

ATOZ



ATOZ SURVEY 2019



LUXEMBOURG RESIDENTS
AND CLIMATE CHANGE:
THE TIME TO ACT IS NOW



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01 INTRO

A new year means a new survey commissioned by the ATOZ Group. The theme of the survey changes each year, but we have always chosen to focus on Luxembourg in order to gain a deeper understanding of our local environment. As thought leaders in our industry, we are drawn to topics that will spark conversation among decision makers in the private sector and institutional partners as well as the population at large. Previous topics have included finding out what Luxembourg professionals and individuals think about taxes (2015), how the surrounding population in the Greater Region views Luxembourg (2016), how Luxembourg residents feel about money and wealth (2017) and most recently, our 2018 investigation focused on the perception of private business and entrepreneurship by the so-called “millennial generation”. Our goal is not to drive opinion or push an agenda; we simply hope that the results of our survey contribute to a larger discussion and give new insights into our local landscape.

The subject of this year’s survey is one that is very topical and, in some respects, controversial. With our results, we hope to analyse the different viewpoints of the Luxembourg population regarding climate change.

This survey aims to highlight where the priorities of Luxembourg residents lie, and to draw on trends that are emerging within the population with regards to reducing emissions of CO2 in order to address the issue of climate change. While climate change may be a borderless crisis which requires a global thinking, it requires local action, to paraphrase a classic slogan. Thus, we have chosen to shine the spotlight on Luxembourg, bringing into view attitudes and opinions at a national level so that we may decide as a country the best way forward.

This report is a summary of the results but also should be read as our interpretation of the results, with an inevitable element of subjectivity. The results of the survey are made freely available to interested parties, so others are free to draw their conclusions, thus contributing to a healthy debate on this crucial topic.

02 METHODOLOGY

Working with the Luxembourg-based marketing firm Quest, we made a survey of a representative sample of 600 people of various ages, nationalities and gender. From 23 July to 6 August 2019, the survey was carried out by a web-based questionnaire. The breakdown of the sample can be seen below.

	N	%
Total	600	100%
Sex		
Men	300	50%
Women	300	50%
Age		
18-34 years	177	30%
35-54 years	226	38%
55 years and older	197	33%
Nationality		
Luxembourgish	315	53%
Foreign	285	48%





03 RESULTS

Troubling the minds of everyone

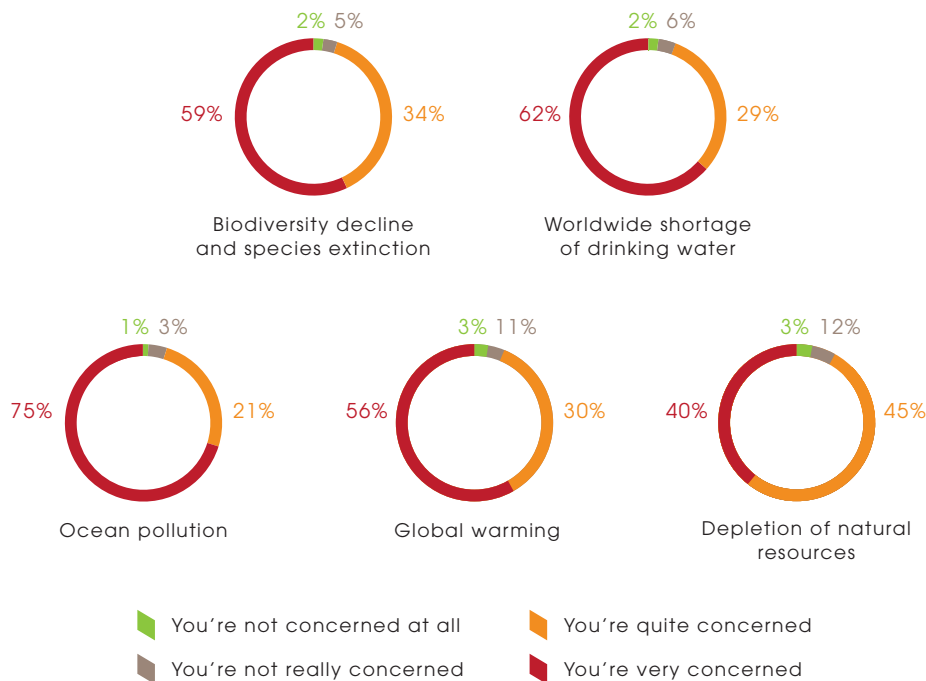
“Et muss een d’Leit wakresch rëselen, datt se verstinn datt et 5 vir 12 ass.”

