

Masdar
A MUBADALA COMPANY



Masdar Gen Z Global Sustainability Survey



November 16th, 2016

Masdar Global Gen Z Sustainability Survey

The first global survey of the attitudes of young people aged 18-25 – ‘Generation Z’ – towards climate change, sustainable development and renewable energy.

Why the Gen Z Survey?

To mark the 10-year anniversary of Masdar in 2016 and launched during the United Arab Emirates' participation in COP22, a global platform on climate change and governance, the survey offers valuable insight into the thinking of tomorrow's decision makers on the critical issues of energy and sustainability.

METHODOLOGY

PSB conducted 4,704 online interviews with members of Generation Z (18-25) in 20 countries across 5 geographies between the 4th March and the 29th March 2016.



Results grouped by region and by categories of development*:

- **Developed** – Germany, France, Spain, UK, US, Japan
- **Emerging** – Brazil, China, Egypt, India, Morocco, Mexico, Russia, Saudi Arabia, South Korea, South Africa, UAE
- **Frontier** – Jordan, Kenya, Nigeria

METHODOLOGY

PSB conducted between 100 and 300 online interviews depending on the level of internet penetration in each country.

The results were weighted slightly to reduce the discrepancy in base sizes between countries.

Margin of error is +/-1.43% for the total sample and larger for sub-groups.

Sample details below:

Middle East & North Africa					Asia				
UAE	KSA	Egypt	Morocco	Jordan	India	China	Russia	Japan	S. Korea
200	200	100	100	100	300	300	250	300	300

Europe				Africa			Americas		
UK	France	Germany	Spain	Nigeria	Kenya	S. Africa	USA	Mexico	Brazil
300	300	300	300	200	200	250	300	200	200

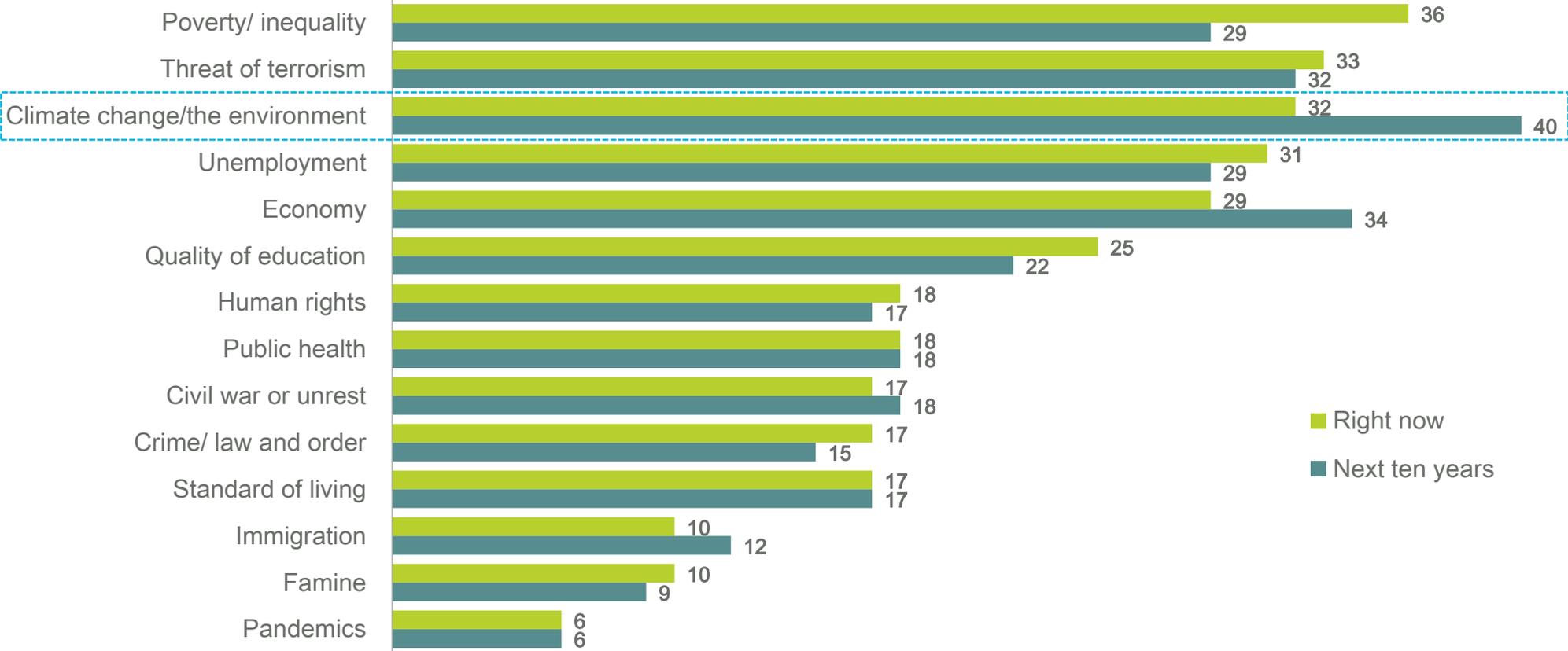
1

Gen Z see climate change as the biggest threat for the next decade



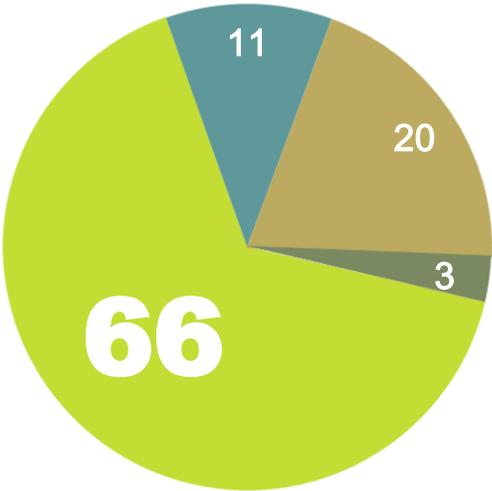
While economic challenges are the immediate priority, climate change is regarded as the greatest challenge in the next decade

Thinking about the challenges the world faces, which of the following do you think are most important right now / in the next ten years?

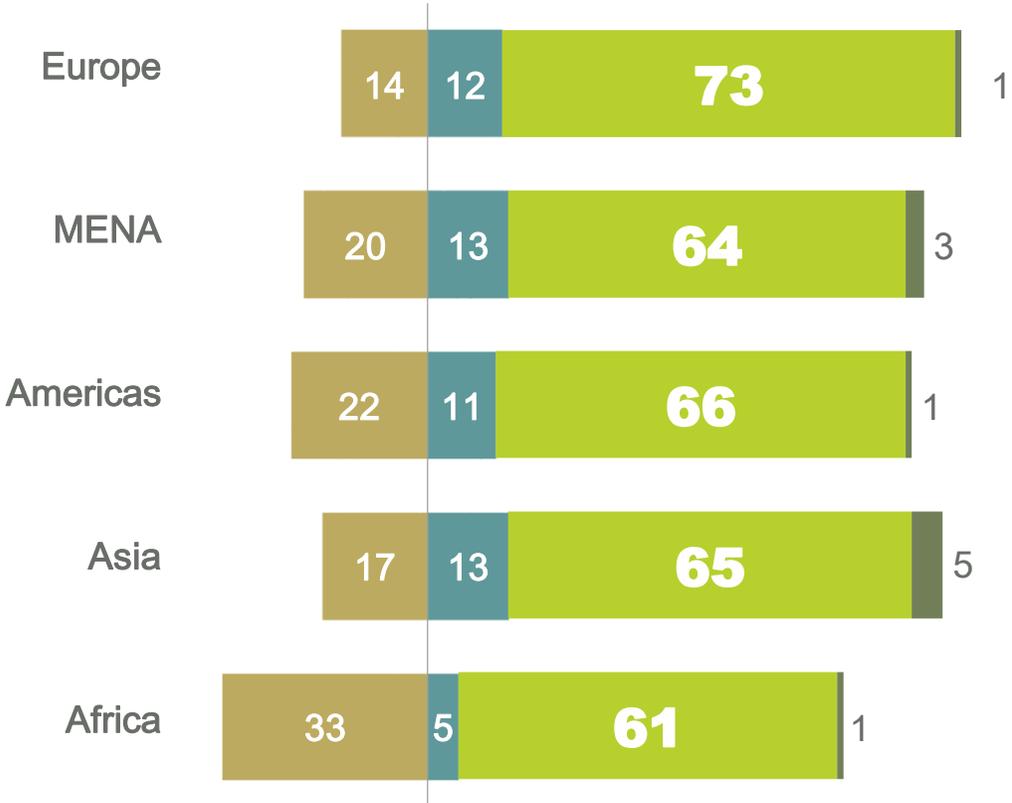


2 in 3 believe the world today is more focused on the environment than it was ten years ago

Compared to a decade ago, do you think people today are...?

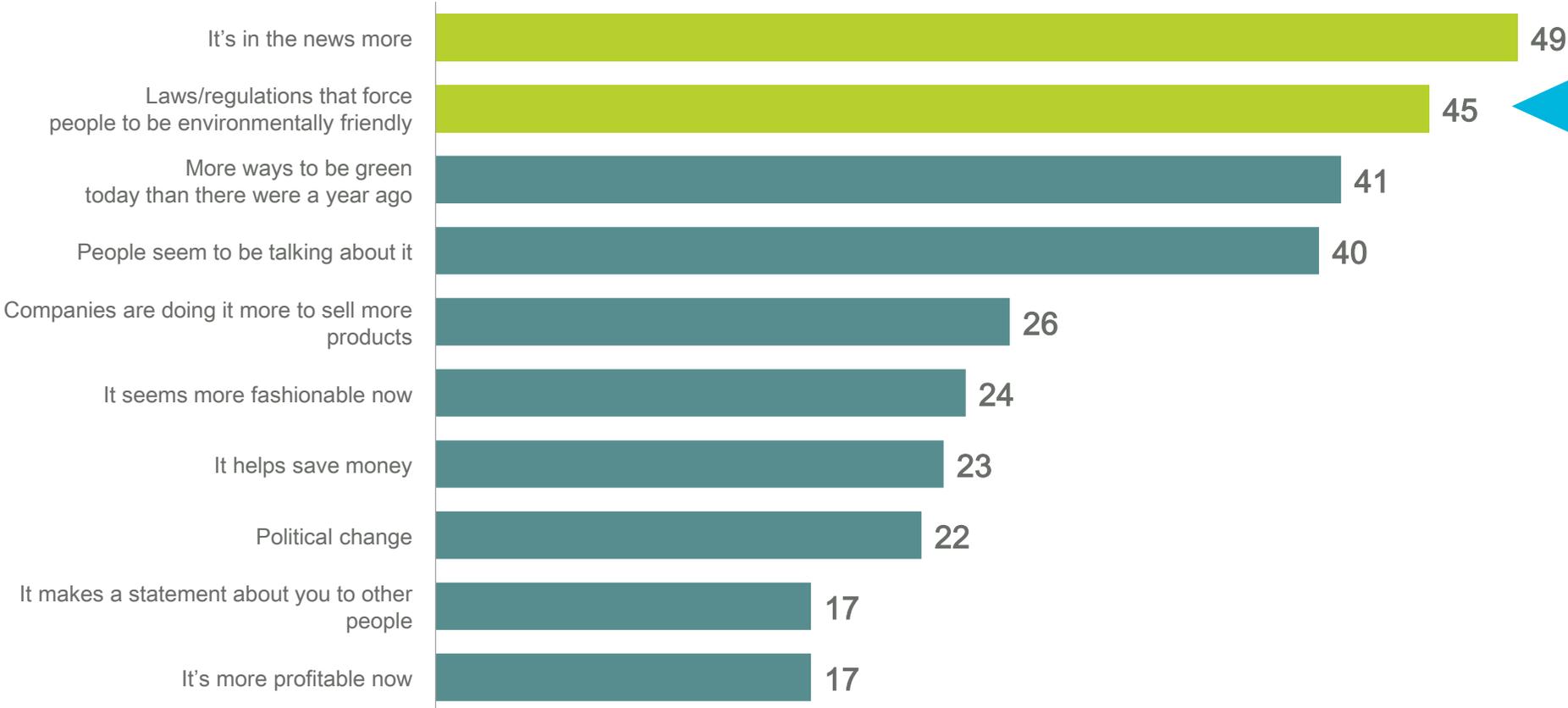


- Much/ somewhat more focused on the environment
- Just as focused as before
- Somewhat/ much less focused on the environment
- Don't know



And most say the media and government regulations are responsible for the increasing awareness

Which of the following do you think are reasons why people today are focusing more on the environment compared to a decade ago?



