

Climate Change
Market Research Report

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Climate Change Poll

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1. Introduction

One of the most talked about subjects worldwide is climate change. In recent years our planet has experienced some of the hottest summers on records, seen huge chunks of the polar ice caps break up, and witnessed freak storms and flash flooding. Many Governments around the world now have special departments set up to deal with reducing greenhouse gases and encouraging their populations to be more environmentally aware. But is it enough? Or is it too little too late?

Continental Research a leading UK research agency and KNOTs Research Continental's online partner with offices in Europe and Japan carried out a poll on climate change in four of the major economies in the west:



UK



Japan



USA



Germany

The survey explored:

- people's levels of concern regarding climate change
- if governments were doing enough to tackle global warming
- what were considered the main causes of global warming
- alternative energy sources favoured over carbon fuels
- actions taken by individuals to help the environment

All interviews were carried out over the Internet and the sample polled reflected the online population in each of the four countries. In total 1081 interviews were achieved, approximately 250 interviews in each country.

Method

In January 2007 Continental Research and KNOTs Research interviewed 1081 adults aged 16 years or older via the Internet. The interviews were spread equally between the four countries surveyed (UK 267, Germany 275, Japan 264, and USA 275). Quotas by age, sex and region were imposed on the sample at the interviewing stage to ensure the sample reflected the profile of the online population in each country. The data was weighted by these demographics at the computing stage to correct any minor sampling imbalances.

1.1 Data reporting

When interpreting the data shown in this report it should be observed that:

- 1. The samples reported represent the profile of the online adult population in each country. The number of adults online represents approximately 60% of the total adult population in each of the four countries.*
- 2. When data for all four countries is presented collectively this data does not take into account the different population sizes in each country. I.e. the US sample has not been up-weighted to reflect its greater population size. Instead all countries have an equal weighting representing the equal number of interviews carried out in each.*

2. Key findings

- ➔ *The population of all four countries expressed considerable concern about climate change. Many felt more could be done by governments and individuals to help the problem.*
- ➔ *Differences did emerge between the four countries and these are summarised as follows:*



- ➔ *Expressed the highest concern about climate change.*
- ➔ *Had high awareness of changes to the climate in the UK. Besides the lack of snow in winter, they had also noticed changes to plants and wildlife, that there was less distinction between the seasons and water shortages were now more common.*
- ➔ *More likely to blame industry's poor energy conservation as a major contributor to global warming.*
- ➔ *The UK's population was very active in practising energy saving activities, especially the recycling of waste.*
- ➔ *Regarding alternative fuel sources the UK population was more likely to favour wind power over solar power.*
- ➔ *Would strongly welcome guidelines from the Government on what to do to help reduce the effects of climate change.*
- ➔ *In comparison to the other countries the UK felt the problem of global warming should not just be left for the Government to sort out.*

**Germany**

- *Were more likely to recognise their country's and Government's efforts to tackle climate change than the other three countries.*
- *Were very aware of changes to the climate in their own country. Besides the lack of snow in winter they also commented on storms becoming fiercer and more frequent.*
- *Poor energy conservation caused by industry was seen as one of the biggest contributors to global warming.*
- *Germany was very active in carrying out energy saving activities and had the highest belief that using public transport helped benefit energy conservation.*
- *They also felt the most guilty about not doing enough to save energy demonstrating their strong commitment to environmental issues.*
- *The German population was more likely to use alternative fuelled cars and were generally more eager to progress with their use of alternatives to carbon fuels.*
- *Solar power was the most popular alternative to carbon fuel.*

**USA**

- *Expressed less concern than the other countries about climate change. A significant minority (29%) felt it had been exaggerated out of proportion.*
- *Although most were aware of changes to the climate in their own country this was less pronounced. Poor air quality was noticeably higher in the US than elsewhere.*
- *A mix of reasons were mentioned as contributing to global warming, including poor energy conservation caused by industry, motor transport and poor energy conservation by the public.*
- *Although the US population was less active in carrying out energy saving actions than the two European countries, they were more active than Japan.*
- *Noticeably fewer people in the USA used public transport.*
- *Fewer people in the USA felt guilty about how much they were doing to help the environment. More did, however accept they could do more to recycle waste.*
- *The US was least accepting of a green tax being put on airline fuel.*
- *A mix of alternative fuels were considered by the US including hydro-electricity, solar, wind and nuclear.*

