TWO YEARS ON: LESSONS FROM COVID TIMES

April 2022

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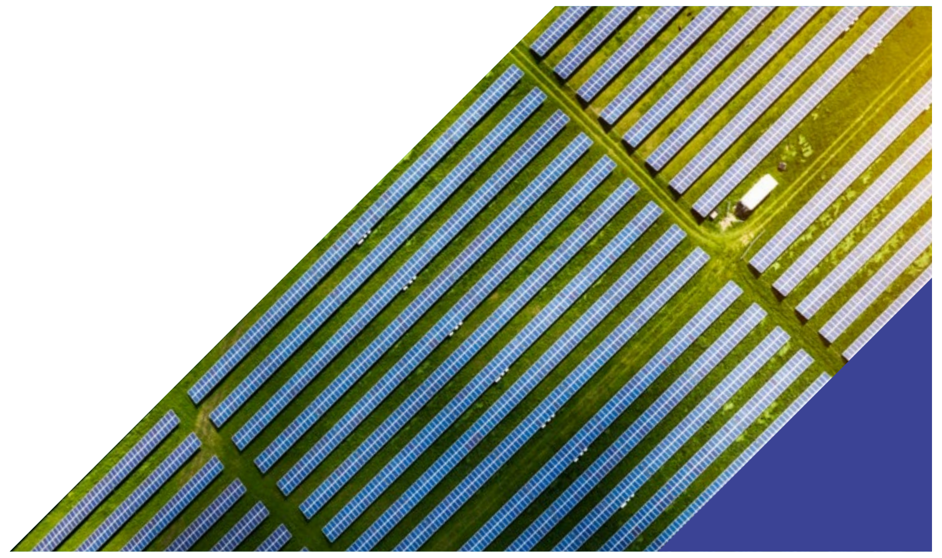
The ten key themes



INTRODUCTION
TWO YEARS ON: LESSONS FROM COVID TIMES

Whatever happens next in this unique, multidimensional, planetary crisis, it feels like we are now at an inflection point when it comes to the pandemic.

For the first time in two years, Coronavirus has lost its place among the most worrying issues facing people around the world. Hospitalisations and deaths are falling in many countries. Government policies are now tilting towards a new “living with Covid” phase, as they look to give societies and economies the best opportunities to recover.

This is before we even start to take into account the watershed moment that is the conflict in Ukraine. Each of us will be very aware that the implications of this new crisis are only just starting to play out. It feels like we are now seeing the beginning of an entirely new era, with consequences perhaps even more far-reaching than the pandemic.

Of course, it’s too early to say with any certainty what the long-term implications of any particular period of crisis will be.

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If we look back at the financial crisis of the 2000s, for example, it was only several years later that we saw some of the aftershocks, such as the rise in populism, start to play out.

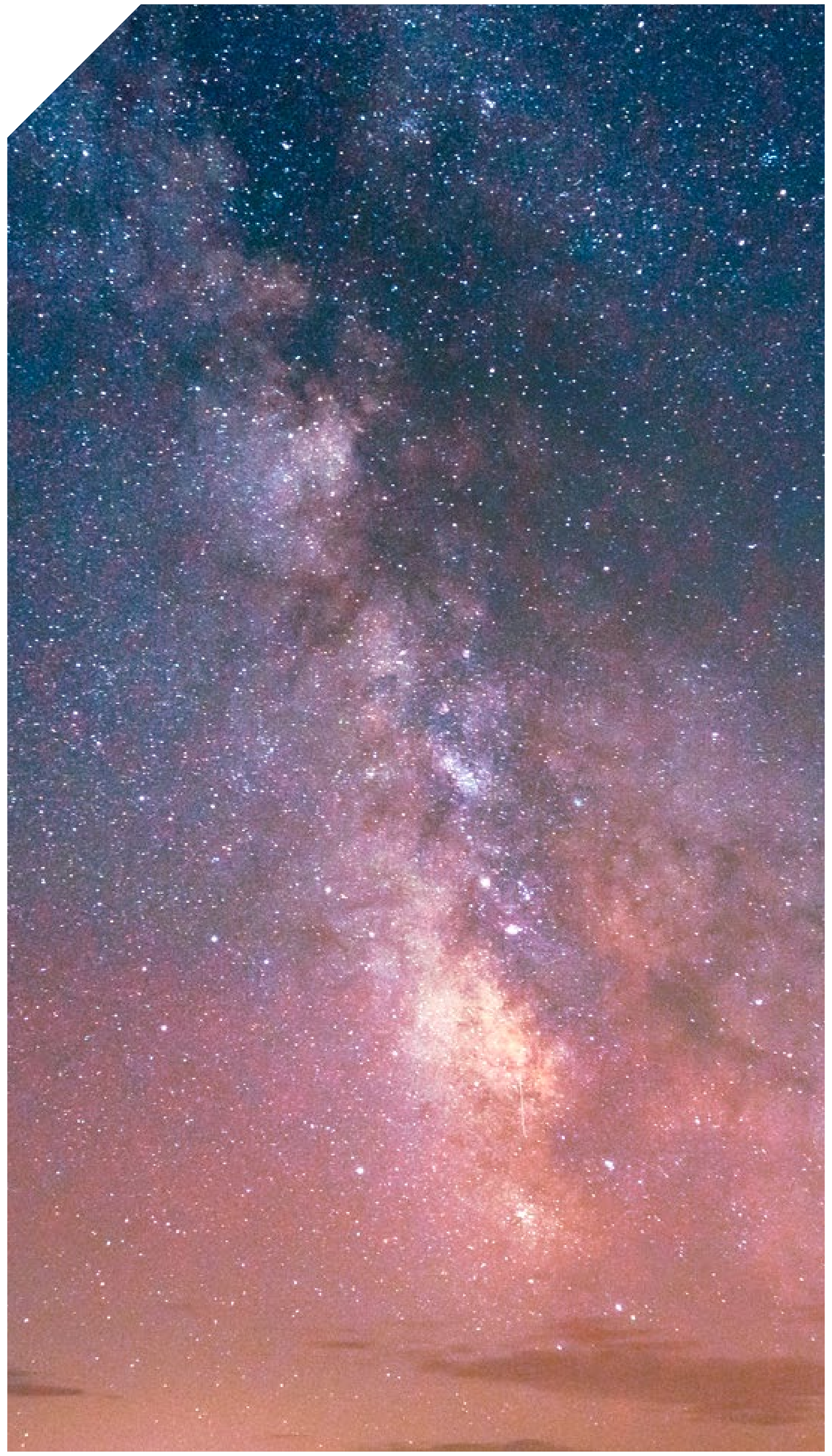
That said, two years into the unprecedented upheavals instigated by a global pandemic, today feels like a good moment to take stock and think about what we have learned during this period. Just what can we say about what the whole experience tells us about individuals, economies and societies?

In doing so, we reminded ourselves of the need to be cautious, for example about breaking out into descriptions of how the world is spinning faster and in more unpredictable ways than ever before. Peel below the surface and we find that change can be overrated. Many of the big challenges the world was already facing have not gone away. We were grappling with the implications of ageing populations, a fragile planet and growing inequalities long before Coronavirus struck.

This report presents our thoughts on some of the big themes that come to the fore in our research for businesses and governments around the world. As we worked through hundreds of studies on different aspects of the crisis, we were struck by individuals' adaptivity and resilience in dealing with the obstacles put in front of them. In drawing out these key themes, we tried to bring out both what the pandemic has revealed and what it has concealed.

Our aim is to stimulate ideas, to help us all start to come to terms with what we have just witnessed — and to be well-prepared for a new and perhaps even more uncertain period ahead.

We look forward to discussing the contents with you.



PEOPLE PROVED ADAPTABLE

People proved adaptable

By the end of March 2020, more than 100 countries were in either full or partial lockdown, affecting billions of people. An event both unprecedented and unexpected.

We then saw how people can bounce back.

Two years on, life, society and business all continue, albeit often in an altered or adaptive state. Many economies have been performing better than initial predictions suggested. And we've all seen, first-hand, human beings' sheer capacity for resilience.

But there are limits to this.

While there were high levels of compliance with lockdown restrictions initially, many people admit to picking and choosing which rules to follow once some sense of normality began to resume.

> “We must be cautious about going too far too quickly with hot takes describing apparently permanent changes.”

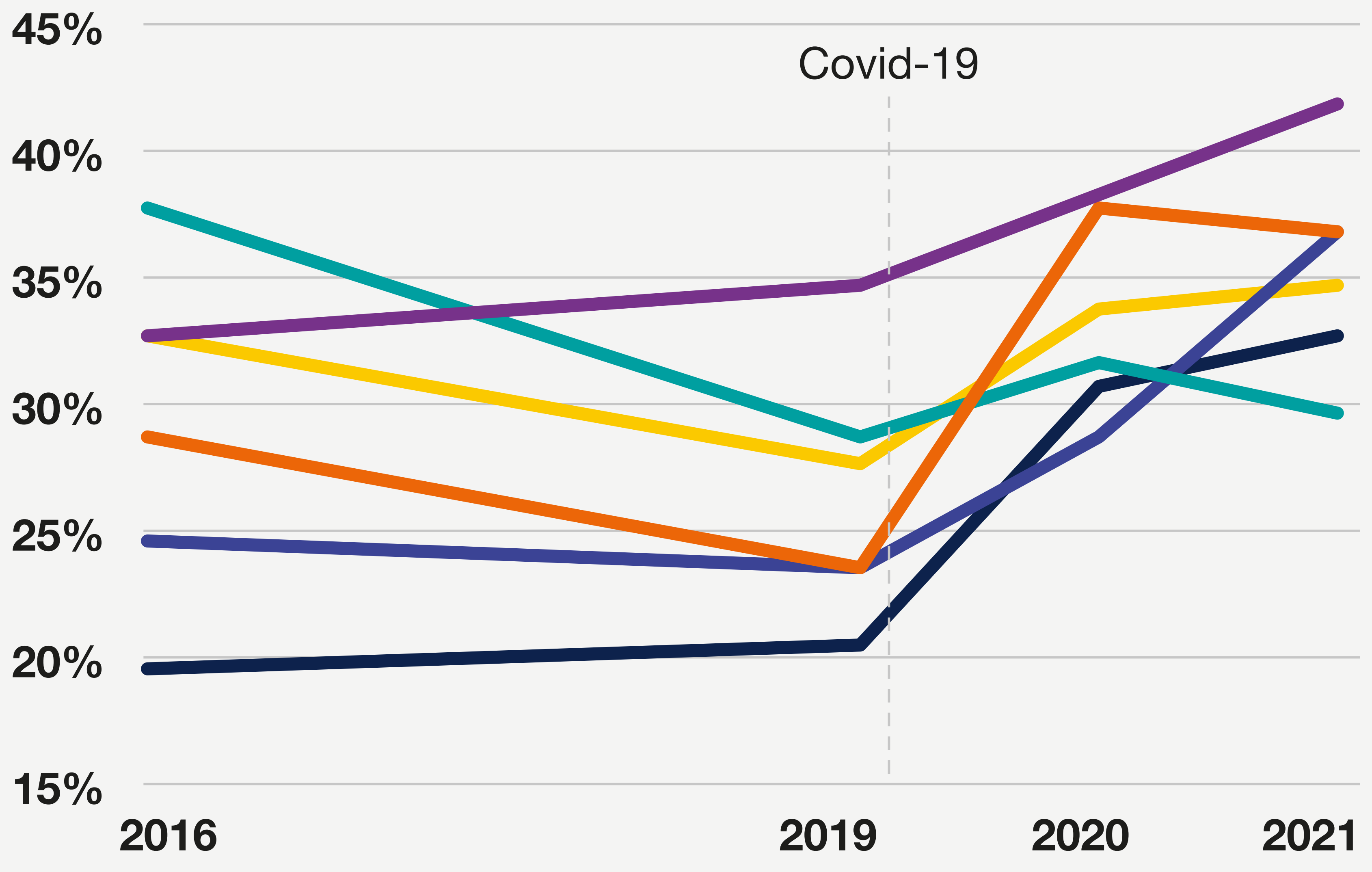
Meanwhile, much is talked about the growth of online shopping, with 43% of people globally saying they are shopping more online. But with acceleration comes friction. Ipsos' Global Trends Survey finds consumers more likely to report difficulties making digital purchases than a year ago.