News coverage is seen as the top reason in Europe (59%), the Americas (53%) and Asia (52%).

Regulation is seen as the top reason in Africa (54%) and MENA (37%).

2

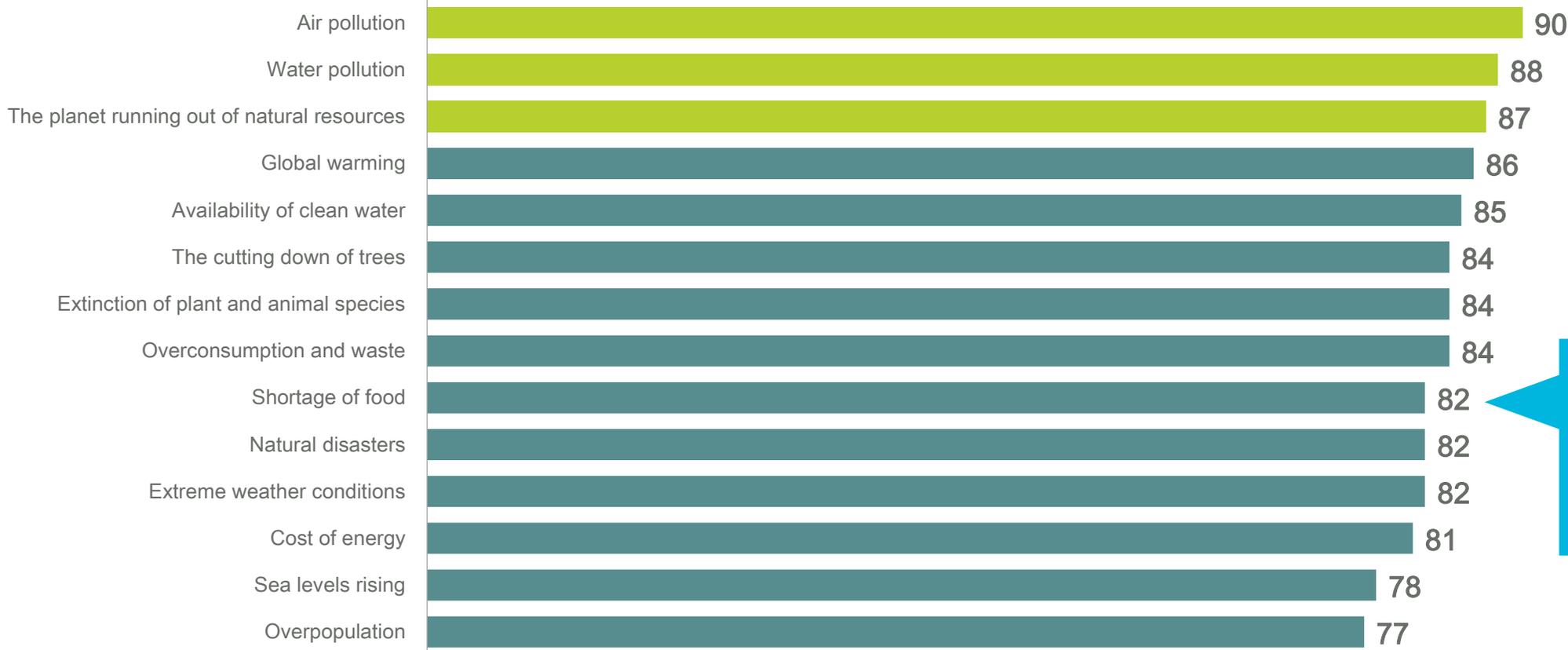
Young people are keen to take on more responsibilities to find solutions



Almost all are concerned about the impacts of climate change, especially pollution levels and lack of resources

How nervous or anxious would you say you are about each of the following?

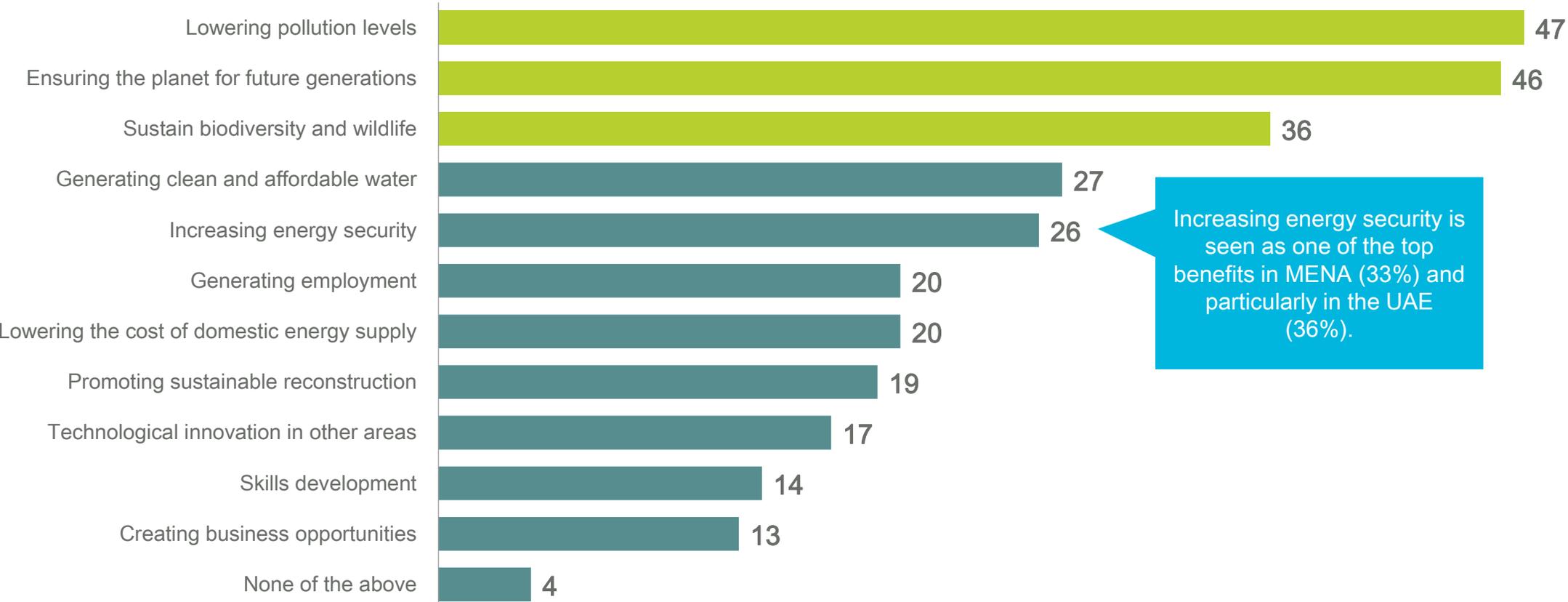
(showing % 'very' + 'somewhat' nervous or anxious)



In Africa, 9 in 10 are very concerned about availability of clean water (94%) and food shortages (93%)

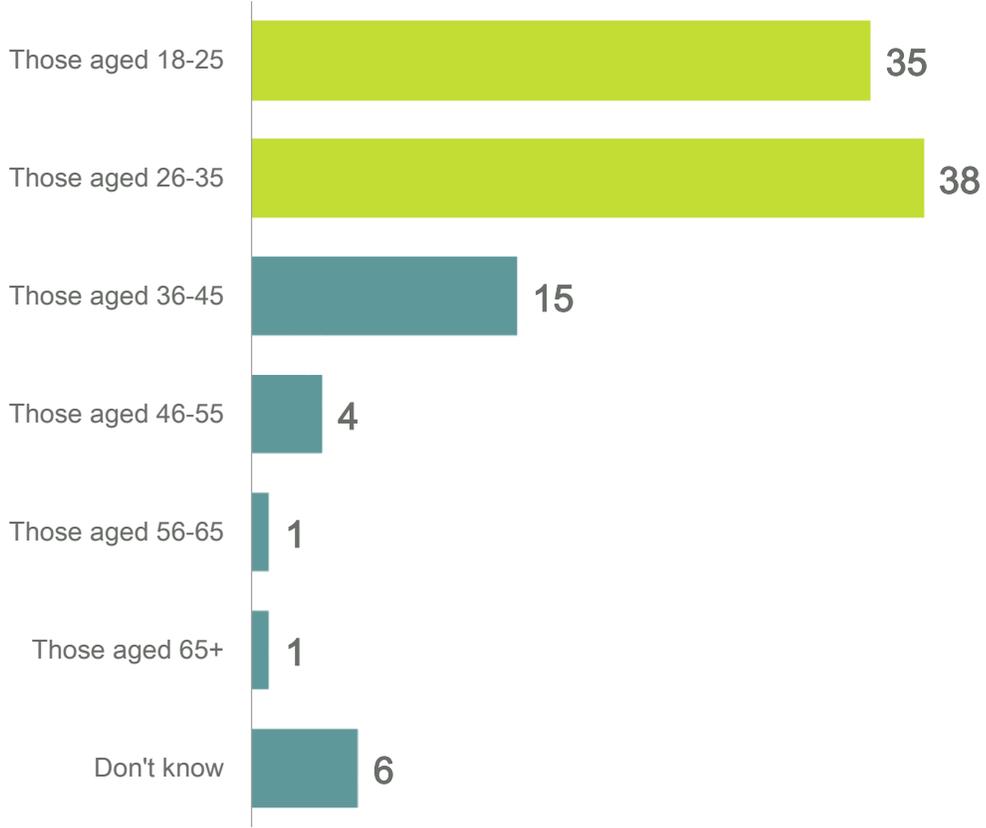
The benefits of renewable energy and clean-tech are seen to be non-economic

What do you think are the benefits of renewable energy and clean technology?



