

Climate Action Research

INGKA Group & GlobeScan Action on Climate & Inequality 2021
Australia Report: Climate Change

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Methodology notes

- The INGKA Group & GlobeScan Action on Climate & Inequality Research 2021 aimed to understand the many people's attitudes, behaviours, and motivators in relation to the three wicked challenges (climate change, unsustainable consumption and inequality) that Ingka (IKEA) tries to tackle.
- This report summarizes the findings on climate change in Australia.
- The research was conducted online using reputable national consumer research panels to recruit respondents in 32 countries.
- The total sample size for each of the 32 markets is c. n=1,000. The final sample size for Australia is n=1,053.
- Samples were designed to be nationally representative as far as is realistically possible using online panels. Exceptions include China and India where a disproportionate number of consumers are highly educated and living in urban areas due to patterns of online access in those countries.
- Throughout the report we compare 2021 figures for Australia with the 2021 global average. We also make a direct comparison with previous survey data from the Climate Action 2017 and 2019 research, where applicable.
- Please note that due to rounding, numbers in charts may not always add up to 100 percent.



Executive Summary

Individual actions

People in Australia are most likely to take climate action at home, by turning off lights when not in the room, recycling their waste, drying laundry on a line indoors or outdoors, or saving on cooling/heating. As consumers, they're most likely to use their own bag when shopping, buy locally grown products or choose energy efficient products. The majority of climate actions have had small variations since 2017. Nearly eight in ten are willing to change their future behaviour and more than seven in ten believe each individual can help address climate change. These are slightly below global averages.

Barriers and motivators

Cost and insufficient government support are the top two barriers that are preventing people from taking climate action, with cost a bigger barrier this year. Saving money is by far the top motivator. Not knowing what to do is another substantial barrier. The top benefits of taking climate action are to build a better life for future generations and the long-term impact of these actions on helping save the planet. Benefits to the country and local community are also relatively important. The largest consumer segment in Australia is the Support Seekers (similar to globally) who are looking for more information and guidance on what to do.

Attitudes

Half of the population say they worry about climate change (50% worry a lot or a fair amount, which is below the global average) – this is very slightly lower than in 2019 but higher than 2017. More than seven in ten believe the government needs to take significant action to reduce climate change. Slightly fewer want action from business.

IKEA Solutions

Open-end commentary illustrates that people would like to see IKEA take action to reduce climate change through having more sustainable, affordable products (e.g., durable, locally made, etc.), as well as sustainable sourcing and circular solutions. When shown a list of possible actions IKEA could take to tackle climate change, consumers want to see IKEA focus most on affordable and environmentally friendly products for consumers, recycled/ biodegradable materials and less packaging. Within the value chain they want IKEA to avoid deforestation, to reduce the company's own carbon emissions and to promote human rights.

Individual Action

What action are people currently taking on climate change in their daily lives?



Overview of Individual Action on Climate



Action at home (individual)

- Nearly all actions have had small variations since 2017. In Australia, the proportion of people generating their own energy is higher than the global average, while repairing broken items is lower.



Action in the neighbourhood (citizen)

- Within the neighbourhood, people are most likely to talk to friends and family about being environmentally friendly (21%), although this is below the global average (31%).
- People are least likely to write to business/government about the environment (7%) or get involved in local community action on environmental issues (8%).



Action at workplace (employee)

- In Australia, 11% of people say they are involved in environmental activities where they work or study, similar to the global average.



Purchasing action (consumer)

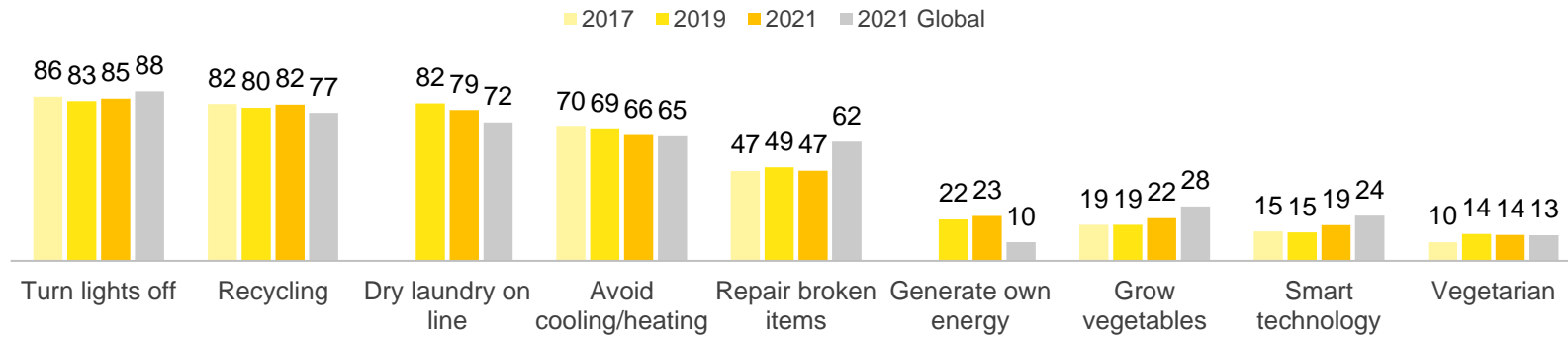
- More than eight in ten people use their own bags when shopping.
- There have been very small declines in almost all consumer actions since 2019, but activity is still generally higher than it was in 2017 – for example, in preferences for locally grown products, products made from recycled/biodegradable materials, and organics.