We don't yet know how "sticky" new behaviours, such as office staff working from home, remote banking, or virtual consultations with doctors are going to be: certainly not everything is being embraced with equal enthusiasm.

Also, we must be cautious about going too far too quickly with hot takes describing apparently permanent changes. The path to the "new normal" will be more incremental and less dramatic than we may expect.

Friction with eCommerce

I find shopping online more difficult than shopping in traditional stores – % agree

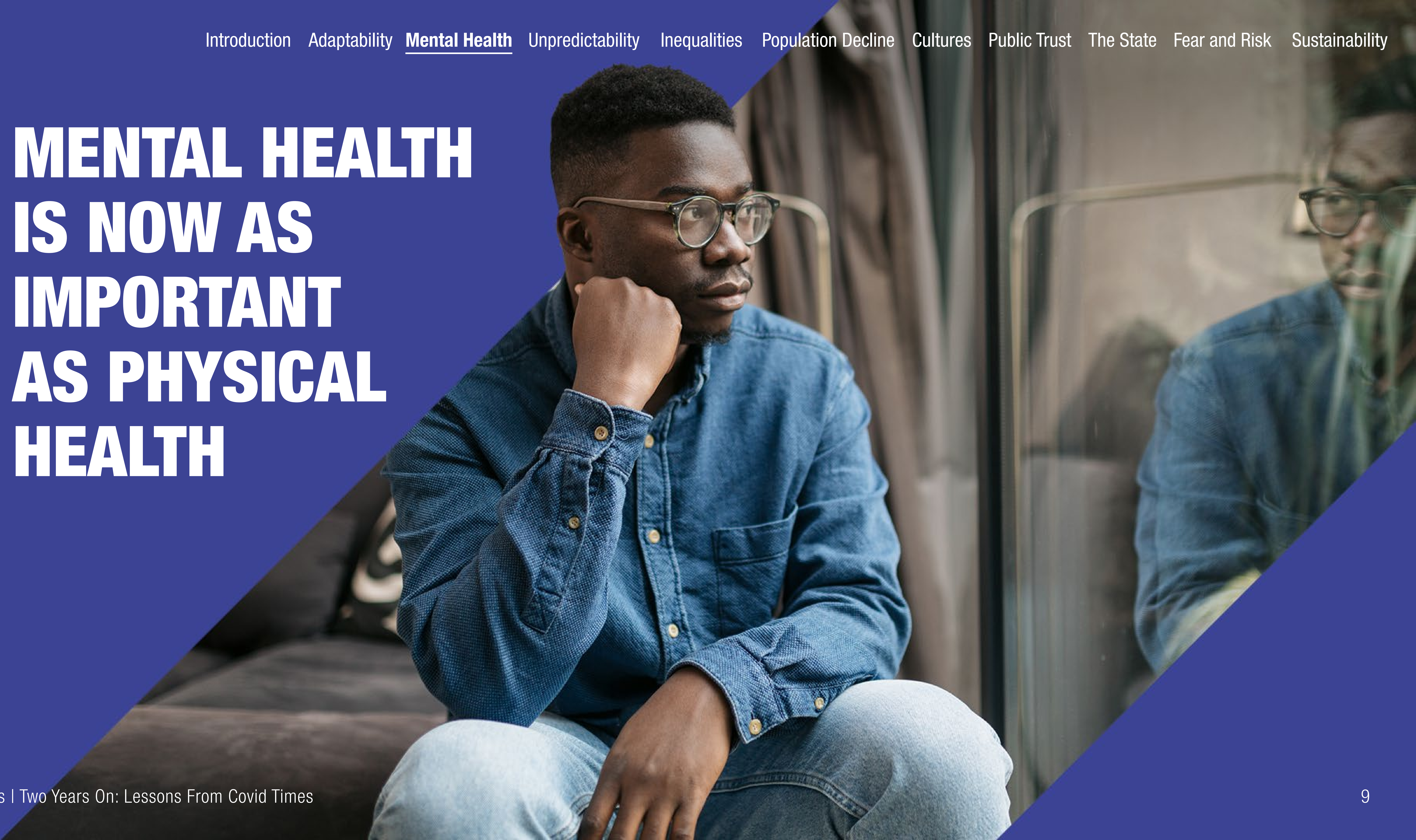


	2021 SCORE	CHANGE FROM 2016
Canada	41%	+9
France	36%	+8
Britain	36%	+12
Italy	34%	+2
Germany	32%	+13
US	29%	-8

Base: 500-1,000 adults aged 16-75 (18-75 in US and CA) per market per year

Source: Ipsos Global Trends Series

MENTAL HEALTH IS NOW AS IMPORTANT AS PHYSICAL HEALTH



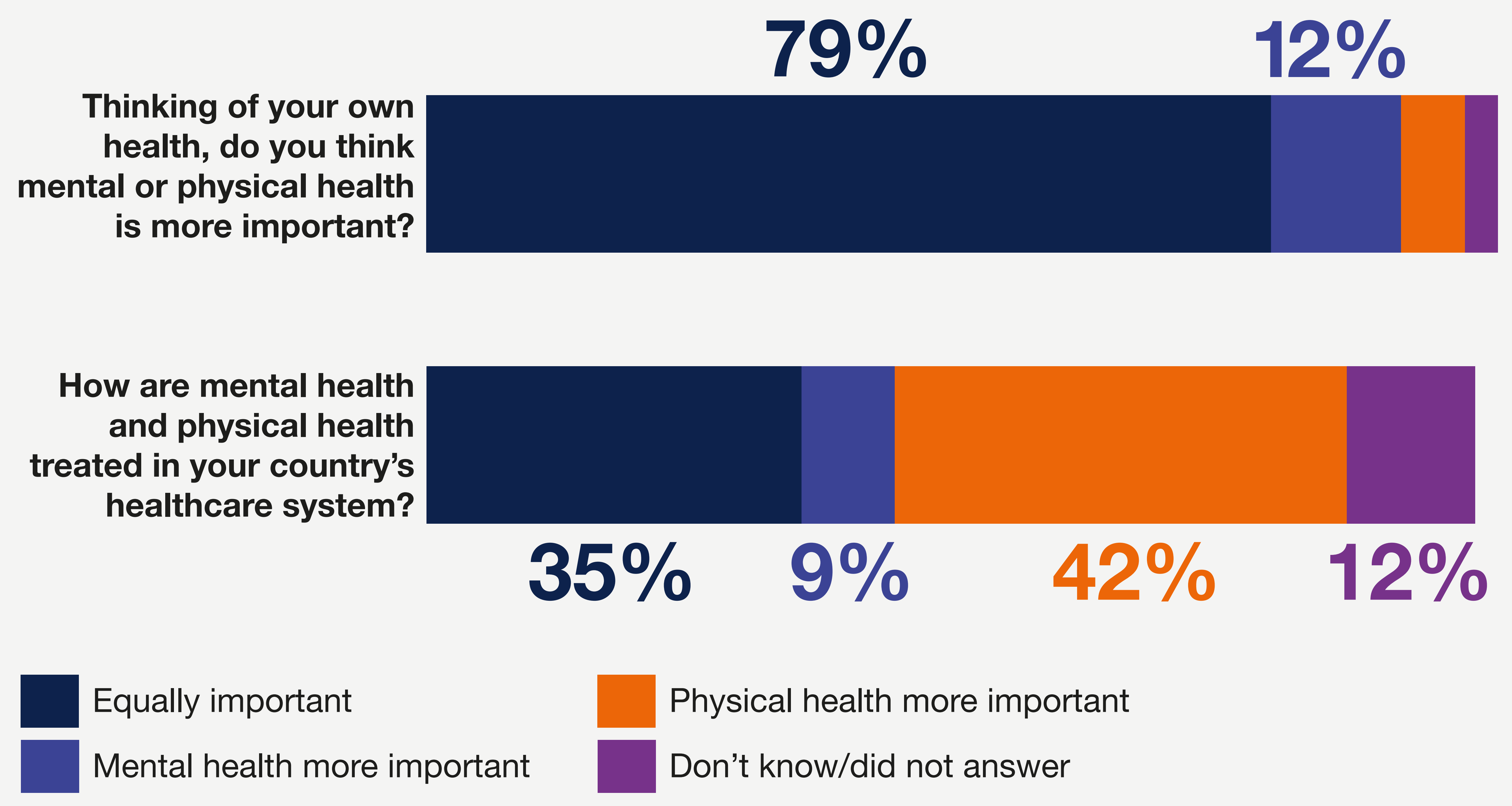
Mental health is now as important as physical health

Through one global public health crisis, another is being revealed. In this multi-dimensional crisis, the health story doesn't begin and end with the Covid-19 virus itself.

The pandemic not only threatened our physical health but also had a profound effect on our mental wellness — and expanded how we think about ourselves.

Many people say their personal health situation has worsened, and that they are experiencing mental health challenges for the first time. Globally, eight in 10 people now say their mental health is as important as their physical health.

Perceived vs. experienced importance of health



Base: 21,513 online adults in 30 countries, August 20th — September 3rd 2021. The "Global Country Average" reflects the average result for all the countries where the survey was conducted.

