

# Environmental Choices™ study 2008

Section 1a:

## **Attitudes (towards Climate Change)** – *Free Summary Data*

Prepared by:

Peter Winters & James  
Ambler, 20th October 2008

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When it comes to the public and Climate Change, the fundamental question that is often asked is – what attitudes are held, and how does this influence behaviour? A common view is that attitudes of concern about Climate Change are not being translated into much action.

That is why this report, the first in a series of 14, considers the attitudes that people hold towards Climate Change.

Subsequent reports will judge what these attitudes tell us about the environmental choices that people make in various aspects of their lives. It will analyse how these attitudes vary by different types of people, and what the most meaningful categories might be. After all, we intuitively know that the choices facing a young mother in suburbia will be different to those facing a single, middle-aged man living in a city-centre or to those facing a retired couple living in a village.

The Environmental Choices™ syndicated survey was conducted from 25th September to 3rd October 2008. Fieldwork for the study was conducted online in native language by Research Now plc, amongst nationally representative samples of a minimum of 1,000 people in each of Canada, England and the USA – 3,156 respondents in all. Results are presented in 14 section reports focusing on the different themes explored in the study.

The study design minimizes self-selection bias by working with a credible fieldwork supplier using a robust methodology. Strict quota controls were applied in terms of region, gender and age. We also ensured that the email invitation did not forewarn respondents that the survey was about climate change. It was essential that we are confident that the survey results provided representative data.

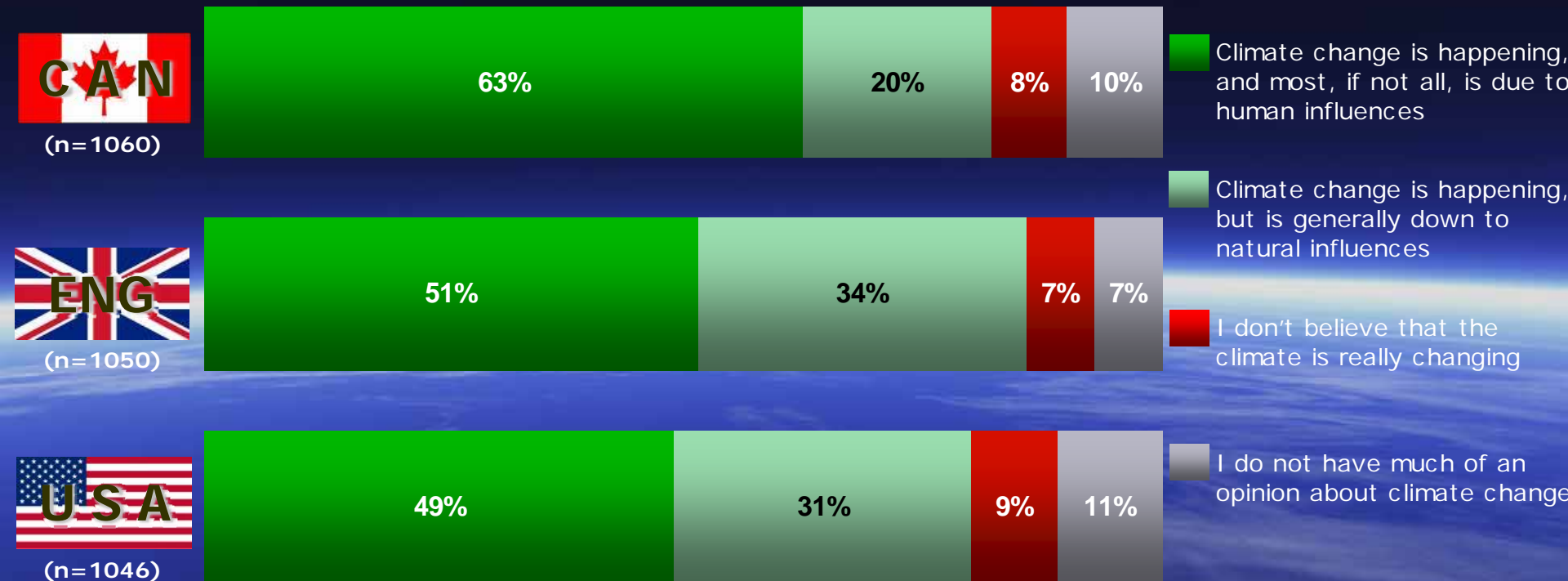
This section report covers responses given by nationally-representative samples of respondents in Canada, England & the USA regarding:

- What associations come to mind when thinking about climate change, and how does it make people feel
- Whether they believe that climate change, caused by humans, is real
- How serious they believe the threat of climate change to be
- Whether the risk of climate change should be best managed as problems occur, or whether a more precautionary approach is required
- How much any concern they feel about climate change influences their decisions on what they do or buy
- How much they are interested and aware of climate change developments

- Public sentiment to climate change is highly segmented.
- With respect to climate change, we should not think Canadians, or the English, or Americans, as being homogeneous groups.
- Instead, as separate endeavours, we should think about how to channel the concerns of those who recognise that we have a serious problem and want action now - the "Climate Citizens" - into effective behaviour. We need to bring into sharper focus the more generalised concerns of the "Mild Greens". We need to know how best to engage with, or at least manage, those who are "Sceptics & Uninvolved".

## *Summary Results*

Most people think that climate change is happening; although a sizeable minority think it is down to natural causes (more so in UK & USA than Canada).



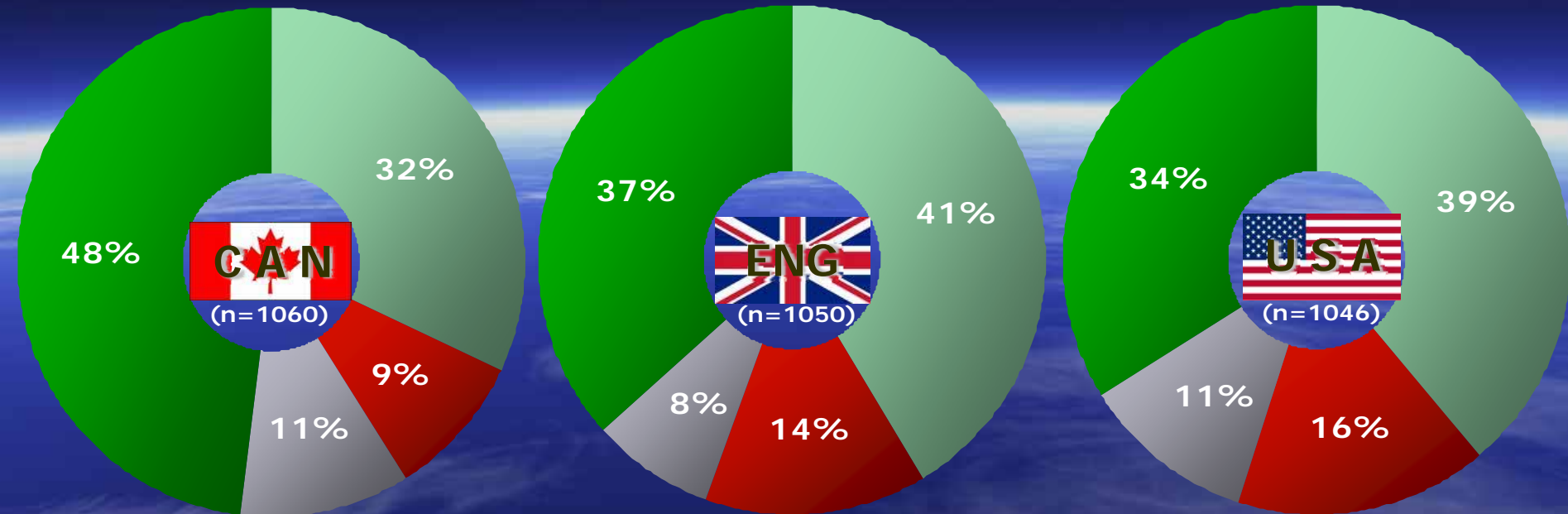
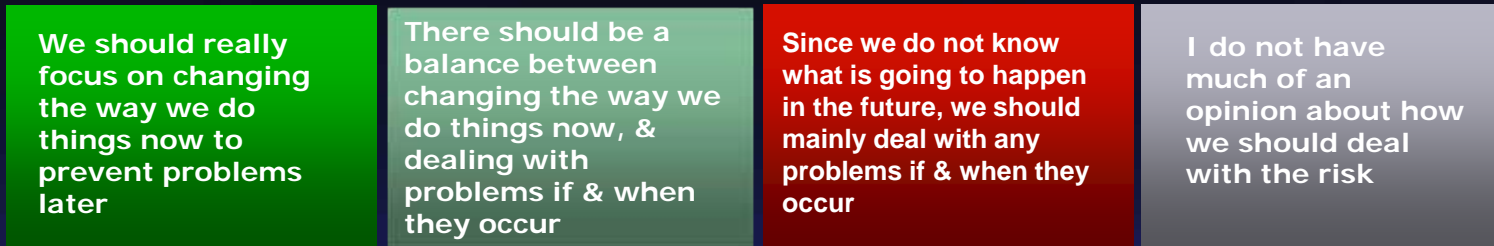
Source: Q23, The Environmental Choices 2008. 'Do you believe that Climate Change is happening? If it is, what do you think is causing it?' (fieldwork: 25 Sep to 3 Oct 2008)