“We need to wake up and realise that it is five minutes to midnight”

We began our survey with a question to find out how personally concerned the population felt in regard to different topics linked to ecology.

We discovered that pollution of the oceans is a topic which worries 96% percent of the population, 93% say that the decline of biodiversity and extinction is worrying, 91% are troubled by water shortages, 86% about climate change and 85% about the depletion of natural resources. While it is interesting to note that ocean pollution is ranked #1 among Luxembourg residents, (perhaps due to a combination of effective communication campaigns and personal experience while on holiday in seaside destinations), we should not downplay the overwhelming response of concern from the majority of individuals on all proposed topics. This is an important finding which gives us a snapshot of a population living in relative distress when it comes to the subject of ecology.

Humanity seems to be facing several challenges at the same time. To what extent do you personally feel concerned with the different major ecological phenomena?



Resigned or skeptical - a sizeable minority

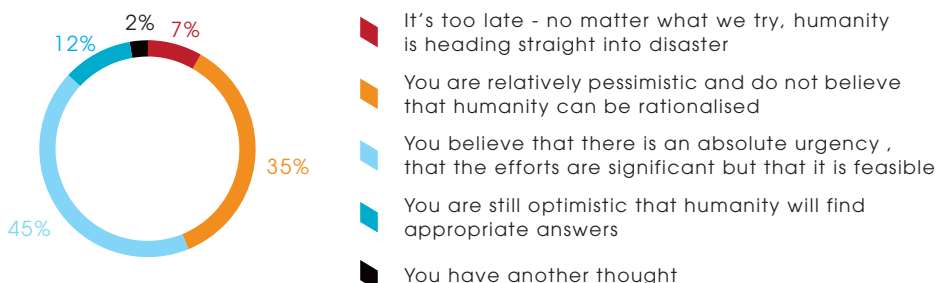
"Es ist schon zu spät. Die Menschheit wird untergehen, wie es vorher anderen Tierarten geschehen ist. Unser Erfolg ist auch unser Schicksal"

"It's already too late. Humanity will disappear, just as other animal species have gone extinct. Our success is also our fate."

Worry aside, it was important to find out if our survey takers held the belief that climate change can be mitigated through changing human behaviours, or if it is already a lost cause. While the majority of the population, 57%, believe that humankind will find the answer to solving the crisis, 42% are pessimists and do not believe that we will be able to save ourselves. It is necessary to keep this high number of resigned individuals in mind when asking the population to act.

Those who think that humanity is beyond saving would logically be less likely to engage in initiatives and more resistant to changing their habits. When it comes to skepticism, it is interesting to see that almost one person out of five (18%) is either totally skepticism or somewhat skeptical that climate change has a manmade cause. Seventy-four percent agree that humans are causing the crisis, and the rest (8%) have not taken a position. While non-skeptics may have the tendency to take for granted the notion that climate change is caused by humans, deciders and law makers should be aware that a non-negligeable percentage of the Luxembourg population is not entirely convinced. As is the case with the 42% of pessimists, these skeptic beliefs can hinder efforts to increase awareness and engagement within the general population.

Do you believe that it is possible to change humanity's lifestyle and its effects on the planet?



"Climate change is caused by humans - urgent action is imperative"... this is the statement that underlies current debates around the world. What is your personal attitude towards this statement?