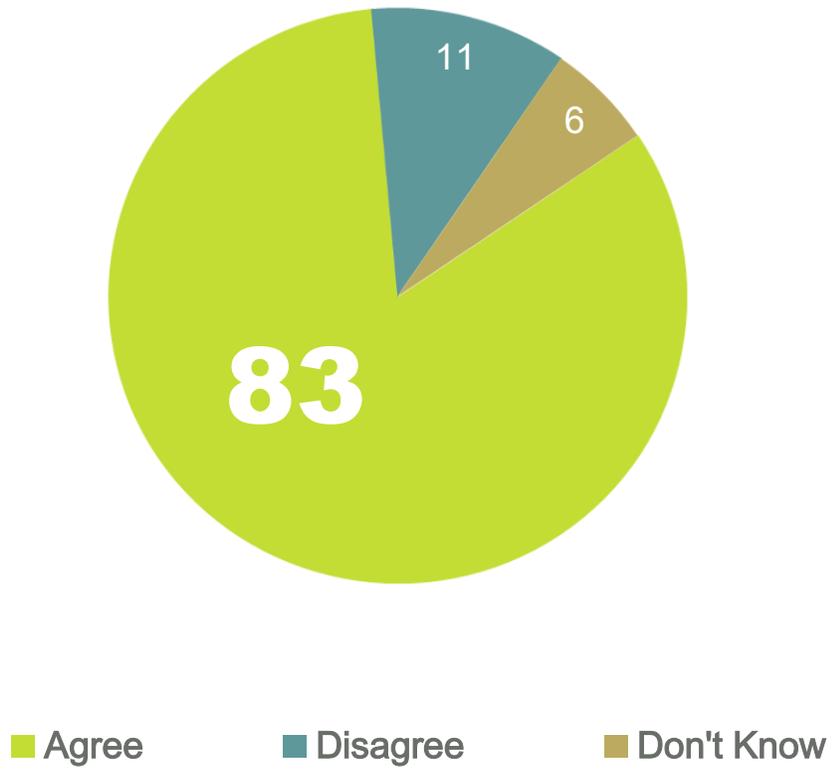
Most of global youth say current leaders have not done enough to protect the environment

Which generation do you think has the biggest responsibility to find a solution to sustainability problems?



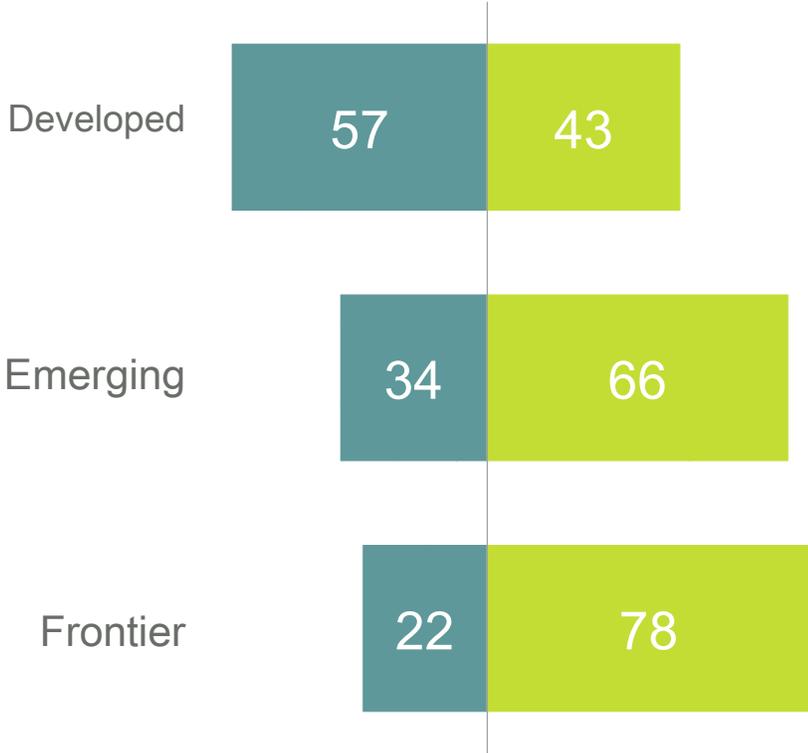
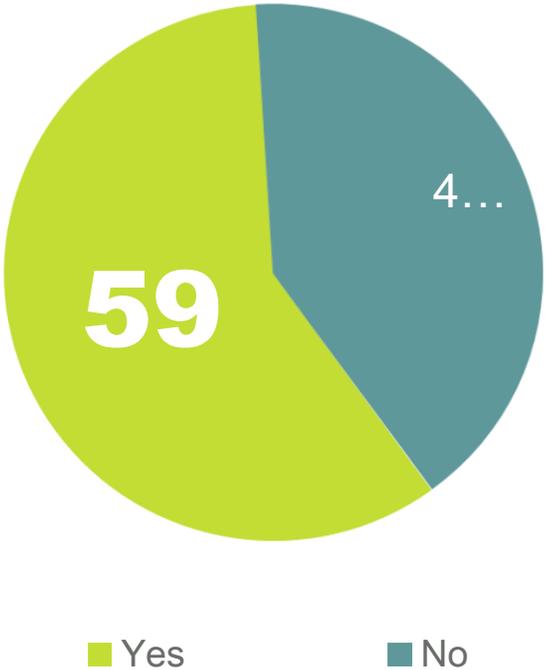
“To what extent do you agree with the following statement?”

“Governments need to listen more to young people on sustainability”



Many young people are interested in a sustainability career, particularly those from emerging or frontier countries

Are you interested in working or studying in a field related to sustainability in the future?



3

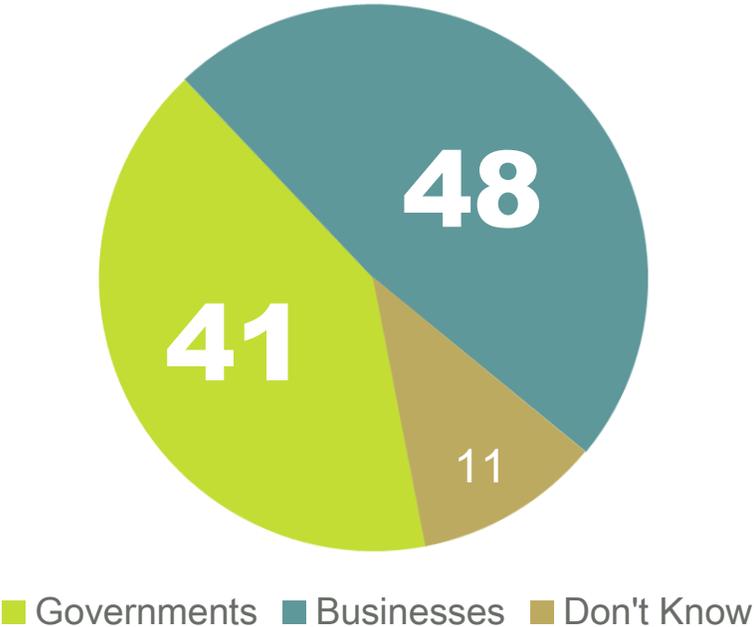
**Government regulations are necessary but
youth
want corporations to take equal
responsibility**



A large majority reject the idea that it is for either government or big business alone to fix the climate

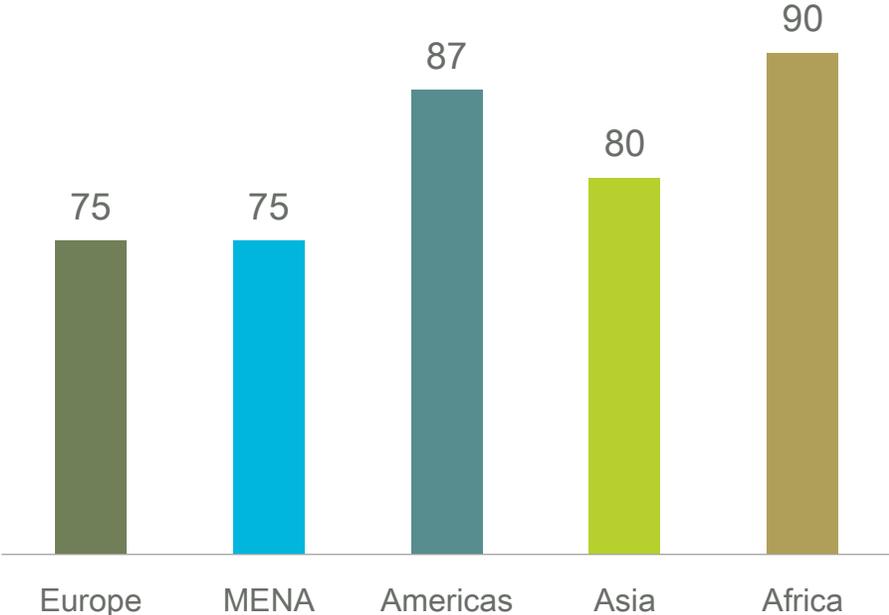
Which of the following is closest to your view?

“Renewable energy and clean technology are most likely to come from...”



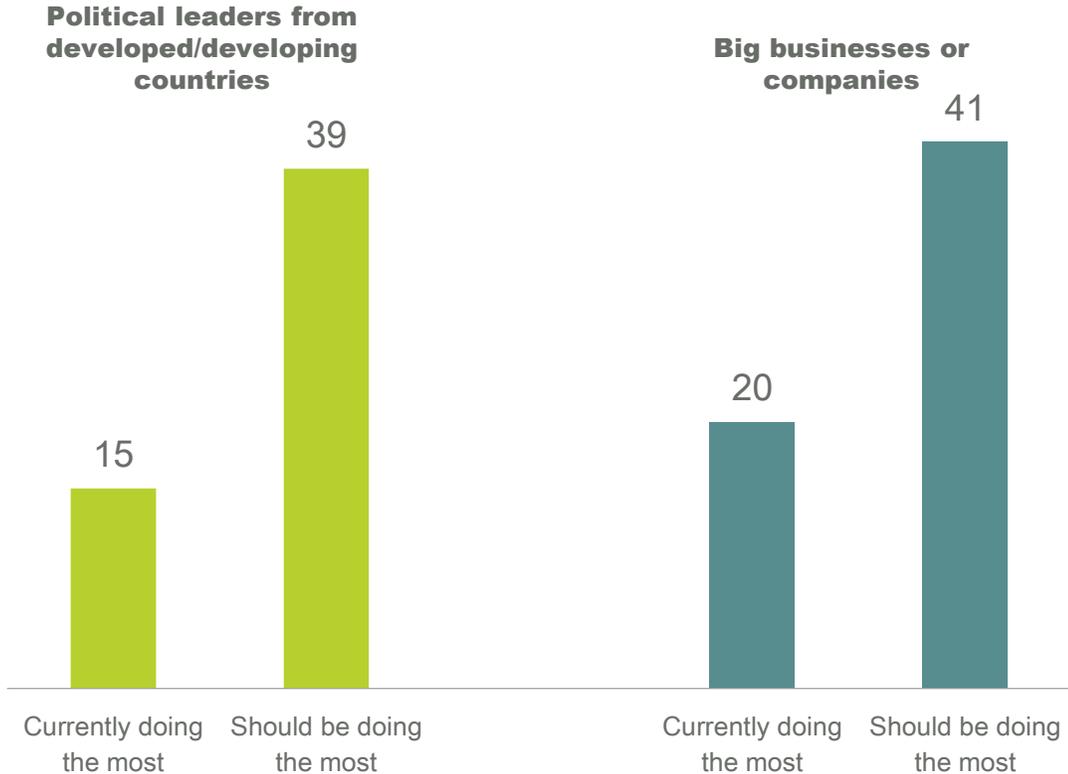
81% overall say business and government share equal responsibility for developing clean technology and renewable energy