Base: All respondents, n=3156

## Most people, but not all, think climate change is a serious threat



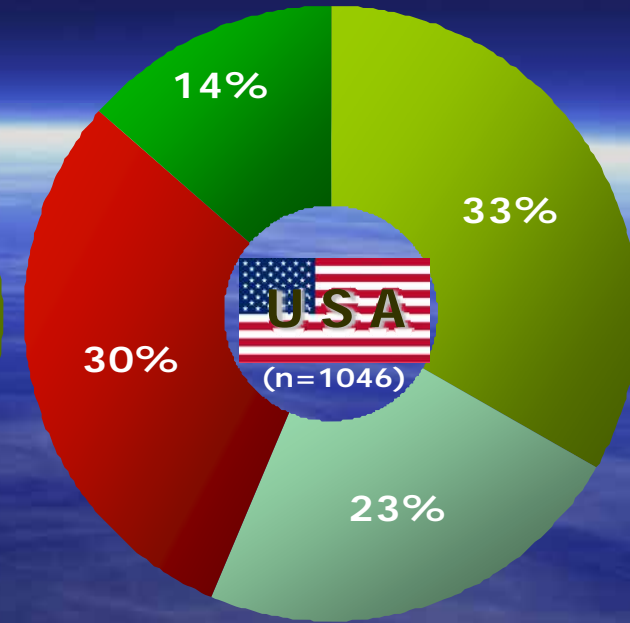
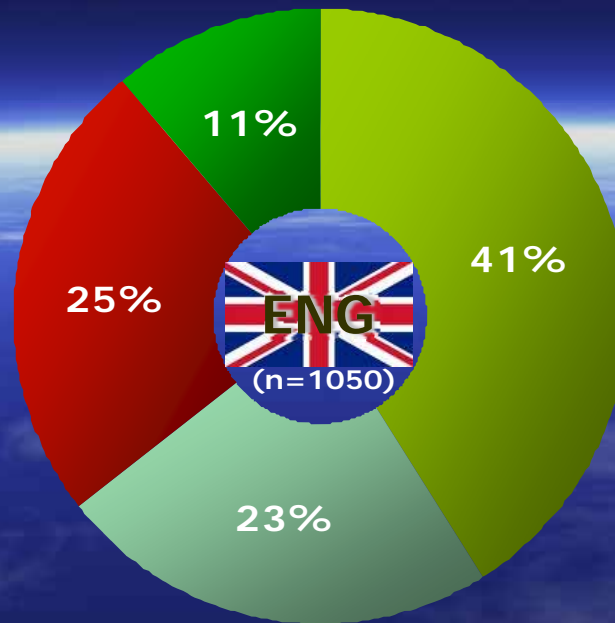
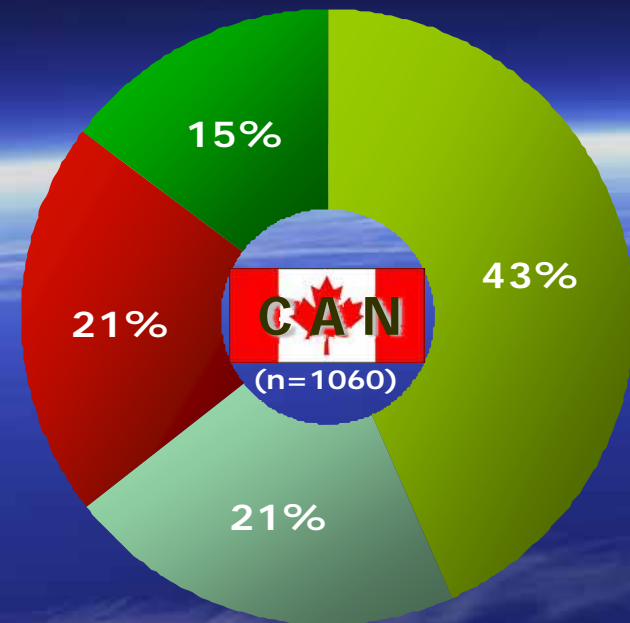
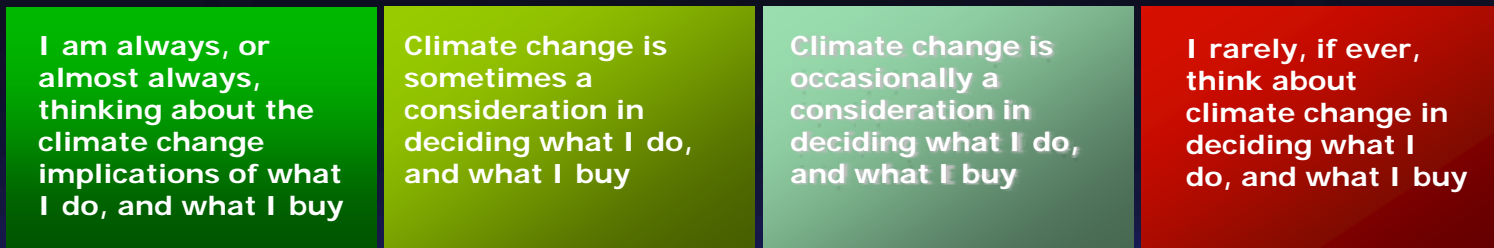
There is a balance in favour of changing the way we do things now to tackle climate change rather than dealing with problems "if & when" they occur. Canadians are especially in favour of changing the way we do things now.