Aware of our shortcomings

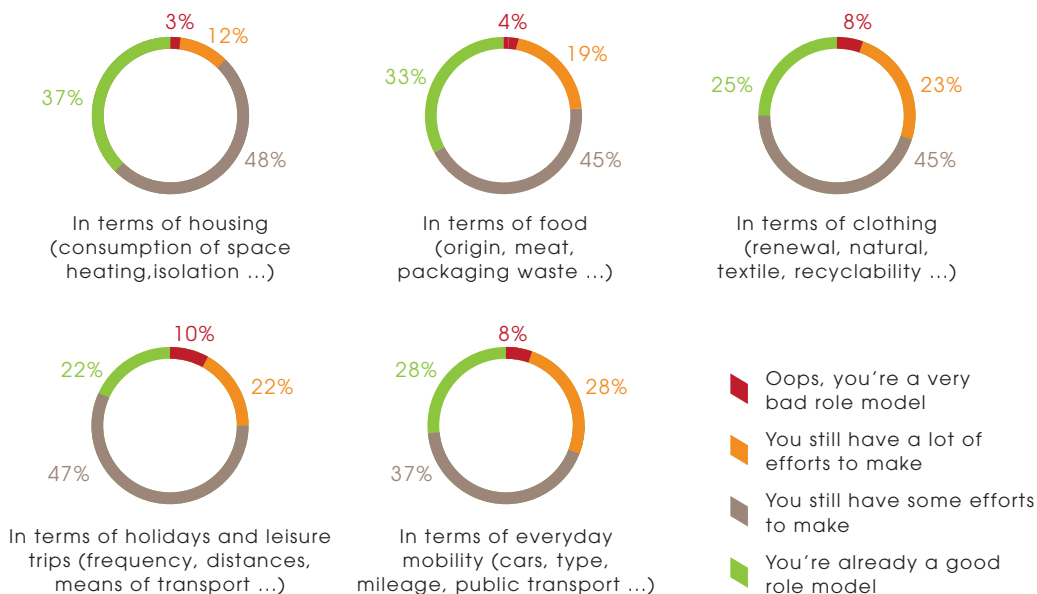
"S'il n'est déjà trop tard, le défi réside à modifier totalement le système avant 2030"

"If it's not already too late, the challenge will be to completely change the system before 2030"

We wanted to know what people thought about their own personal way of

life. Did they consider themselves to be shining examples of green-living or were they more realistic in how they evaluated their choices? We chose five different topics (housing, food, clothing, holidays and everyday mobility) and asked our survey takers to evaluate themselves on a scale from 'very bad role model' to 'very good role model'. The overwhelming majority admitted that they still have efforts to make in all categories. What this result shows is a clear awareness on the part of individuals regarding their behaviour. Sixty-three percent of those surveyed concede that they have at least some efforts to make in terms of housing, 68% say that they are not a good role model when it comes to food, 73% for everyday mobility, 76% for clothing, and a full 79% for holidays and leisure travel think of themselves as needing to make more efforts to be green.

Nobody's perfect. How do you assess the different aspects of your personal life in terms of environmental and climate-related impact?



But willing to change

"Je fais partie des personnes qui pensent que l'humanité peut assez rapidement changer beaucoup de choses concernant ces modes de vie."

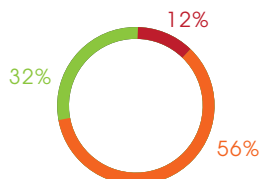
"I am one of those people who thinks that humankind can change its way of life rather quickly."

After asking our survey takers where they thought they could make a greater effort to adopt a more carbon neutral lifestyle, we gave them some very concrete options to choose from. We noted a particular will to act from a large portion of the population (or the confirmation that they were already acting). However, we also noted that the willingness to change depended greatly on the effort required to make the change.

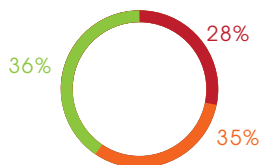
For example, over half of those questioned (56%) said that they would be willing to only eat food produced within a 100km radius of their home. Thirty-two percent maintain that this is already the case. The opposite is true when we ask our sample of Luxembourg residents if they would be ready to hand over the keys to their car and only use public transport. In this case, while 16% says it's already the case for them, only 17% would be ready to make that drastic of a lifestyle change.

Yet, residents are open to alternatives to traditional vehicles. Forty-three percent of those surveyed affirmed that they would be willing to trade their current vehicle for an electric one today. The other suggestions, such as keeping their home at 17°C in the wintertime, only taking the plane once per year and eating a diet free of meat would be readily adopted by around 1 out 3 Luxembourg residents.

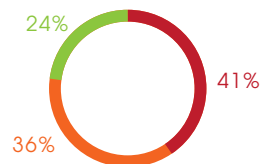
What are you personally willing to change today in terms of your consumption to help resolve climate problems?