% saying business and government share equal responsibility

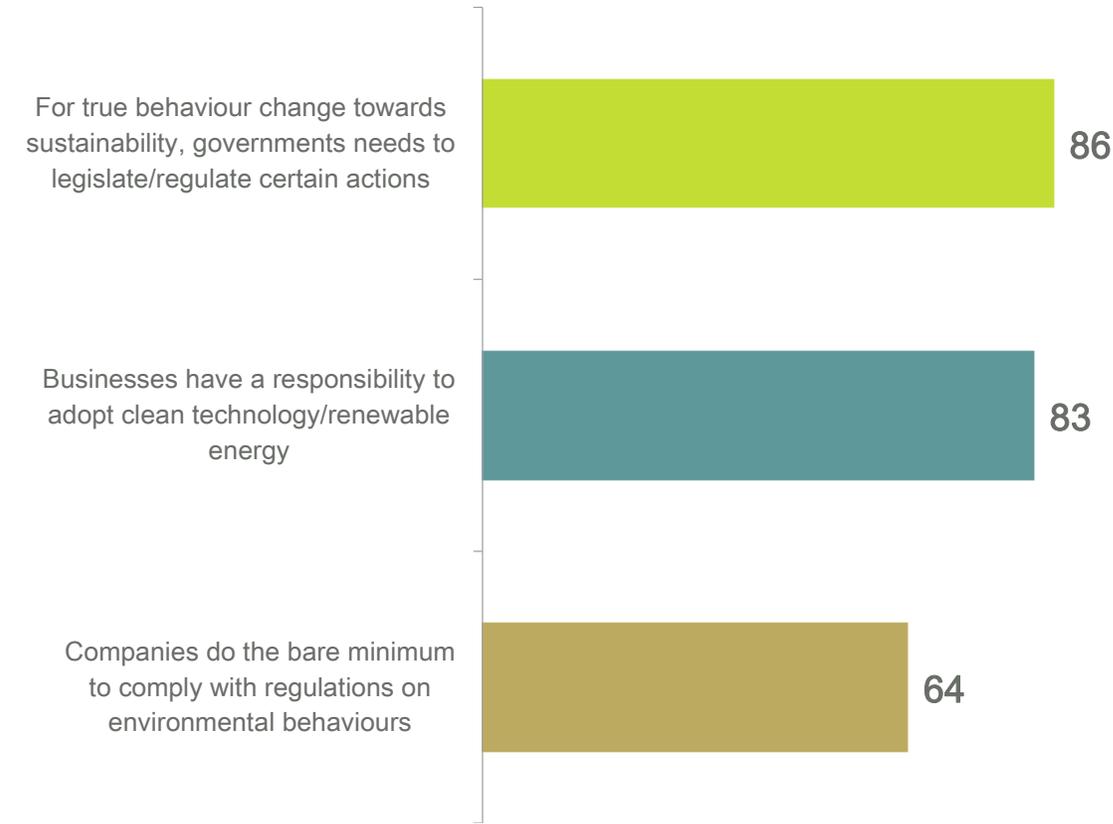


Most youth want government and the business community to do more on the environment – and regulation is seen as necessary to change behaviours

Who or what do you think is currently doing / should be doing the most on sustainable energy consumption and production?



To what extent do you agree with the following statement?



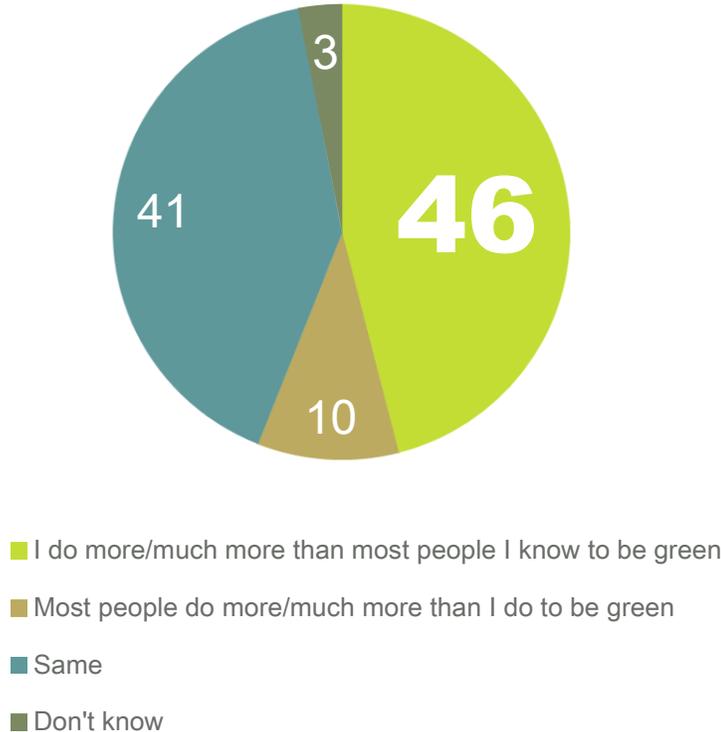
4

Youth are doing more to be 'green'

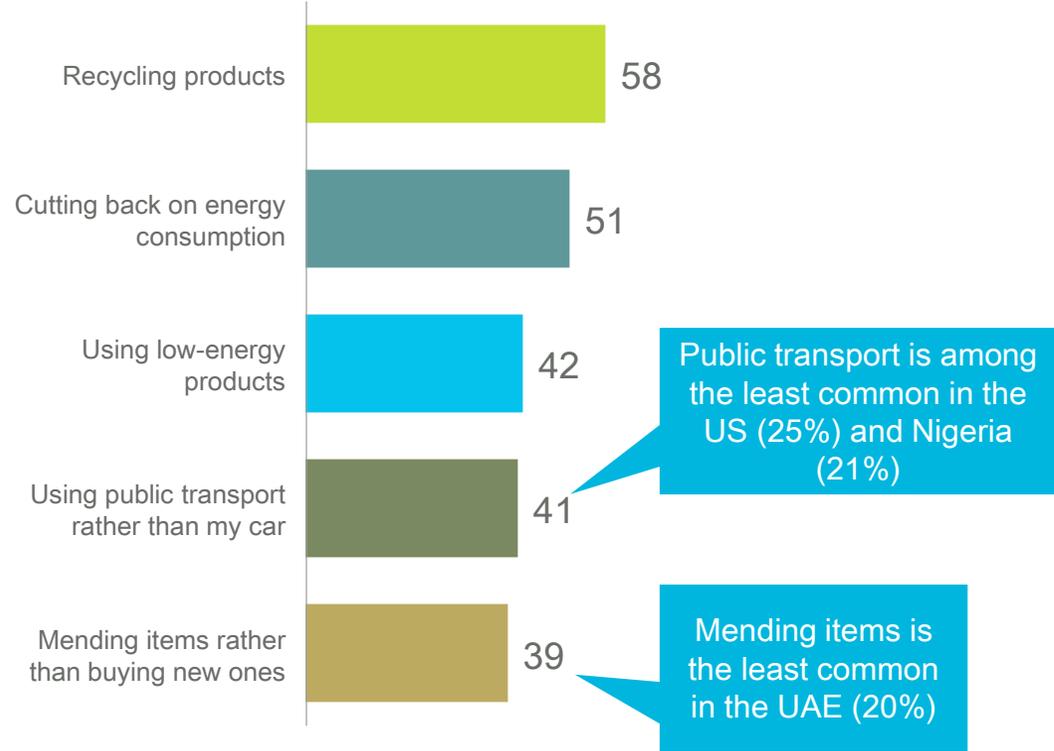


Almost half believe they do more than most people they know to be green

How would you rate yourself in terms of how environmentally active you are?

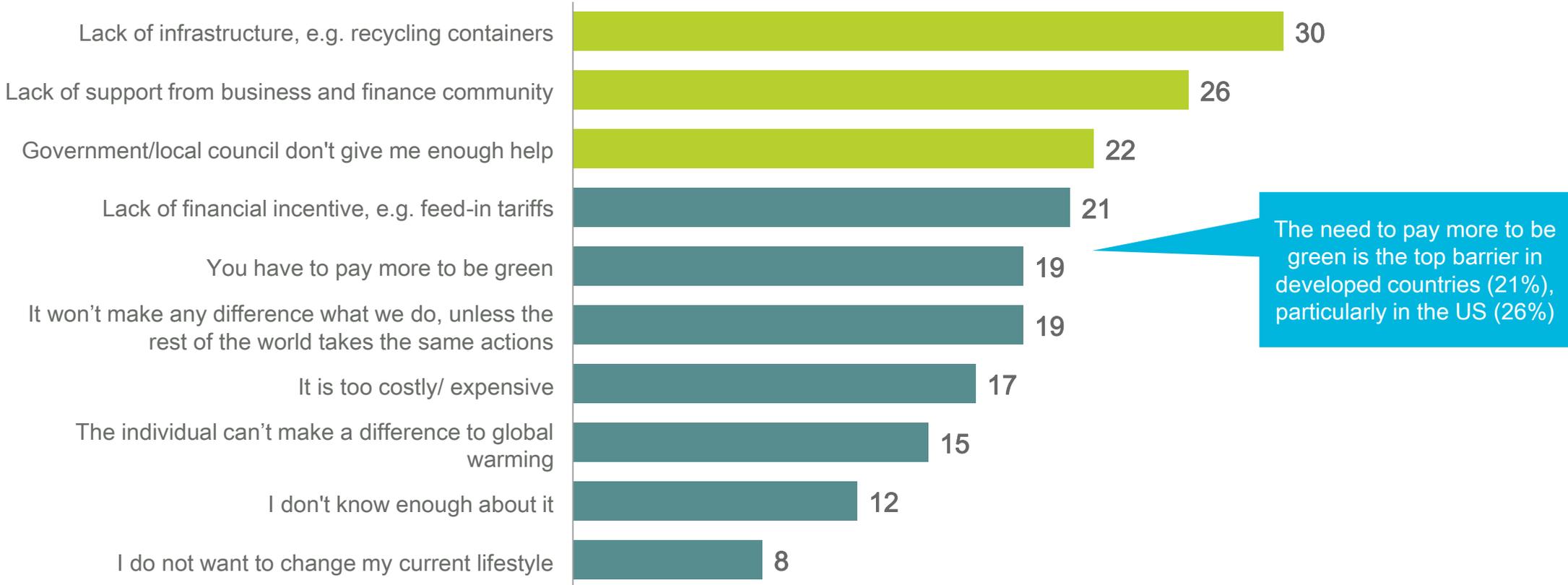


What are you currently doing to behave in a sustainable manner? Showing top 5



The top sustainability barriers are lack of infrastructure and support from both business and government

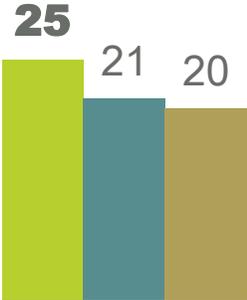
Which of the following, if any, are the greatest barriers to you personally doing more for the environment? (showing Top 10)