**Japan**

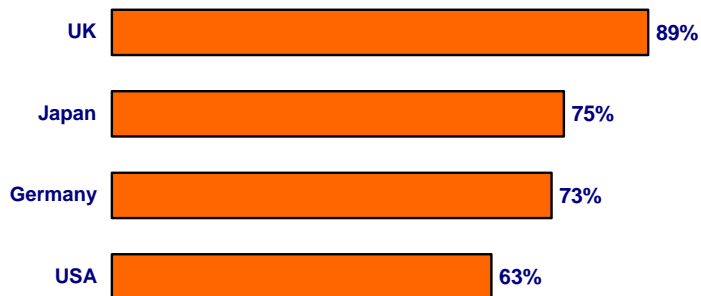
- *Were the most critical of their country's and government's efforts to tackle climate change.*
- *Although critical of their government's efforts they were more likely to agree that it was up to the government rather than everyone to sort out the problem of global warming. In particular they would welcome more guidance on what should be done.*
- *Had high awareness of changes taking place to the climate in their own country and were more likely to mention sea temperatures rising than other countries.*
- *Felt that poor energy conservation by members of the public was a bigger contributor to global warming than poor energy conservation by industry.*
- *The Japanese population was much less likely to carry out energy saving actions compared to people in the other three countries surveyed. This could be because they were more realistic about how much they really do, compared to other countries where there could be an element of over claiming on this issue.*
- *They were also the most accepting that they could do more to save energy. In particular they felt guilty about leaving electrical appliances on standby rather than switching them off.*
- *Solar power was the favoured alternative energy source.*
- *More Japanese (76%) than other nationalities believed the planet was dying as global warming had now progressed too far.*

3. Climate change – main findings

3.1 Level of concern

Governments are right to put the environment high on their list of priorities. The Continental/KNOTs online poll found that the majority of adults in the four countries surveyed said that they were concerned about climate change brought about by man's activities. Highest concern was measured in the UK (89%). Although less concern was expressed in the US (63%) this still was high.

Table 1: If concerned about climate change caused by man's activities



Base: online adults in 4 countries (1081)

Source: Continental/KNOTs Research

Worry about the climate is quite consistent across different demographic groups demonstrating that climate change really does affect everyone. Table 2 overleaf shows that nearly as many men (72%) as women (79%) expressed concern. Likewise young and old as well as those from either blue or white collar backgrounds all expressed similar levels of worry. To have this consistency across different demographic groups should make it easier for governments and environmental groups to get their message across as most sections of society feel the same way on this issue.

A group that showed a slight difference were those living in a major city. Urban dwellers had a higher level of concern compared to those living in the countryside, probably because the air quality drops considerably in cities during hot spells and everyday life becomes that much more uncomfortable.

**Table 2: Concern about climate change caused by man's activities
(by demographic groups)**

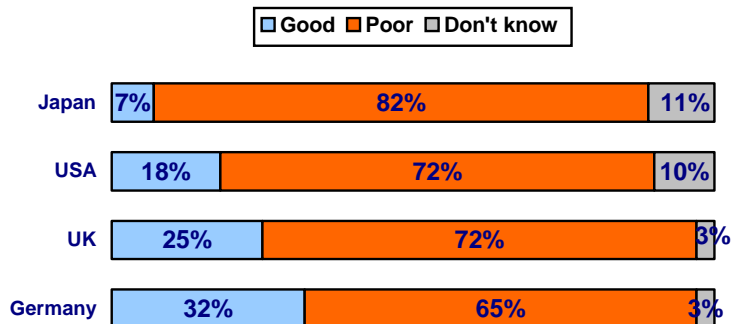
	% expressing concern
All four countries	75%
Male	72%
Female	79%
16-34	73%
35-44	74%
55+	78%
White collar	76%
Blue collar	72%
Major city dweller	77%
Countryside dweller	69%

Base: online adults in 4 countries (1081)

Source: Continental/KNOTs Research

3.2 Rating of Government's efforts

In most countries around seven in ten people felt their Government's efforts to tackle climate change was poor. The Japanese were most critical of their Government's performance (82% said poor) whereas in Germany this figure was significantly lower (65%).

Table 3: Rating of individual Governments efforts to tackle climate change

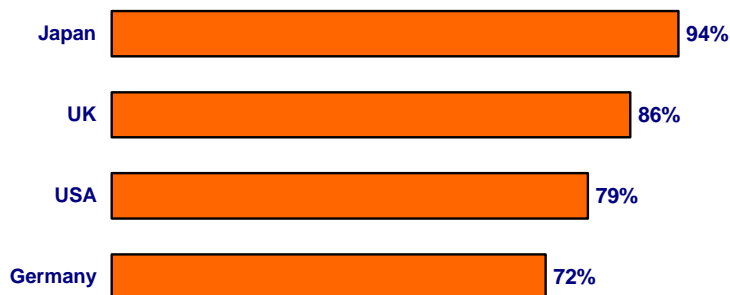
Base: online adults in 4 countries (1081)

Source: Continental/KNOTs Research

These government ratings are quite consistent across all the main demographic groups. Men and women as well as young and old equally feel their governments could improve their efforts on tackling climate change.