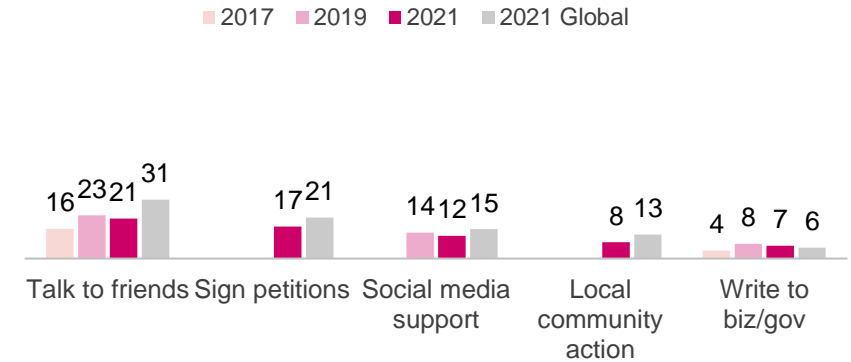
Climate and consumer actions

Proportion of people taking each action all or most of the time

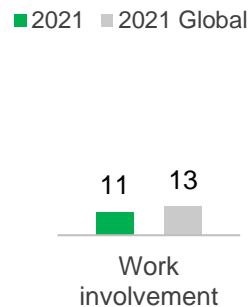
At home



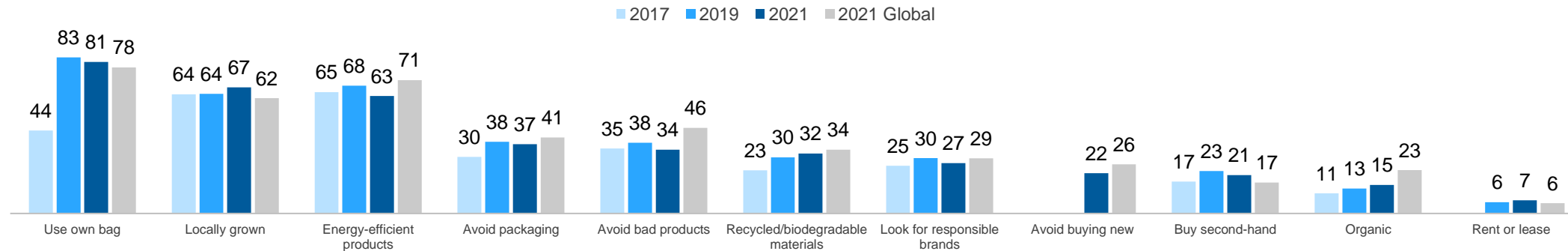
In the neighbourhood



At work



Consumer action



Q1. Please indicate how often you do the following actions. never, rarely, sometimes, most of the time, all of the time

All numbers are percentages, % signs removed due to number of data points.

Individual Actions on Climate: Full Wording

	Shortened label	Full wording
Home	Vegetarian	I eat mainly vegetarian or vegan food
	Grow vegetables	I or my family grow our own vegetables
	Avoid cooling/heating	I try to save on cooling and heating my home
	Turn off lights	I turn the lights off when I leave a room
	Smart tech	I use smart technology at home to save energy / monitor my energy use
	Dry laundry on line	I dry my laundry on a line (indoors or outdoors)
	Generate own energy	I generate my own energy (e.g., solar, ground energy)
	Repair broken items	If something breaks in my household, I try to repair it instead of buying something new
	Recycling	I sort my waste for recycling and disposal
Neighbourhood	Talk to friends	I talk to friends and family about being environmentally friendly
	Write to biz/gov	I write to companies or the government about the environment
	Social media support	I post support for environmental causes on social media
	Sign petitions	I sign petitions on environmental issues
	Local community action	I get involved in local community action on environmental issues