Source: Ipsos Global Advisor

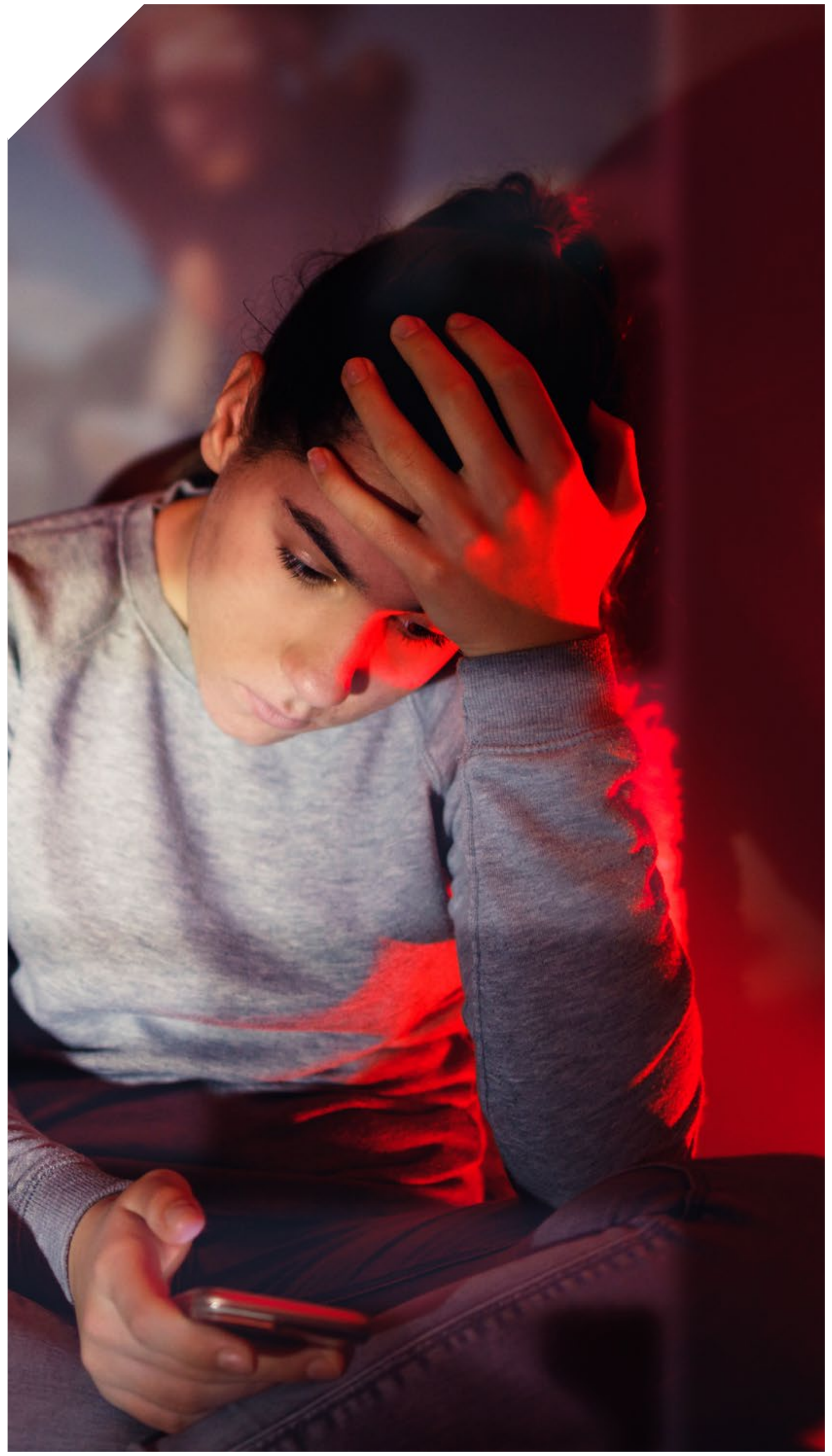
Demographics

It has been especially tough for certain groups. Ipsos research with AXA finds 68% of women said they had felt worried or anxious since the advent of Covid-19, including 49% who said this began or worsened during the pandemic. Around four in ten women (41%) said that lockdown and curfew measures, which limited options to shop, go out, attend events, and so on, had a major negative impact on their mental health. Almost as many (38%) said the same about limitations on the number of people they could meet at home or visit. At the same time, we must be aware that men tend to be less likely to share mental health concerns.

One in five young Americans are "languishing", as opposed to thriving, and those who fall into this languishing category are much more likely to have been impacted by Covid-19 in terms of their physical health, financial situation, or future prospects.

Our mental health risk study in Canada explores the demographic differences between those classified as "high risk": 54% of women vs 42% of men, 51% of lower income vs 44% of higher income, and 73% of Gen Z vs 26% of baby boomers.

> "Around four in ten women (41%) said that lockdown and curfew measures had a major negative impact on their mental health."



Long-term impact

The full extent and long-term implications of the mental health impact of Covid-19 will take some time to become apparent. But, already, almost four in ten across 29 countries (37% on average), expect worse mental health and wellbeing among children and young people to be a long-lasting outcome of Covid-19. Yet, investment in mental health services is still only a small fraction of overall health spend. This balance may have to shift if societies are to adequately respond to emerging health needs.

While the end of the pandemic could to some extent put an end to the adverse effects on our mental health, for now, there is no clear "end" in sight. Continued breakouts and the emergence of new variants means it can feel far from over. In December 2021 we found a mix of expectations on when life will return to normal — if at all.

> "Almost four in ten expect worse mental health and wellbeing among children and young people to be a long-lasting outcome of Covid-19."

Ipsos tracking of how people are feeling through pandemic phases shows an increase in positivity as people anticipate reaching the "new normal". However, the "opening up" phase can also be a stressor. This serves as a reminder that the end of the pandemic will not necessarily restore a healthier balance, and people may need more and different types of support going forward.

CONSUMER DESIRES ARE UNPREDICTABLE

Consumer desires are unpredictable

At the start of the pandemic, there was much noise initially about stockpiling and pantry filling. This was followed swiftly by news about how lockdowns and social distancing created a void to be filled with more premium brand experiences, and it is certainly the case that the disposable incomes of middle classes were not dented – they even rose in some countries.

In early 2021, our Ipsos Essentials tracker found 55% across 16 countries saying that, when shopping for food, they often buy higher quality products because they are "saving money in other places right now".

Even if economies proved resillient, uncertainty still reigns – witness the rise in concern about inflation. Our latest What Worries the World study reveals inflation is now a greater worry than Covid-19 and in fifth place overall, recording the highest level of concern since we began tracking in January 2013. Compared to the beginning of the year, concern about inflation has grown most in Great Britain (+19 points) and Germany (+15), and is now the number one issue in Canada, Great Britain, and the US, expanding the group of three nations (Argentina, Poland, and Turkey) where it was already top.

If we are about to go through a period of restricted purchasing power, innovating brands may need to be patient. Looking back at the experience of the late 2000s, brands like Amazon, Netflix and Dominos really took off in the wake of adjustments made either during or in response to that particular crisis.

Perils of Predictions

There are a few things we can predict with confidence about the years ahead: our “known knowns”. For example, technology will continue to dominate, while climate change and mental health will remain high on the agenda.

But there are many things we do not know, and we would be foolish to try and make too many predictions. The economy is one realm in which we are often unsure; initial suggestions that it will make a strong recovery have been tempered in early 2022 by concerns about inflation and geopolitical uncertainties.

So, rather than predictions, scenario planning has an important role to play. This is where we take what we do know (via the data we have), alongside what we cannot predict, and find a way to work within that context.

INEQUALITIES ARE WIDENING

Inequalities are widening

The pandemic has left us with all of our old problems — and added some new ones. It has exacerbated existing inequalities and disparities across age, gender, ethnicity, and geography. These have perhaps never been as visible as they are today.

Gender

We cannot consider the gaps intensified by the pandemic without considering the disproportionate impact on women. When looking specifically at the workplace, women's employment fell globally by 4.2% in 2020 compared with 3% for men, as sectors in which women tend to work more (such as tourism) were disproportionately impacted by restrictions used to curb the spread of the virus.

There is also evidence of a growing childcare gender gap. A quarter of respondents in our 2022 International Women's Day study stated that childcare or caring responsibilities have prevented them from applying for a job or promotion or have caused them to leave or consider leaving a job (25%), with women more likely to be affected than men (31% vs 19%).

Meanwhile, a March 2022 EU-wide study finds around three-quarters (77%) of women across the EU think that the Covid-19 pandemic has led to an increase in physical and emotional violence against women in their country, with those who indicate that the pandemic has made them more financially dependent on their partner, other relatives or friends the most likely to agree.

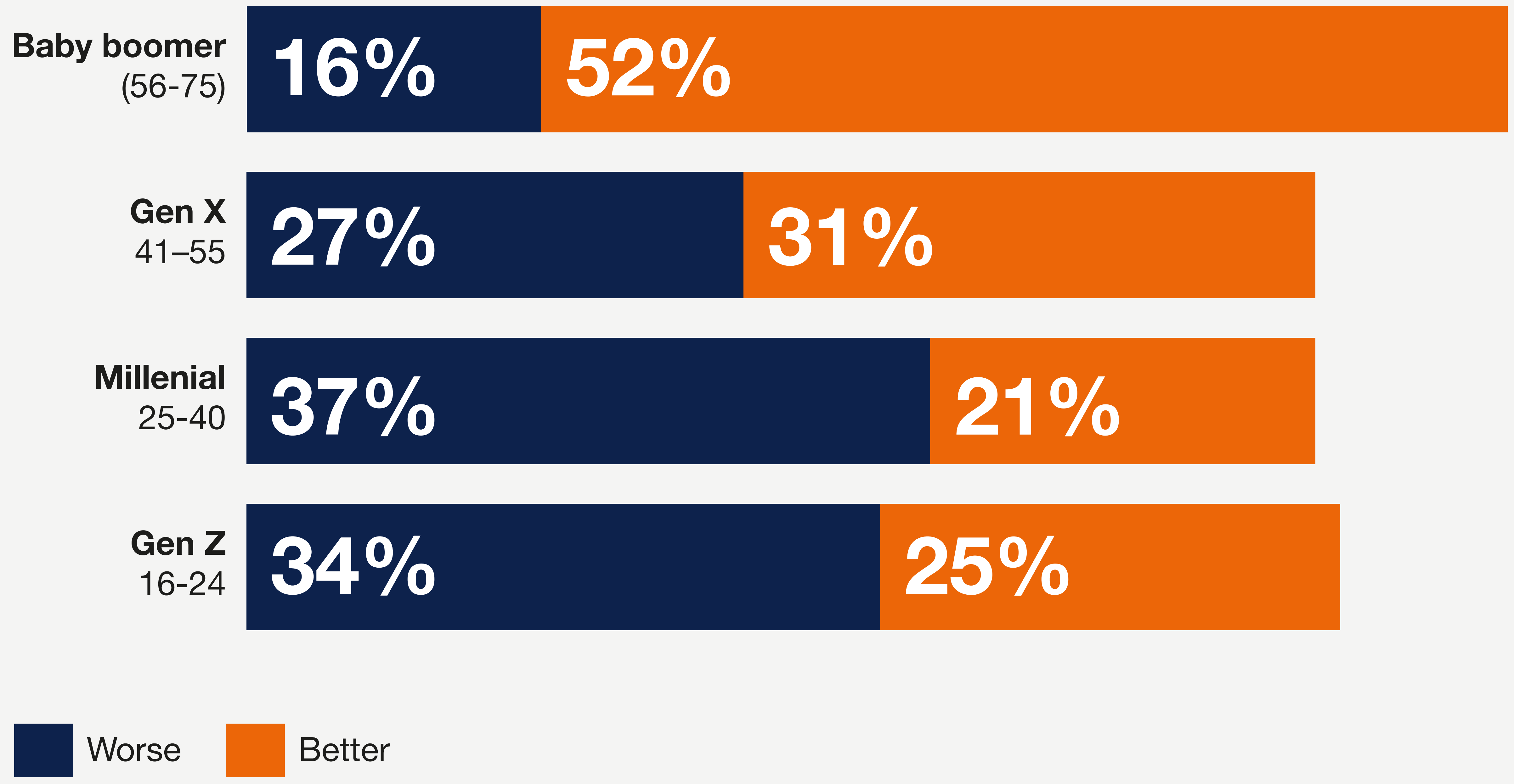
Age

We are also witnessing a widening expectations gap between young people and their parents/ grandparents. In July 2020, 37% of British Millennials felt that “their generation will have had a worse life than their parents” (vs. 21% to the opposite). Meanwhile, only 37% of younger Americans think there will still be money left in the system by the time they retire.

Income

While there is no universal conclusion about how the pandemic has affected income, our data does paint part of the picture. We know the affluent carried on spending, and spending more, with luxury product purchases increasing between 2020 and 2021. Luxury watches saw the biggest rise in spending (+22%), followed by designer clothing (+6%).

To what extent, if at all, do you feel that your generation will have had a better or worse life than their parents, or will it have been about the same?