Lack of infrastructure is seen as the greatest barrier to personal behaviour change everywhere except Europe

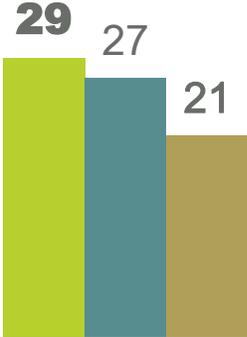
Which of the following, if any, are the greatest barriers to you personally doing more for the environment? (showing Top 3)

- 1 Lack of business support
- 2 Won't make any difference
- 3 Have to pay more to be green



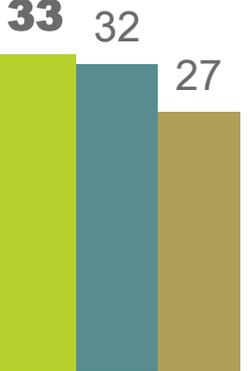
Europe

- 1 Lack of infrastructure
- 2 Lack of business support
- 3 Lack of financial incentives



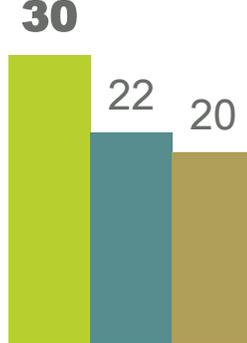
MENA

- 1 Lack of infrastructure
- 2 Lack of business support
- 3 Lack of financial incentives



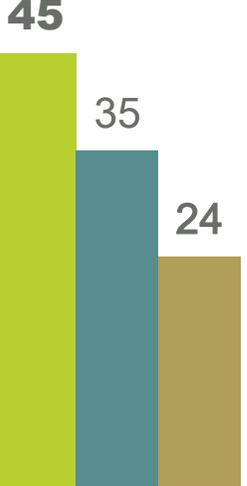
Americas

- 1 Lack of infrastructure
- 2 Not enough help from government
- 3 Have to pay more to be green



Asia

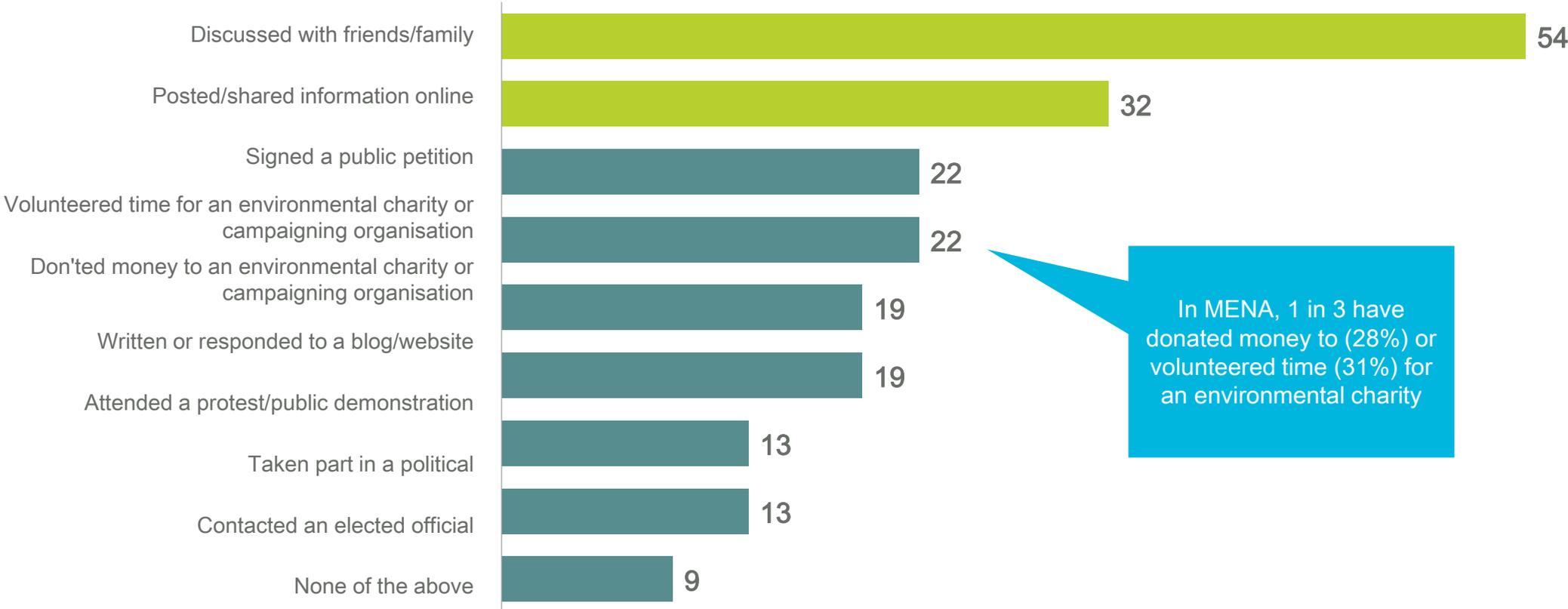
- 1 Lack of infrastructure
- 2 Lack of business support
- 3 Not enough help from government



Africa

Gen Z are talking about environmental issues online and offline – and in MENA, they are actively engaging with charities

Which of these, if any, have you personally done over the past 12 months or so? (about environmental issues)



In MENA, 1 in 3 have donated money to (28%) or volunteered time (31%) for an environmental charity

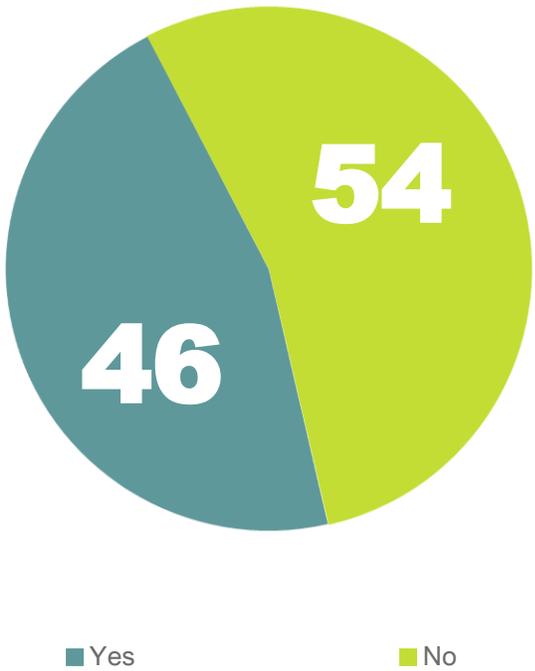
5

Youth boycott companies which are not sustainable



Many are willing to spend more on sustainable products and say they have boycotted companies that aren't green

Have you ever spent more to buy from a company that behaves in a sustainable way?

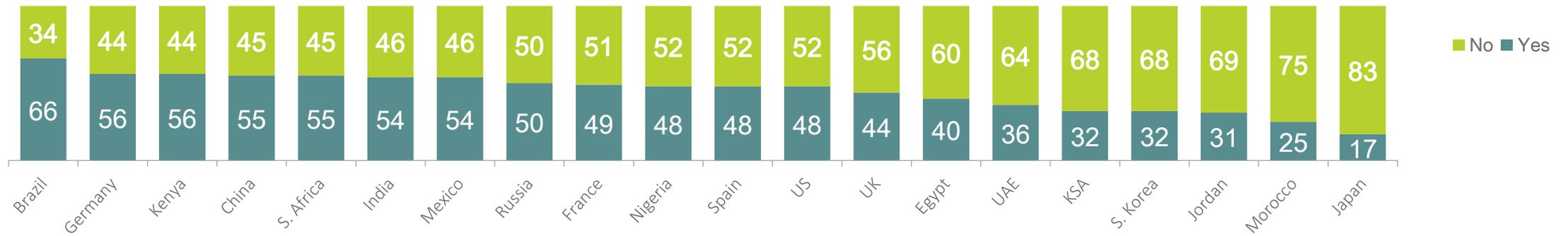


MENA youth are the most sceptical about green products. Only 31% think green products are just as good as their regular alternatives.

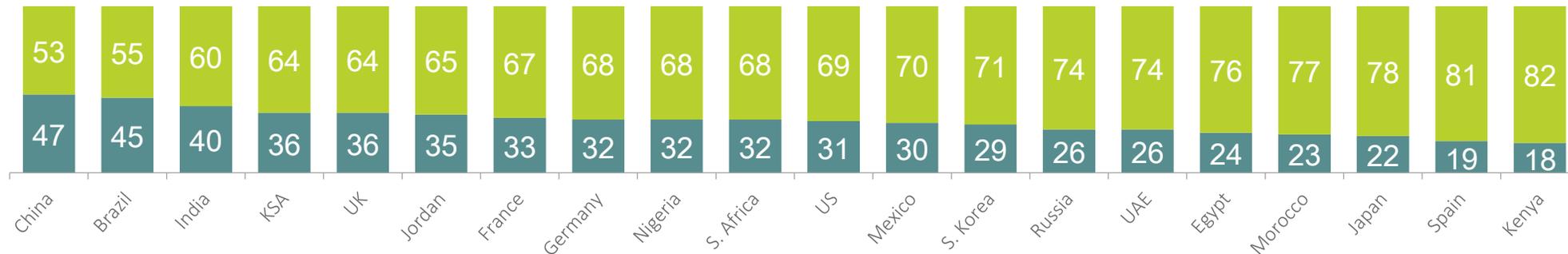
49% think green products are just as good as their regular alternatives

31% say they have in the past boycotted a company because it did not behave sustainably

Have you ever spent more to buy from a company that behaves in a sustainable way?

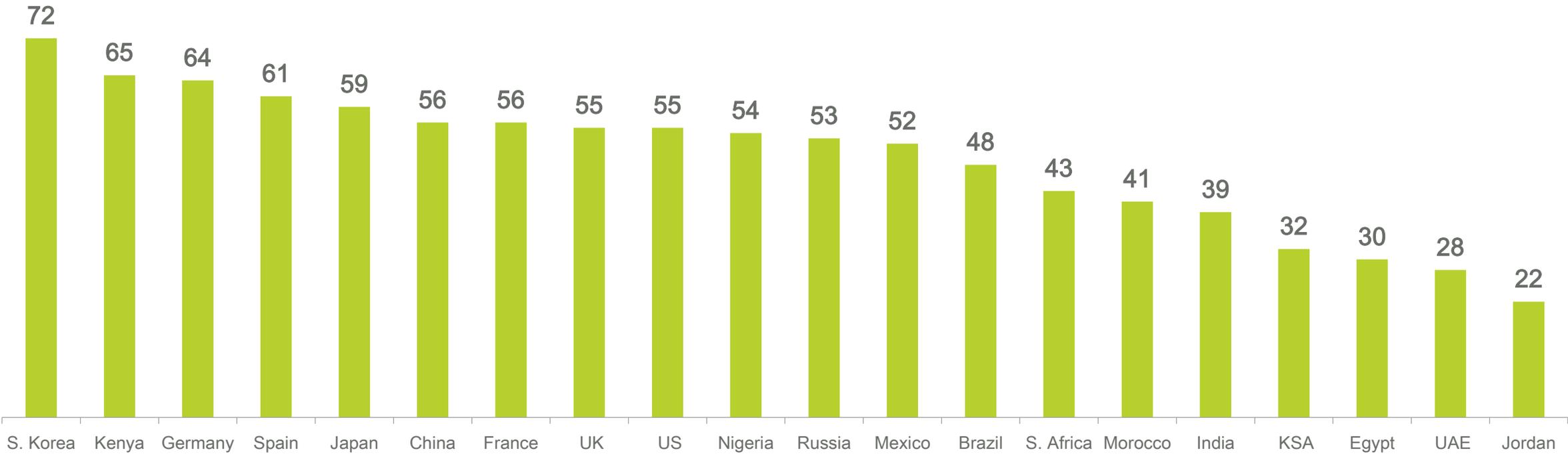


Have you ever spent more to buy from a company that behaves in a sustainable way?