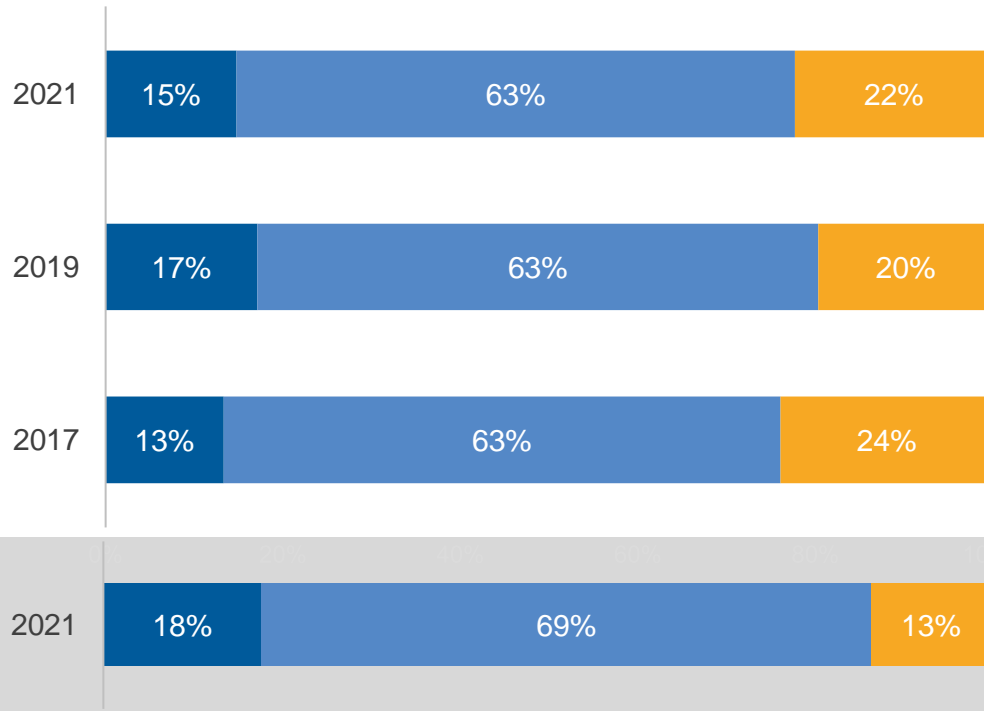
	Shortened label	Full wording
Work	Work involvement	I am involved in environmental activities where I work or study
	Organic	I buy organic products instead of ordinary ones
Consumer	Locally grown	I prefer domestically / locally grown products to those imported
	Energy- efficient products	When buying home appliances, I choose energy-efficient ones
	Avoid bad products	I avoid buying products that are bad for the environment
	Look for responsible brands	I actively look for brands/companies that are environmentally responsible
	Avoid packaging	I avoid buying products with a lot of packaging
	Use own bag	When shopping I use my own bag instead of getting a new one
	Recycled/ biodegradable materials	I try to buy products made of recycled or biodegradable materials
	Avoid buying new	I try to avoid buying new products, to reduce my impact on the environment
	Rent or lease	I rent or lease one or more household items or furniture
	Buy second-hand	I buy second-hand household items or clothing



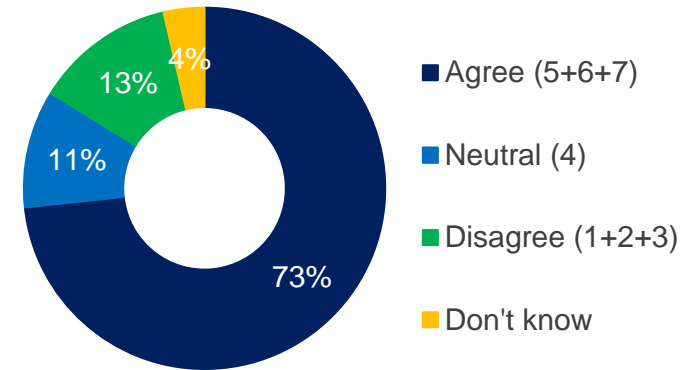
Individual empowerment

Willingness to take more action: climate change

■ Make a strong effort to improve ■ Make an effort to improve ■ Stay the same



Agreement that each individual can help



73% believe each individual can help address climate change compared to **81%** globally

Nearly eight in ten people say they will make an effort to improve their future behavior to help reduce climate change. Around nine in ten of those aged 18-24 say they would be willing to make future changes to their behavior, compared to 70% of those aged 65+.

Women are most likely to believe that each individual can help to address climate change (78% vs. 69% among men).

Attitudes

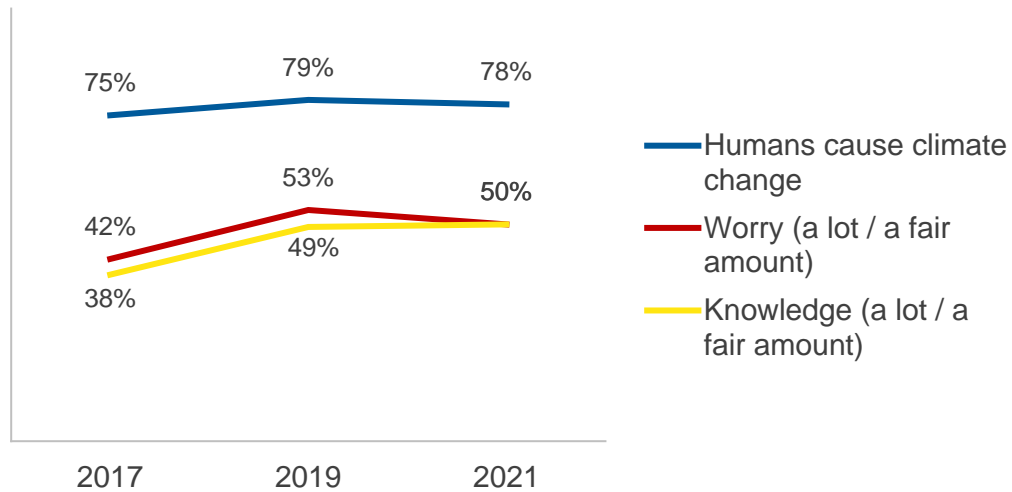
How much do people know and care?





Climate: Knowledge, Worry, Role of Gov't & Business

Knowledge and worry about climate change



50% say they know a lot or a fair amount about climate change, compared to 58% globally Q5. How much do you know about climate change?