Base: 2,237 UK residents aged 16-75, interviews 17-20 July 2020

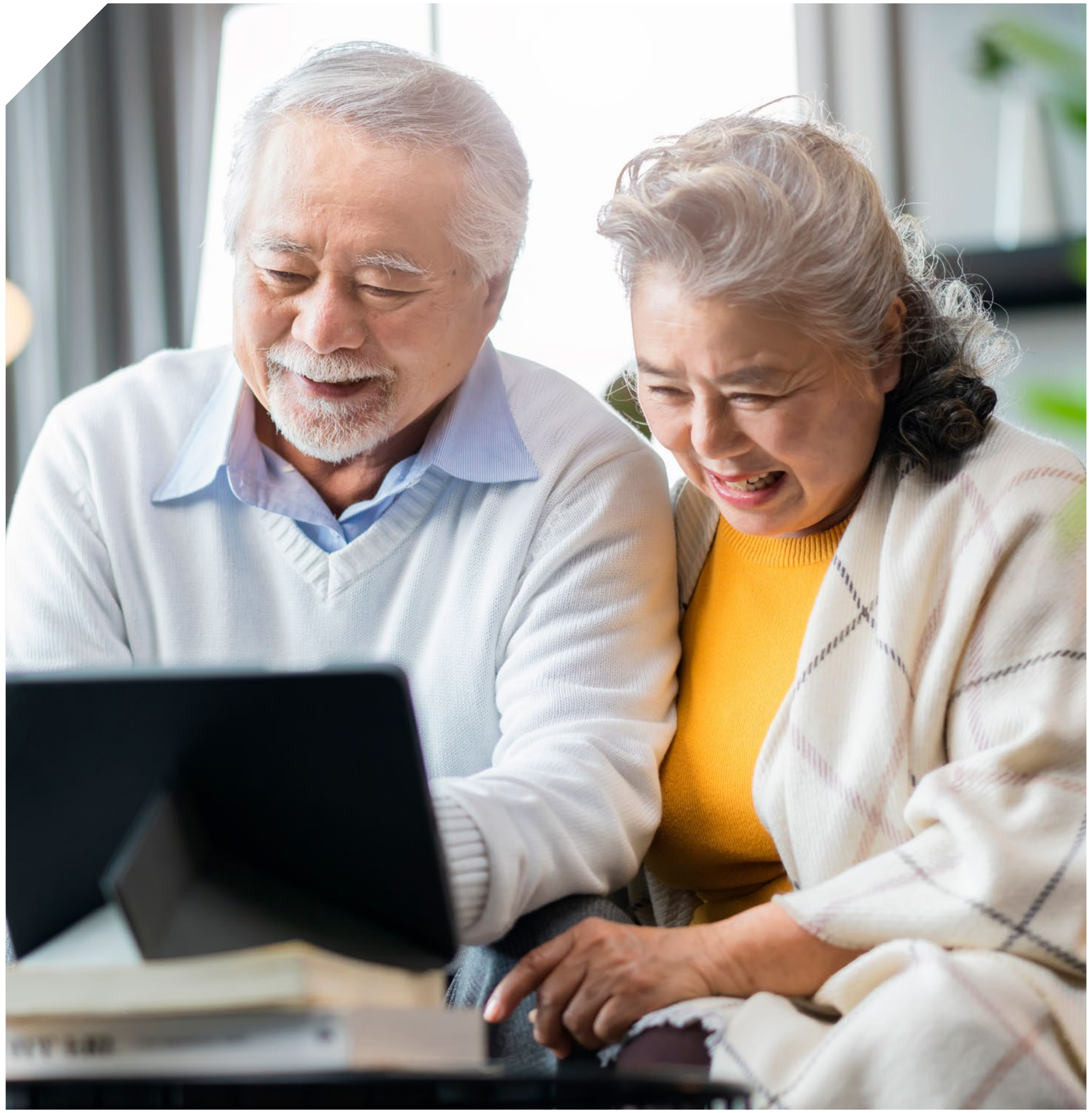
Source: King’s College London and Ipsos MORI

Meanwhile, about four in ten women (38%) say that the pandemic has had a negative impact on their income. This can be explained by women doing less work for a salary or wage than they wanted to, either because of the pandemic's impact on the job market (31% agree this applies to them) or because of the increase in work at home (25% agree).

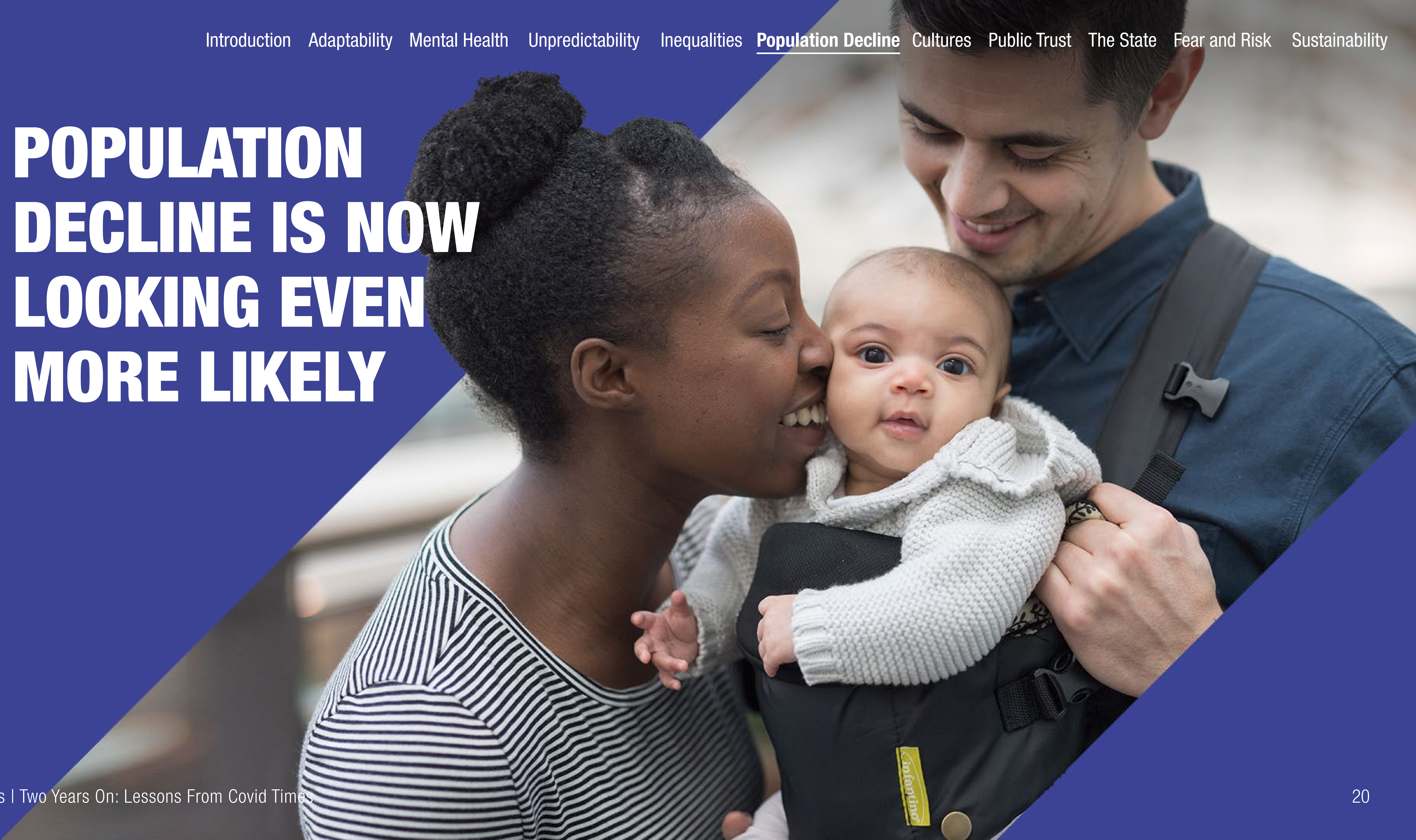
In it together

The picture is not all bad, however. When it comes to the "digital divide", we see a narrowing in some aspects, such as older people's increasing adoption of technology-based tools to keep in touch with friends and family. Another positive is the opportunity created for employment and online learning in a more digital environment. This digital acceleration, and the end of the taboo against home working, seems set to have real implications for the future of our daily lives, including the potential reorientation of how our cities, suburbs, and surrounding areas all interact.

While it is apparent that the pandemic has reached all corners of the world, the experience and extent of effects and ramifications vary widely within and across countries. We may be in this together, but the experiences are diverse and divided.



POPULATION DECLINE IS NOW LOOKING EVEN MORE LIKELY



Population decline is now looking even more likely

The pandemic has modified birth rates, but not in the way commentators speculated or people joked at the start of lockdowns. Uncertainty has caused many to delay having children, accelerating the pre-existing phenomenon of population decline. We expected this "empty planet" scenario to take hold by 2050. It may now be coming even sooner.

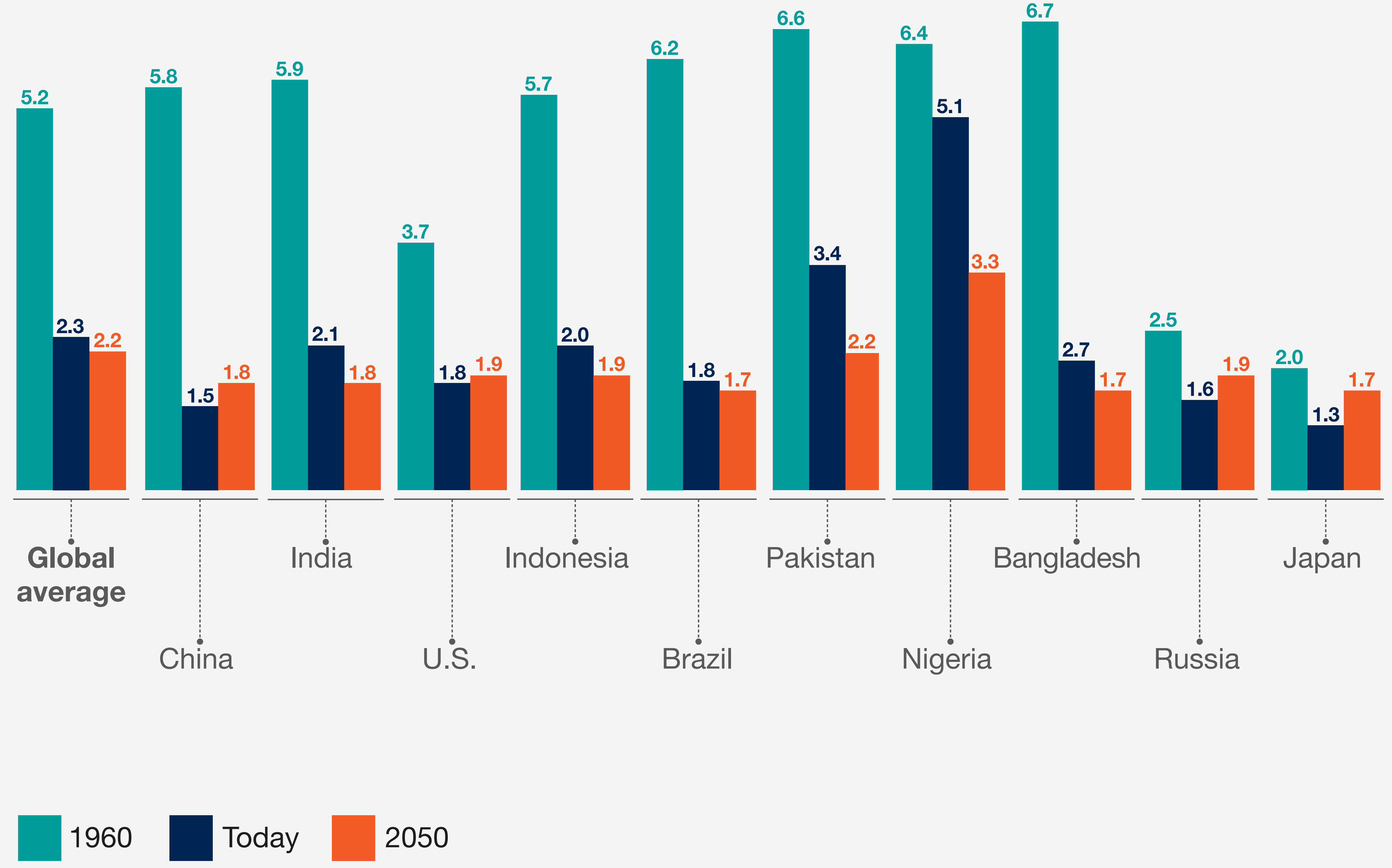
Fertility rates

So, what does a major decline in fertility look like? Our chart (next page) shows the UN's birth rate figures for the world's 10 most populous countries in 1960, today, and 2050. Since 1960, the birth rate in these countries has dropped by more than half. In eight of the 10 countries it is already at or below the natural replacement rate of 2.1.