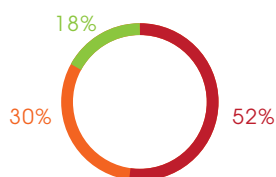
Limit your consumption of fruit, vegetables and other food to products from a 100 km radius



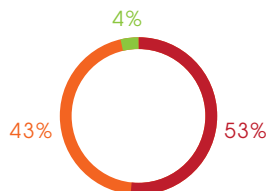
Limit yourself to a single flight each year by looking for alternatives for your other more distant trips



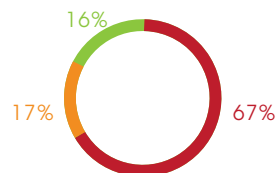
Limit heating in winter to 17°C in your home



Abandon meat consumption today in favour of a more CO2-neutral diet



Exchange your traditional car for an electric car now



Totally give up a personal car to use only public transport

■ No
 ■ Yes
 ■ I already do it

And willing to contribute, as long as the money is used wisely

"Payer une taxe n'est pas un soucis, c'est plus l'utilisation de cet argent qui me rend perplexe."

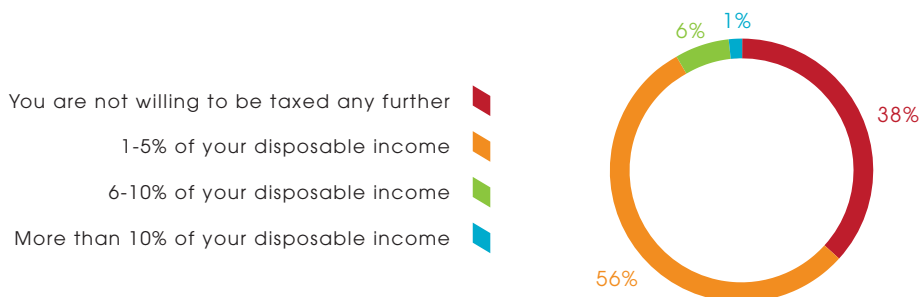
"Paying a tax isn't a problem, it's what it is being used for which confuses me."

When we asked if our survey takers were ready to contribute a percentage of their salary in order to finance a fund for the fight against climate change, the majority was willing, theoretically at least, to contribute at least 1% of their earnings. In fact, 62% of those surveyed would agree to pay a tax for the environment. However, it is important to note that in the free comments section of the survey, many people expressed frustration at the simple idea of a 'tax' to act against climate change.



People are willing to contribute, but they know that it is not enough to “throw money” at the problem. They would like to see money used efficiently. As one person wrote “Kënnen mir eis verlossen dass wann mir zusätzlech Geld bezuelen, dat Geld och ukend wu et virgesin as?” “Can we be sure that if we pay extra, the money ends up where it belongs?”. Other people had more elaborate proposals including the idea to tax those who create pollution while giving subsidies to those who are acting to combat climate change and maintaining a carbon-neutral lifestyle.

Imagine that nations agree to create a fund to fight and limit global warming. This fund must be urgently financed. The idea is to introduce a tax imposed every year on companies and consumers. What is the acceptable amount of this annual tax for you personally?



If people have no choice but to pay or reduce their carbon emissions, the majority (54%) would pay at least 50 EUR per month to maintain their current lifestyle. Only 16% of survey takers would adopt a carbon neutral way of life under the threat of financial penalty. One out of five would refuse to pay the tax altogether, therefore accepting any negative consequences that this may have. Therefore, as we have seen with answers to previous questions, while people are generally willing to contribute financially to combat climate change, if given the opportunity to compensate their own emissions by paying, the majority will take that option. It is important to keep this attitude in mind when calling for change, as money alone cannot solve the problem.

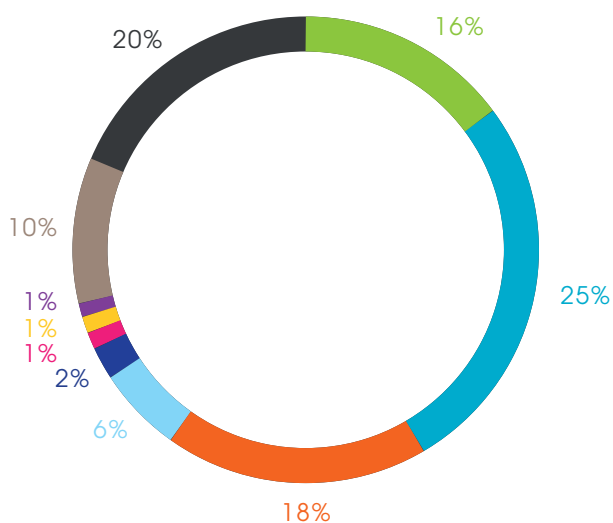


Imagine if legislation required you

- to pay taxes

- or to adopt a totally CO2-neutral lifestyle (no car, no flights, passive energy housing, vegetarian and regional food...)