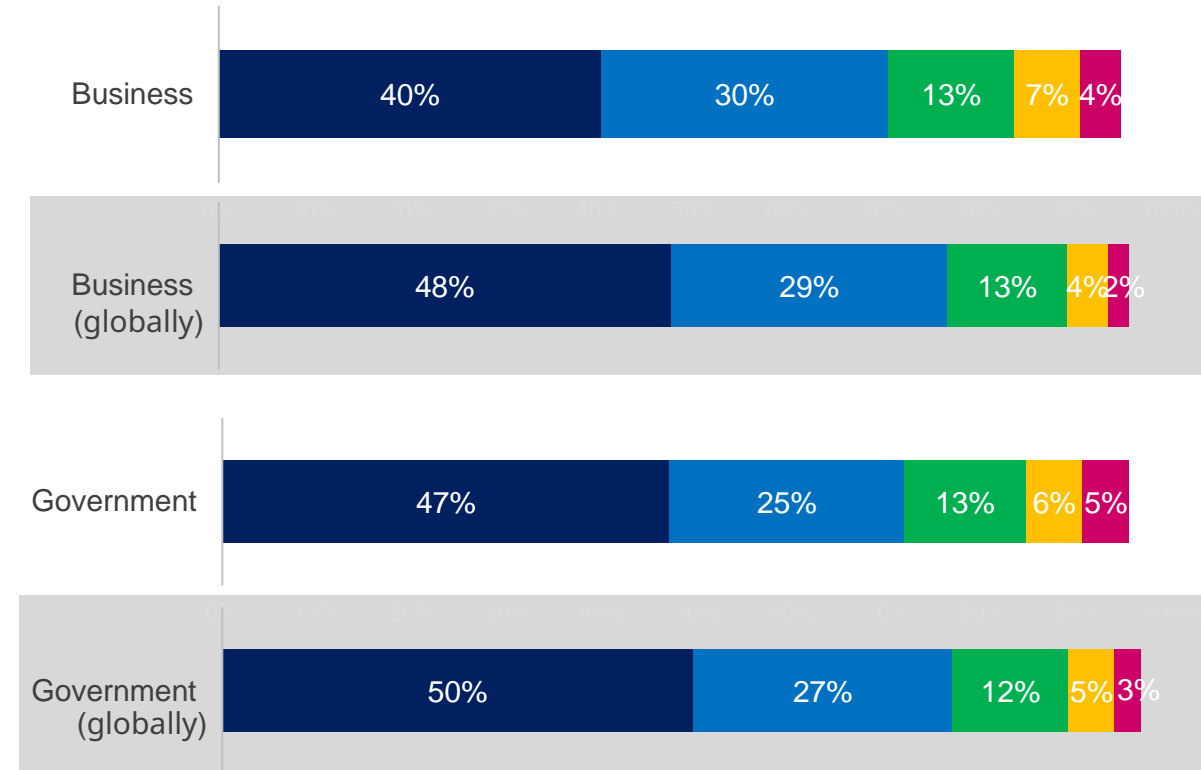
50% worry a lot or a fair amount about climate change compared to 70% globally Q7. How much do you worry about climate change?

78% believe that human activity causes climate change, compared to 88% globally

Q8. Which of the following statements about climate change do you agree with most? Human activity is one of the causes of climate change / Climate change occurs naturally and is not affected by human activity

Expected level of climate action from business and government

■ Very significant action ■ Significant action ■ Some action ■ A little action ■ No action



Q31. How much action do you want the government and business to take to reduce climate change between now and 2030?



52%

Believe that climate change and inequality are *equally important* issues facing society

Q42. Now thinking about the topics we have covered so far in the survey: climate change / global warming and inequality. Which one do you think is the most important challenge for us to address as a society?

57%

Believe that vulnerable people experience the worst impacts of climate change

Q43.4. Vulnerable people experience the worst impacts of climate change / and global warming. Percent of those who "Agree" (5+6+7 on 7-pt scale).

41%

Of people think addressing climate change will help fight inequality

Q43.1. Addressing climate change / and global warming will help fight inequality. Percent of those who "Agree" (5+6+7 on 7-pt scale).