Young people in MENA aren't convinced about the quality of 'green' products

% saying that 'green' products are usually as good as their 'regular' alternatives



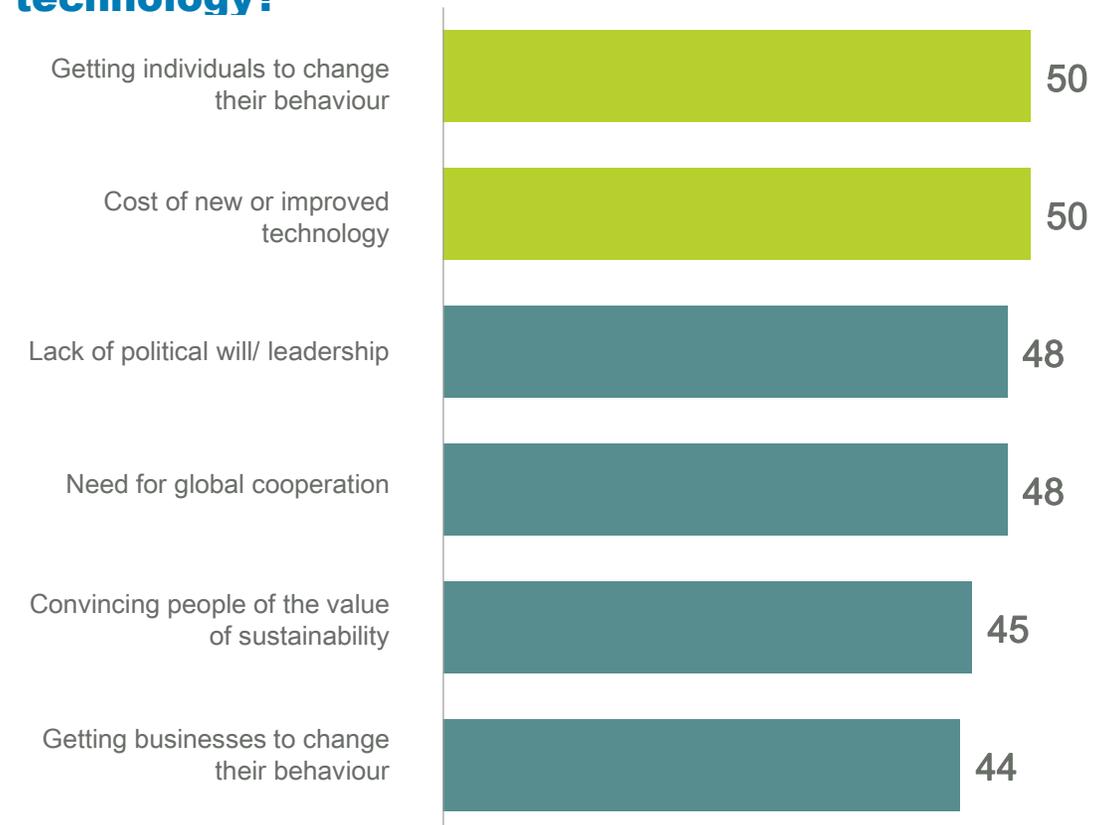
6

Behavioural change is needed to help renewable energy investment



Half of global youth think reluctance to change behaviour is the main obstacle to investment in renewable energy

What do you think are the main barriers to investment in renewable energy and clean technology?



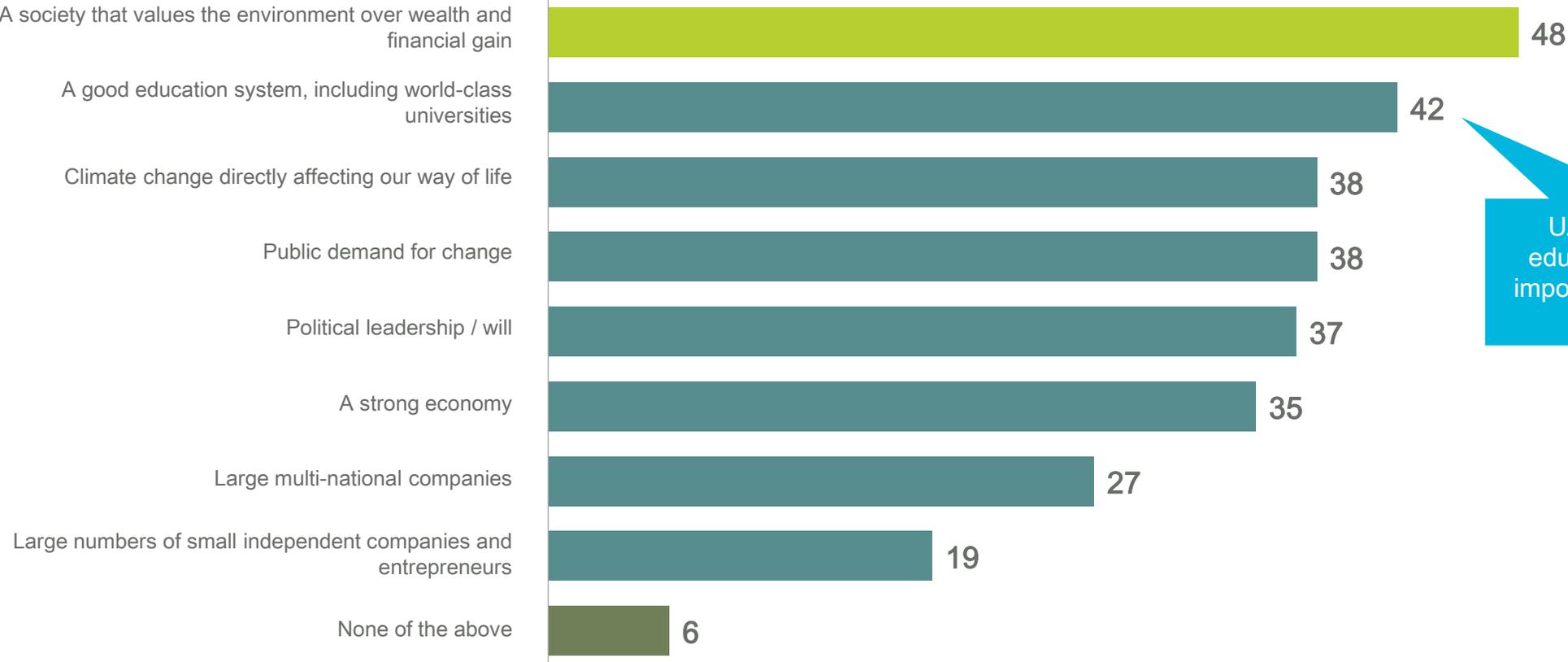
Which of the following, if any, are the greatest barriers to you personally doing more for the environment?

95% of Gen Z in frontier countries do not see their lifestyle as a barrier to them personally doing more for the environment,

compared to just **89%** in developed countries

A society that values the environment over financial gain is seen as most important for fostering green technology

Which of the following would you say are most important for fostering green technology?



UAE youth see a good education system as most important (43%) for fostering 'clean tech'.

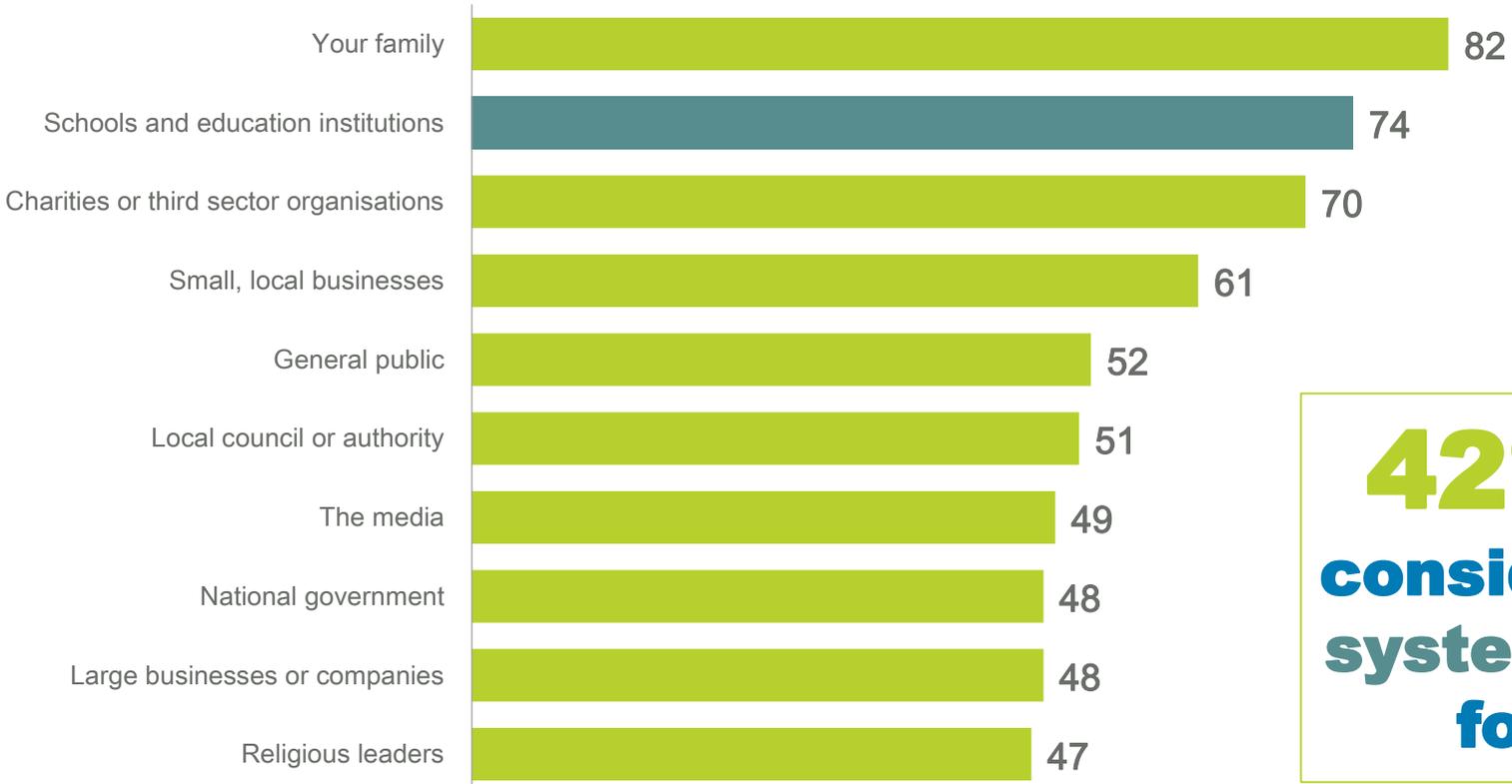
7

**Education is seen as vital in making
the world more sustainable**



Youth trust educational institutions to set a good example for sustainable behaviour

Thinking about institutions in your country, to what extent do you trust or distrust each of the following to behave in a sustainable way? (showing % 'Trust')



42% of Generation Z consider a good education system as most important for fostering green technology.