What is the highest tax you are willing to pay to maintain your current lifestyle?



 You immediately adopt the required lifestyle

 50€/month

 200€/month

 100€/month


 300€/month

 400€/month

 500€/month

 Even more than 500€/month is acceptable

 You think you already have a totally CO2 neutral lifestyle

 You refuse to pay the tax with all the consequences it may entail



A call for action

“Politiker sollen net souvill schwätzen mee HANDEIEN”

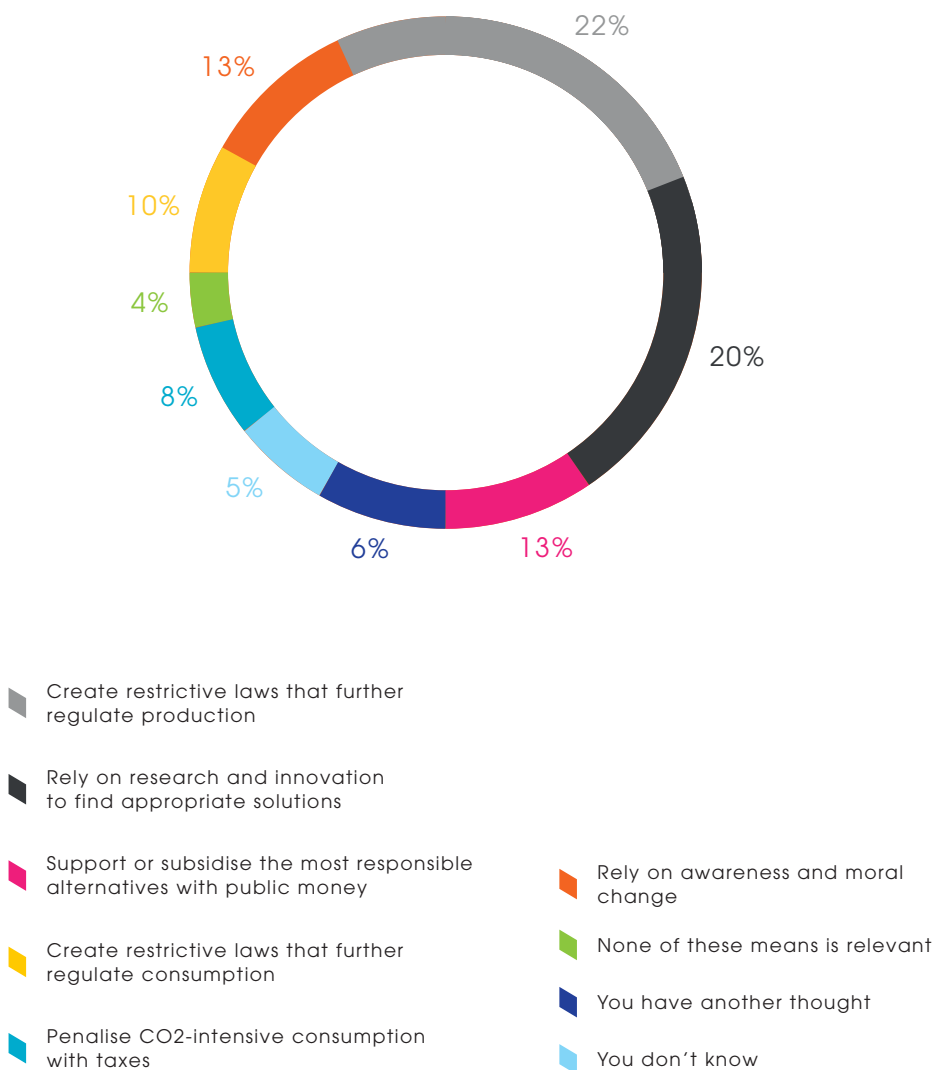
“Politicians should not talk so much, they should ACT”

We asked our survey takers for their opinion on how best to tackle the issue. The results were quite clear with 73% of those surveyed are asking for a solution from lawmakers. Whether it be by creating laws on production or consumption, subsidising alternatives or penalising emissions, the population is counting on its leaders to guide them towards a sustainable solution.