3.3 Country responsibility

The majority of people in each of the four countries surveyed believed their country could do more to stop climate change caused by man. The Japanese were the least impressed by their country's actions, where 94% felt their country could do more. Japan was behind other countries when it came to carrying out environmentally friendly activities such as recycling waste and this may explain why so many feel their country could do more. This is discussed more in section 5 of the report.

Table 4: % saying their country is not doing enough to stop climate change caused by man

Base: online adults in 4 countries (1081)

Source: Continental/KNOTs Research

Women were less impressed by their country's efforts than men. In total across the four countries nearly nine in ten women (87%) felt their country could do more compared to 79% of men.

3.4 Country doing the least

Each nationality was asked which one of the four countries (UK, Germany, Japan or USA) was in their opinion doing the least to prevent climate change. Probably because of the US's reluctance to ratify the Kyoto agreement, the majority of people in UK, Germany and Japan thought the USA was doing the least. In the USA a high number were unsure (52%) which one of the four countries was doing the least. However, amongst those Americans who did have an opinion (i.e. those who did not say "don't know") the majority cited their own country.

Table 5: Which of the four countries is doing the least to prevent climate change

	UK	Germany	Japan	USA
USA	70%	83%	60%	35%
Japan	5%	4%	11%	6%
Germany	1%	3%	2%	6%
UK	6%	1%	1%	1%
Don't know	18%	9%	26%	52%

Base: online adults in 4 countries (1081)

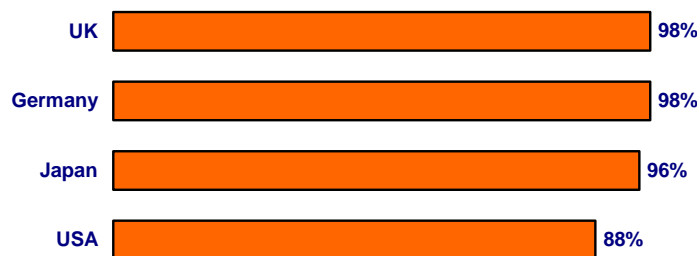
Source: Continental/KNOTs Research

4. Climate observations

4.1 Changes noticed in the weather

The next area of the survey looked at what changes people had noticed to the climate in their own countries. In UK, Germany and Japan virtually everyone had personally noticed some changes to their country's climate. The figure was slightly lower in the USA (88%) but still very high.

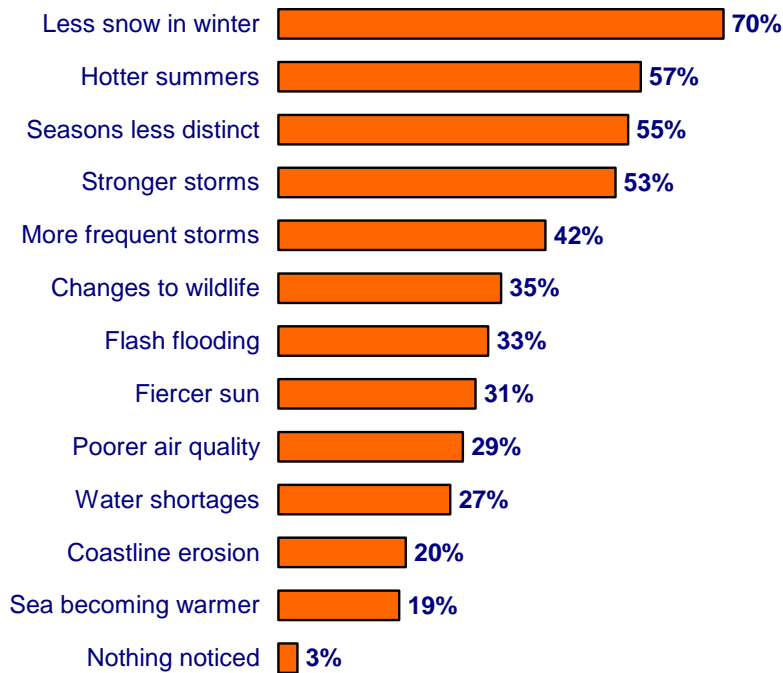
Table 6: Numbers noticing changes to the climate in their own country



Base: online adults in 4 countries (1081)

Source: Continental/KNOTs Research

The most noticed change, experienced by the populations in all four countries, was less snow in winters. In addition many found summers were getting hotter and that there was a general lack of distinction between the different seasons. With so many people experiencing first hand climate change, it is of little surprise that worry about what we are doing to the environment is high.