Source: Q25, The Environmental Choices syndicated study, 2008 'How do you feel we should deal with any risk associated with Climate Change?' (fieldwork: 25 Sep to 3 Oct 2008)

Base: All respondents, n=3156

Around 10/15% think about climate change all-the-time when making decisions; and at the other extreme, 20/30% do not think about it at all. The answers to this question indicate that the impact of climate change on decision-making is highly segmented - especially in the USA.



Source: Q26, The Environmental Choices syndicated study, 2008 'Does the idea of Climate Change have much impact on your life?' (fieldwork: 25 Sep to 3 Oct 2008)

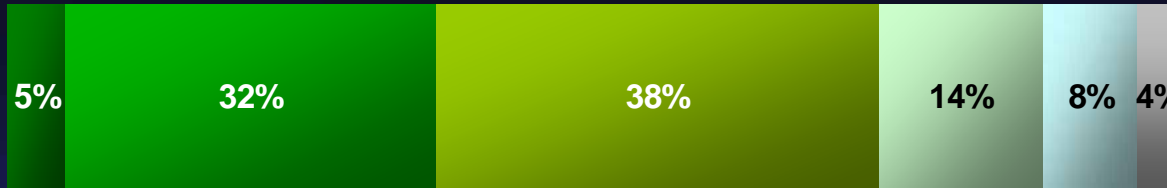
Base: All respondents, n=3156

Most people are aware of climate change, though there is a broad spectrum of knowledge and interest in the subject. Around 35%, know a reasonable amount about climate change and keep up with developments.

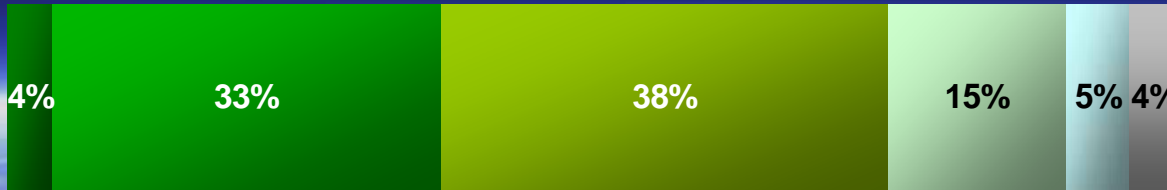
- I know a great deal about Climate Change, and really try and keep up with the latest thinking as it is a real interest of mine
- I know a reasonable amount about Climate Change; I am interested in the subject and try to keep up with developments
- I know a reasonable amount about Climate Change, although I do not really keep up with developments
- I know a bit about Climate Change but I am not really interested in it
- I really know nothing, or almost nothing, about Climate Change
- Other



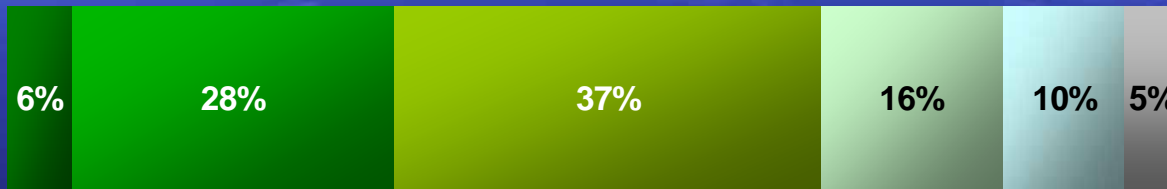
(n=1060)