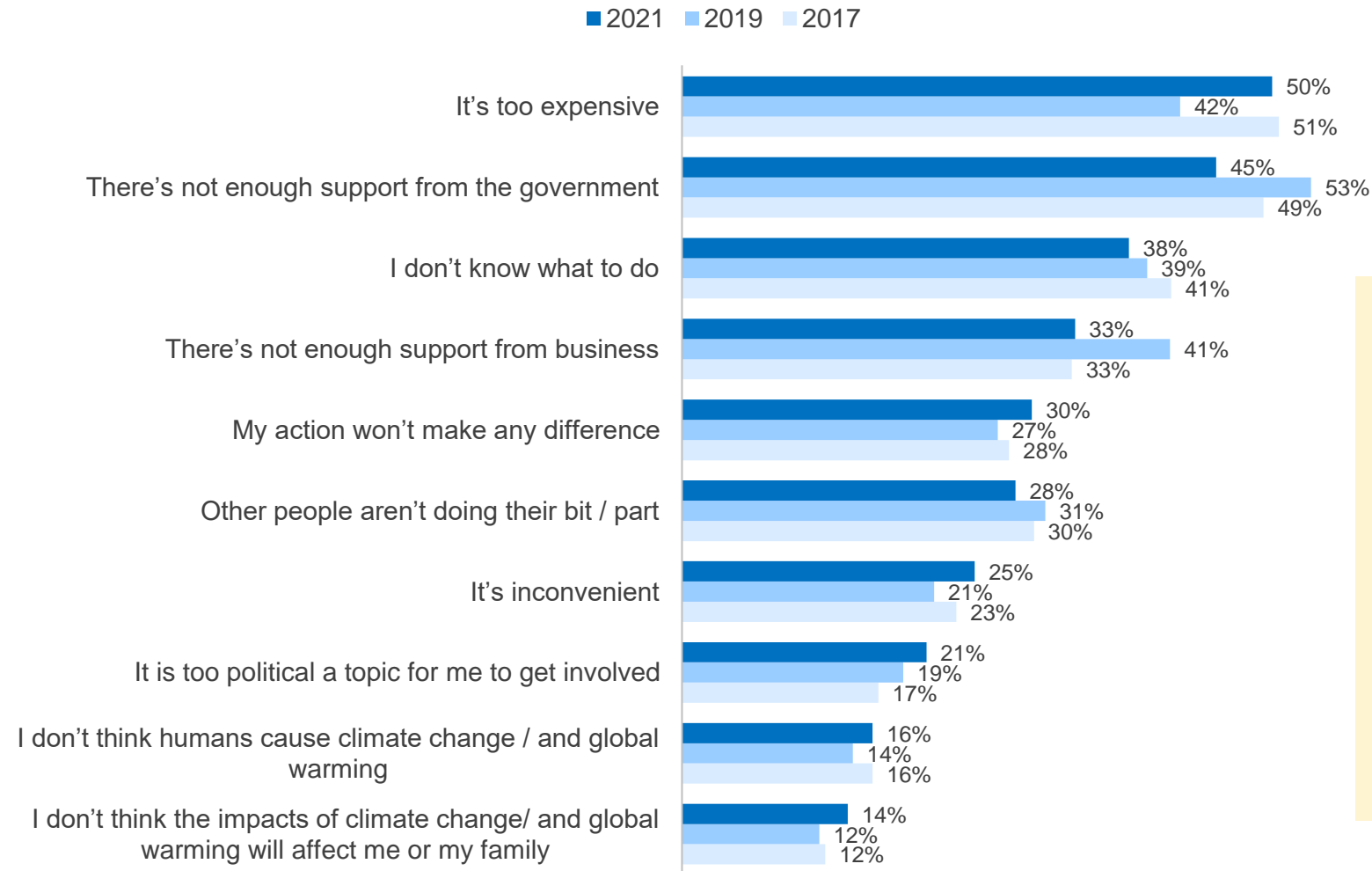
Barriers & Motivators

What's holding people back from taking more action? What are the benefits of acting and what does a positive future look like?



Barriers to individual action on climate change

Proportion of people selecting each barrier in their top three



Half of Australians feel it is simply too expensive for them to do more to help reduce climate change. Cost is a bigger barrier than in 2019 and is selected more often among people aged 45-64 (55%) versus those aged 65+ (39%).

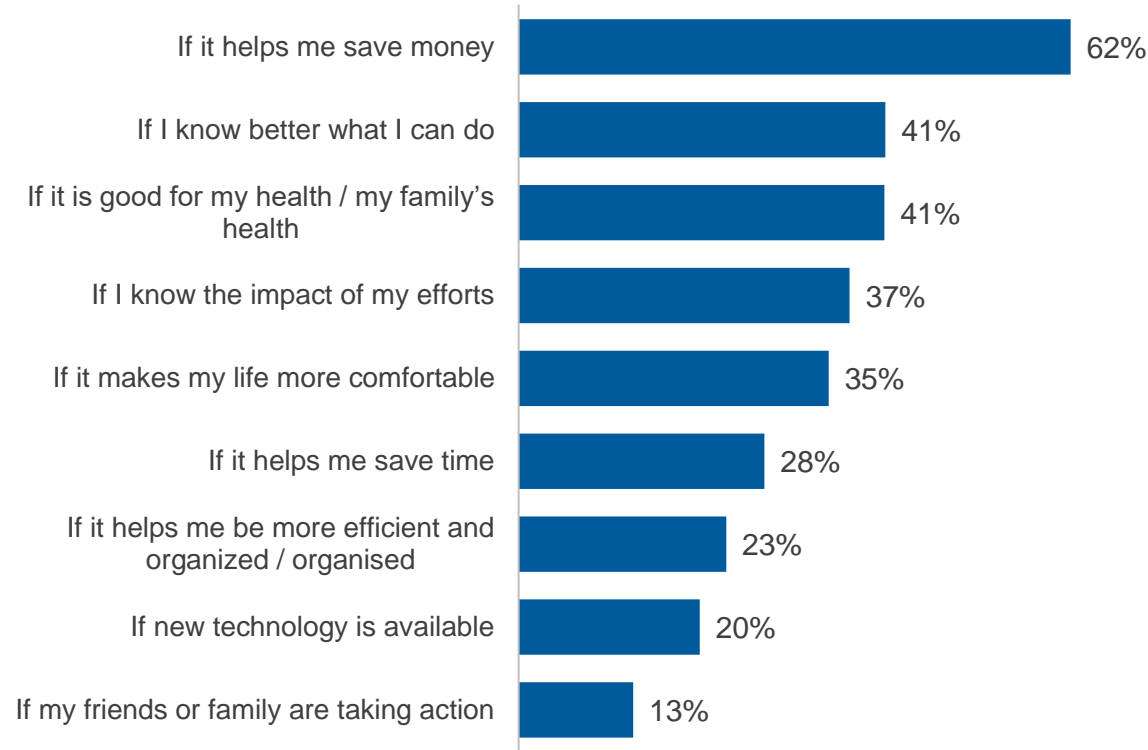
Meanwhile, 45% believe there is not enough government support. This number is higher among the youngest (49% of those aged 18-24).