It is clear that with no pull or push from the government, the population will not spontaneously act in favour of reducing carbon emissions. Only 13% of survey takers agreed that the best course of action would be to “rely on awareness and moral change”, while the majority expressed the need for clear rules and framework.

If we take a more granular look at the results, we see that there is more support for changes from a production standpoint than from a consumption standpoint. Practically, this means that the population is less prepared to accept regulations and taxes on what they purchase or use and more willing to see these measures applied to the corporations who are producing the goods or services. The consumer is still affected, but in an indirect (and perhaps more painless) way.

What do you think is the best way to induce a change towards more responsible lifestyles with regard to our planet?



04 CONCLUSIONS

Through our analysis of the survey results, we have uncovered a population which is ready, willing and able to help in the fight against climate change.

The majority understand the gravity of the crisis and feel personally concerned by pollution, extinction of species, climate change, water shortages and the depletion of natural resources. A sizeable portion of Luxembourg residents would immediately adjust their lifestyles, with the greatest willingness to change coming from the origin of their food and swapping their traditional car for an electric one.

These trends lead us to believe that the time to act for our environment is now. The population is demanding change and communicating its readiness, but it also needs guidance and support. Most of the survey takers agreed that change should come from outside forces, including restrictive laws, taxes and subsidies; these are the tools of policy makers and politicians.

So what should we do?

Firstly, we are of the view that leaders of all types in Luxembourg need to rise to this challenge. Whether politicians, business leaders, community leaders, or family leaders, we have a responsibility to lead. Each will decide what form that leadership takes. Luxembourg is uniquely prosperous among nations and with that good fortune comes responsibility. Leading by example in this area as a nation can be seen as a responsibility, but also an opportunity to adopt a leadership role that can make us all proud.

We also believe that on an individual level, the Luxembourg population needs to take personal responsibility and on our own, in our families, among our friends, we should take the large and small steps that together will make a difference.

The population is open to financial contributions in the form of a tax when they can be sure that the money is being used for the stated purpose. Why not introduce a designated and taxpayer supported fund for climate change and make a fully transparent public report available each year, explaining how the money has been used, and the environmental impact.

Forty-three percent of the population would be willing to start driving an electric car today. Why aren't they? What is stopping people from purchasing the greener alternative? When we have identified the barriers, we can more finely tune the solution. A higher number than the 2794 of hybrids and electric vehicles, representing 1.4% of all cars currently in circulation in Luxembourg (source: STATEC) is surely feasible.

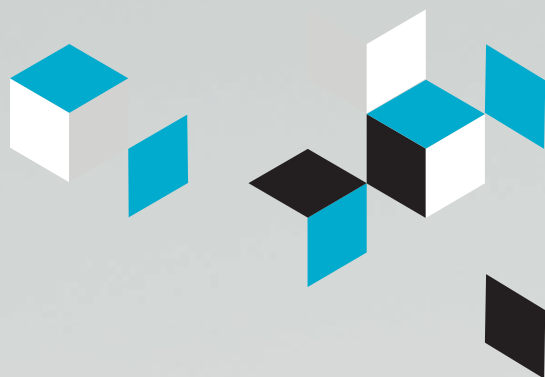
We also may have some leverage as to how we source our food. The majority of residents would be willing to limit their consumption to locally produced food. Why not create a label to help consumers identify those foodstuffs produced within a 100km radius of Luxembourg ville?

And lastly, holiday travel. If 1/3 of the population is willing to limit their flights to one per year, why not make train travel more appealing? Developing the offer from Luxembourg

to other European capitals and promoting overnight trains as a more comfortable alternative to a cramped flight could be the push needed to get more people to choose this more ecologically sound alternative for city trips or even longer holidays on the Italian, Spanish or French coast.

Reducing carbon emissions and fighting for a greener future has become a subject of absolute urgency. Each day, news headlines filled with environmental disasters, burning forests, droughts, heat waves, floods and ever-intensifying storms remind us that inaction bears the gravest of risks. The Luxembourg population, most of whom are both conscious of the enormity of the problem and convinced that it is not too late to find an answer, is imploring its leaders to stop talking and start acting. In the words of one of our survey takers: *L'heure de la réflexion est passée. Il faut agir tout de suite.* "The time for thinking is over, the time to act is now."

On behalf of all the partners and staff of the ATOZ group, I'd like to thank the participants in the survey and the teams within ATOZ and our advisers that made this possible. The call to action is clear.



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