New data showing the impact of Covid-19 on the number of births is startling. Over the last year, Poland experienced a 25% decline in new births and preliminary data from many other European countries also show accelerating declines. The Brookings Institute estimates that 300,000 fewer babies will be born in the US as a result of Covid, while Canada just reported its lowest birth rate in history. Particularly noteworthy is that early estimates for births in China over the last year show a decline of around 15%.

Recent Ipsos polling data supports this, with 11% of people around the world saying they have delayed or decided not to have a child/any more children due to the Covid-19 pandemic. Financial concerns was the biggest contributing factor (21%). On the whole, people do not seem to want to have large families today: one in two globally think that the ideal number of children for a family is two.

Declining fertility/birth rates: The 10 most populous countries



Source: UN Population Division & Bill and Melinda Gates Foundation, publsihed in The Lancet, July 2020

Impact of Covid-19:

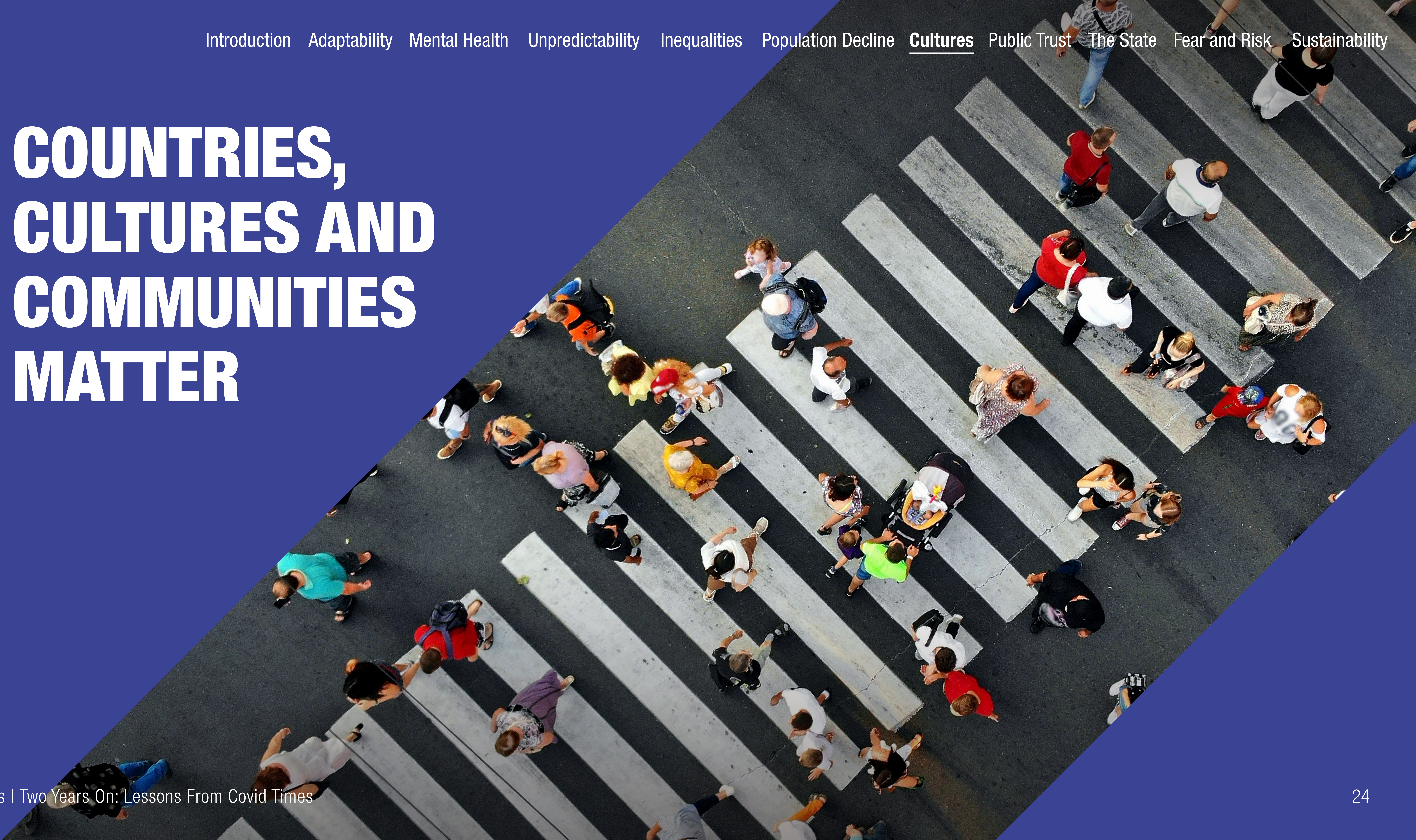
- Depressed fertility rates
- Disrupted immigration
- Excessive death among elderly
- Outmigration from major cities (temporary?)

An ageing population

Considering the situation with declining fertility rates, we could observe — for the first time in history — that humanity feels old. Most of the world's population growth today is happening not because we are having lots of babies, but because we are not dying as quickly as we did in the past.

As a result, brands and governments will need to pay more attention to older generations: they have greater spending power but also present a growing dependency burden for public services. Companies may have to think about how best to restructure their workforce to plug any gaps created by an ageing, non-replacing workforce which is becoming scarcer and potentially more powerful.

COUNTRIES, CULTURES AND COMMUNITIES MATTER



Countries, cultures and communities matter

Time and time again, our surveys show huge disparities in outlook by country, even between apparently similar close neighbours. We need to factor in prevailing cultures, legal systems *and* the decisions of governments: these all collide, making a real difference to what people experience and how they feel.

Governments are increasingly concerned about dependence on foreign countries for strategic goods and materials. Borders have become thicker during the pandemic and citizens remain reluctant to open them up again.

Those looking for signs of "de-globalisation" will find some supporting evidence, as people retreat to the familiar realms of their country and their family, But, as the research we've been carrying out during the last couple of years illustrates, the global vs local dynamic is a complex one.

The first thing to remind ourselves is that not all countries were affected by the pandemic to the same extent, at the same time, and their populations did not share the same concerns or expectations either before or after the Covid-19 outbreak.

The global picture

Our latest Global Consumer Confidence Index finds that the conflict in Ukraine has tempered any optimism brought upon by the lifting of Covid-control measures in many parts of the world. Among 23 countries, 16 show no meaningful change in their national consumer confidence score since February.

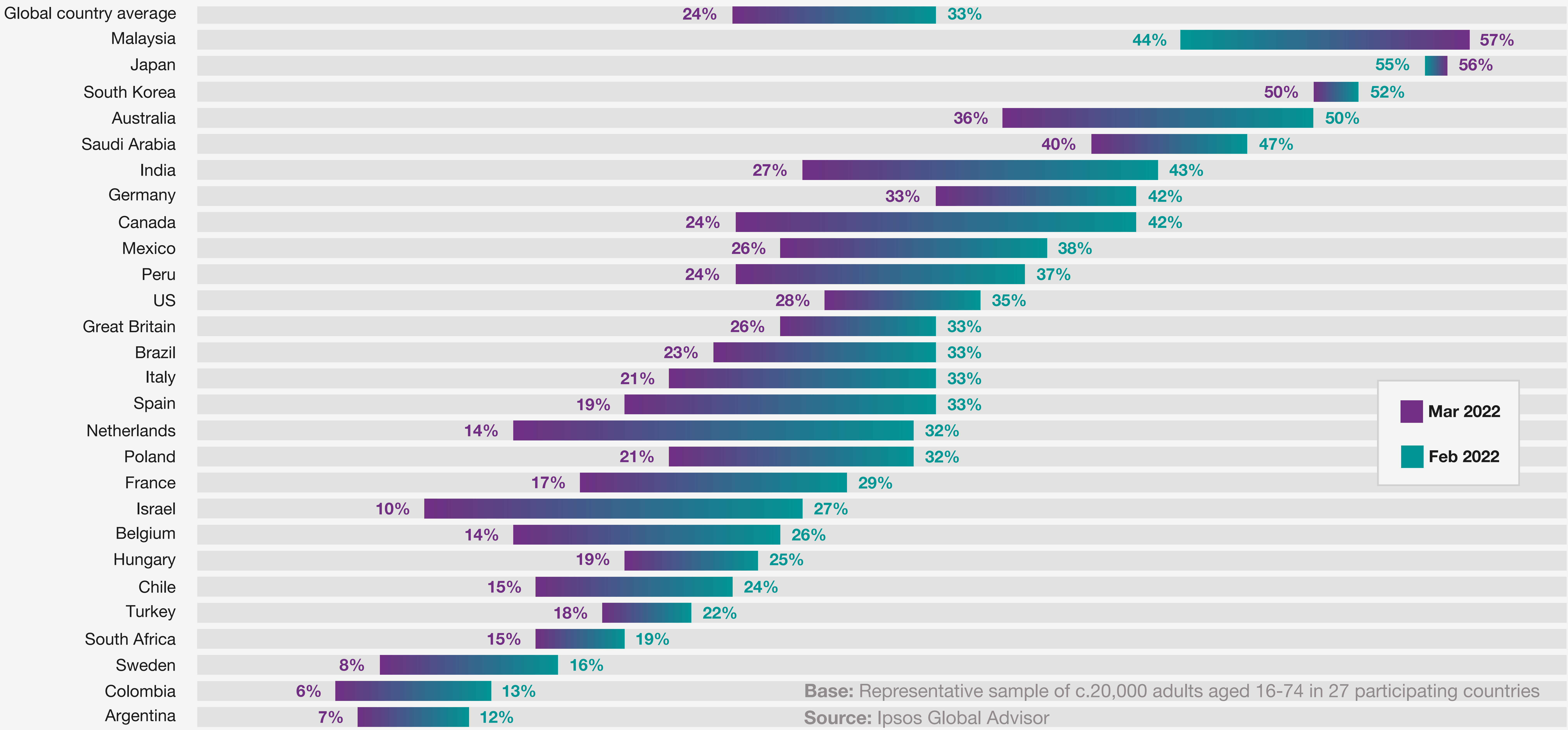
But country divides are clear. Two years after the World Health Organization declared a global pandemic, nine countries show a score that remains significantly lower than it was at the beginning of 2020, while another nine now enjoy a significantly higher one.

Meanwhile, our What Worries the World survey has shown Coronavirus to be the top global concern for the duration of the pandemic – only dropping off the top spot for three months (October and November 2021, and March 2022).

A key feature of our tracking has been the large variations in reported concern between countries – and within countries themselves over time in response to a volatile environment. The latest results show it ranges from 6% in Colombia to 57% in Malaysia, the latter moving against the grain with a 13-point increase in concern at a time when we see the largest and most consistent drop in Covid-19 concern to date.

> “The relative level of concern about Covid-19 varies greatly from one country to another.”

Changes in Coronavirus concern (February 2022 — March 2022)



Base: Representative sample of c.20,000 adults aged 16-74 in 27 participating countries

Source: Ipsos Global Advisor

Attitudes towards vaccines

Meanwhile, national attitudes towards vaccines have been particularly illustrative of culture-based differences, with marked variations among otherwise comparable countries.

Before the vaccine rollouts, and well ahead of the implementation of more assertive policies like Covid passes, we were measuring very considerable opposition in countries as diverse as France, Russia and South Africa. The increase in vaccination intent at the beginning of 2021, as seen in our attitudes to Covid-19 vaccines, was revealing of trends which were going to have a significant impact on the year ahead.

Our latest Global Trends study found that, while faith in vaccines fell in 2020, it rebounded for many in 2021, albeit with wide variations by countries. Policies turned out to be less important than cultures in explaining the differences in vaccination rates across countries, and indeed the very differing attitudes to mandatory vaccinations, as our February 2022 study illustrates. Findings reveal vastly different attitudes, with over 75% support for "making a Covid-19 vaccine mandatory for anyone eligible to receive one" from those in India, China, Malaysia, Singapore, and throughout Latin America. However, in most of Central and Eastern Europe, as well as in the US, majorities are opposed to it.