Nearly four in ten are unsure of what to do to help reduce climate change. This number is higher among women (45% versus 31% of men) and younger generations aged 18-24 (46%) and 25-44 (44%).



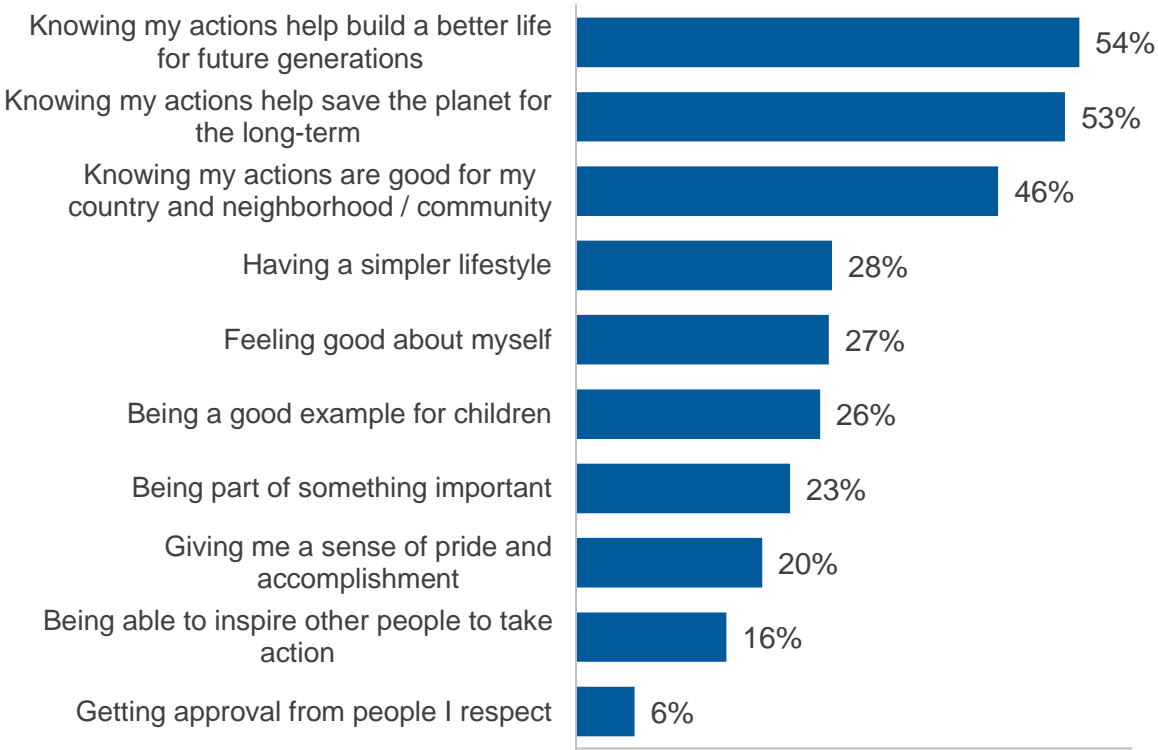
Benefits to acting on climate change

Motivators, proportion of people selecting in their top three



Saving money is an even stronger motivator to take more action to reduce climate change for those aged 45-64 (67%), while health is more of a motivator for older people (56% for 65+). Having better knowledge of what to do is another strong motivator, but less so for men (33%) and non-parents (38%).

