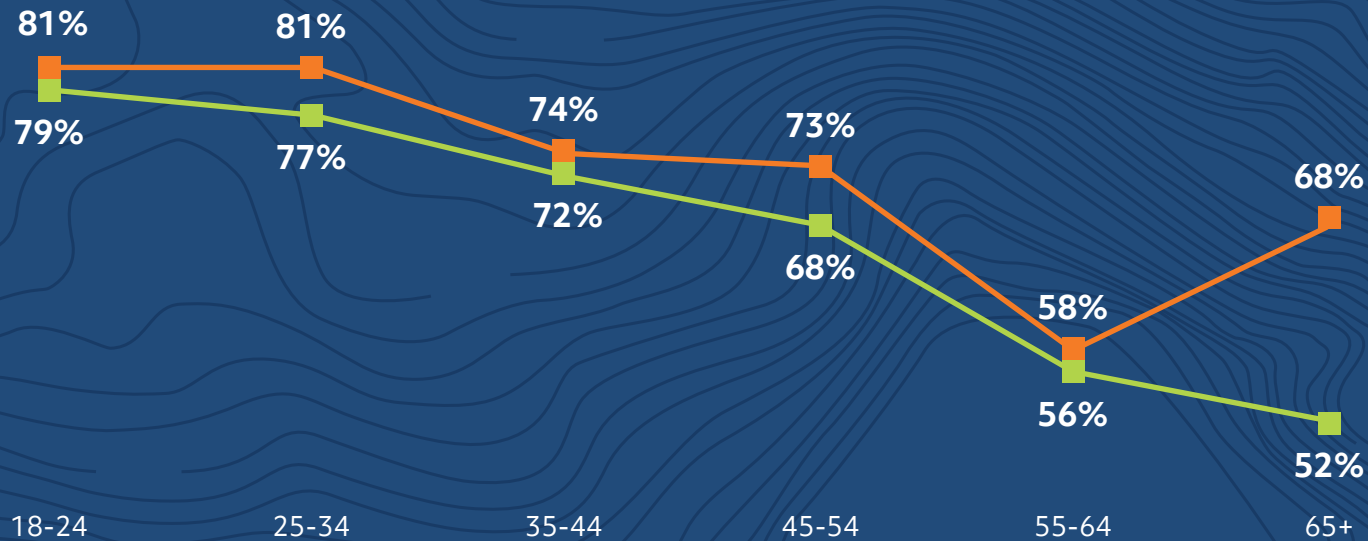
What about you and your household? How much more could you be doing to reduce your impact on the environment?



- A great deal – there's lots we could change
- A fair amount – there's a few things we could change
- Not very much – we're doing fairly well
- Nothing at all – we're doing really well
- I don't know enough to be able to say

3 continued

Difference in personal and collective responsibility by age



■ Personal (those saying they could do a great deal or fair amount more)
■ Collective (those saying the country needs to do a great deal or fair amount more)



Securing greater buy-in from the over 55s must be a particular area of focus – helping them evaluate and break long-term habits where required.

4

Do people believe that the government is going to meet its net zero target?



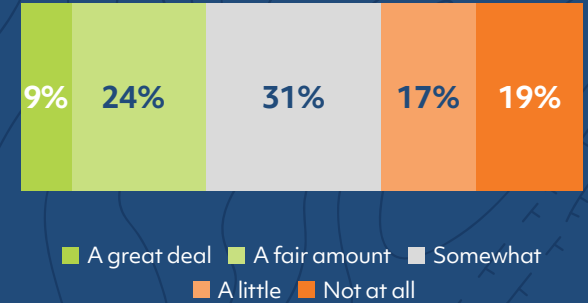
People are uncertain whether the government will reach the climate change targets it has set.

Our polling finds people are evenly split in trusting the government to make progress on reaching the net zero target, with the majority in the middle – apparently reserving judgement for the time being.

Worryingly for the government more than double the number of people don't trust it at all compared to those that trust it a great deal. How this sentiment develops over time could inform what people think the country could do collectively and what they think they could do personally.

The government will understandably be keen to redress this balance to promote buy-in for net zero policies.

How much do you trust the government to make progress on reaching climate change targets?



To shore up trust, the government will have to demonstrate quick wins and meaningful impact.

5

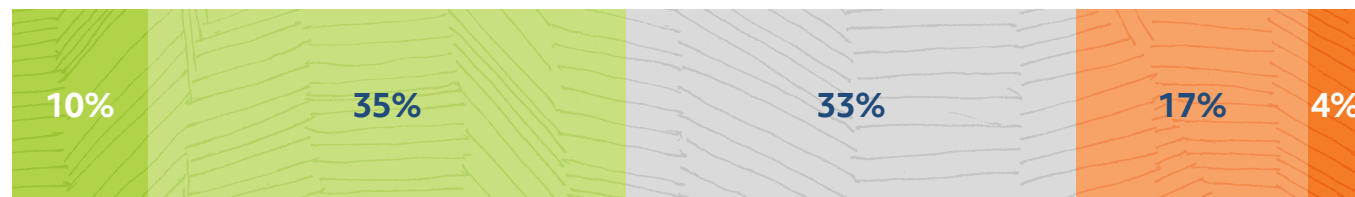
Do people care about what businesses have to say on the environment?



There is healthy interest in the environmental credentials of businesses, with people using this information to inform purchasing decisions.