Table 7: Changes to climate noticed in own country

Base: online adults in 4 countries (1081)

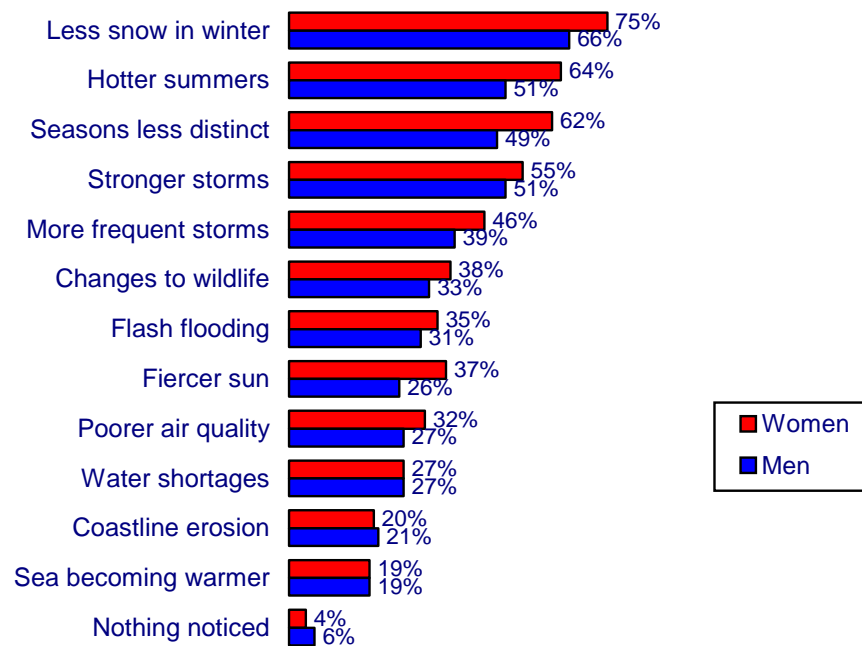
Source: Continental/KNOTs Research

Differences do occur between countries, in particular:

- ➔ Germans were more aware of stronger and more frequent storms. Also that there was less snow in winter.
- ➔ In the UK people were more aware of changes to plants and wildlife and also noticed that there was less distinction now between the seasons. Water shortages were also more of a problem here.
- ➔ The Japanese were more likely to mention they had noticed the sea becoming warmer.
- ➔ The US was more likely to experience a reduction in air quality.

Women were more aware of changes to their country's climate than men, as shown in Table 8 below, especially the hotter summers and fiercer sun.

Table 8: Changes to climate noticed in own country



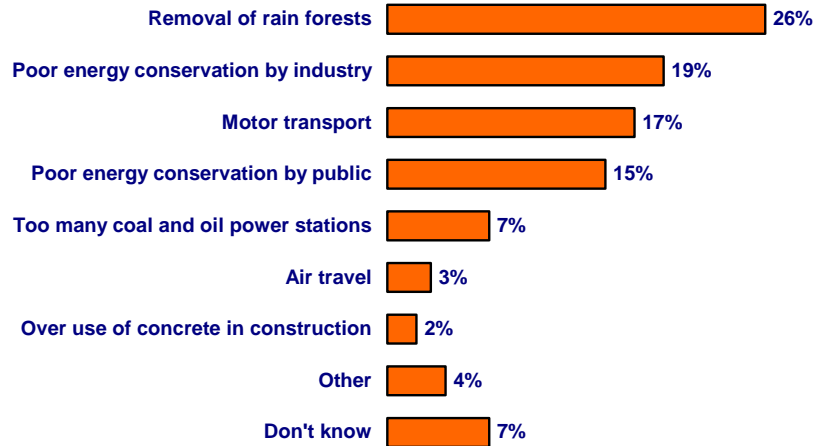
Base: online adults in 4 countries (1081)

Source: Continental/KNOTs Research

4.2 Main contributing factors to climate change

Overall across the four countries people believed that the destruction of the world's rain forests was the biggest contributor to climate change. The destruction of our natural habitat by man is a strong emotional trigger to many and may explain why deforestation is seen as a major cause of climate change.

Table 9 overleaf shows the combined responses of all four countries regarding what people thought was the one biggest contributor to climate change.

Table 9: What perceived as the biggest contributor to climate change

Base: online adults in 4 countries (1081)

Source: Continental/KNOTs Research

There are differences between countries on what people believe is the biggest cause of climate change. The US was less likely to mention removal of rain forests, which is in direct contrast to the other three countries. In addition, a higher number of people in the US were unable to give a reason (13%), possibly because the US was less concerned (see Table 1), or less informed about climate change than the other three countries.

Table 10: The biggest contributor to climate change

	UK	Germany	Japan	USA
Removal of rain forests	25%	29%	30%	19%
Poor energy conservation by industry	23%	22%	13%	19%
Motor transport	15%	15%	18%	19%
Poor energy conservation by public	11%	13%	23%	13%
Too many oil/coal power stations	9%	8%	2%	8%
Air travel	6%	4%	1%	1%
Over use of concrete in construction	2%	1%	6%	2%
Other	3%	6%	1%	6%
Don't know	6%	2%	6%	13%

Base: online adults in 4 countries (1081)

Source: Continental/KNOTs Research

Both the UK and Germany were more likely to point the finger of blame at industry's poor energy conservation as a main cause of climate change. Whereas Japan, was more likely to blame poor energy conservation by members of the public. This subject is further discussed in the next section where it was observed that the Japanese public were less likely to carry out energy saving activities than the other three nationalities polled.