> **"National attitudes towards vaccines have been particularly illustrative of culture-based differences."**

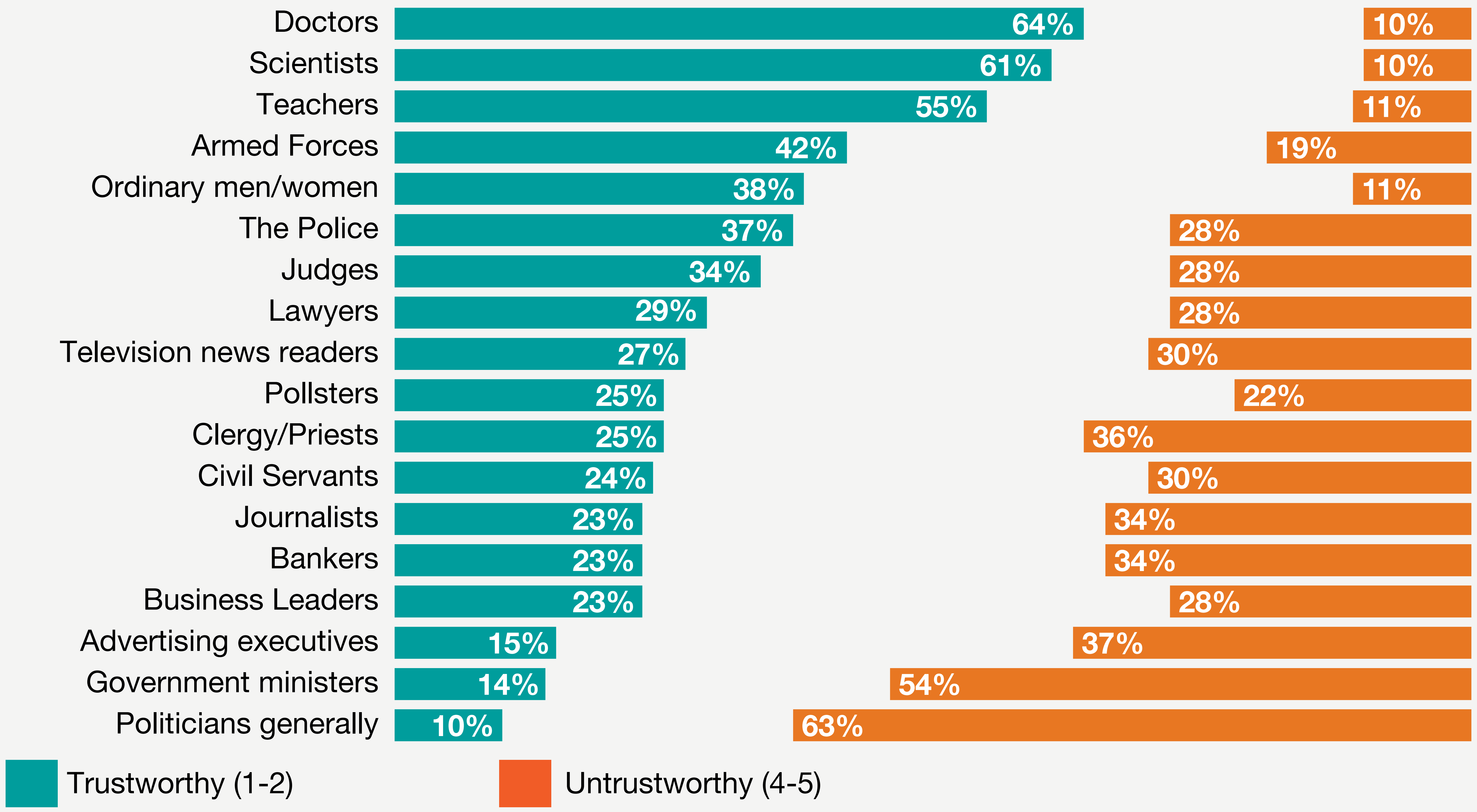
MAINTAINING PUBLIC TRUST IS DIFFICULT

Maintaining public trust is difficult

Ipsos's *Global Trustworthiness Index* reveals it is doctors who are now the world's most trusted profession. Scientists are second, while politicians and advertising executives remain at the foot of the league table.

On average, almost two-thirds globally rate doctors as trustworthy (64%), an increase of seven percentage points since 2019. Great Britain leads the world when it comes to in trust in doctors, with 72% rating them as trustworthy, followed by the Dutch (71%) and Canadians (70%).

Global trustworthiness ranking 2021



Source: Ipsos Global Trustworthiness Index 2021 **Base:** 19,570 participants across 28 countries , interviewed online 23 April-7 May 2021. Online samples in Brazil, Chile, mainland China, Colombia, India, Malaysia, Mexico, Peru, Romania, Russia, Saudi Arabia, South Africa, and Turkey tend to be more urban, educated, and/or affluent than the general population. This "Global Country Average" reflects the average result for all the countries where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.

Trust in government

The most unexpected effect of the pandemic on public trust, though, regards governments. The public is now more likely to say that the "government does what it does with the best of intentions" (28% in 2021 vs. 24% in 2019) and that it behaves responsibly (25% vs. 21%).

Infringements on personal freedom in the name of collective national action seemed to have increased, instead of deteriorated, trust in governments. This was particularly apparent in democratic countries where severe measures (lockdowns, curfews, vaccine mandates, Covid passes, etc.) were accepted for the first time in living memory.

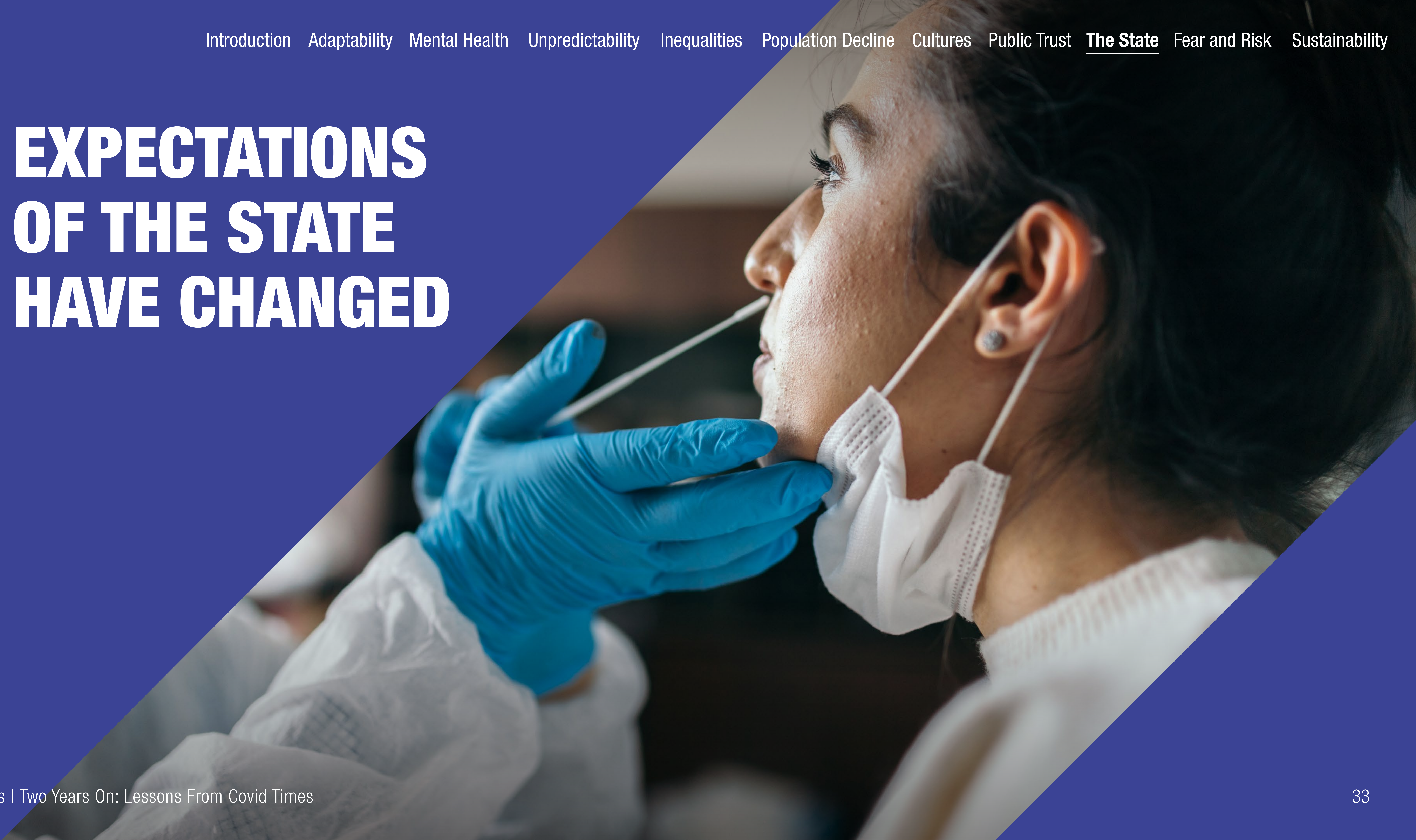
One possible explanation for the improvement in trust could be how these sectors have acted during the course of the Covid-19 pandemic. Especially in times of crisis, governments must be equipped with the expertise to correctly interpret and communicate data. Working transparently, and showing that they are guided by the evidence, is key. This will avoid the risk of misinterpretation and improve public trust, something they will need when explaining the rationale behind any future restrictions and lockdowns.

Trust in media

Interestingly, private businesses have witnessed a similar trend of rising levels of trust during the pandemic, with the notable exception of technology companies, which were increasingly under scrutiny precisely because of some serious doubts about their accountability, transparency and likeliness to always behave responsibly.

Globally, the news sources most trusted to provide accurate information about politics and current affairs are the more traditional forms of media (newspapers, radio, television), as well as online newspapers and news websites or apps, while trust in other digital sources is lower. Media and social media companies are now some of the least trusted businesses of all those measured. The problem with the media was investigated in depth in Ipsos' 2020 report with the Trust Project, *Trust Misplaced?*. Since then, a sizeable minority of respondents in our international survey think the media distorted the scope of the Covid-19 outbreak (on average, about three in 10 across the eight countries).

EXPECTATIONS OF THE STATE HAVE CHANGED



Expectations of the state have changed

In March 2020, when the World Health Organization officially declared the novel Coronavirus (Covid-19) outbreak a global pandemic, the expectations of governments around the world quickly shifted.

For the first time ever, all citizens and all governments in all countries had a common and singular issue to focus on. Most governments acted quickly, taking measures to slow the spread of the Coronavirus. In some cases, this included limiting personal movement and shutting down sectors of the economy. There were opposition protests, but the majority of citizens in most countries accepted these limitations given the heightened concern and high level of uncertainty around Covid-19. This type of action by government would have been seen as a significant infringement on personal rights even a month before the pandemic was declared.

When asked who should take primary responsibility for recovering the economy from the effects of the pandemic, 53% globally named their country's government, ahead of all other groups or institutions.

People turned to governments to protect the economy and society, and to mobilise the healthcare response to the crisis, including — in richer countries — the vaccine rollout. We witnessed the force of governments, as well as their limitations.

Governments also quickly created partnerships with the private sector to accelerate the development and eventually the distribution of vaccines that would greatly slow the spread of the virus. This public-private partnership was a success in accelerating the development of Covid-19 vaccines. It may have the most lasting impact on state institutions and prove to be the model for tackling other global threats like climate change.

A new era for the state?