Our research finds that almost half of people pay a lot or a fair amount of attention to what businesses say about their environmental credentials, and this figure increases to more than three quarters if you include people who pay a little attention.

In general, how much attention do you pay when brands and companies talk about the environmentally friendly things they're doing?

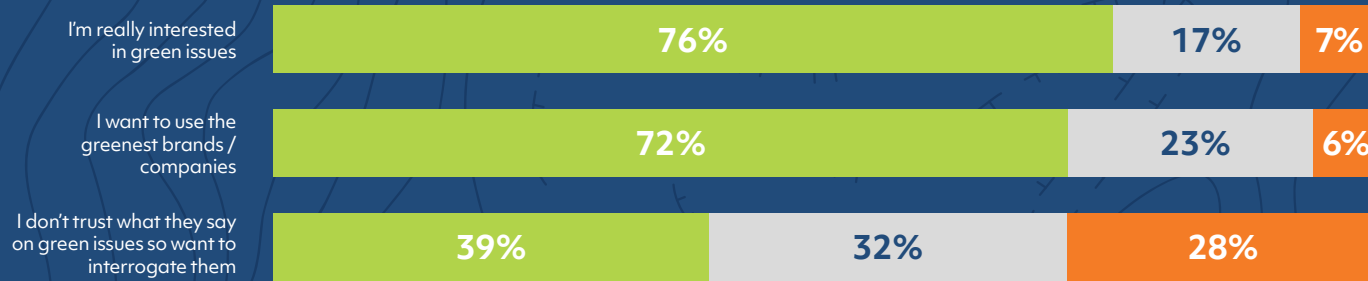


■ A lot ■ A fair amount ■ A little ■ Not very much ■ None at all

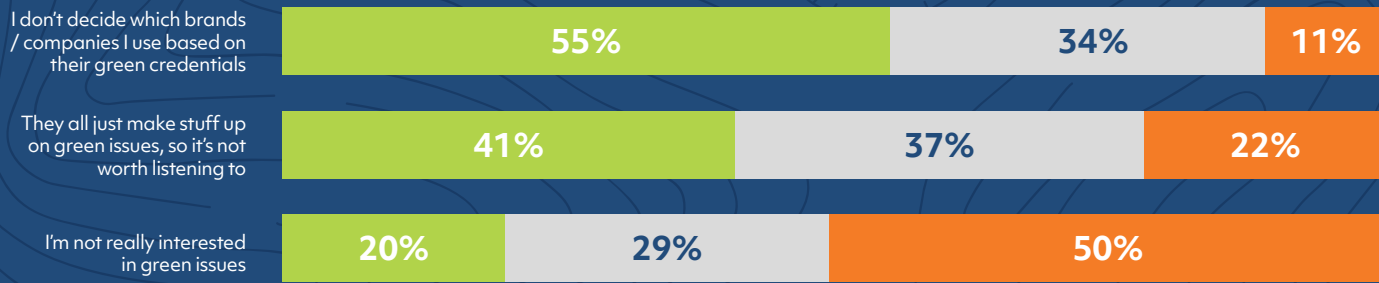
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Of the majority who pay attention, most do so because they care about green issues and use information to make purchasing decisions, although some say it is because they don't trust what they are being told and want to interrogate the information. Conversely, of the minority who don't pay attention, the main reason is that they don't use information to make purchasing decisions, followed by distrust of business and then disinterest in green issues.

Why do you pay attention?



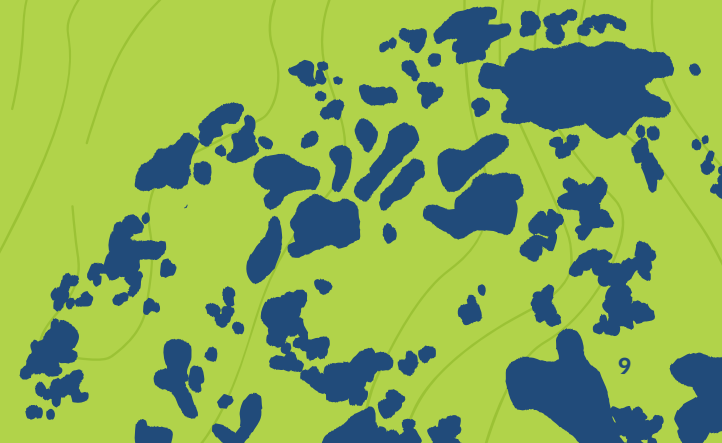
Why do you not pay attention?



■ Agree ■ Neither/nor ■ Disagree



Businesses who accurately report their environmental footprint and communicate it in a simple no-nonsense way have a real and significant opportunity to gain a competitive edge.



6

Key takeaways



- ▶ **Businesses still have a job to do in better communicating their commitment to tackling climate change. It is not enough for a business to say what they are doing, they need to say why, and for this motivation to ring true with their public culture.**
- ▶ **As net zero becomes more real for people, they will be looking to government and business to clarify and quantify how certain actions will help solve specific problems, to set out how risks are being identified and managed, and to make sure that the benefits of the transition are felt across the country.**
- ▶ **Securing greater buy-in from the over 55s must be a particular area of focus – helping them to evaluate and break habits where required.**
- ▶ **To shore up trust, the government will have to demonstrate quick wins and meaningful impact.**
- ▶ **Businesses who accurately report their environmental footprint and communicate it in a simple no-nonsense way have a real and significant opportunity to gain a competitive edge.**



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