Benefits, proportion of people selecting in their top three

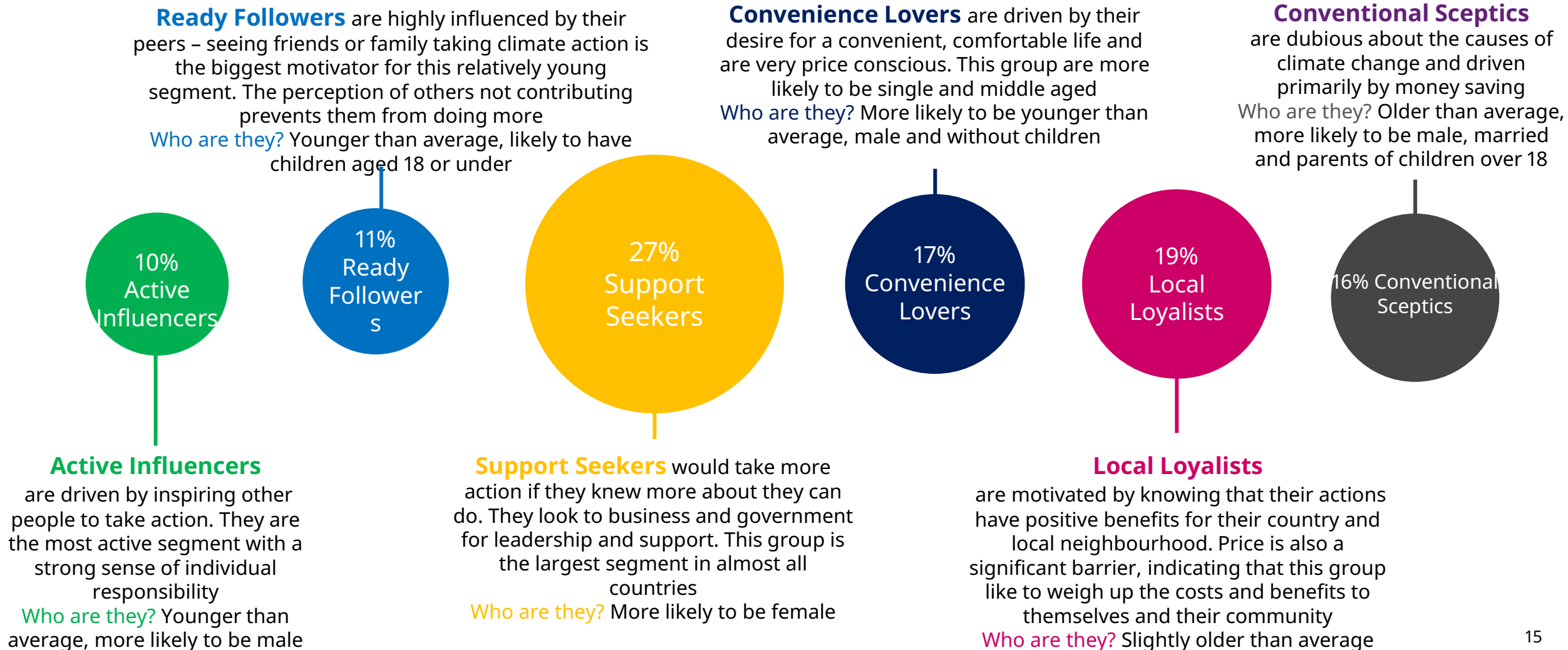


A high proportion of older people (65+) are more likely to select benefits related to building a better life for future generations (64%), while the top benefit for those aged 18-24 is knowing their actions can help save the planet for the long-term (56%).

Q11. What would encourage you to take more action to help reduce climate change? Please select 3 reasons from the following list in order of importance.

Q21. What are the benefits of taking action to help reduce climate change? Please select 3 benefits from the following list in order of importance.

People can be split into six segments based on what motivates them to take climate action



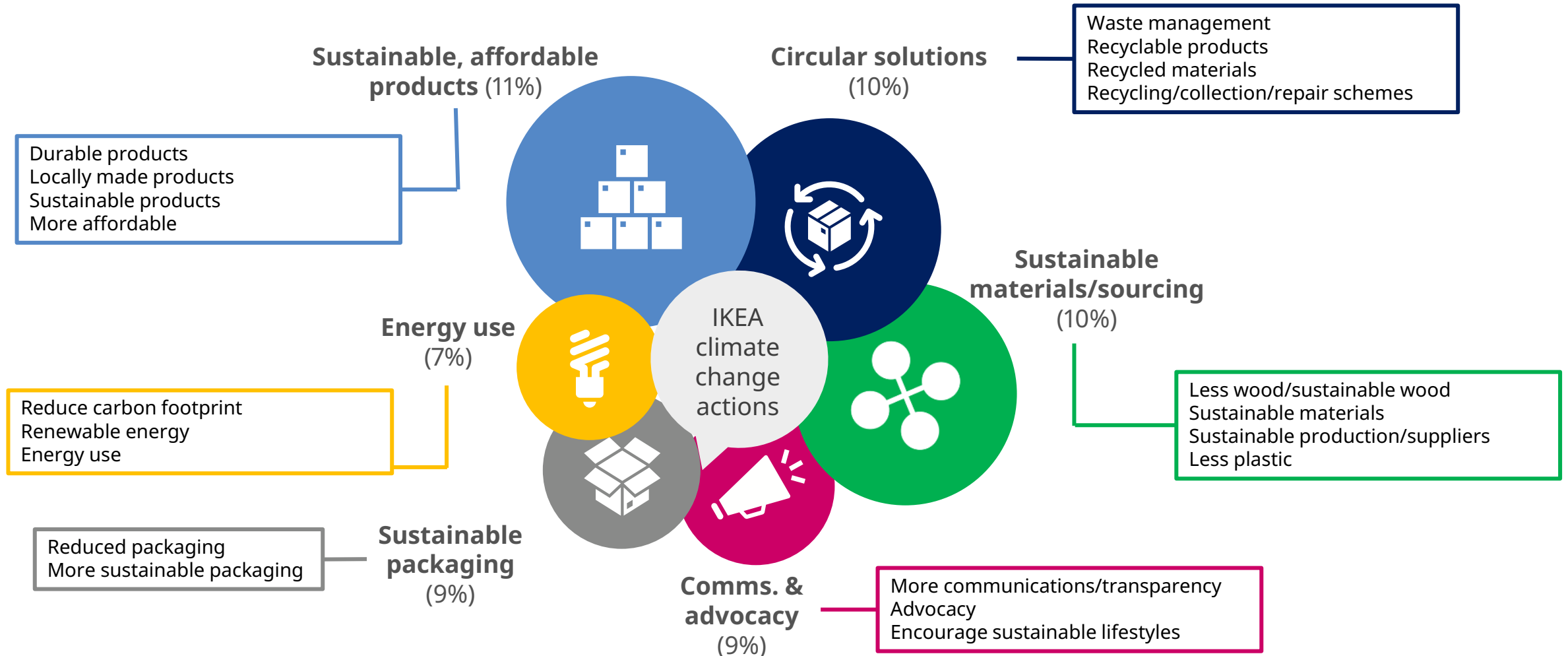
Solutions

What would the many people like to see IKEA do?