(n=1050)



(n=1046)



Predominantly, emotional associations to the words 'climate change' are negative, indicating the high level of anxiety & concern that is associated with this subject



Base: All respondents, n=3156

## Top-of-mind associations to the words 'climate change' can be combined into 11 sub-categories & 3 meta-categories.

*"Sad - worry for my kids & grand-kids"*

*"Doom - we're all going to die"*

*"We have to act - people can make a difference"*

*"Real issues - our planet is in trouble"*

*"Afraid of global warming & its effects"*

Scared or worried about future/natural disasters 21.1%

It's man-made, need to take action 7.1%

It's really happening & important 7.2%

Global Warming – causes & effect 17.6%

**Acceptance / Concern**  
53.0%

*"So many conflicting opinions - why such a cold wet summer?"*

*"Time to get out the long underwear & prepare for winter"*

*"Catch phrase of the moment"*

*"Al Gore / Polar bears"*

Unsure / Debatable / Confused 2.4%

Weather descriptions 14.8%

Topical / Current / Thought provoking 2.3%

Al Gore, Ice caps & Polar Bears 2.8%

**Non-emotional / Unsure**  
22.4%

*"Hoax - tree huggers bending the truth for their own agenda"*

*"I should feel concerned, but am not"*

*"Not that blasted subject again."*

*"Natural occurrence - not man-made"*

*"Hope it's warmer in the summer"*

*"I wish the climate would change, it's hot!"*

It's a natural/cyclical phenomenon 2.3%

It's Politics / Hype to make money 12.6%

I'm Bored / Not again! 7.9%

Climate Change is good. I'm happy! 1.7%

**Denial / Disbelief**  
24.5%

\* 28.2% have been discounted due to not answering the question. The %'s above are of those that did express a top of mind response.

## Emotions evoked by climate change can have quite different origins & meaning according to the internal associations of the individual

*"Climate change is happening & it's a huge concern"*  
*"We can't risk ignoring it or delaying"*  
*"I hope it is not too late for big business and people to change"*

**Acceptance / concern**  
**53.0%**

Tense 12%  
Angry 15%  
Depressed 15%  
Sad / unhappy 19%  
Nervous 20%  
Annoyed 20%  
**Worried 35%**

*"Mixed feelings - unsure what to believe about this"*  
*"Winter is coming"*  
*"Everyone's talking about it"*  
*"Penguins and Polar Bears"*

**Non-emotional / unsure**  
**22.4%**

Tense 9%  
Nervous 10%  
Depressed 10%  
Sad / unhappy 11%  
Interested 12%  
Worried 13%  
Annoyed 16%

*"Ho-hum, here we go again"*  
*"What a load of rubbish"*  
*"What caused the glaciers to recede thousands of year ago? No SUV's then"*  
*"People scare mongering"*

**Denial / Disbelief**  
**24.5%**

Interested 7%  
Disgusted 8%  
Unamused 13%  
Angry 15%  
Bored 28%  
**Annoyed 38%**

**Associations**



**Three distinct categories**



**Feelings**

A cluster analysis, performed on 5 attitudinal questions, indicates that there are 3 coherent groups which can help us understand people's relationship with climate change and the low-carbon economy.

33.1%

## Climate Citizens

*As a prerequisite to being a Climate Citizen, you would believe that climate change is caused by human activity, that it is a serious threat and that we should focus on changing the way we do things **now** to tackle this. All Climate Citizens believe these things. There is some variability in how much climate change would impact the decisions you make in your life, and your personal interest in climate change - though, on average, it would be more than other groups.*

36.2%

## Mild Greens

*Mild Greens see climate change as one of a number of serious threats that we all face. You would likely believe that climate change is caused by human activity, but alternatively you might tend to believe it has natural causes. You would most likely believe that climate change should be handled by **balancing** changing what we do now with managing problems "if and when" they occur. You would probably know a reasonable amount about climate change (but maybe not), and it is sometimes a consideration in your decision-making (but maybe not).*