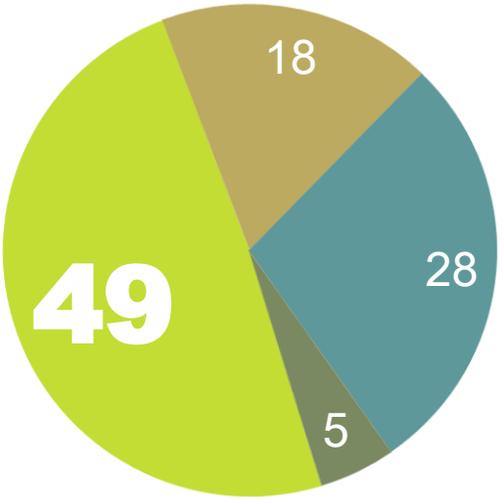
8

**Germany, Canada, the US and the UK
are perceived as clean-tech leaders**



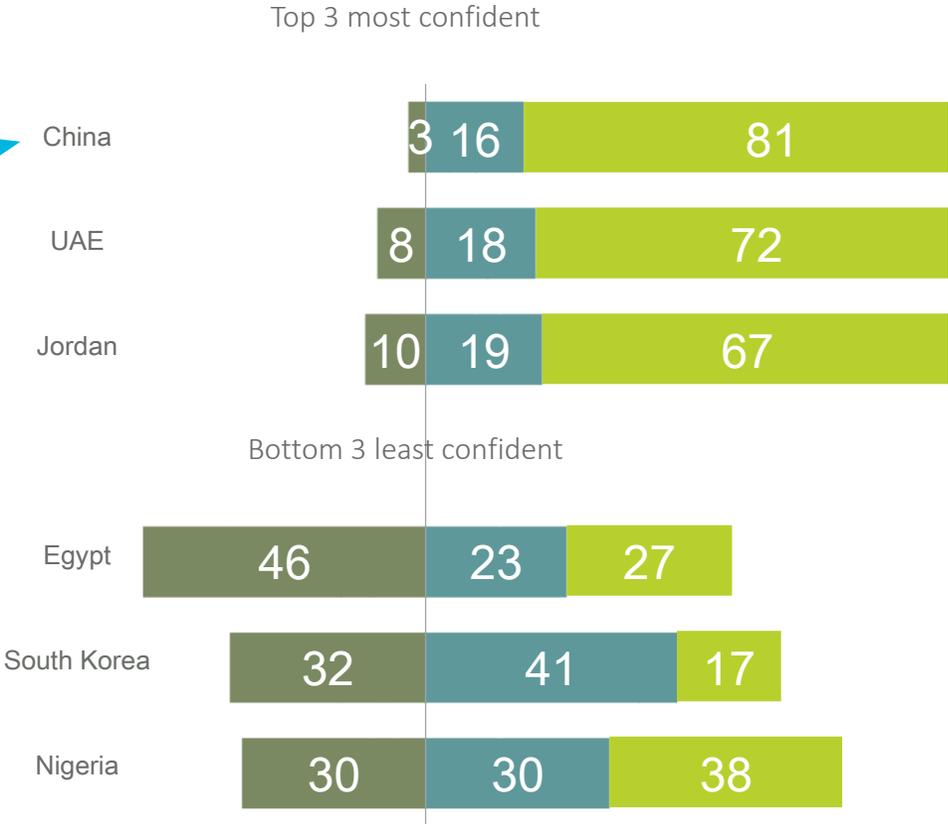
Half of global youth think their country has been getting greener

How would you rate your country in terms of its 'greenness' over the past year or so?



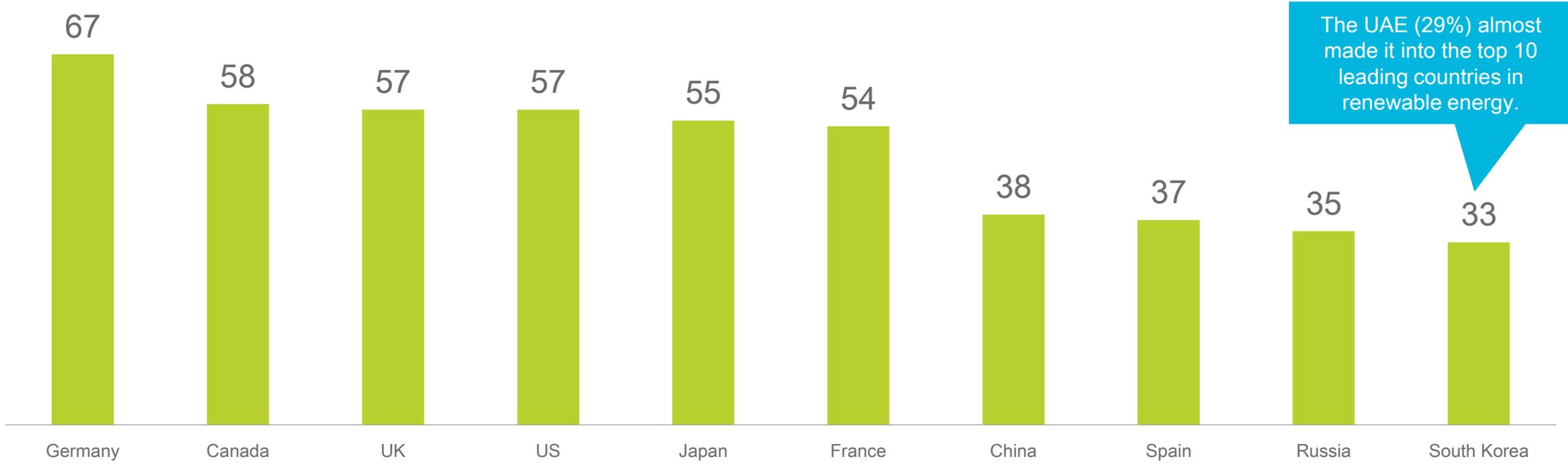
- The country has been getting greener
- The country has been getting less green
- The same as a year ago
- Don't know

However, in China only 1 in 5 (22%) think their country is ahead of other countries in terms of investing in clean energy



European, American and Asian countries are seen as leaders in clean-tech while the UAE is top among MENA countries

To what extent do you think these countries are leading or lagging in renewable energy and clean technology?
(showing % 'leading')



9

The majority of Gen Z believe that solar and wind energy is a priority for the future



Solar is king in all countries except Germany and the UK where young people count on wind energy

63% of Generation Z think solar energy should be the priority energy source for the future of their country



37% pin their hopes in hydroelectricity

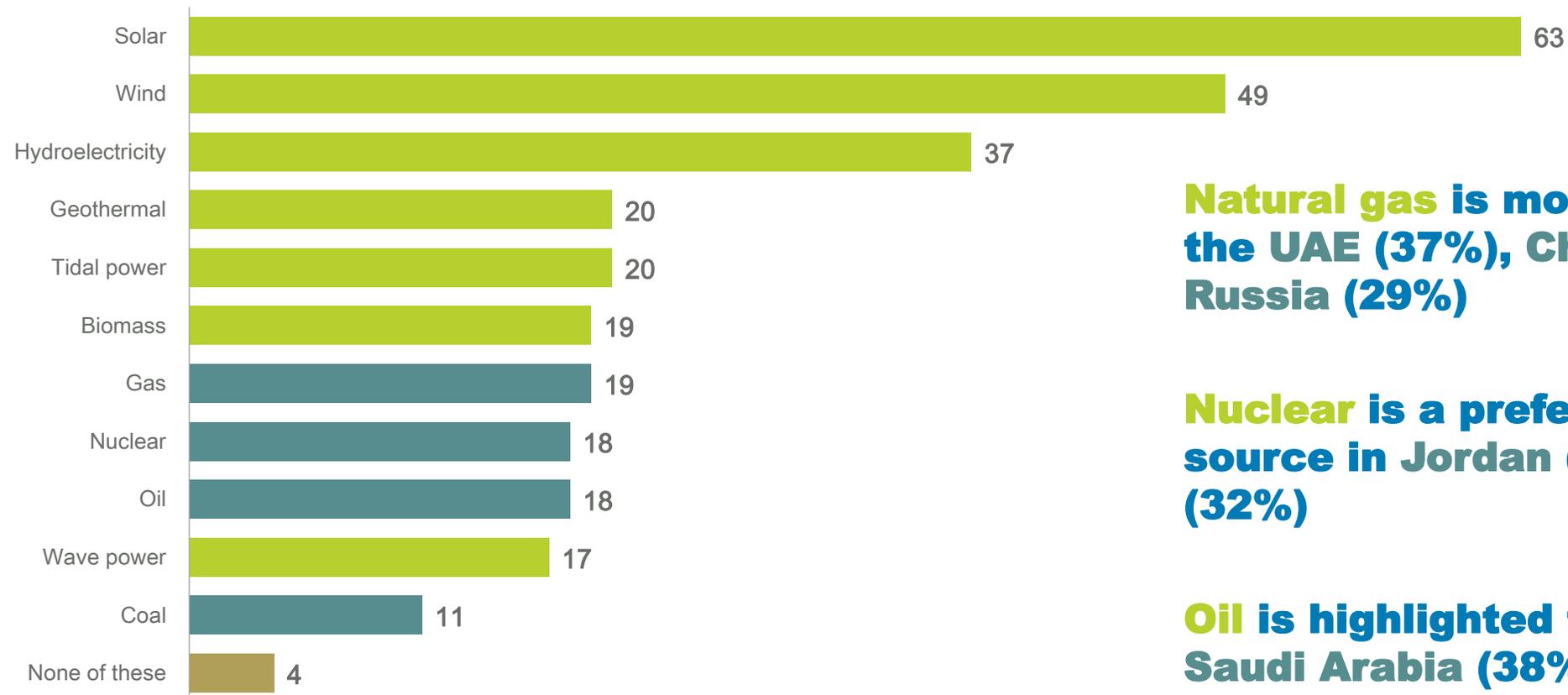


46% want their country to focus on wind energy. Wind is the preferred future energy source in Germany and the UK



Youth from countries with large oil & gas reserves prioritise a diversified energy portfolio

Which of the following do you think should be the priority energy sources for the future of your country?