5. Helping the environment

5.1 Actions taken

All were shown a list of energy saving actions and asked which ones they did on a regular basis to help the environment. In all four countries most people claimed to turn off unnecessary lights around their home. However, for many of the environmentally friendly activities measured the Japanese were less likely to carry these out than the other three nationalities. This could explain why, as discussed in the previous section, Japan thought poor energy saving actions by members of the public was a major contributing factor to global warming. Furthermore many Japanese regularly use public transport, yet may not necessarily see this as an energy saving activity.

Table 11: Energy Saving activities carried out on a regular basis

	UK	Germany	Japan	USA
Switch off unused lights	88%	84%	78%	90%
Recycle waste	86%	76%	48%	69%
Use dishwasher/washing machine when have full load	70%	84%	30%	74%
Use energy efficient light bulbs	72%	65%	35%	62%
Don't leave electrical appliances on standby	67%	76%	35%	56%
Use a thermostat to regulate heating in home	68%	59%	20%	78%
Insulate your home to conserve heat	64%	51%	15%	53%
Use public transport rather than car	36%	40%	28%	12%
Reduce the amount of air travel you do	29%	32%	5%	31%
Use solar or other alternative power in your home	6%	13%	6%	4%
Drive using an alternative fuel such as electricity, gas etc	7%	11%	6%	4%
Don't know/nothing	3%	1%	9%	3%

Base: online adults in 4 countries (1081)

Source: Continental/KNOTs Research

Other noticeable differences between the four countries were:

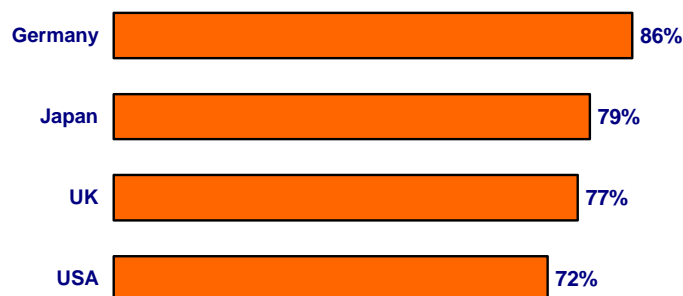
- ➔ the UK leading the way on recycling
- ➔ America's low use of public transport
- ➔ over one in ten Germans using an alternative fuel to petrol in their car such as electricity, natural gas, bio-diesel etc

Women were more conscientious than men regarding many of these activities. In particular they were more likely to switch off lights, recycle waste and use the dishwasher or washing machine only when it had a full load.

5.2 Actions feel guilty about

Still focussing on the list of environmentally friendly activities, each was asked if they felt guilty about not doing any of these individual environmentally friendly actions (as shown in the previous Table 11). Most did feel guilty about not doing one or more of these activities. The Germans were the most self-conscious where nearly nine in ten (86%) felt guilty about not doing at least one of the actions. The least self-conscious were the Americans where just under three quarters (72%) felt guilty about not doing at least one of the environmentally friendly activities.

Table 12: % feeling guilty about not doing environmentally friendly activities



Base: online adults in 4 countries (1081)

Source: Continental/KNOTs Research

The one activity that people felt especially guilty about in most countries was not using public transport (as shown in Table 13 below).

Table 13: Activities felt guilty about because could do more of

	UK	Germany	Japan	USA
Use public transport rather than car	27%	35%	33%	23%
Drive using an alternative fuel such as electricity, gas etc	22%	33%	11%	27%
Don't leave electrical appliances on standby	22%	19%	25%	19%
Use solar or other alternative power in your home	23%	28%	11%	17%
Recycle waste	18%	8%	15%	23%
Use energy efficient light bulbs	14%	13%	14%	20%
Insulate your home to conserve heat	10%	14%	12%	9%
Switch off unused lights	10%	11%	11%	11%
Use a thermostat to regulate heating in home	10%	8%	7%	7%
Reduce the amount of air travel you do	9%	12%	5%	5%
Use dishwasher/washing machine when have full load	5%	5%	10%	8%

Base: online adults in 4 countries (1081)

Source: Continental/KNOTs Research

As already noted the Germans were the most likely to use an alternative type of fuel in their car. Evidence that this is a strong message in Germany is further demonstrated in that they felt the guiltiest (33%) about not using an alternative fuel in their cars. Also more Germans felt guilty about not using other energy sources in their homes, indicating that the Germans are more advanced and eager to progress with their use of alternative fuels.