26.6%

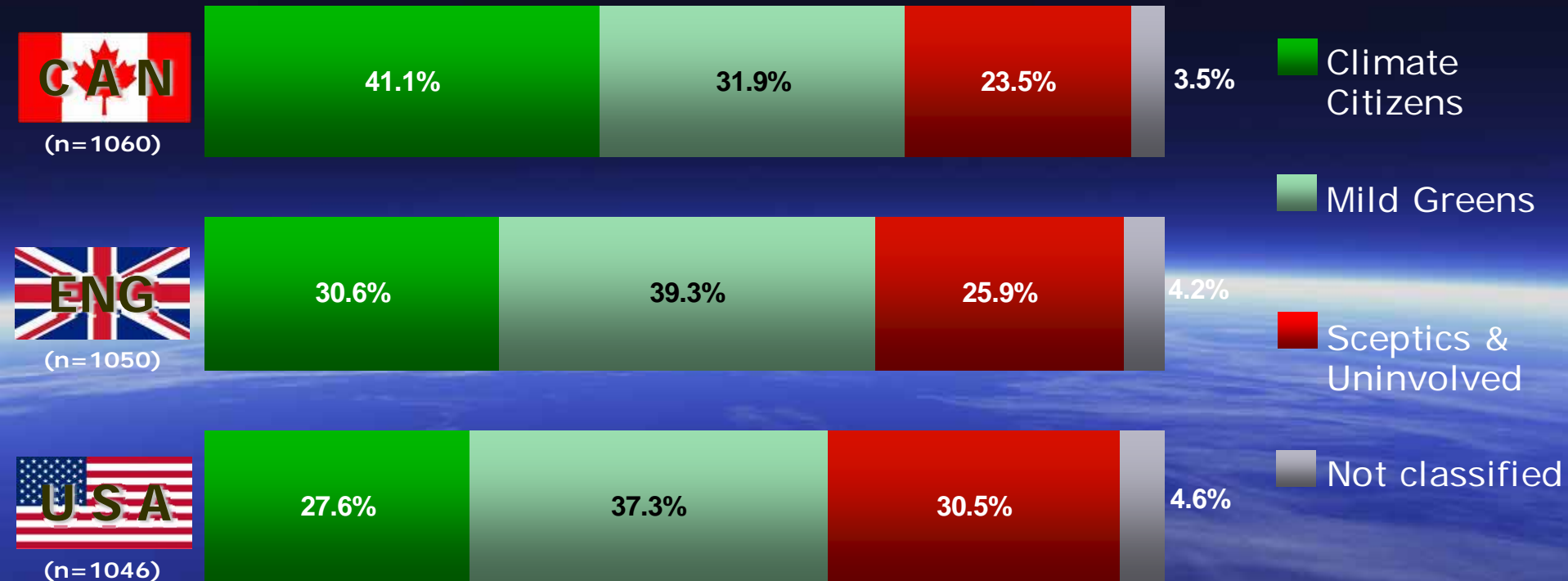
## Sceptics & Uninvolved

*Sceptics & Uninvolved do not believe that climate change is a serious risk. Although nearly half think the climate is changing, few think that it is mainly caused by human activity - and a sizeable minority really have no opinion on the issue. Climate change has very little impact on the decisions you make in your lives.*