There is a strong desire for something new, according to our 28-country study for the Halifax International Security Forum, with 83% of people globally endorsing the view that the world needs new international agreements and institutions led by democratic countries. Nearly as many (78% overall) agree they would have more respect for global institutions or agreements if democratic nations had more influence over them than authoritarian nations.

Meanwhile, 58% agree the world's current international organisations have done a good job dealing with challenges such as the global pandemic, climate change, and international peace – although satisfaction varies widely across countries. This view is expressed by at least three-quarters of respondents in India, Malaysia, and China, but fewer than half in France, Japan, Italy, Turkey, Belgium, Germany, Hungary, and Russia.

FEAR AND RISK ARE BEING RE-DEFINED

Fear and risk are being re-defined

One of the things that has defined society since the beginning of 2020 has been the stop-start nature of our lives as we moved from lockdowns, to opening up, and then back to new restrictions. People have been on an emotional rollercoaster as we have been faced with new challenges and impositions on our lives.

Personal health and safety

The advent of Covid made people think more about their own personal health and safety. That initial combination of financial and health worries created a "control crisis" — with individual loss of freedom compounded by perceptions that governing institutions were not always in control of the situation either.

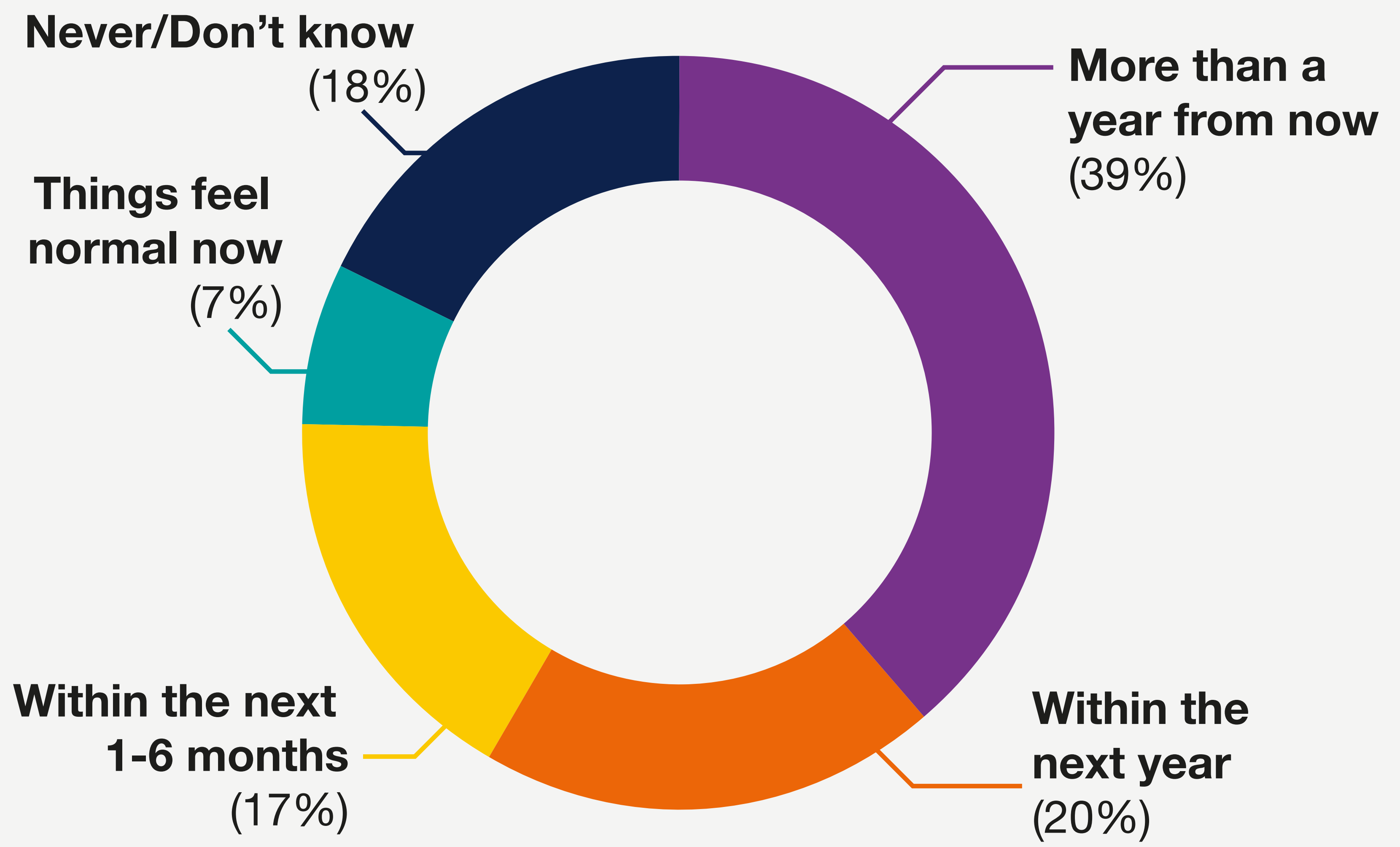
Fear and inconvenience are still presenting serious hurdles in many areas of life, for example when it comes to international travel. This feeling extends across borders with more than two in three people in the US, Russia, Brazil and Germany agreeing with the statement: "I feel things in my country are out of control right now."

As the pandemic has moved and changed, people around the world have needed to adapt to constantly shifting contexts and weigh up what risks they are, and are not, comfortable taking.

Throughout the pandemic there have been repeated moments in which a return to normal felt in sight once again, only for this to move off further into the distance. Back in July 2020, 31% felt the return to normal will take more than a year. Fast forward to February 2022, and 39% globally still believe the return to normal is more than 12 months away, with a further 18% saying things may "never" get back to how they were.

The emergence of the Delta variant, followed by Omicron, have been key factors. Four out of five (79%) are worried that new Covid-19 variants will emerge, causing delay to the return of our pre-pandemic lives.

Wide range of expectations on when life will return to pre-Covid normal



Source: Ipsos Essentials survey. **Base:** 10,530 adults aged 18-74 across 16 countries, February 2022.

> "As the pandemic has moved and changed, people have needed to adapt to constantly shifting contexts and weigh up what risks they are comfortable taking."

The world continues to be viewed as a dangerous place

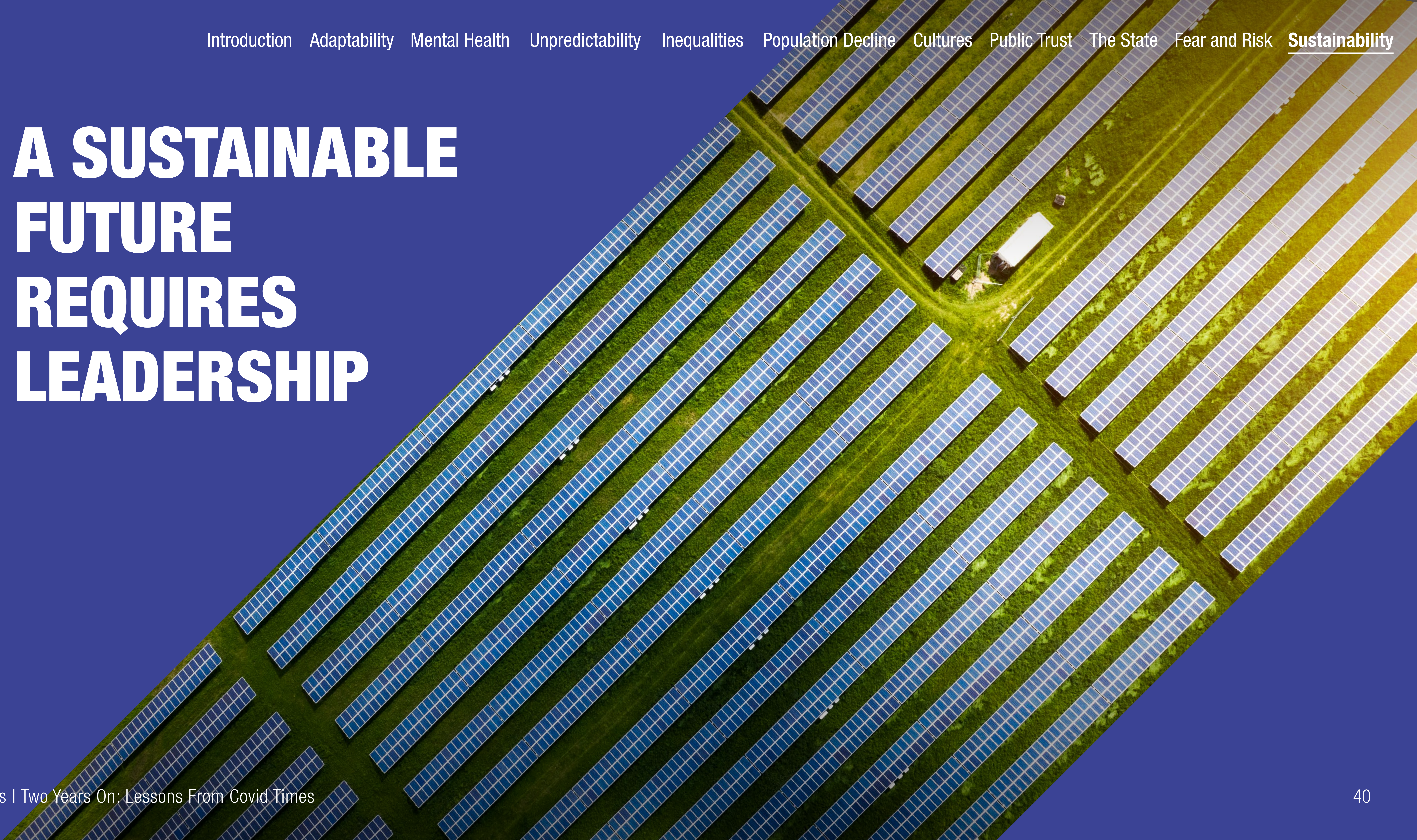
Our global survey finds an average of 82% agreeing that, during 2021, the world has become more dangerous.

Although most citizens of every country agree the world is a dangerous place, views are split about the direction it is taking. Across the world, 49% say that more things are getting better in the world than are getting worse these days, but there is considerable variation among countries. This view is held by large majorities in China (86%), India (79%), Saudi Arabia (73%), and Malaysia (72%), but by fewer than one in three in Japan (25%), Turkey (26%), France (31%), and Belgium (31%).

With the increasing availability of Covid-19 vaccines and the relaxation of measures to control the spread, global citizens' assessment of threats has shifted. Slightly more people now see being hacked in the next 12 months as a real threat (75%) than do about a major health epidemic outbreak in their country (70%).

Meanwhile, our Global Advisor survey finds no national consensus on what specific event would signal the end of the pandemic. On average, 20% say it will be when at least 75% of the population have been vaccinated, 19% say when transmission of the virus has completely stopped, and 17% say when hospitals have had normal operations without staffing or equipment shortages for at least one month.