Note that this section reflects the views of the many people which can be used, in combination with other factors, to inform consumer engagement and communications.



Top-of-mind IKEA actions on climate



Top-of-mind IKEA actions on climate



Produce more durable items and use less plastic in products, particularly kitchenware.

Female, 55-64, Convenience Lover

Less plastic packaging, making products from recycled materials, commitment to using renewable energy sources.

Female, 18-20, Active Influencer

Use recycled materials, use solar energy in the production of their products and their stores.

Male, 55-64, Support Seeker

Reducing energy usage and having more recyclable packaging for products instead of plastic and Styrofoam.

Female, 21-24, Ready Follower

Explain to consumers how their products are eco-friendly and how they source their materials for their furniture.

Female, 35- 44, Convenience Lover



IKEA Solutions for Climate Action at Home

Perceived importance of different IKEA solutions for the home

Educate Build awareness and understanding	Motivate Emphasise the benefits of these actions	Activate Increase engagement opportunities
<ul style="list-style-type: none">• Save energy at home advice• Organic products• Rent/lease products• Show how to insulate home• Show how to save water at home• Show how to sort waste• Plant-based food• Show how to grow veg	<ul style="list-style-type: none">• Healthier home products• Repair/refurbish service• Repair/refurbish advice• Renewable energy access• Used furniture selling service• Generate electricity at home• Climate action ideas at home	<ul style="list-style-type: none">• Affordable environmentally friendly products• Recycled/biodegradable materials• Recyclable products• Less packaging• Locally made products• Energy-efficient products
<i>These are the potential IKEA actions that people feel are less important to them today. These initiatives will require more education for people to understand and engage with</i>	<i>These potential IKEA actions are moderately important to people – engagement may require some motivation: what are the benefits?</i>	<i>People are keen for IKEA to undertake these actions over all others tested and expectations in these areas are very high</i>



IKEA Actions across the Value Chain

Perceived importance of different IKEA solutions for the home

Educate Build awareness and understanding	Motivate Emphasise the benefits of these actions	Activate Increase engagement opportunities
<ul style="list-style-type: none">• EV delivery	<ul style="list-style-type: none">• Reduce water consumption• Biodiversity in supply chain• Climate advocacy	<ul style="list-style-type: none">• Do not contribute to deforestation• Reduce carbon emissions• Promote human rights
<i>These are the potential IKEA actions that people feel are less important to them today. These initiatives will require more education for people to understand and engage with</i>	<i>These potential IKEA actions are moderately important to people – engagement may require some motivation: what are the benefits?</i>	<i>People are keen for IKEA to undertake these actions over all others tested and expectations in these areas are very high</i>

IKEA Climate Actions: Full Wording

IKEA actions - label		Full wording
Home	Plant-based food	Offer healthy plant-based (vegetarian/vegan) food
	Show how to sort waste	Show me how to sort my waste easily
	Show how to grow veg	Show me how to grow salad/vegetables easily
	Organic products	Sell organic products (e.g., food or cotton)
	Locally made products	Offer locally made products
	Energy-efficient products	Offer products that help to save energy in the home
	Save energy at home advice	Provide advice on how to save energy in the home
	Show how to save water	Show me how to save water at home
	Show how to insulate home	Show me how to insulate my home better
	Generate electricity at home	Sell products that generate electricity for customers to use in their home (e.g., solar panels)
	Renewable energy access	Give access to affordable renewable energy
	Affordable/env friendly products	Sell more affordable products that are good for the environment
	Less packaging	Reduce product packaging
	Recycled/biodegradable materials	Sell more products made of recycled or biodegradable materials
	Climate action ideas at home	Share ideas and advice for how to take climate action at home with my family and friends
	Repair/refurbish service	Provide a service for repairing/refurbishing furniture
	Repair/refurbish advice	Show me how to prolong the life of my furniture through repair/refurbish
	Used furniture selling service	Provide a service for selling used furniture
	Recyclable products	Sell products that are easy to recycle
	Rent/lease products	Offer furniture for rent or lease
	Healthier home products	Sell products that help create a healthier home

IKEA actions - label		Full wording
Value chain	EV delivery	Deliver products to my home in electric vehicles
	Biodiversity in supply chain	Take action to prevent the loss of biodiversity in its supply chain
	Do not contribute to deforestation	Ensure products are made from materials that do not contribute to deforestation
	Reduce carbon emissions	Reduce carbon emissions from its operations and supply chain
	Reduce water consumption	Reduce water consumption of its business and supply chain
	Promote human rights	Promote human rights in its operations and supply chain
	Climate advocacy	Campaign for climate action from governments and business

Thank you

Caroline Holme

Senior Director, GlobeScan

caroline.holme@globescan.com

Abbie Curtis O'Reilly

Associate Director, GlobeScan

abbie.curtis@globescan.com