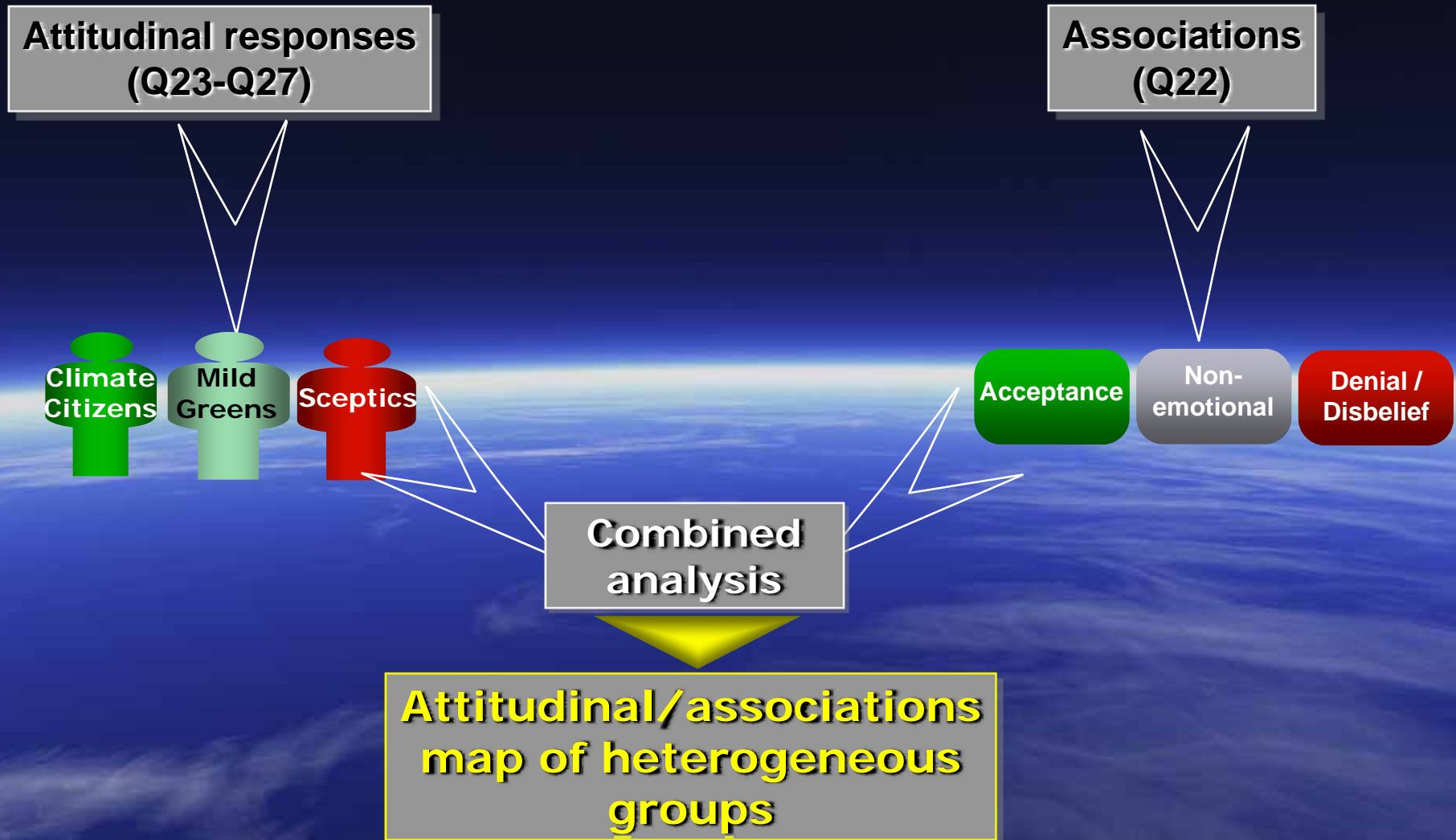
\* 4.1% of respondents could not be classified by the cluster analysis into these 3 coherent groups

Base: All respondents, n=3156

There is divided opinion about climate change in each country. Having said that, Canada is the most progressive country and USA, the least.



Combination of the analytical categorisations of emotional & attitudinal questions produces a map of internal states of mind.



Emotional responses tie quite closely with attitudinal segments. Influencing how people act on climate change needs to take account of what associations comes to mind, and how they feel about it!

## Associations (q22)

Attitudinal Clusters	Acceptance (n=1,171)	Non-emotional / unsure (n=486)	Denial / disbelief (n=504)	Totals
	<b>Climate Citizens (n=1,046)</b>	61.4%	12.7%	7.0%
<b>Mild Greens (n=1,141)</b>	38.1%	18.0%	15.0%	71.1%
<b>Sceptics &amp; Uninvolved (n=840)</b>	11.2%	17.6%	31.0%	59.8%
<b>Totals</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	

*Climate Citizens are more likely to mention associations they have about "climate change" than other groups*

(q23 – q27)

Base: All respondents who are either Climate Citizens, Mild Greens or Sceptics & Uninvolved, n=3027

## 1. Section report

If you need more information on a particular section report, then this is available to purchase. This purchase will provide two outputs.

i) A detailed ***interim report*** of the data on the date of the section report release. This analysis will be in PowerPoint format, allowing you to incorporate the charts & tables included within into your own presentations & reports.

ii) The interim report will be replaced by a detailed ***final report*** of the data, again in PowerPoint format, will be sent to you later this year at no extra cost. This will include further analysis of the results, partly based on client feedback, as well as a considered commentary about the meaning of the data.

Please visit [http://haddock-research.com/public\\_opinion\\_monitor](http://haddock-research.com/public_opinion_monitor) to buy the section reports or for more information. Alternatively please contact us via [info@haddock-research.com](mailto:info@haddock-research.com).