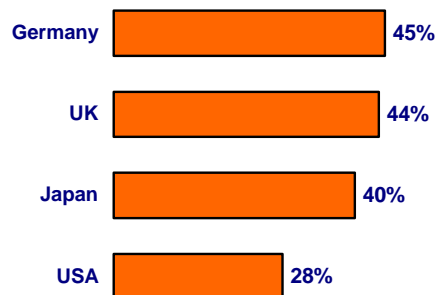
Americans felt more guilty than other nationalities about not recycling waste or using energy efficient light bulbs. The Japanese felt guilty about leaving electrical appliances on standby and using the dishwasher or washing machine when it was not a full load.

Despite considerable publicity about the harm caused by increased air travel fewer people mentioned that they intended to reduce their amount of air travel. This could be because many might feel they don't do that much anyway.

5.3**Green tax on airline fuel**

There was a mixed reaction to the idea of Governments introducing a green tax on airline fuel by populations in the UK, Germany and Japan. The US with its historical low taxation culture was the most opposed.

Table 14: Number supporting the idea of a green tax on airline fuel which would increase the cost of air travel.



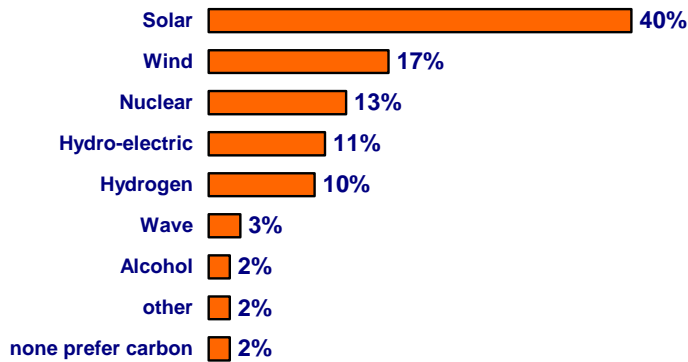
Base: online adults in 4 countries (1081)

Source: Continental/KNOTs Research

6. Alternative energy sources

Overall solar power is by far the most favoured alternative to carbon fuels.

Table 15: Energy source most favoured as alternative to carbon fuels

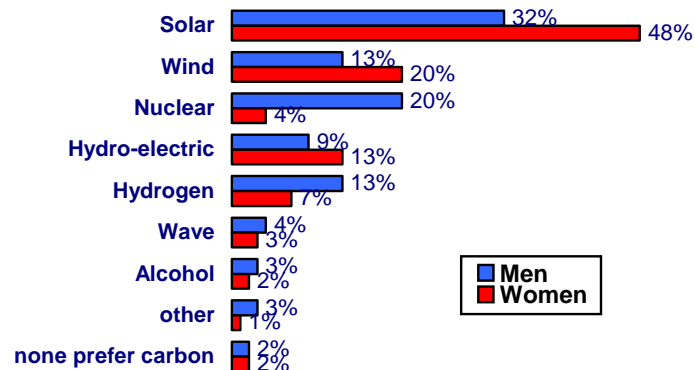


Base: online adults in 4 countries (1081)

Source: Continental/KNOTs Research

Despite the controversy surrounding nuclear fuel it is the third most preferred alternative and is considerably more popular amongst men. Women were more in favour of natural sources such as solar, wind and hydro-electric power.

Table 16: Energy source most favoured as alternative to carbon fuels



Base: online adults in 4 countries (1081)

Source: Continental/KNOTs Research

Further difference also occurred by country. Germany and Japan were most in favour of solar, whereas the UK, probably because of our weather, were slightly more in favour of wind rather than solar. Although solar was the most popular choice in the US, a mix of different power sources were mentioned. Hydro-electric was more popular in the US than elsewhere.

Table 17: Energy sources most favoured as alternatives to carbon fuels

	UK	Germany	Japan	USA
Solar power	24%	51%	51%	33%
Wind power	29%	16%	8%	13%
Nuclear power	13%	11%	12%	13%
Hydro-electric power	13%	6%	6%	18%
Hydrogen fuel	7%	11%	12%	12%
Wave power	7%	1%	3%	1%
Alcohol fuel	1%	2%	2%	5%
Other	3%	1%	3%	1%
None – prefer carbon fuels	2%	1%	3%	3%

Base: online adults in 4 countries (1081)

Source: Continental/KNOTs Research

7. Attitudes to Global warming

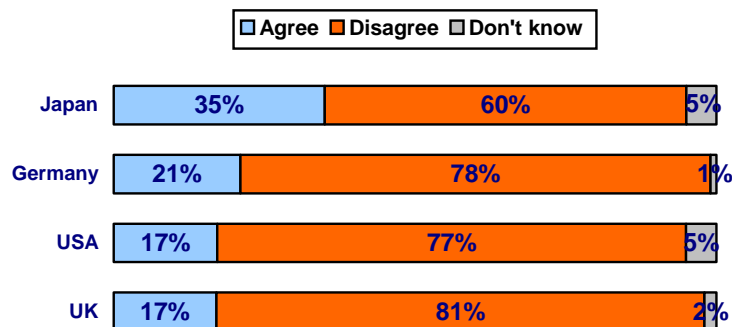
The next part of the survey looked at people's attitudes to climate change. Each was asked to say if they agreed or disagreed with a series of comments relating to global warming.