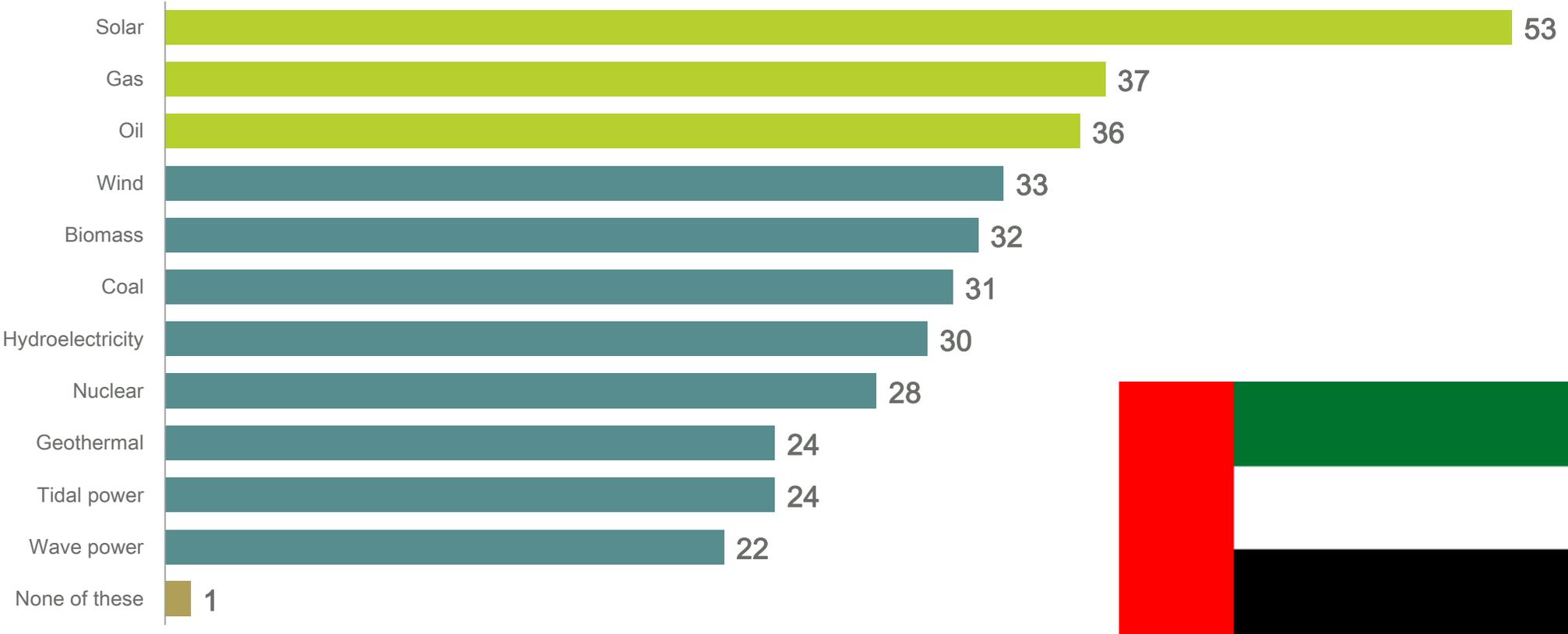
Natural gas is most preferred in the UAE (37%), China (35%) and Russia (29%)

Nuclear is a preferred energy source in Jordan (35%) and India (32%)

Oil is highlighted the most in Saudi Arabia (38%) and the UAE (36%)

Solar is seen as the energy source of the future in the UAE – but oil & gas still have an important role to play

Which of the following do you think should be the priority energy sources for the future of your country?



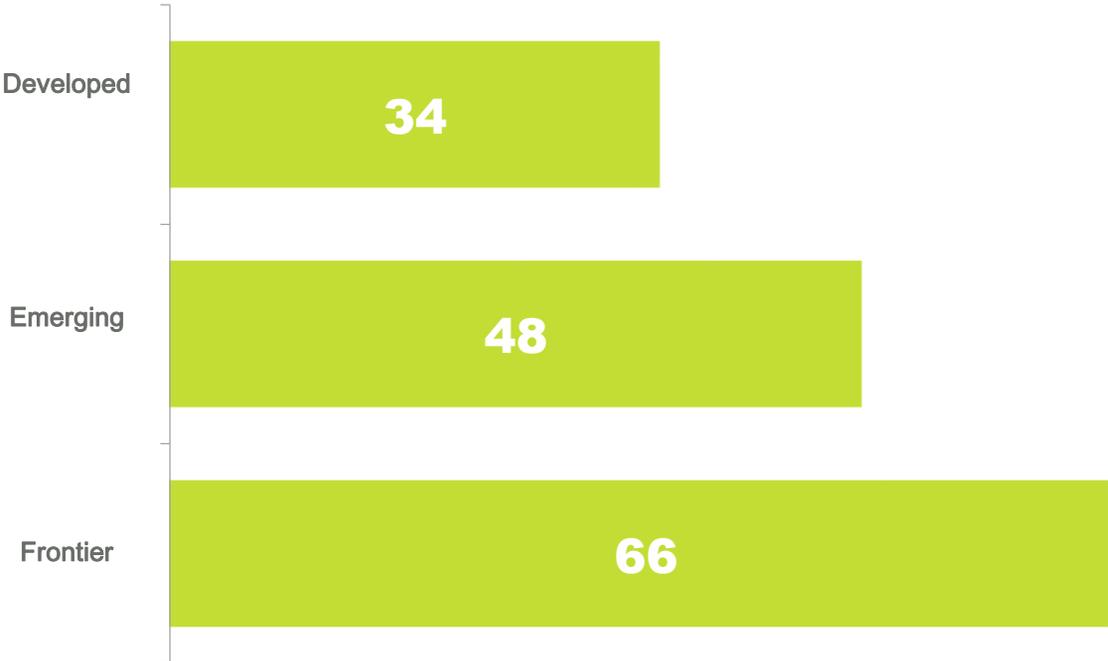
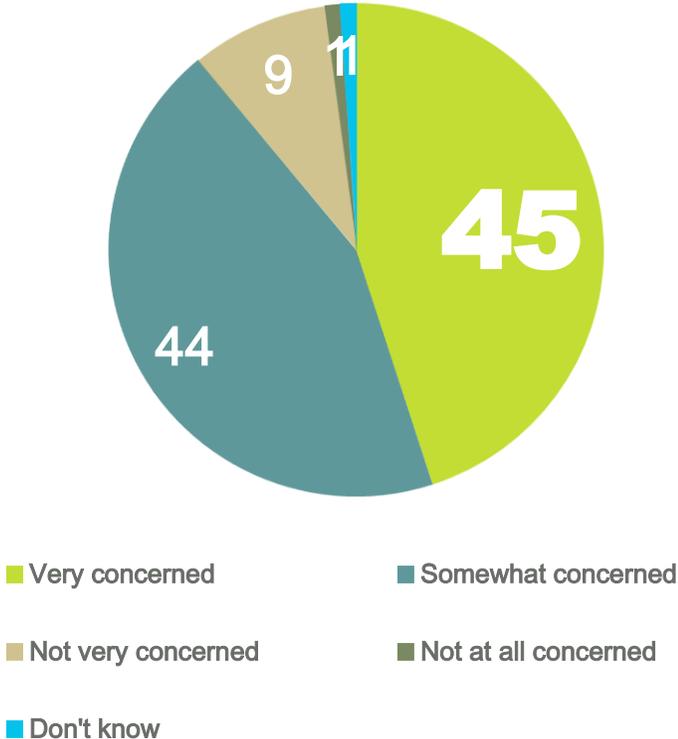
10

Youth in frontier countries are more committed to a sustainable future



While almost half of global youth are very concerned about the environment, concern is highest in frontier countries

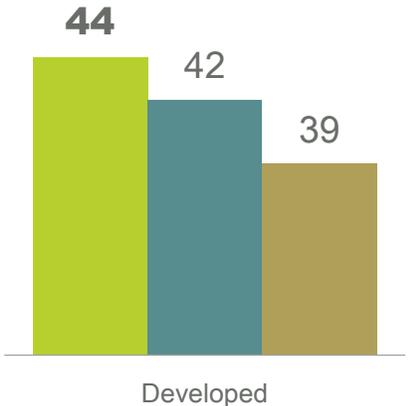
How concerned about the environment are you personally?



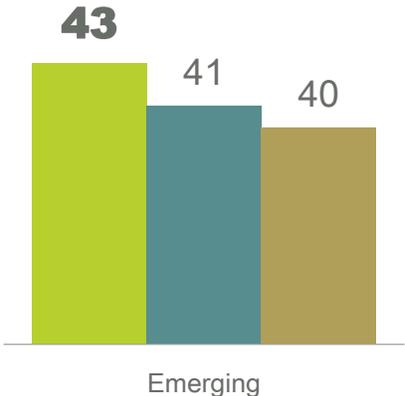
Youth in frontier nations are more likely to believe that the general public has a more important role to play than politicians

Who or what do you think should be doing the most on sustainable energy consumption and production?
(showing % Top 3)

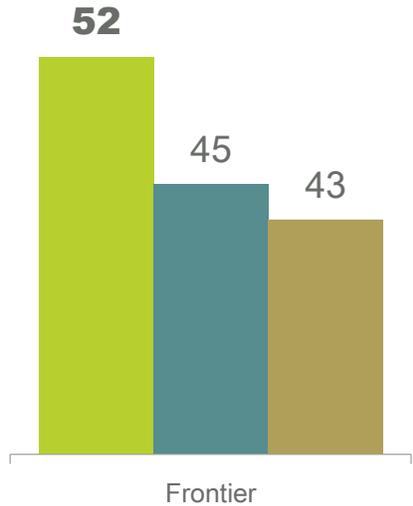
- 1 Political leaders from developed countries
- 2 Big business or companies
- 3 The general public



- 1 The general public
- 2 Big business or companies
- 3 Political leaders from developed or developing countries



- 1 The general public
- 2 Environmental NGOs
- 3 The United Nations/ Schools and Educational Institutions

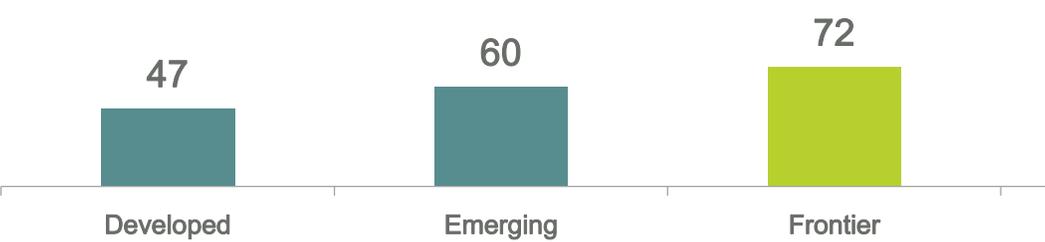


Youth in frontier countries believe all countries have an equal responsibility to adopt renewable energy

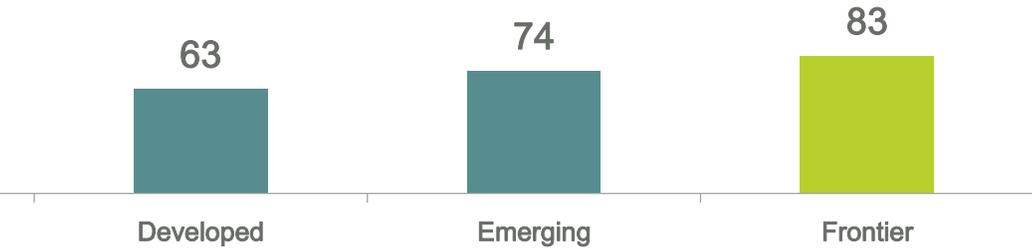
Which of the following is closer to your views?



% optimistic about future sustainability and renewable energy in my country



% agree 'My country will have made significant progress towards sustainability energy within my lifetime



The “Green” Generation