A SUSTAINABLE FUTURE REQUIRES LEADERSHIP

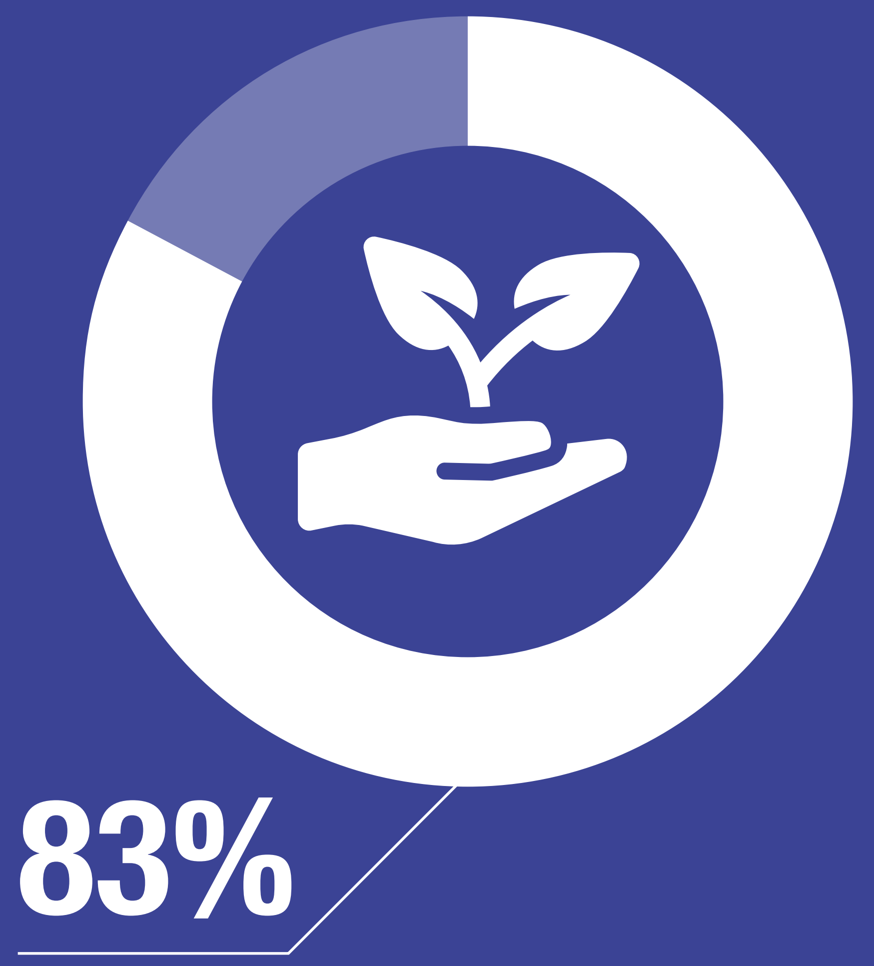


A sustainable future requires leadership

The pandemic has not dented climate concern. There's a near-consensus that we are heading for an environmental disaster unless we change our habits quickly.

When it comes to changing these habits, there is rising pressure for government and business to lead action against climate change; our 2021 Earth Day study found two-thirds of the global public say they will be failing employees, consumers and citizens if they do not. Globally, only 31% believe their market has a clear plan in place for how government, businesses and people themselves are going to work together to tackle climate change.

> **"We are heading for environmental disaster unless we change our habits quickly"**



Source: Ipsos Global Trends
Base: 24,332 adults aged 16-75 (18-75 in US and CA) in 25 markets, interviewed August - September 2021

Covid-19 has disrupted the way that we live and offered us a key opportunity for change — to take a more sustainable approach that could protect the long-term viability of business and pay more attention to environmental and social outcomes.

Our survey for the Global Commons Alliance found that 74% of people around the world think that their economy should prioritise the health and wellbeing of people and nature rather than solely focusing on profit. A similar proportion (75%) agree that the pandemic has shown that it is possible for people to transform behaviour very rapidly, while 71% agree the pandemic recovery is a unique moment to build societies more resilient to future shocks.

However, opinions are divided on whether tackling climate change should or should not be a priority in the economic recovery. Globally, 36% agree climate change should not be a priority, while 35% disagree.

How will individual citizen-consumers react to the changes ahead? Our study with Tetra Pak reveals nearly half (49%) of the global population are recognising that their everyday actions have a direct impact on the environment. As people look ahead to how they might modify their lives post-pandemic, reducing food waste, avoiding overpackaging, and cutting back on car journeys are among the changes people expect to do in the future to limit their environmental impact.

Living sustainably

However, evidence shows that people are far from aware of just how their lifestyles may need to adapt to save the planet. For example, 59% globally believe that recycling waste as much as possible has a significant impact on CO_2 emissions, while it is relatively minimal in comparison with other activities. And, overall, we see only slight increases in public willingness to change specifically high carbon emission behaviours since 2014, which poses a problem.

But by understanding the barriers to sustainable actions — whether structural social or educational — business and government can make the changes that will enable people to do their part.

As we have seen from the Covid-19 experience, the public requires clear leadership from experts and those in power to collectively deal with the climate crisis effectively. They have given them a clear mandate to act. The question is whether, and how quickly, sustainability and climate action can become embedded into present structures, or indeed new ones that we build.

> "Nearly half of the global population are recognising that their everyday actions have a direct impact on the environment."

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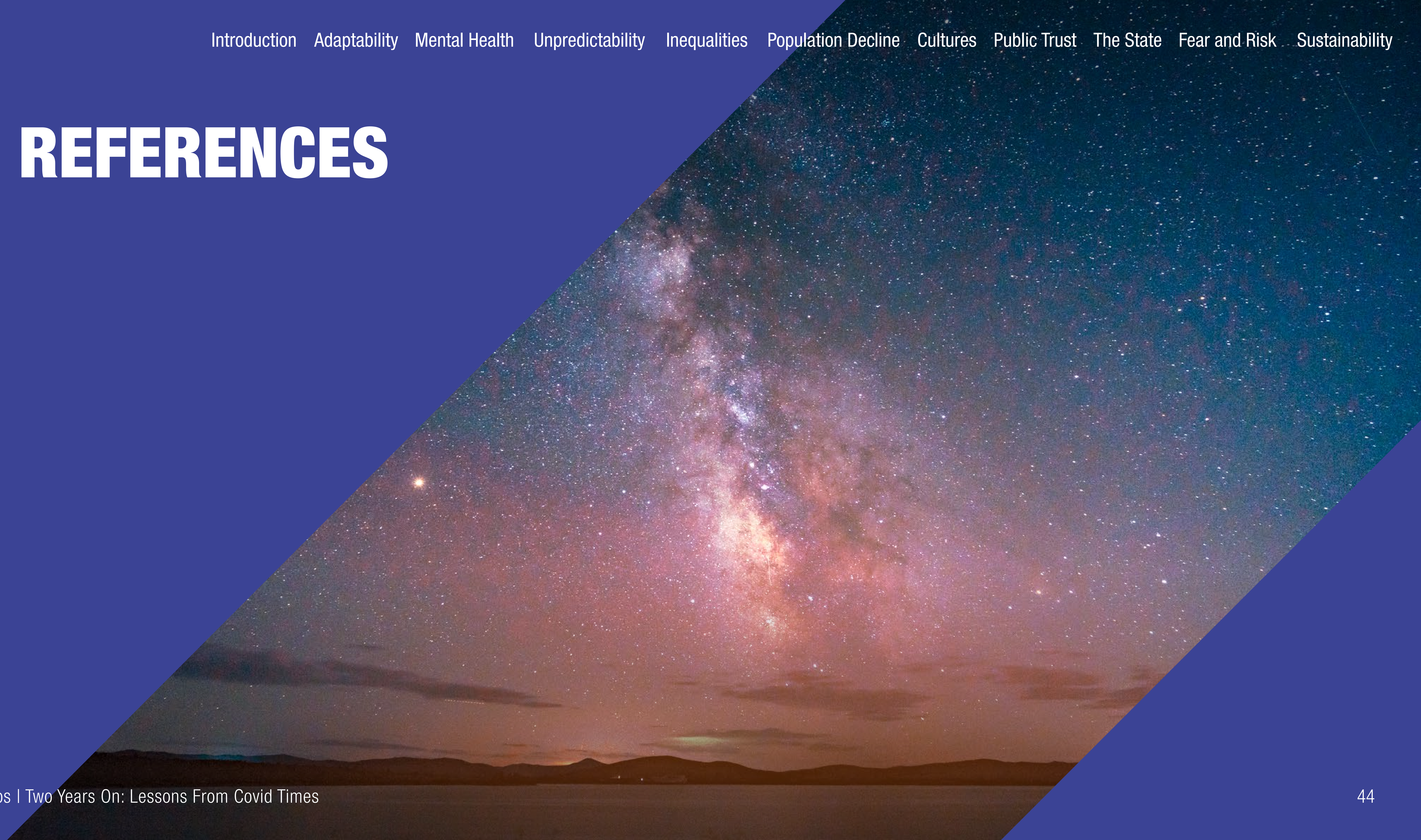

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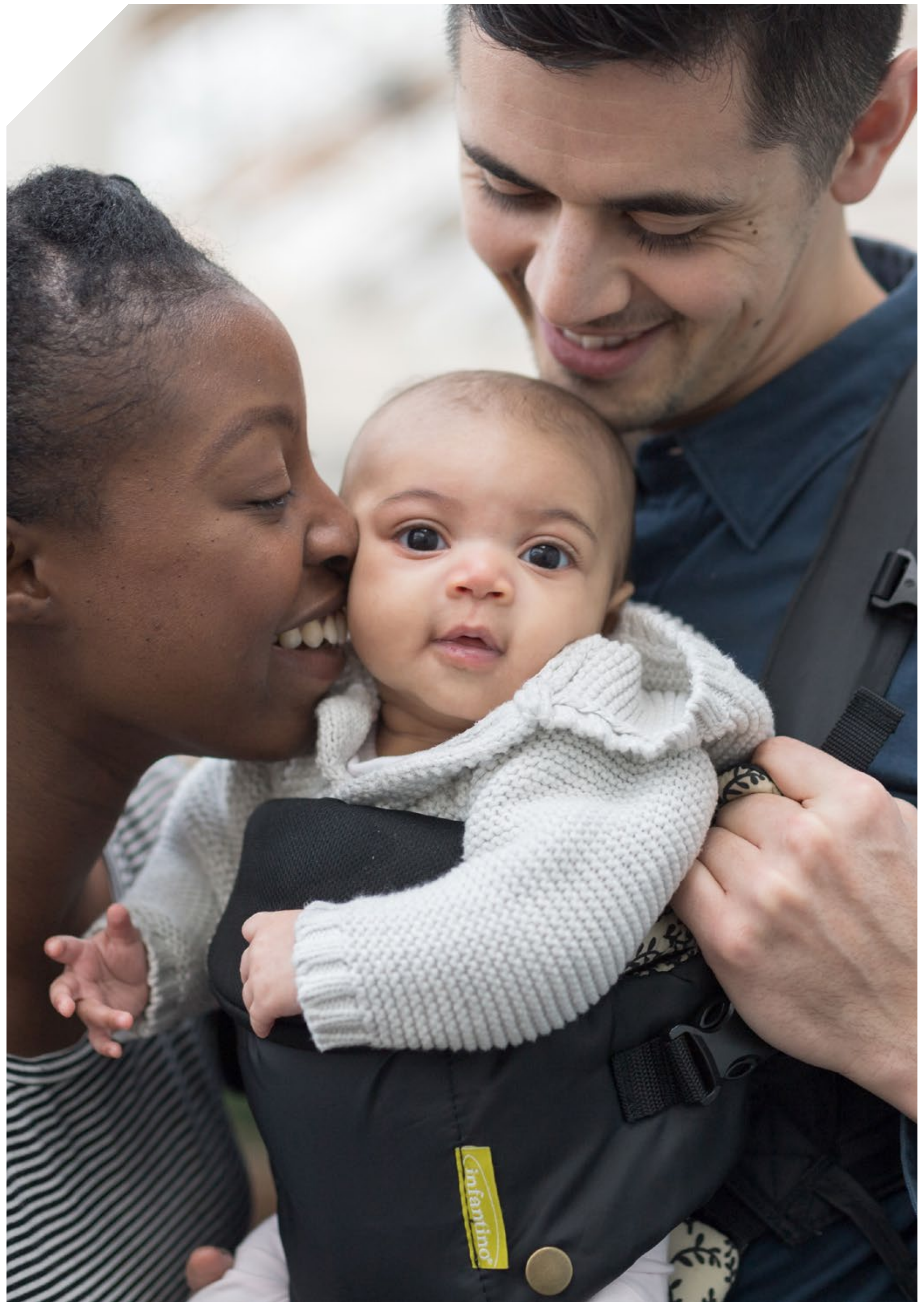

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