“Climate change is not up to me it’s an issue for governments”

The first topic explored was if people felt climate change was the responsibility of governments, rather than individuals to sort out. Encouragingly the majority in all four countries believed they should not just sit back and expect governments to solve the problem. The Japanese were, however, less likely than the other three nationalities to acknowledge they had a personal voice in the matter.

Table 18a

“Climate change is not up to me its an issue for governments”



Base: online adults in 4 countries (1081)

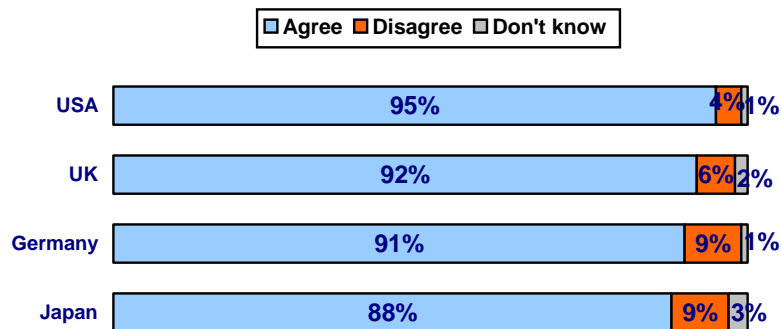
Source: Continental/KNOTs Research

“If everyone takes small steps to save energy it will have a positive effect”

The vast majority agreed that they could help on a personal level. This will be good news for governments when passing legislation to curb greenhouse gases, as people should be more willing to accept changes as they recognise action needs to be taken to help the environment.

Table 18b

“If everyone takes small steps to save energy it will have a positive effect”

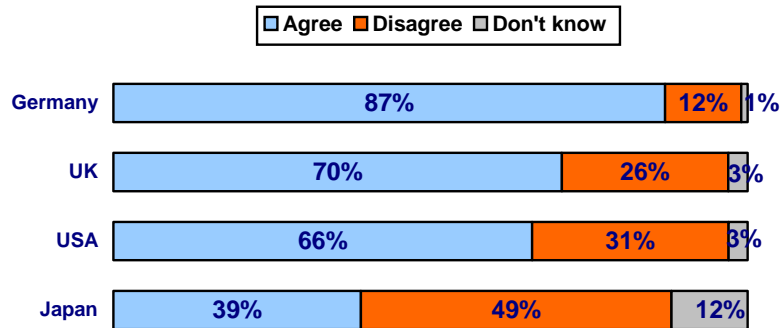


Base: online adults in 4 countries (1081)

Source: Continental/KNOTs Research

“I do everything I can to help the environment”

People feel passionate about the environment, especially in Germany where 87% claimed that they try and do everything they can to help the environment. As already commented Japanese members of the public carried out less environmentally beneficial activities, than the other three nationalities. This is further acknowledged as only 39% felt they were doing all they could to help the environment, compared to 87% of Germans, 70% of Britons and 66% of Americans. A possible reason for this difference it that the Japanese maybe more realistic about their efforts and there maybe an element of over claiming about what people in the other countries are actually doing.

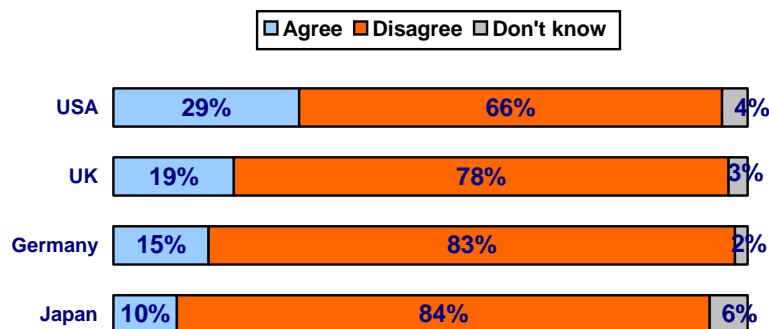
Table 18c**“I do everything I can to help the environment”**

Base: online adults in 4 countries (1081)

Source: Continental/KNOTs Research

“Global warming is not a serious issue and has been exaggerated out of all proportion”

The majority in all four countries, disagreed that the seriousness of global warming has been exaggerated. In the US, although the majority did believe it was a serious issue, a significant minority (29%) disagreed. The Bush administration has said that curbing greenhouse gases in the US to levels specified by the Kyoto agreement would harm the US economy. If people felt their livelihoods could be affected then this may make them reappraise the seriousness of global warming.