## 2. Full Environmental Choices™ report

The 2008 Environmental Choices™ survey is comprised of 14 section reports, of which this is one. Clients are very welcome to buy individual section reports, but are encouraged to buy the complete survey report at a considerable discount (see below).

Clients who buy the full report will also receive a further commentary which cross-references the various section reports, and consequently will provide a 'gestalt' picture of the subject matter. The results of this study will be integrated within the frameworks described in the project proposal to provide a narrative about how people feel, think and act with regard to climate change, and how this can be used to guide businesses and policy action.

The analysis of the data will treat people holistically in the way that they perceive issues surrounding climate change touched-on within this study. Too often quantitative research data is analysed piecemeal, question-by-question, and reported in computer tabulations. Statistical techniques used with the data will include segmentation by brand-usage, cluster analysis, CHAID, regression modeling and mapping. The analysis program, SPSS, will be used as the principle tool to analyse the study data.

We encourage feedback from our clients as to the types of analyses they would like to see in the final report.

## Payment

**1) Section reports:** The standard licence cost of one section report is CAN\$1,000, and the corporate licence is CAN\$2,500. Organisations of over 500 employees would require the corporate licence. G.S.T. and Q.S.T. will be added to the price for Canadian clients.

**2) Full report:** The full report is sold at a considerable discount compared to the purchase of individual section reports. The standard licence cost of the full report is CAN\$5,000, and the corporate licence is CAN\$12,500. Organisations of over 500 employees would require the corporate licence. G.S.T. and Q.S.T. will be added to the price for Canadian clients.

It is possible to “trade-up” from buying a section report to the full report by paying the difference.

Please visit [www.haddock-research.com](http://www.haddock-research.com) for more details regarding payment, delivery and our terms & conditions.

## Bespoke analysis

Clients who purchase the reports may like further analysis of the data done specifically for them. Please contact us at [info@haddock-research.com](mailto:info@haddock-research.com) to discuss this and we can provide you with a quotation.

## Ad hoc research

Haddock is a full service market research agency. Please contact us via [info@haddock-research.com](mailto:info@haddock-research.com) to discuss tailored research projects that we could conduct on your behalf.

Free summary reports of each of these sections are available from the [Haddock site](#).  
Please check there to see which free reports are currently available.

Code	Title	Free Summary :	Interim Report :
<b>SECTION 1. Measuring how people think, feel and act towards Climate Change</b>			
1.a	Attitudes (towards Climate Change)	Available	<i>In production</i>
1.b	Feelings (towards Climate Change)	<i>In production</i>	<i>In production</i>
1.c	Behaviour (towards Climate Change)	<i>In production</i>	<i>In production</i>
<b>SECTION 2. The Social Physics of Climate Change</b>			
2.a	Influencers on Climate Change & social tipping points	<i>In production</i>	<i>In production</i>
2.b	Government mandates for action on Climate Change	<i>In production</i>	<i>In production</i>
2.c	Materialism, happiness, incentives and passions - & dealing with Climate Change	<i>In production</i>	<i>In production</i>
<b>SECTION 3. Low-Carbon Sector Analysis</b>			
3.a	Power generation: Reactions to coal & nuclear power; & Al Gore's plan for 100% renewable electricity in 10 years, in the USA	<i>In production</i>	<i>In production</i>
3.b	Climate change campaigning organisations & marketing campaigns	<i>In production</i>	<i>In production</i>
3.c	Climate change & the home	<i>In production</i>	<i>In production</i>
3.d	Green energy companies & hydrogen fuel cells	<i>In production</i>	<i>In production</i>
3.e	Telepresence & flying	<i>In production</i>	<i>In production</i>
3.f	Transport, cars & car-share organisations	<i>In production</i>	<i>In production</i>
3.g	Carbon-offset companies & business reputations	<i>In production</i>	<i>In production</i>
3.h	The branding of climate change	<i>In production</i>	<i>In production</i>

*To get the most out of this data, we encourage users to make queries about the results and suggestions for further analysis. We will then incorporate relevant analyses and interpretation within the final version of the paid reports, which will be released later in 2009.*

## Supporting marine charities

At Haddock Research & Branding, we have a particular interest in helping the haddock, or offshore hake, survive. Therefore, we have committed to donating 10% of net profits from the Environmental Choices™ study to marine charities. We will be splitting this pledge equally between these three charities:

- WWF Global Marine Programme
- Marine Stewardship Council
- The International Union for Conservation of Nature

If you have any further questions, please don't hesitate to contact us at [info@haddock-research.com](mailto:info@haddock-research.com)