Table 18d**“Global warming is not a serious issue and has been exaggerated out of proportion”**

Base: online adults in 4 countries (1081)

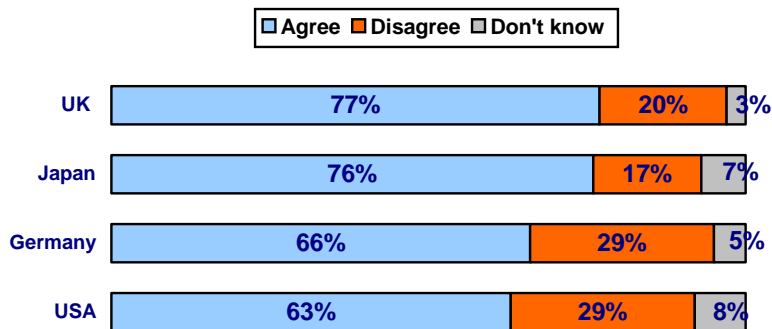
Source: Continental/KNOTs Research

I would take more action if there was clearer guidance from our government on how I could save energy.

With most governments now placing a strong emphasis on the environment it is encouraging to see that two thirds, or more, of people in each of the four countries surveyed agreed that they would take more action if there was clearer guidance from their governments on how they could save energy.

Table 18e

“I would take more action if there was clearer guidance from our government on how I could save energy”



Base: online adults in 4 countries (1081)

Source: Continental/KNOTs Research

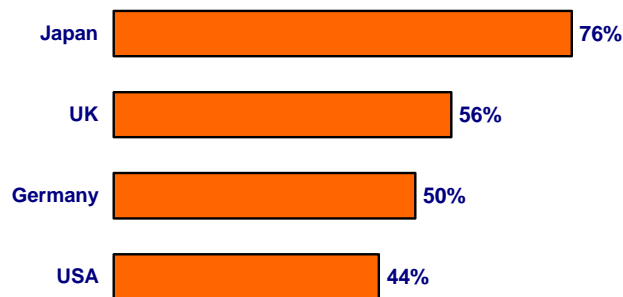
8. Is the planet dying?

People in all four countries were clearly concerned about the effects of global warming. To further assess how serious they felt the problem was they were asked

“Some people have said that global warming has progressed too far and that our planet is dying. Just based on your own feelings do you agree or disagree?”

Japan was the most pessimistic with over three quarters (76%) believing the planet is dying. Around a half of the population in the UK and Germany also believed this. The Americans were more optimistic, yet even here over four in ten felt the planet was dying.

Table 19: If believe planet is dying as global warming has progressed too far



Base: online adults in 4 countries (1081)

Source: Continental/KNOTs Research

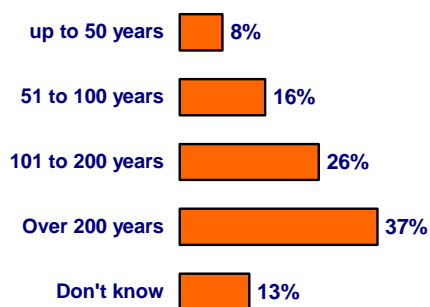
Women were much more pessimistic, nearly two thirds (63%) felt global warming had progressed too far and was killing the planet. This compares to 49% of men.

For those who believed that the planet was dying all were asked:

“How many years do you think it will be before the planet dies and is unable to support human life?”

Most believe it will be after their lifetime i.e. in over 100 years time. However, nearly a quarter think it will occur in the next 100 years and therefore possibly happen in their lifetime.

Table 20: Number of years before planet dies and can no longer support human life



Base: All agreeing planet is dying (592)

Source: Continental/KNOTs research

The Intergovernmental Panel on Climate Change (IPCC) makes clear that the green house gas reduction targets being considered will do little to stop the rise in global temperatures. The consequences of this could be disastrous. It also concludes that there is a nine out of ten chance that human beings are responsible for these temperature increases.

What the world needs to know, and fast, is what actions need to be taken to control the situation and enable us all to start taking these now.

**** End ****

9. Continental Research and KNOTs Research

Continental Research is a full service research agency based in the UK. It carries out online surveys worldwide with its partner KNOTs Research who has offices in Europe and Japan. The agency was founded in 1989 and specialises in media, public sector, travel, advertising and financial research.

The climate change report was produced by Continental's Public Sector team and our worldwide online research partner KNOTs Research. More detailed information on the data supplied in this report is available on request from:

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Continental/KNOTs have access to 15 million households worldwide for research surveys:

