



Obs'COP 2022

PRESENTATION OF FINDINGS
INTERNATIONAL OBSERVATORY ON
CLIMATE AND PUBLIC OPINION

Mobilization, concern or indifference:
where are the citizens of 30 countries
at with regard to climate change?



Methodology

30 countries questioned in all 5 continents, representing 2/3 of the world's population.

Selection of countries based on their CO2 emissions, geographic location or exemplariness in fighting climate change

Australia	Morocco
Belgium	Nigeria
Brazil	Norway
Canada	Poland
Chile	Russia
China	Saudi Arabia
Colombia	Singapore
Egypt	South Africa
France	South Korea
Germany	Spain
India	Sweden
Indonesia	Turkey
Italy	United Arab Emirates
Japan	United Kingdom
Mexico	USA



- 24,001 individuals (500 or 1000 according to countries)
- Representative of the population aged 16 and over (quota method)



Research fieldwork conducted **online**
from **August 30 through September 26, 2022.**

OPINION AND UNDERSTANDING OF THE CLIMATE ISSUE





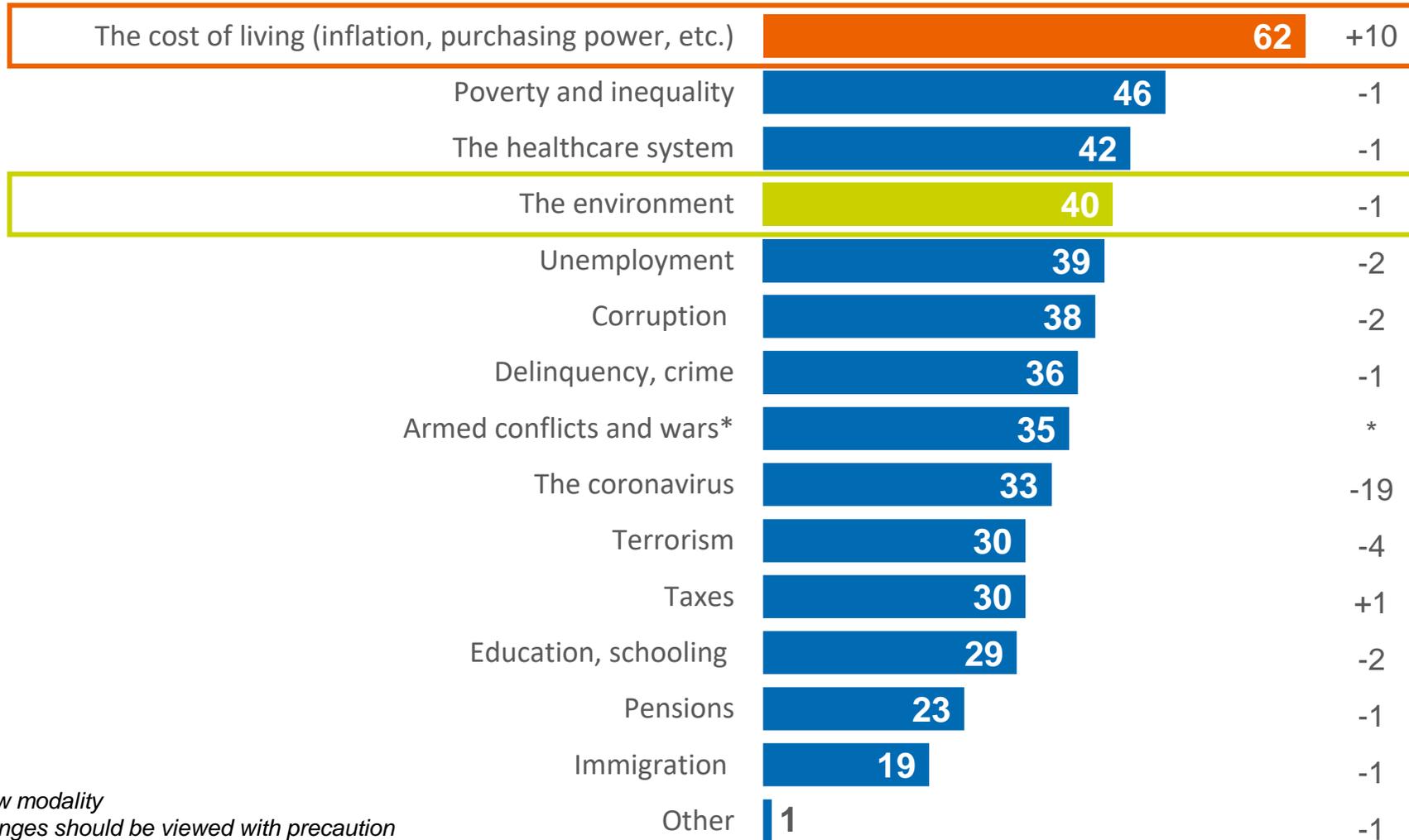
In a period marked by heavy inflation, economic concerns have been growing while economic concerns have been stagnating on a global level



The rise in the cost of living is the main topic of concern on an international level with further strong growth this year. Poverty and inequality remain at the top of the list, followed by health issues.



Q. From this list, which topics worry you the most?



+++
 United Kingdom 77%, +25 pts
 Australia 77%, +18 pts
 Canada 76%, +7 pts
 Singapore 74%, +7 pts
 Russia 73%, +2 pts

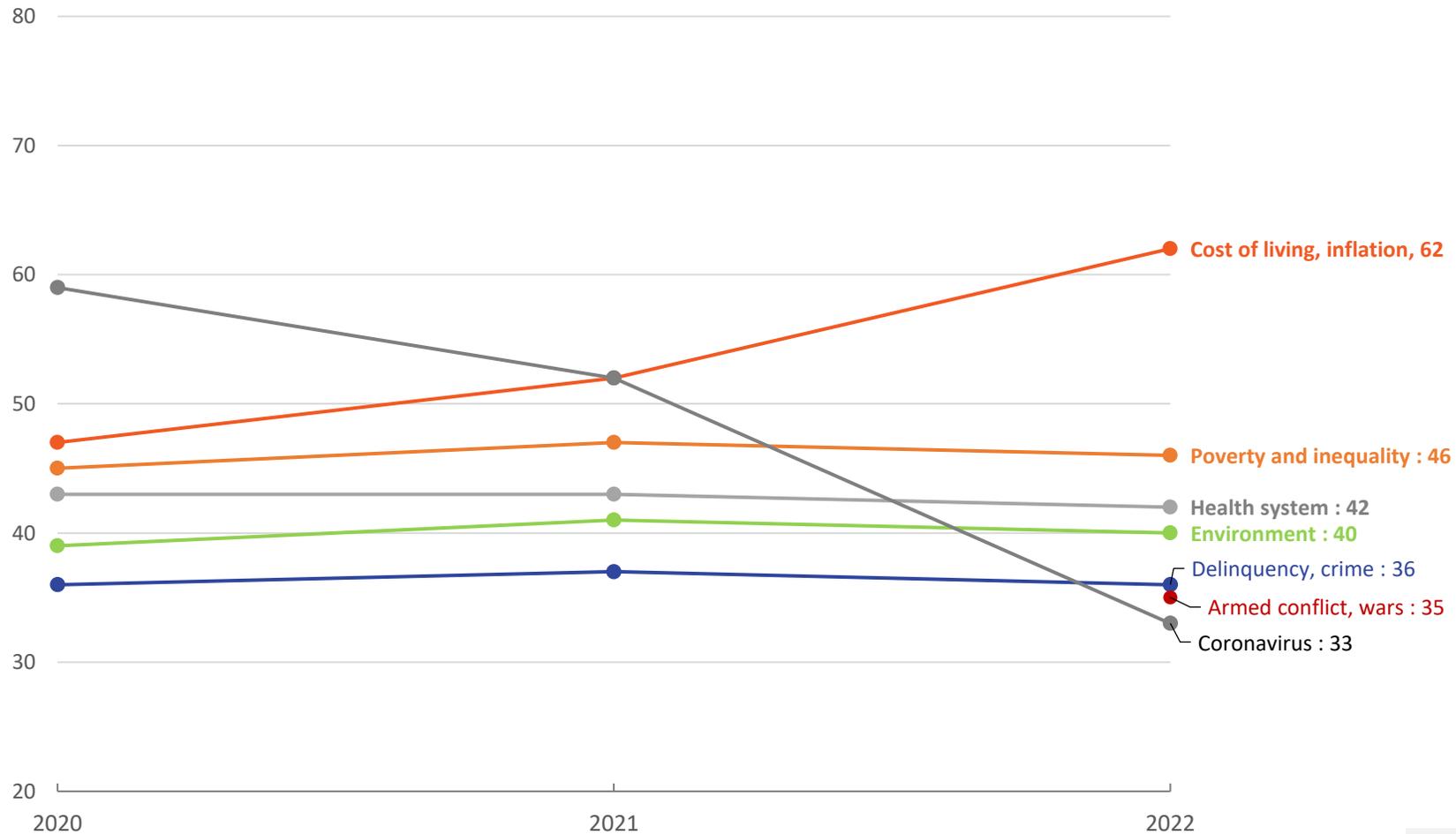
*New modality
 Changes should be viewed with precaution

+/-: Change since the 2021 wave

The increase in the cost of living is the main subject of concern globally, progressing strongly again this year. Poverty and inequality continue to top the ranking, followed by health issues.



Q. From this list, which topics worry you the most?

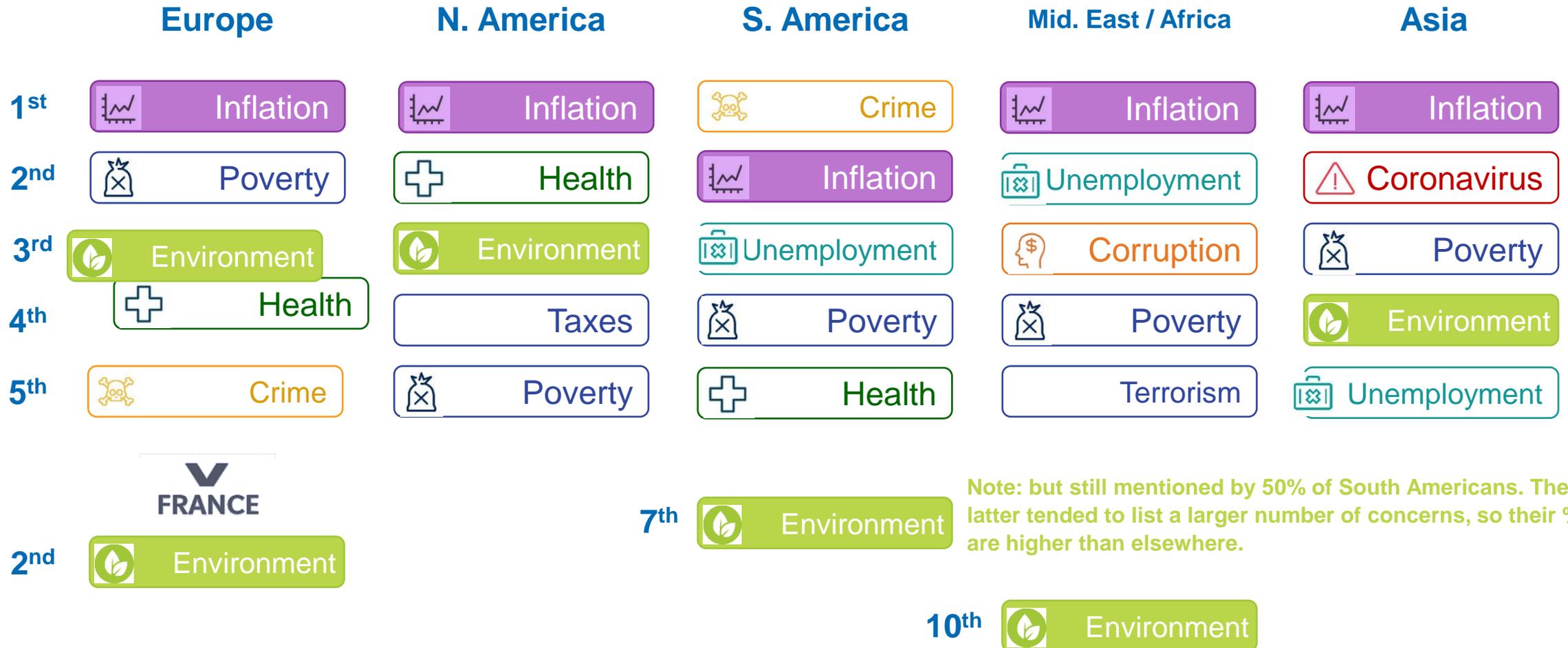


*New modality

+/-: Change since the 2021 wave

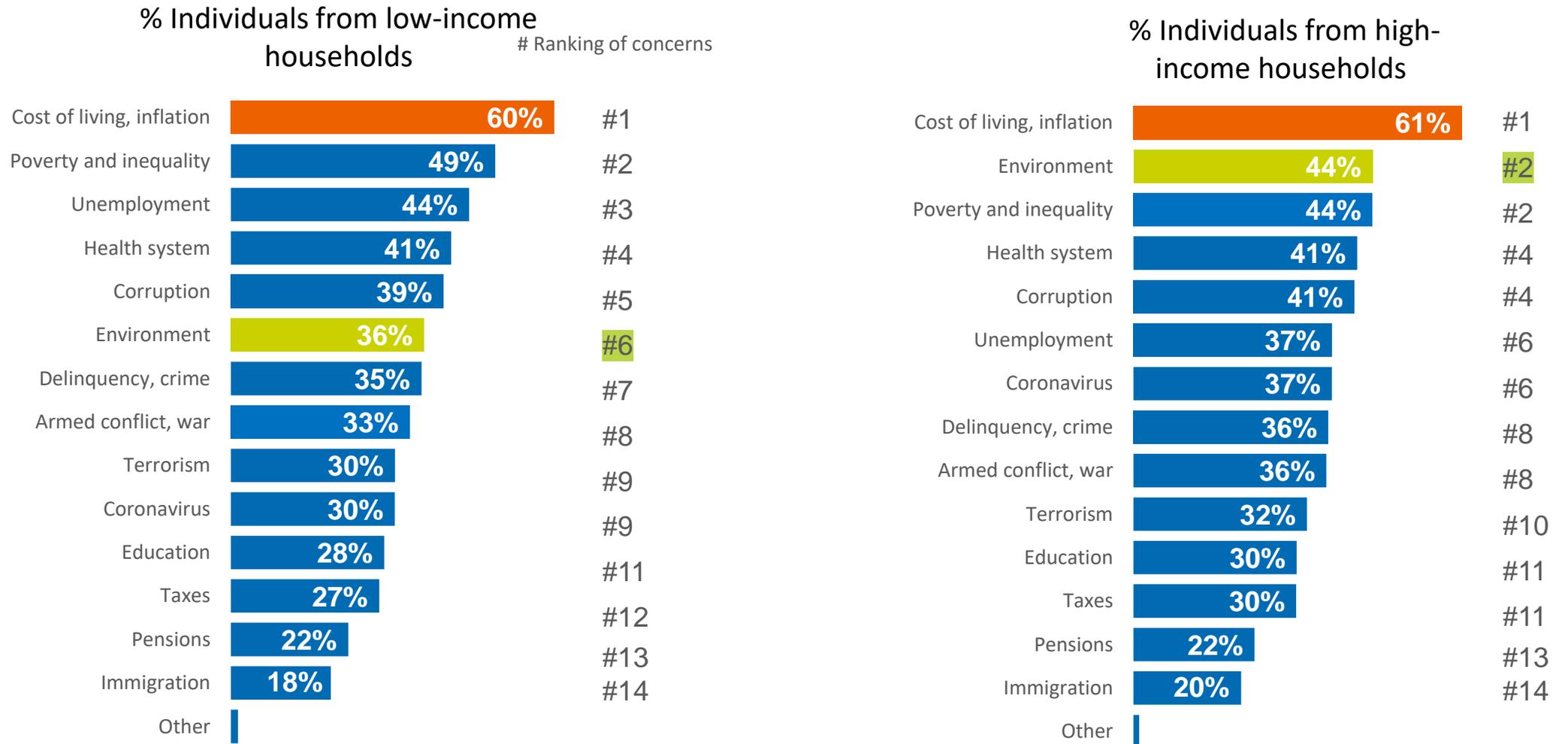
While inflation is the predominant concern in all continents, priorities diverge after that: health in North America, crime in South America, the Coronavirus in Asia, unemployment in Africa and South America. The environment continues to be an important concern.

Order of concerns



Note: but still mentioned by 50% of South Americans. The latter tended to list a larger number of concerns, so their % are higher than elsewhere.

Worldwide, the Environment is more of a concern among privileged categories



Between environment and economic growth, individuals still give priority to the environment, but less distinctly as the years go by. A sign that economic difficulties are hampering a pro-environment turnaround in our economies.

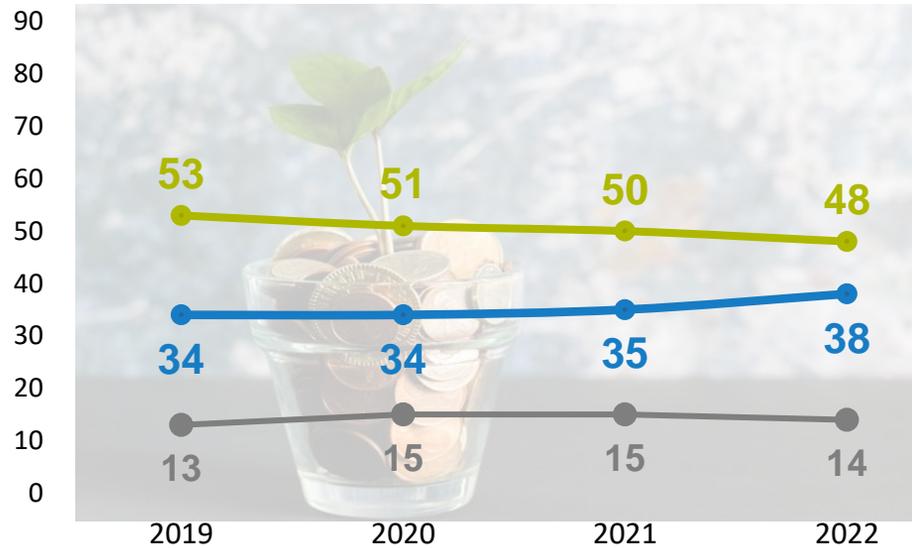
Q. Which of the following two statements do you agree with most?

Priority should be given...

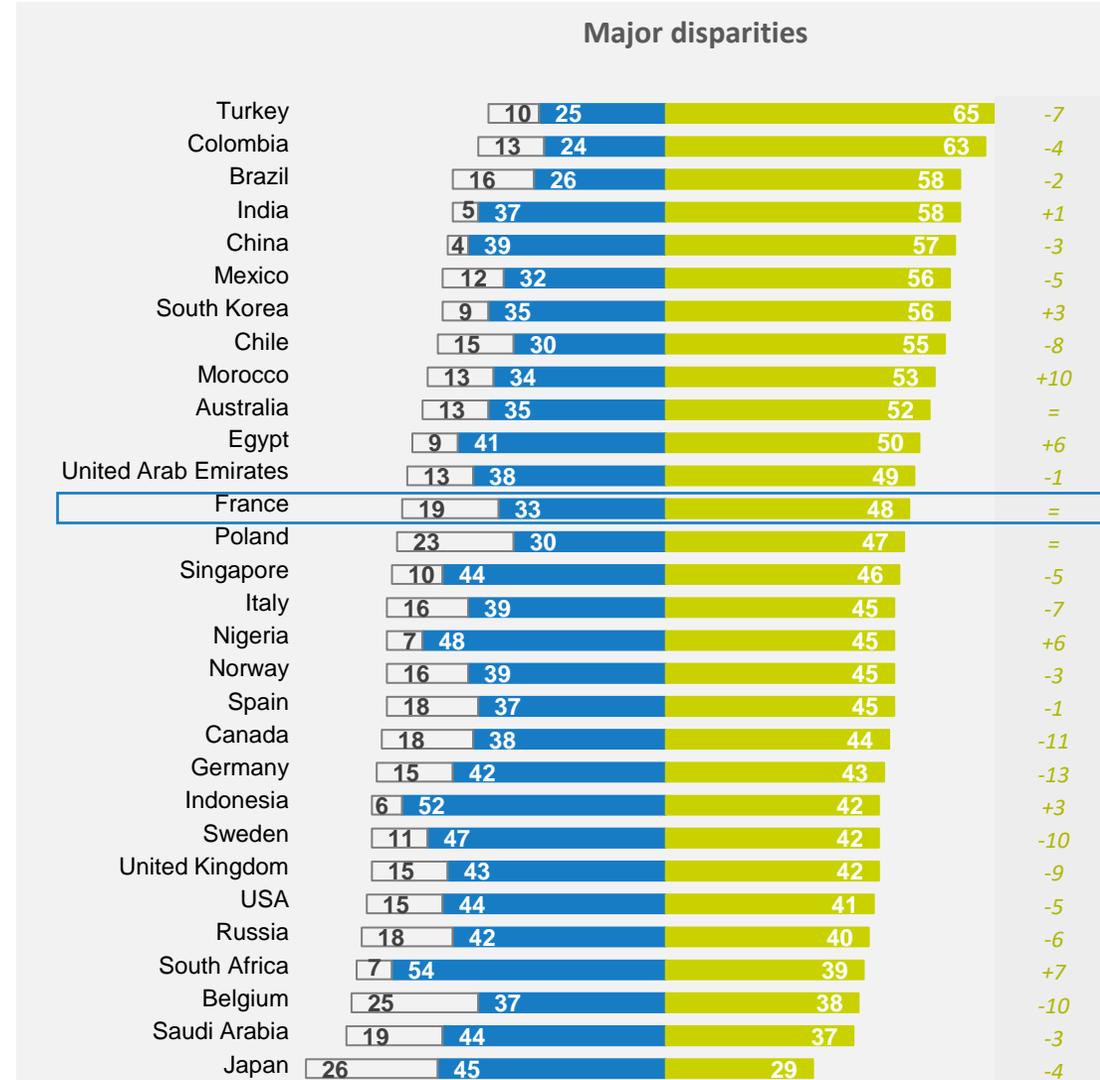
...to the **ENVIRONMENT** even if it might slow down growth in your country and cause job losses

...to **ECONOMIC GROWTH** and jobs even if it might have harmful consequences for the environment

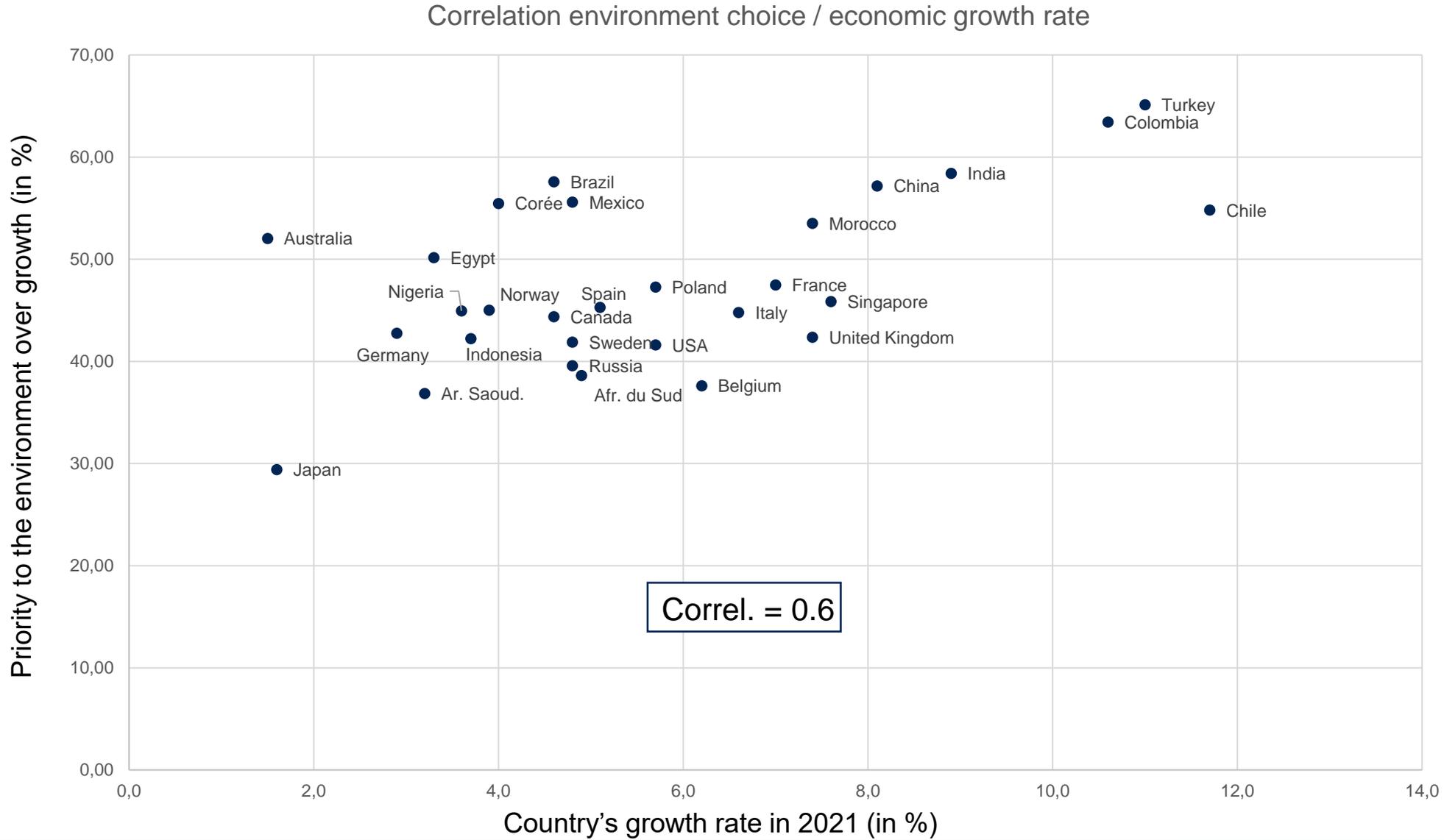
Don't know



A high rate of no opinion indicating that a part of the public cannot relate to this alternative, especially in Japan (26%), Belgium (25%), Poland (23%), France (19%), Saudi Arabia (19%).



A fairly strong correlation between the country's growth rate and the priority given to the environment





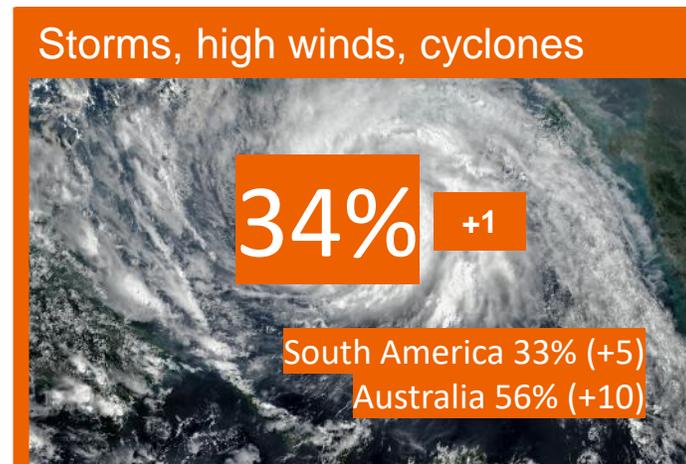
The feeling of being a witness to climate change is progressing in regions confronted with high temperatures and drought in 2022



After a summer marked by major climate events, Europeans claim to have had to deal with more drought and declining water levels in waterways in 2022. Australia has been particularly affected by flooding and storms.

Q. Where you live, in recent years, have you been affected by the consequences of the following listed climatic disturbances?

Question only asked to those who had noticed the effects of climate change in their region



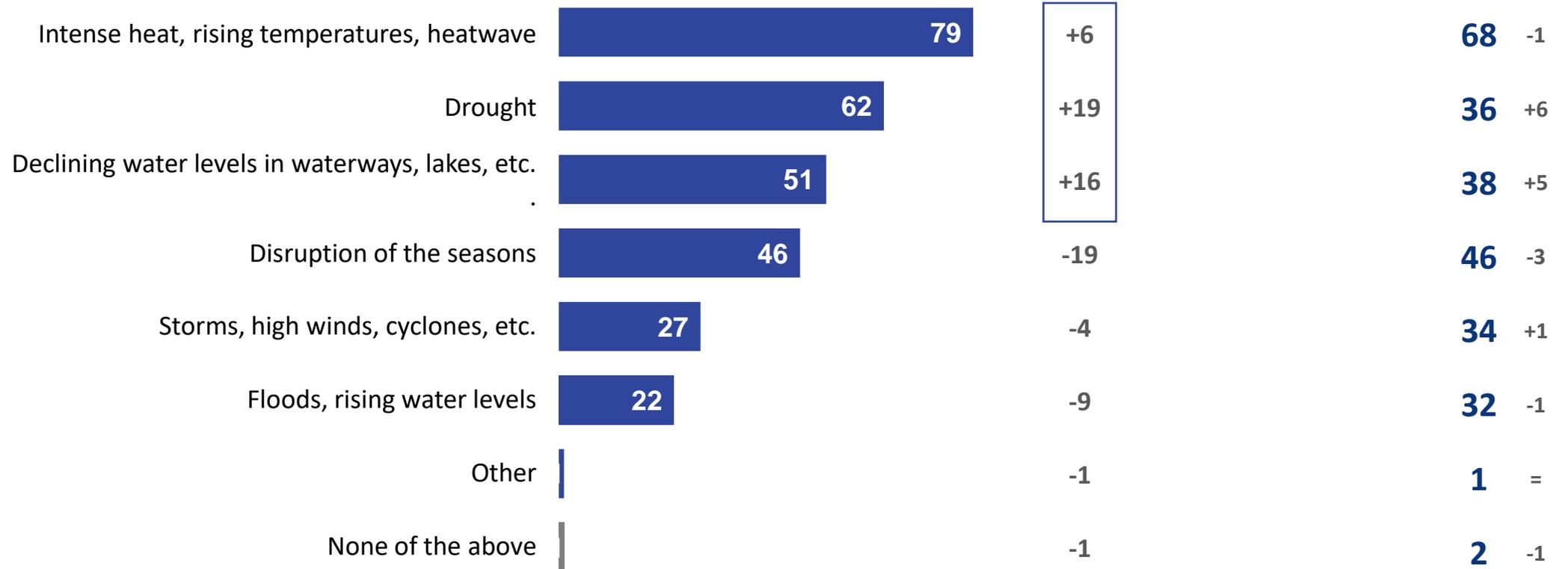
+/-: Change since the 2021 wave

The French have clearly been subjected to certain signs of climate change at a higher level this year: drought, declining levels in waterways and high temperatures.



Q. Where you live, in recent years, have you been affected by the consequences of the following listed climatic disturbances?

Question only asked to those who had noticed the effects of climate change in their region

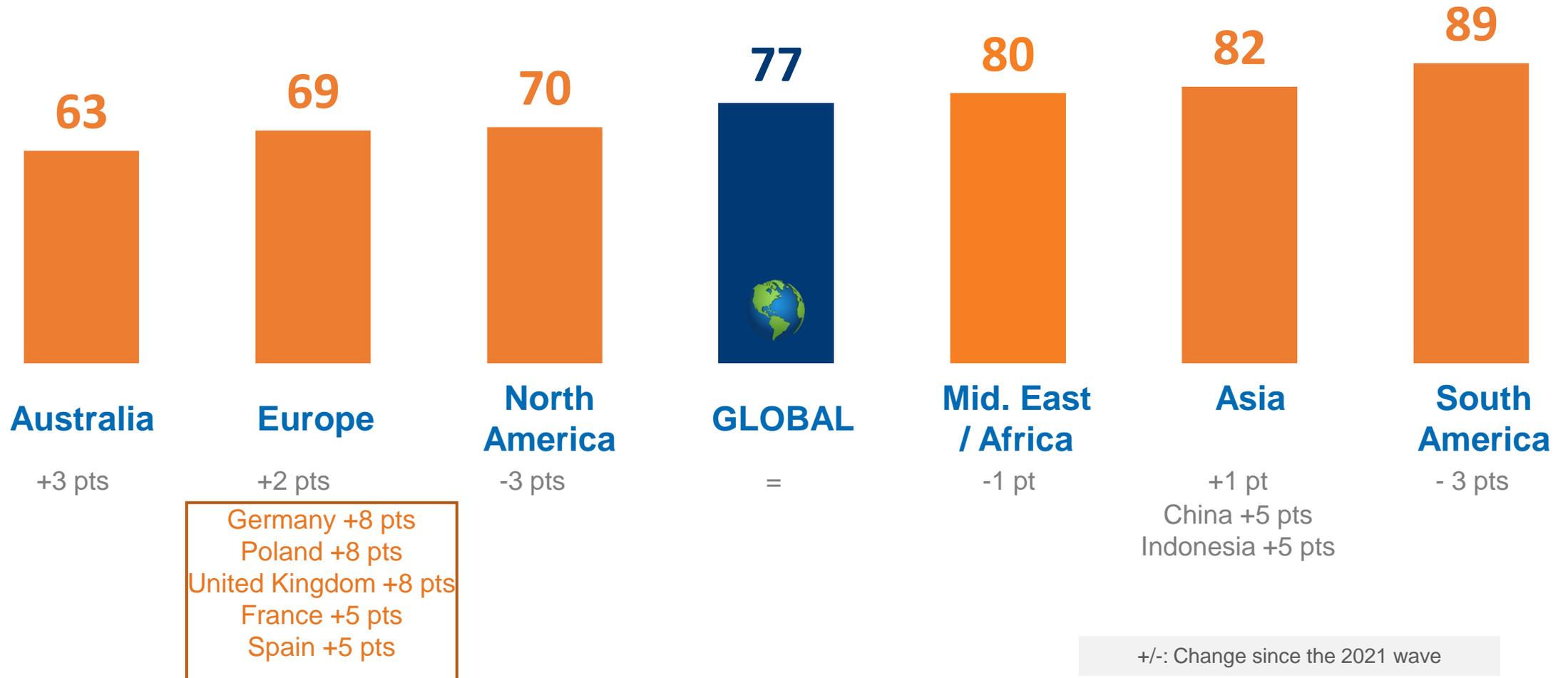


+/-: Change since the 2021 wave

Climate change is a reality observed by the population, and particularly in South America, Africa and the Middle East. But this year it has only progressed in exposed regions like certain European countries and Australia.

Q. On the whole, would you say that, in your region, you have already noticed the effects of climate change?

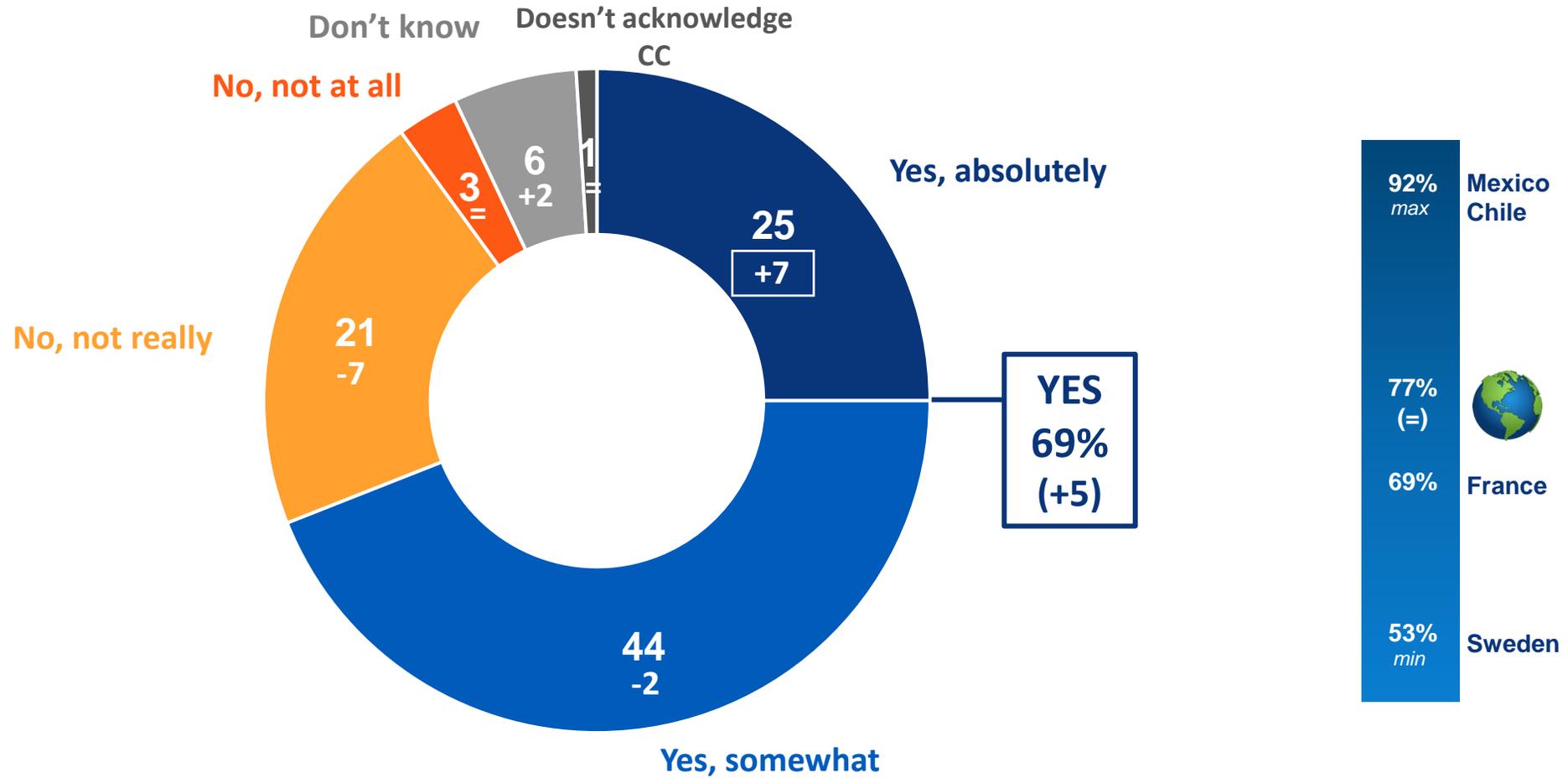
% have already observed the effects of climate change in their region (absolutely + somewhat)



In France, certainty about being confronted with climate change in their region has progressed.



Q. On the whole, would you say that, in your region, you have already noticed the effects of climate change?



+/-: Change since the 2021 wave

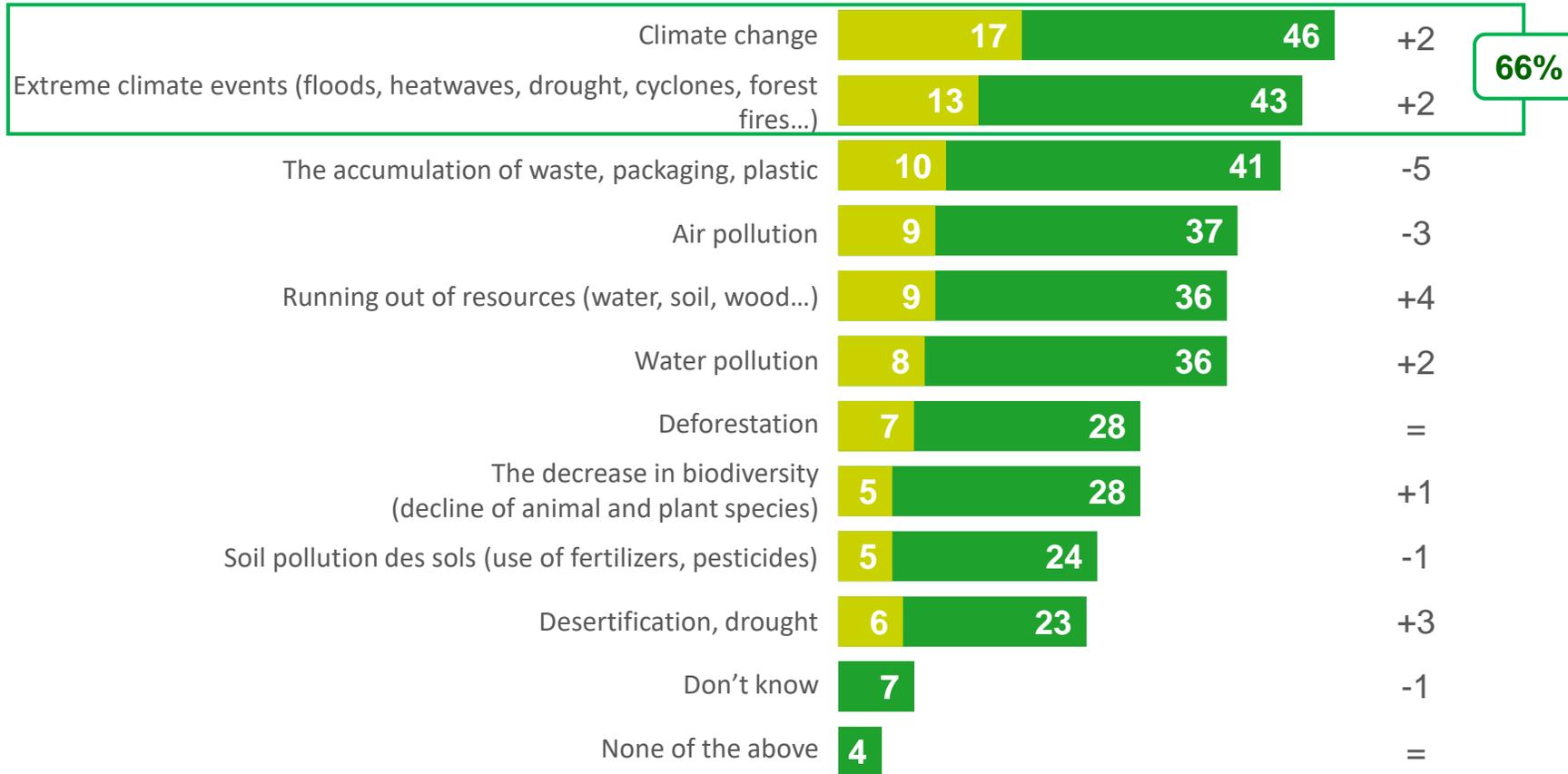


Although at the top of the list of environmental priorities, climate change is not generating a higher level of concern and human responsibility for it is acknowledged less and less

Climate change and extreme climate events have become the leading reasons for environmental concern, ahead of waste and plastic.



Q. From the following list, which environmental problems do you think are the most concerning in your country?



Heavy progression in South Africa, Morocco and South Korea:

Big rise in extreme climate events in these countries:

South Africa	47	+17
Morocco	40	+16
South Korea	48	+12
China	46	+6
Brazil	36	+6
Indonesia	58	+5
Australia	60	+4
Germany	53	+4
Spain	52	+4
Nigeria	37	+4

+/-: Change since the 2021 wave

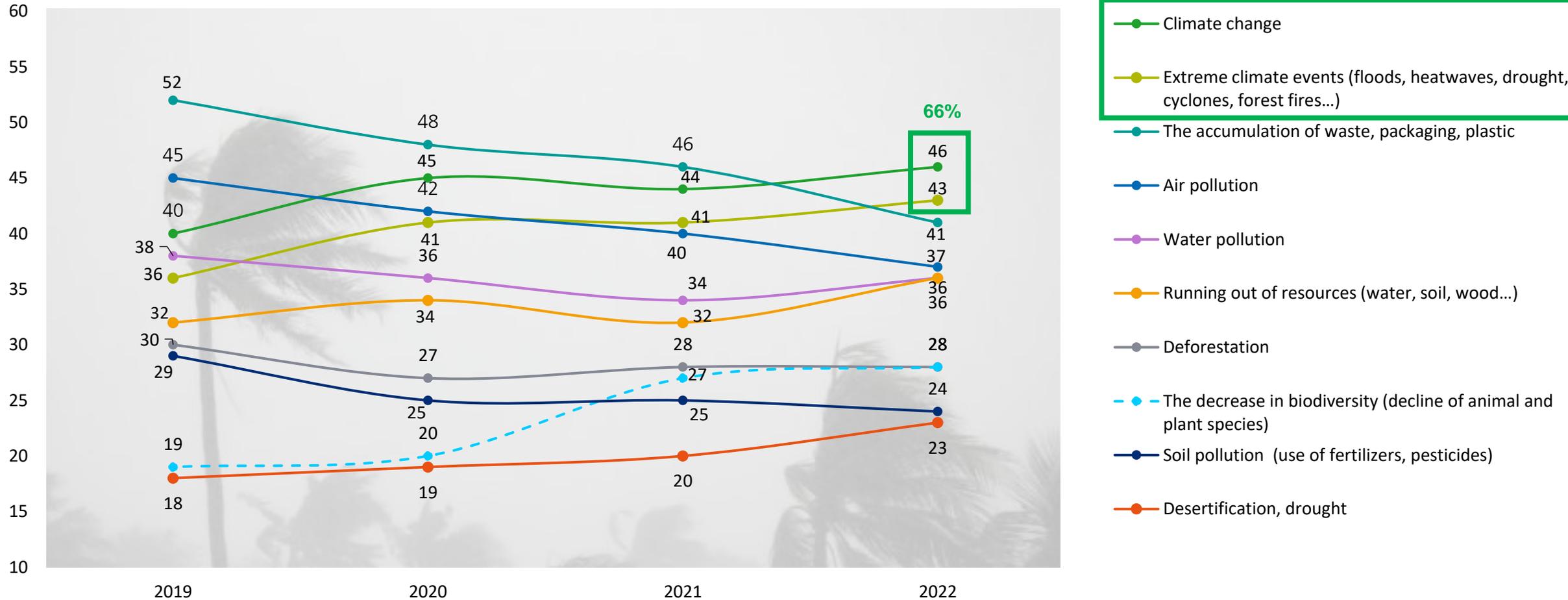
First

Total

Two thirds of inhabitants view the climate as a priority issue, as opposed to 60% in 2019.
 Loss of biodiversity and desertification and drought have also progressed since 2019, although they still cause less concern.



Q. From the following list, which environmental problems do you think are the most concerning in your country?



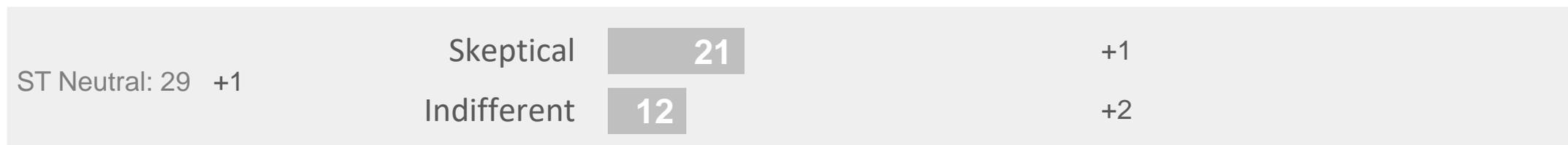
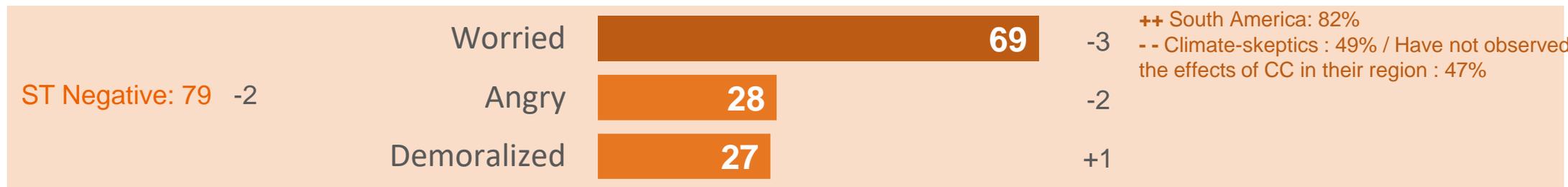
- Climate change
- Extreme climate events (floods, heatwaves, drought, cyclones, forest fires...)

- The accumulation of waste, packaging, plastic
- Air pollution
- Water pollution
- Running out of resources (water, soil, wood...)
- Deforestation
- The decrease in biodiversity (decline of animal and plant species)
- Soil pollution (use of fertilizers, pesticides)
- Desertification, drought

The level of concern about climate change is still high but is tending to drop. Once again, only a small minority have a positive feeling about it, although with a slight increase.



Q. Personally, when you think about climate change, what goes through your mind? Do you feel..... (Answer all that apply- Total above 100%)

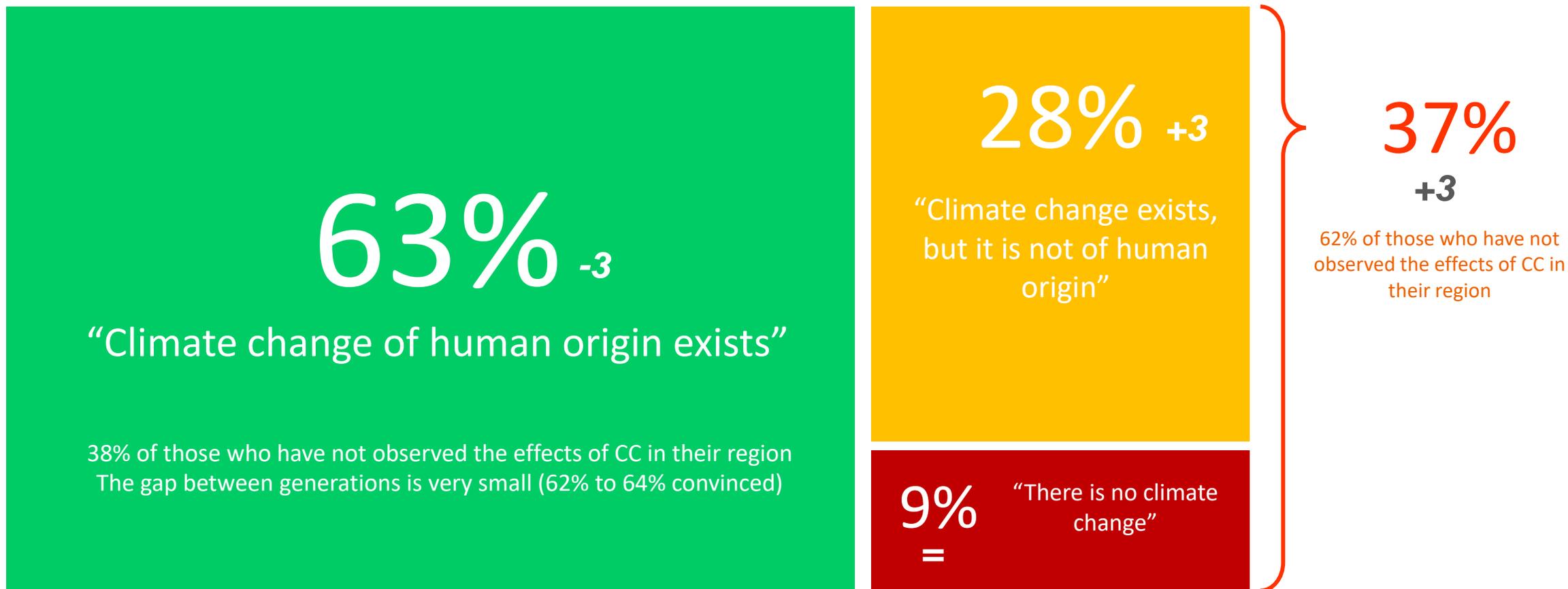


Another surprise: climate skepticism tended to grow between 2021 and 2022 (“natural origin” version).



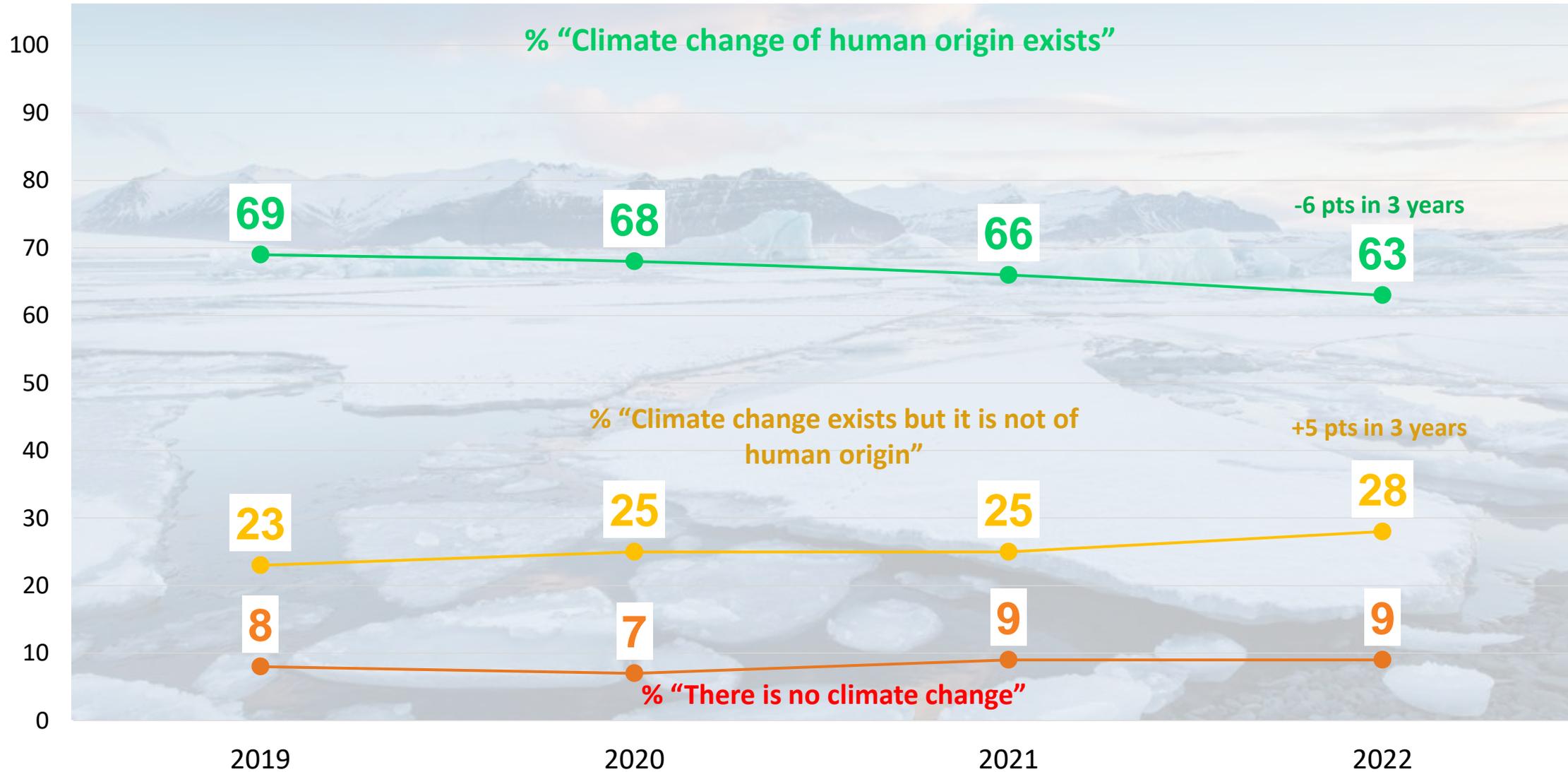
Q. Would you say that we are experiencing a change in climate?

Q. And concerning this climate change that we hear about, would you say: that it is mainly due to human activity, that it is mainly due to a natural phenomenon, or that there is no way to know?

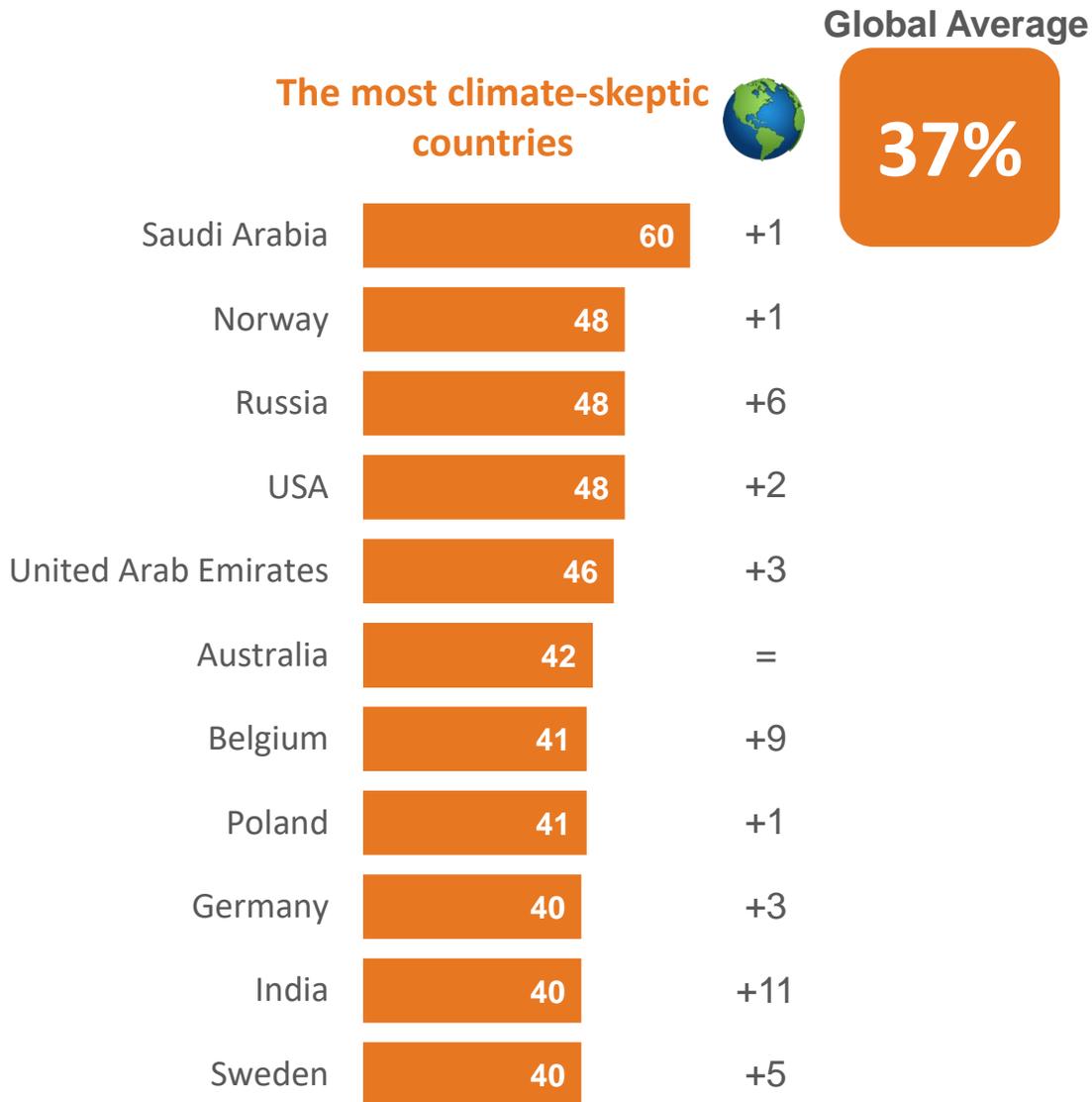


+/-: Change since the 2021 wave

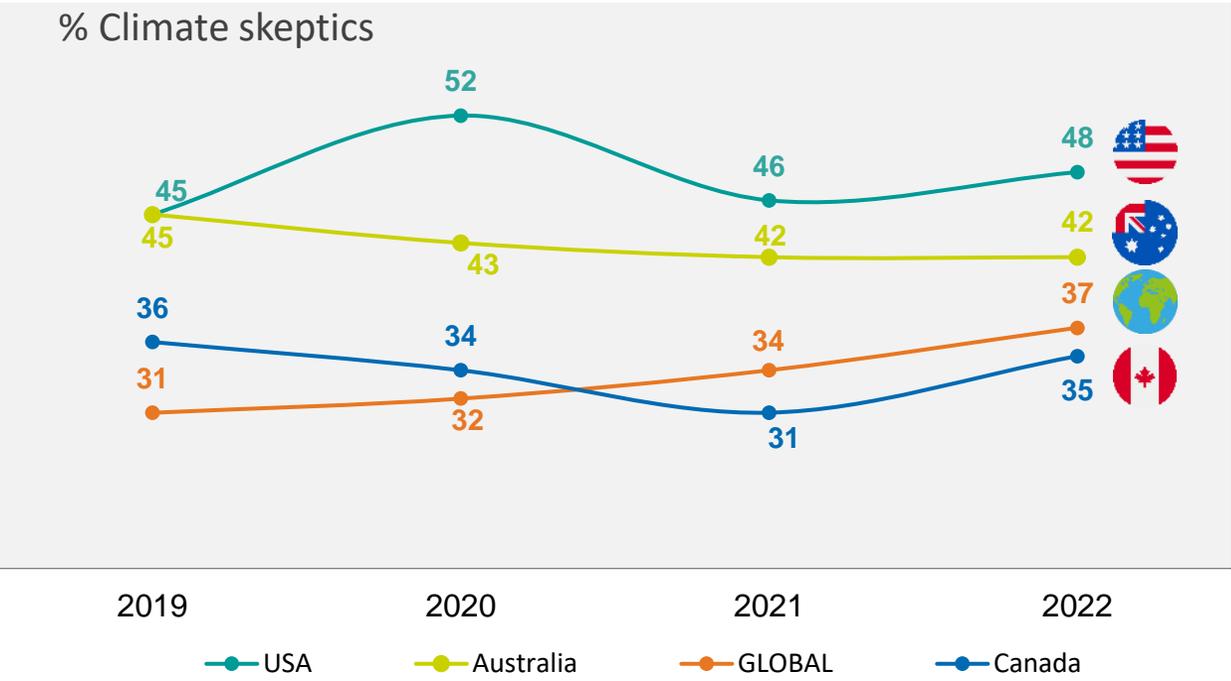
Climate-skepticism has grown consistently over the past three years: more respondents now envision a “natural” form of climate change rather than one linked to human activity.



Climate-skepticism is more established in the fossil-fuel-producing countries.



The USA, which has returned to its 2019 level of skepticism after the sharp rise at the end of the Trump presidency, still counts among the most climate-skeptical countries in the world. In Australia and Canada, countries that have suffered extreme events caused by climate change in recent years, awareness is progressing, but slowly:

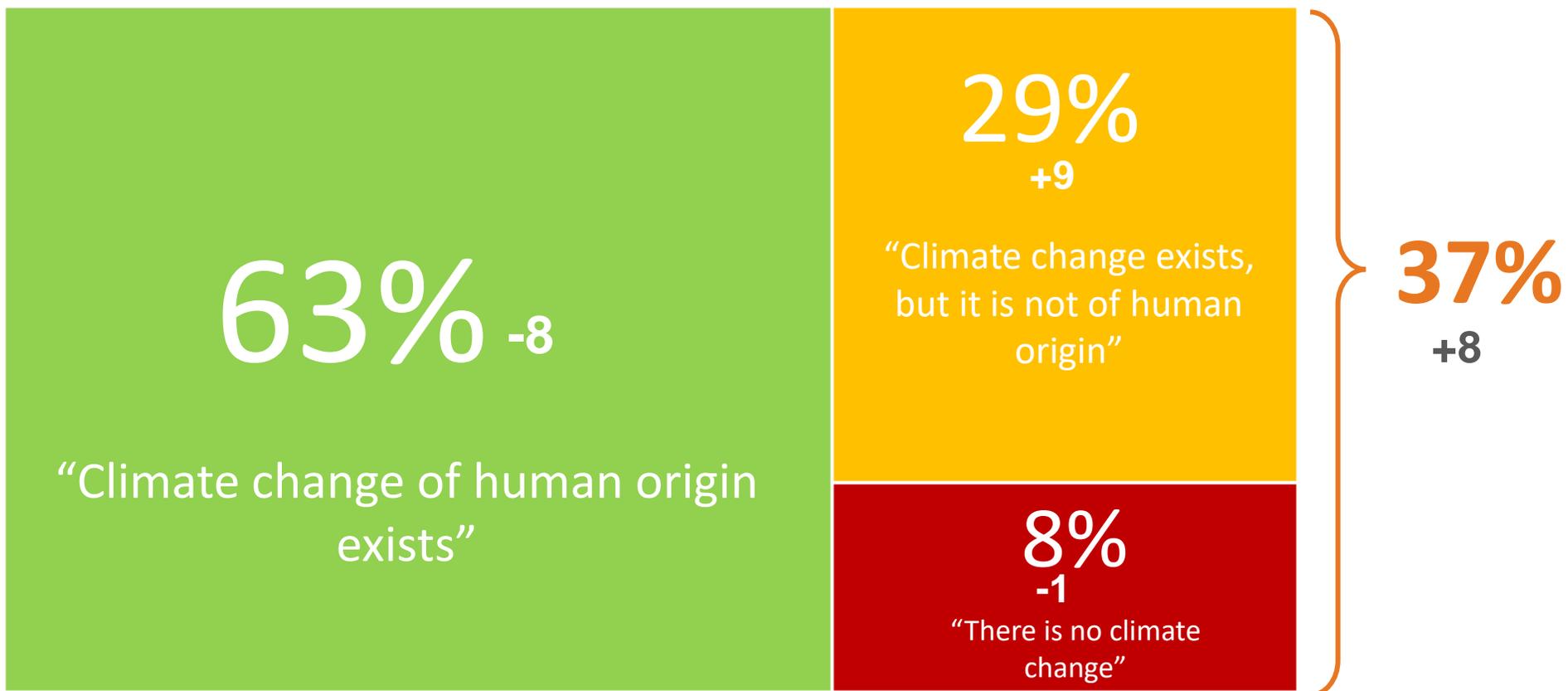


This observation is even more evident in France, where climate skepticism progressed to reach 8 points this year.



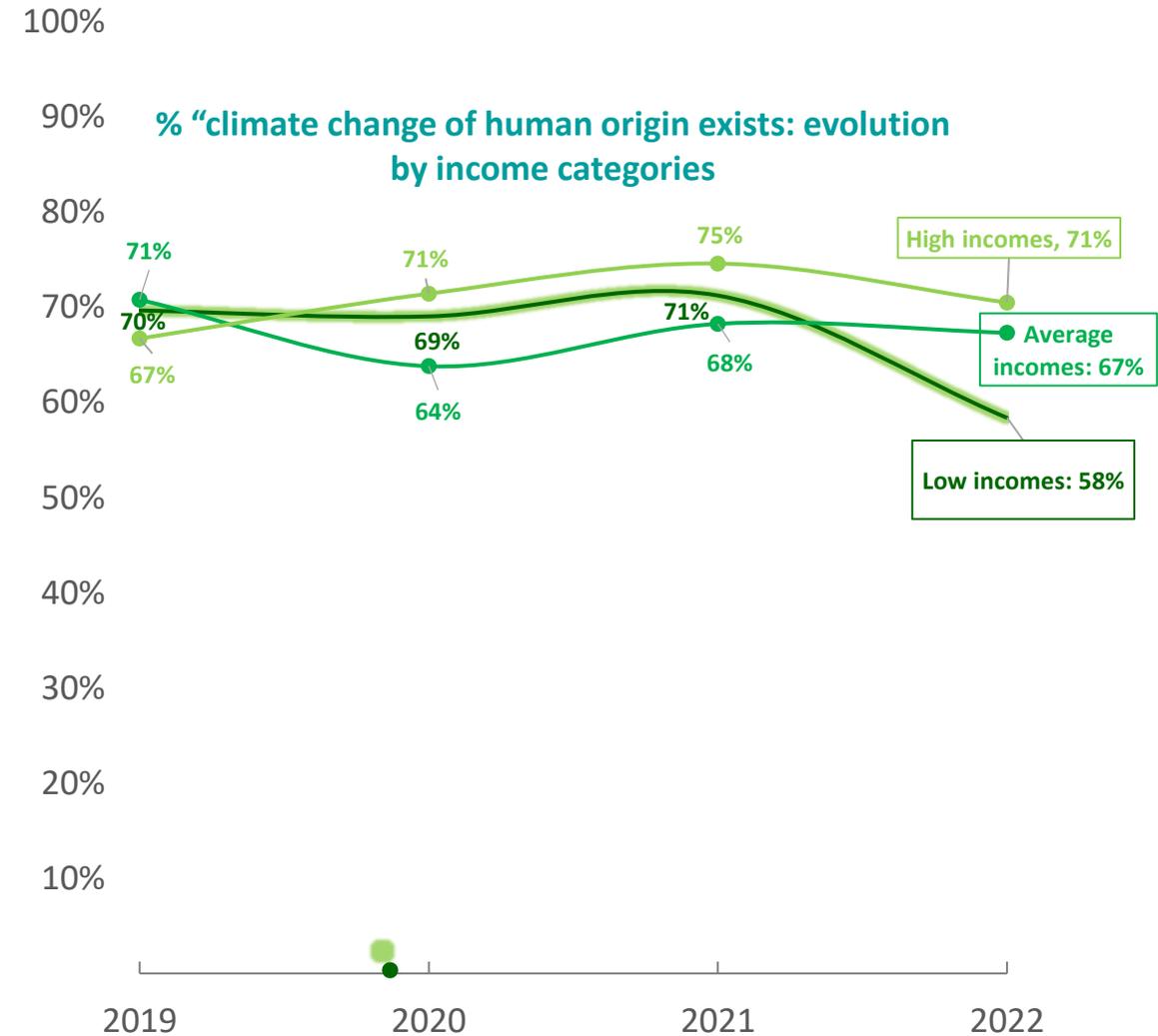
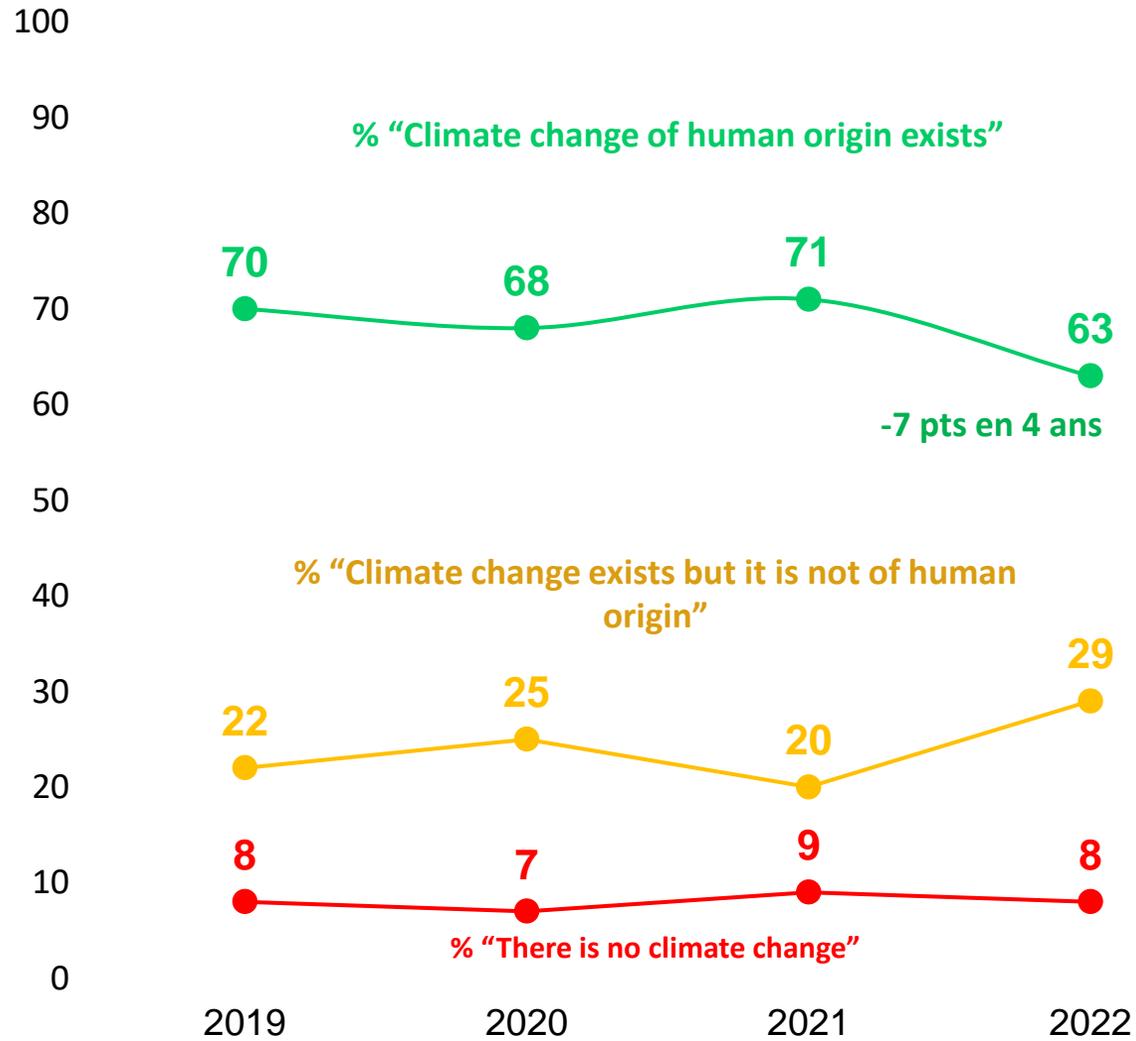
Q. Would you say that we are experiencing a change in climate?

Q. And concerning this climate change that we hear about, would you say that it is mainly due to human activity, that it is mainly due to a natural phenomenon, or that there is no way to know?



+/-: Change since the 2021 wave

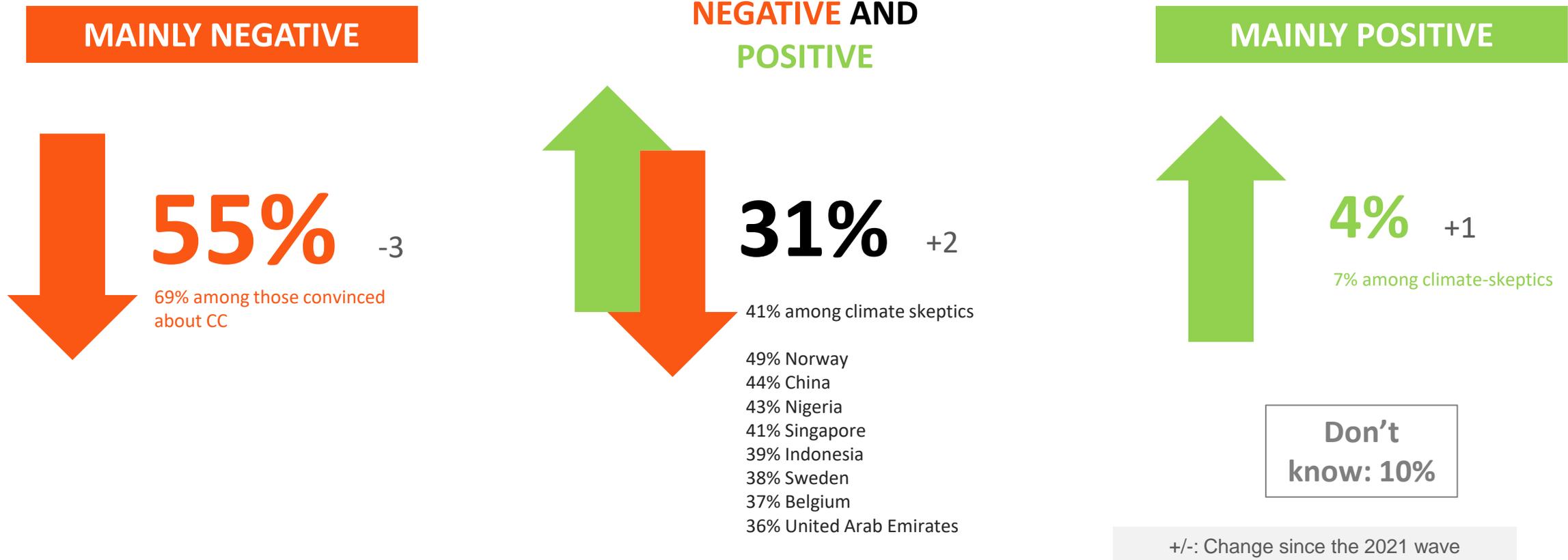
Quite a big decrease in belief in the human causes of climate change in France, more obvious among the working-class categories



The consequences of climate change are not just negative according to 35% of respondents (+10% no response)

Q. In your opinion, what consequences will climate change have where you live?

CONSEQUENCES THAT ARE:



TAKING ACTION ON CLIMATE CHANGE: WHO SHOULD ACT? AND TO DO WHAT?





Individuals are less certain of the need to act on an individual level and are leaving it up to government and private decision-makers, who they now judge less severely...

Citizens tend to think that their country will give priority the environment over economic growth

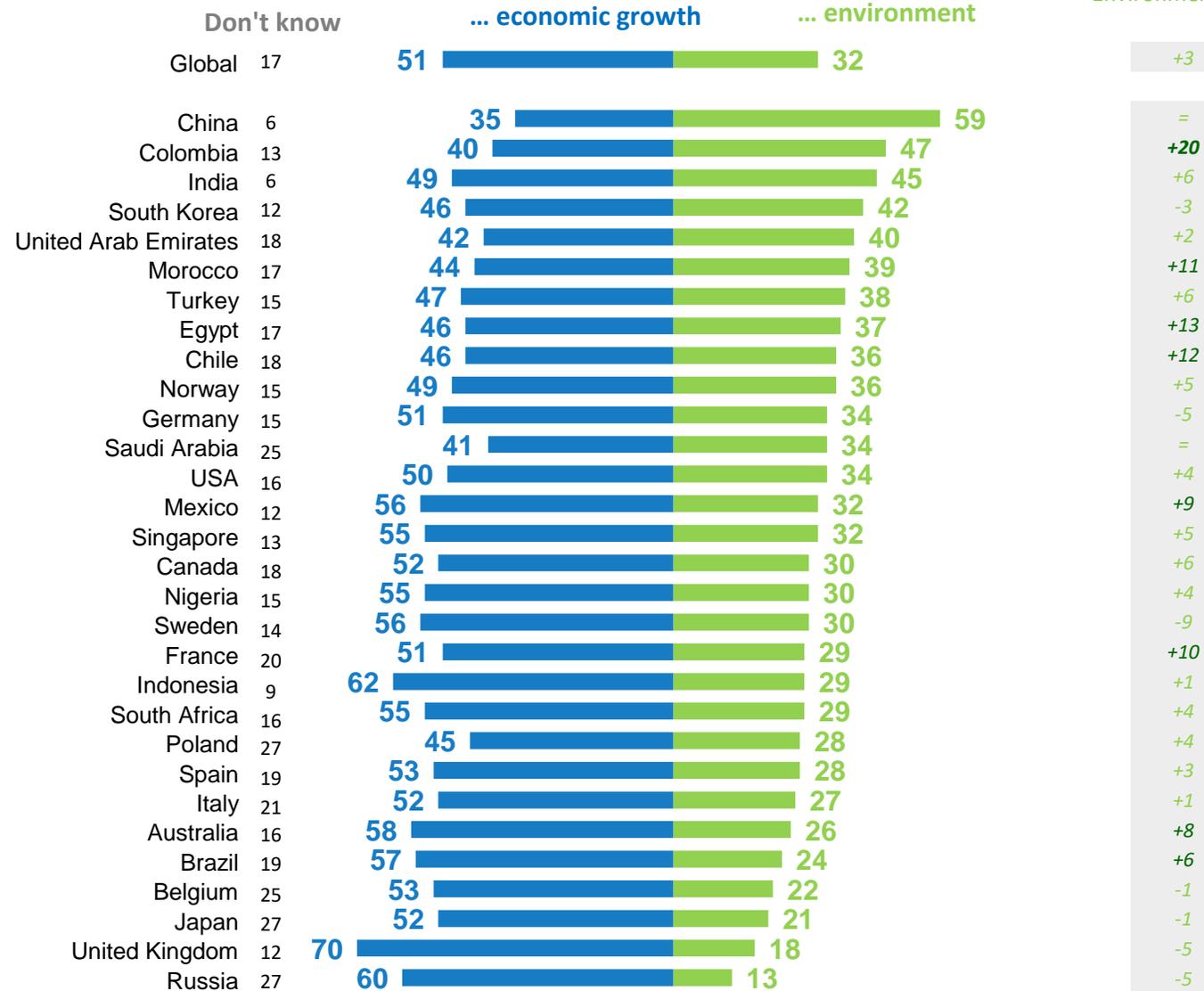
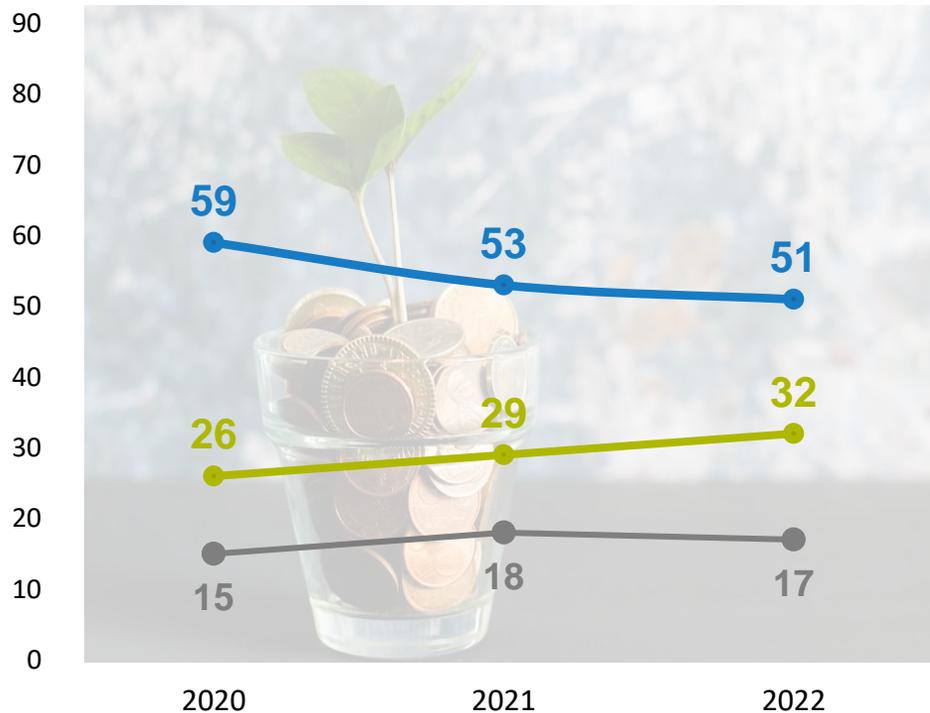


Evolution Environment

Q. And what do you think will happen over the next few months in your country? Priority will be given...

...to the **ENVIRONMENT** even if this causes economic growth to slow down in your country and cause job losses

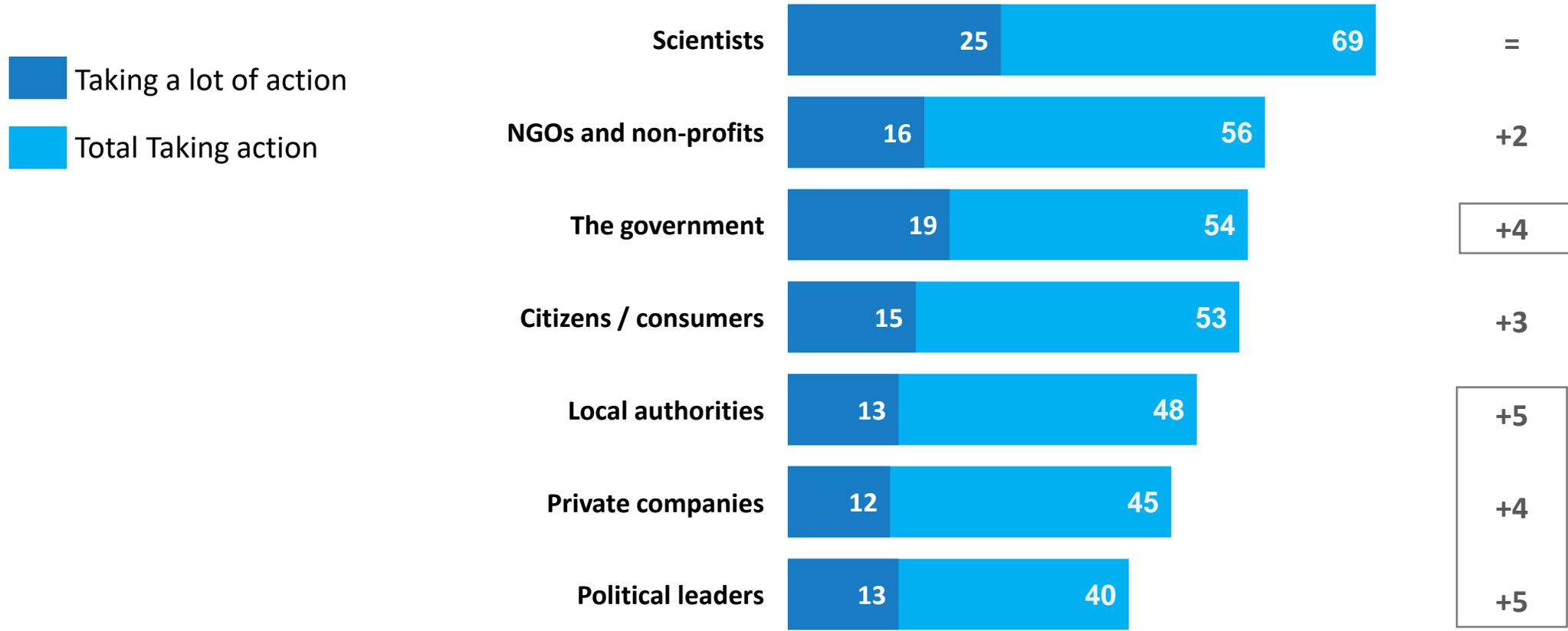
...to **ECONOMIC GROWTH** and jobs, even if it might have harmful consequences for the environment



Individuals tend to have the feeling that political and economic leaders are mobilizing to fight climate change, particularly local authorities.



Q. And for each of the following players, do you think that they are taking action to fight climate change in your country?

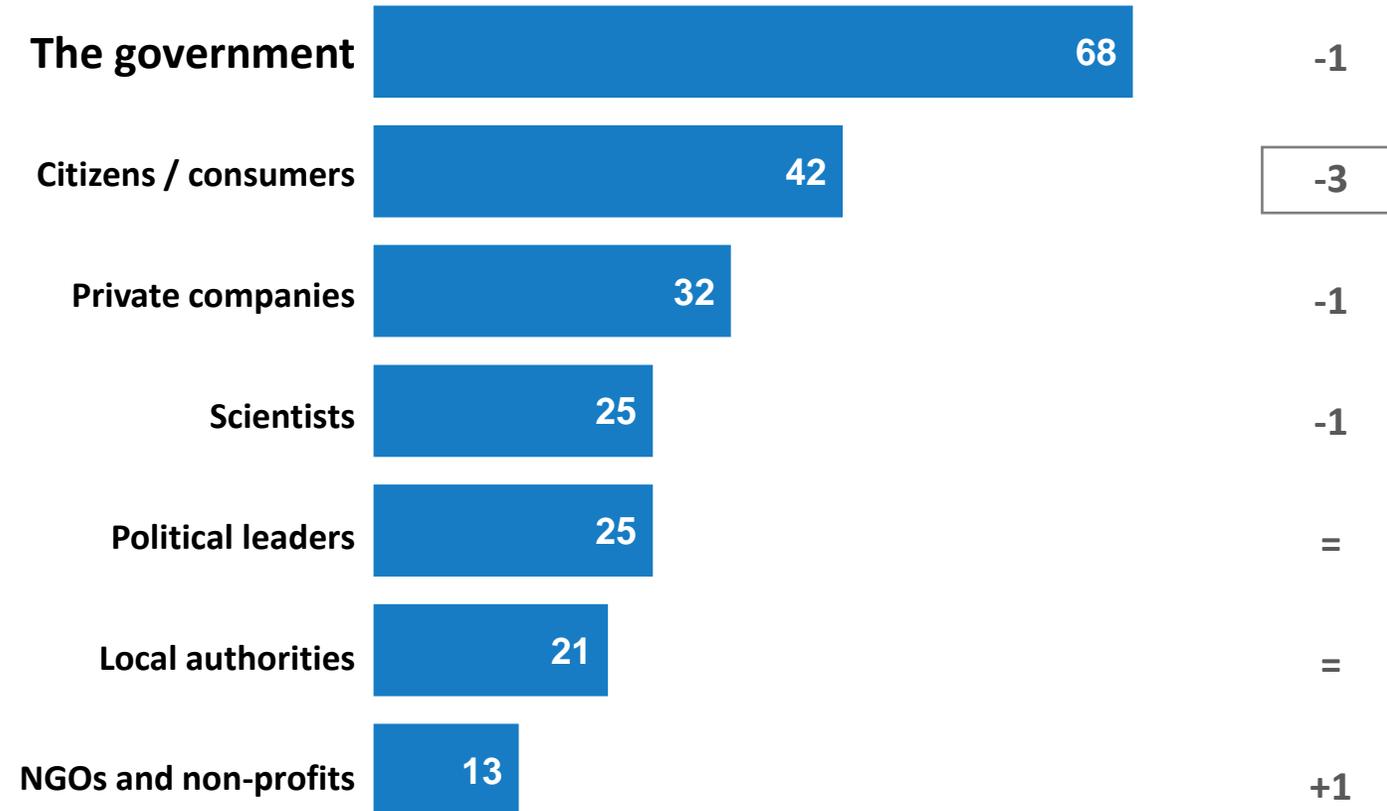


+/-: Change since the 2021 wave

Expectations of the various players are relatively stable: governments are still clearly at the top of the list. A slight drop can be seen however in the need to get involved on an individual level. A temporary reflection of the constraints on purchasing power?



Q. In your opinion, which entities in the following list need to take action first and foremost to fight climate change?

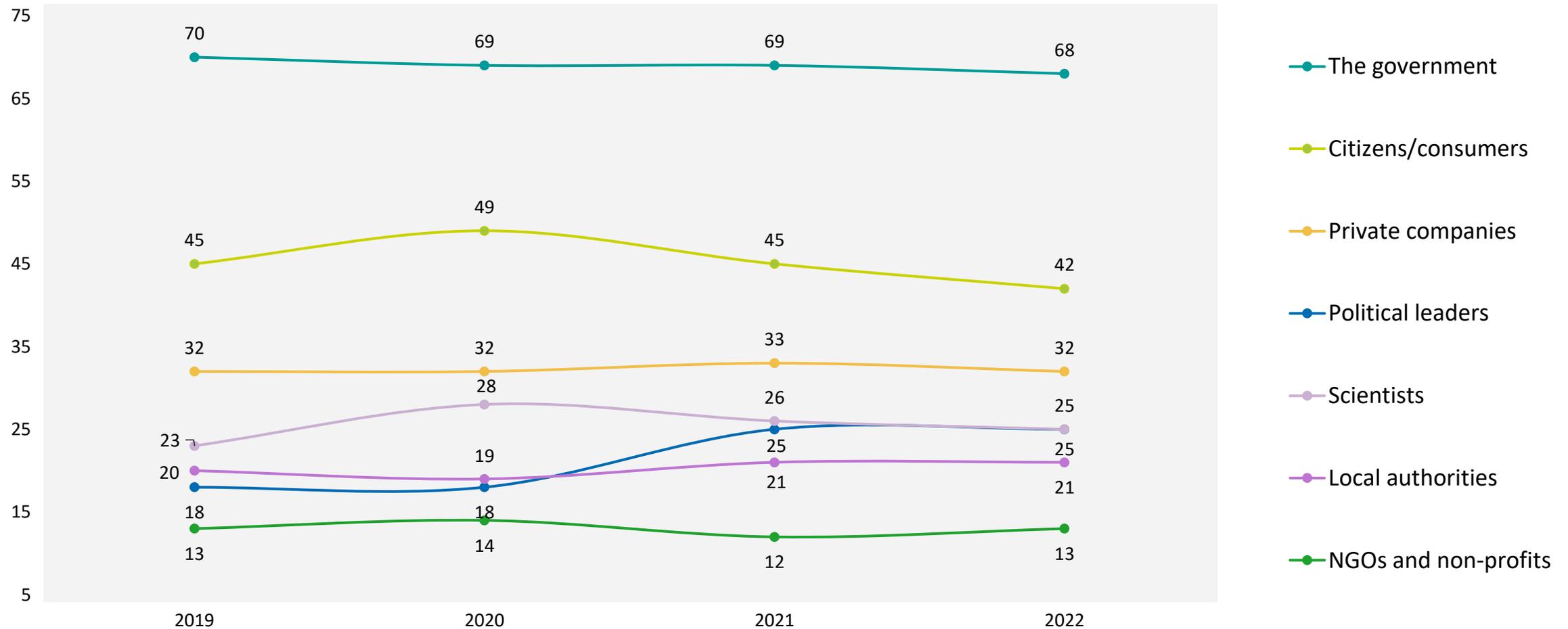


+/-: Change since the 2021 wave

Expectations of the various players have remained relatively stable: governments are still clearly at the top of the list. However, there has been a slight drop in the need to get involved as a citizen.



Q. In your opinion, which entities in the following list need to take action first and foremost to fight climate change?



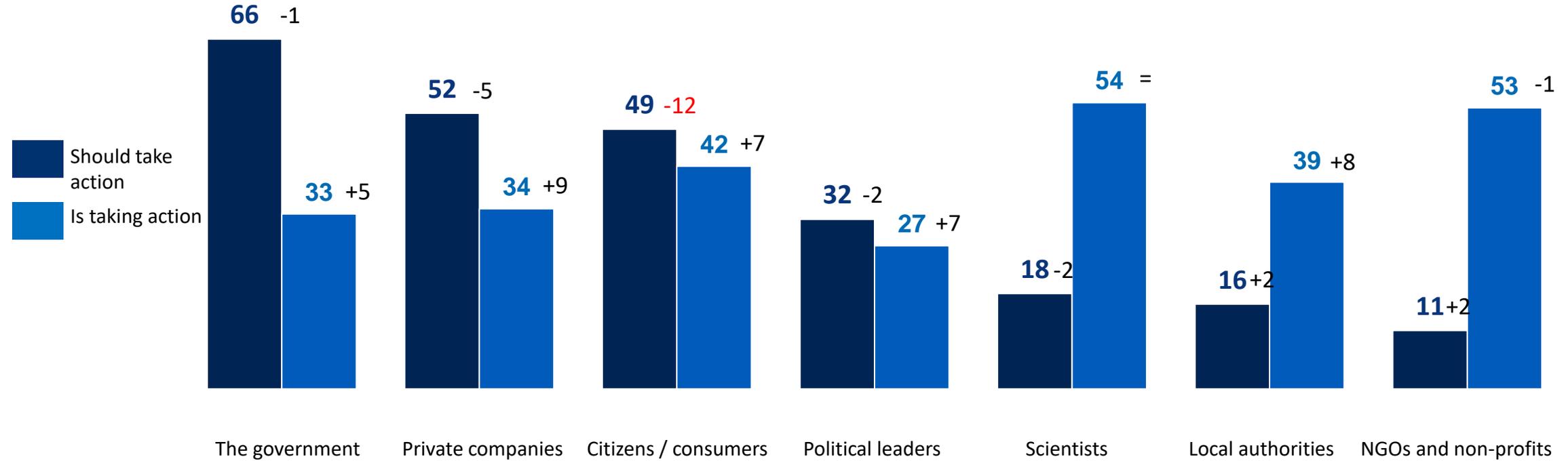
+/-: Change since the 2021 wave



In France, action taken by political institutions, private companies and individual citizens is recognized more this year. Expectations of companies and citizens have lowered but are still high.

Q. In your opinion, which entities in the following list need to take action first and foremost to fight climate change?

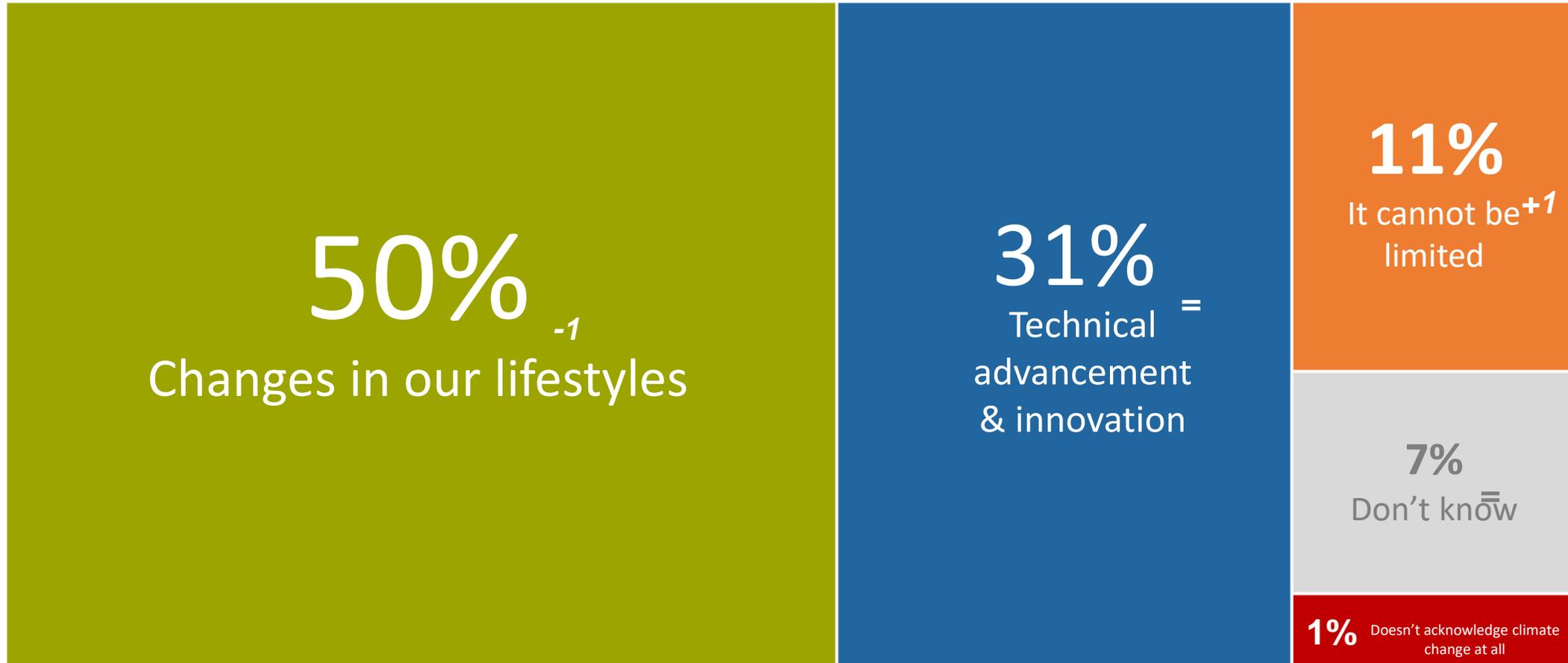
Q. And for each of those same players, do you think they are taking action to fight climate change in your country?



+/-: Change since the 2021 wave

In order to resolve the climate equation, one out of two inhabitants are convinced of the need to alter our lifestyles, a proportion that has not progressed and that has even tended to drop since 2019 (-3 pts).

Q. Which of these three opinions is closest to your own?



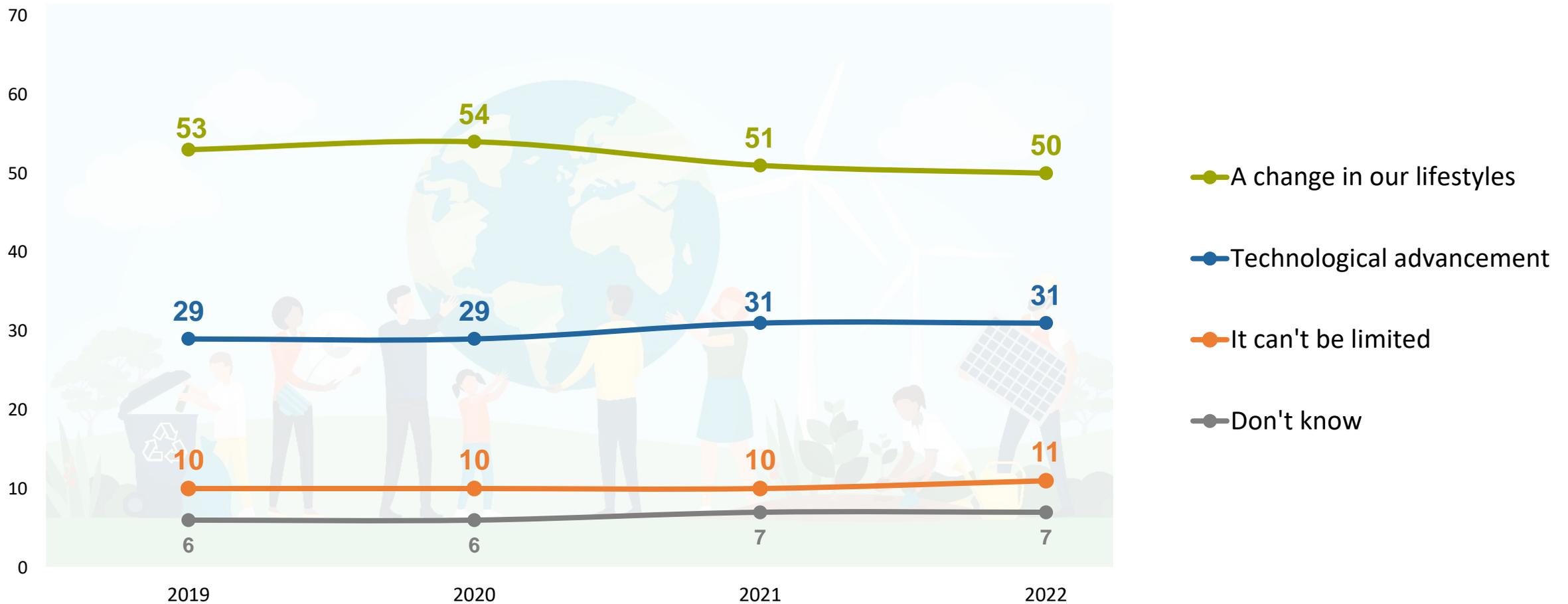
Reminder of the full wording of items:

- It is mainly through technological advancement and scientific innovation that we will find solutions to climate change
- It is mainly through major changes in our lifestyles that climate change will be limited
- There is nothing to be done, we can no longer limit climate change

+/-: Change since the 2021 wave

In the past 3 years, this opinion has tended to subside.

Q. Which of these three opinions is closest to your own with regard to fighting climate change?



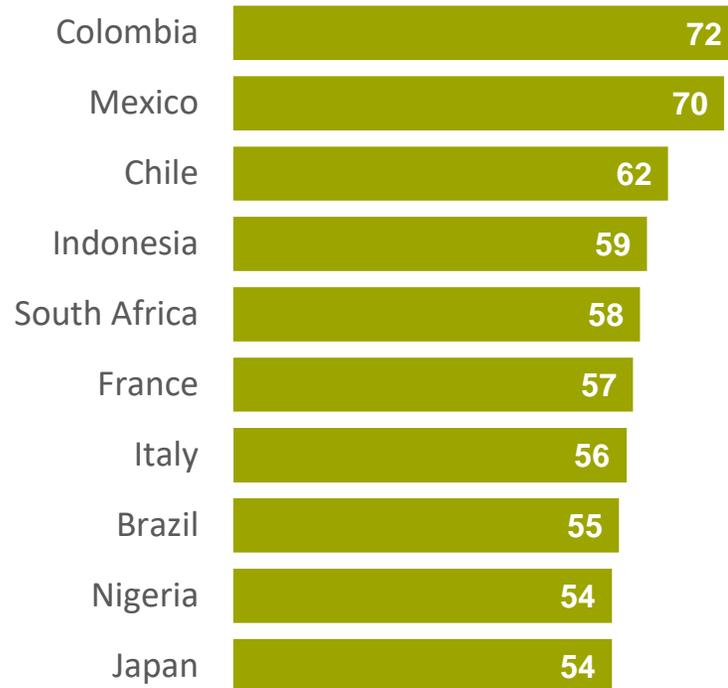
Reminder of the full wording of items:

- It is mainly through technological advancement and scientific innovation that we will find solutions to climate change
- It is mainly through major changes in our lifestyles that climate change will be limited
- There is nothing to be done, we can no longer limit climate change

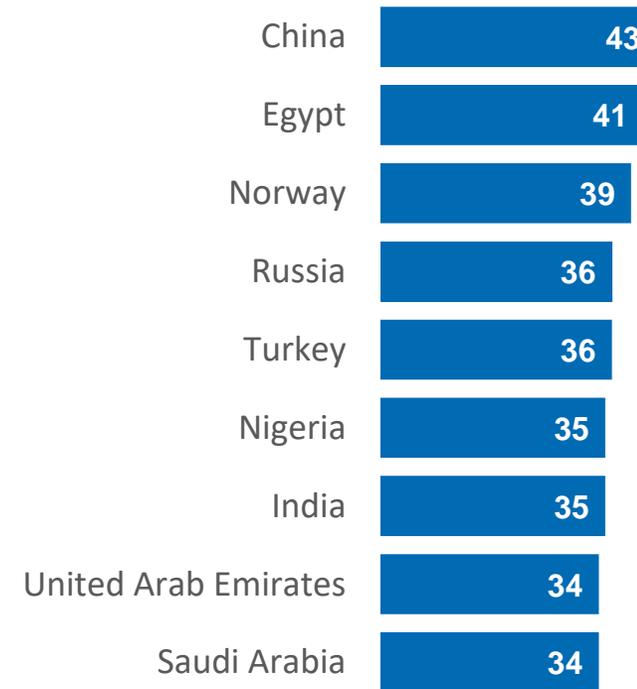
As was the case in 2021, it is in Latin America that the need to change life styles is the most widely recognized.

Q. Which of these three opinions is closest to your own?

Countries most likely to think that the solution will come through a change in life style



Countries most likely to think that the solution will come from technical advancement and innovation



Reminder of the full wording of items :

- It is mainly through technological advancement and scientific innovation that we will find solutions to climate change
- It is mainly through major changes in our lifestyles that climate change will be limited
- There is nothing to be done, we can no longer limit climate change

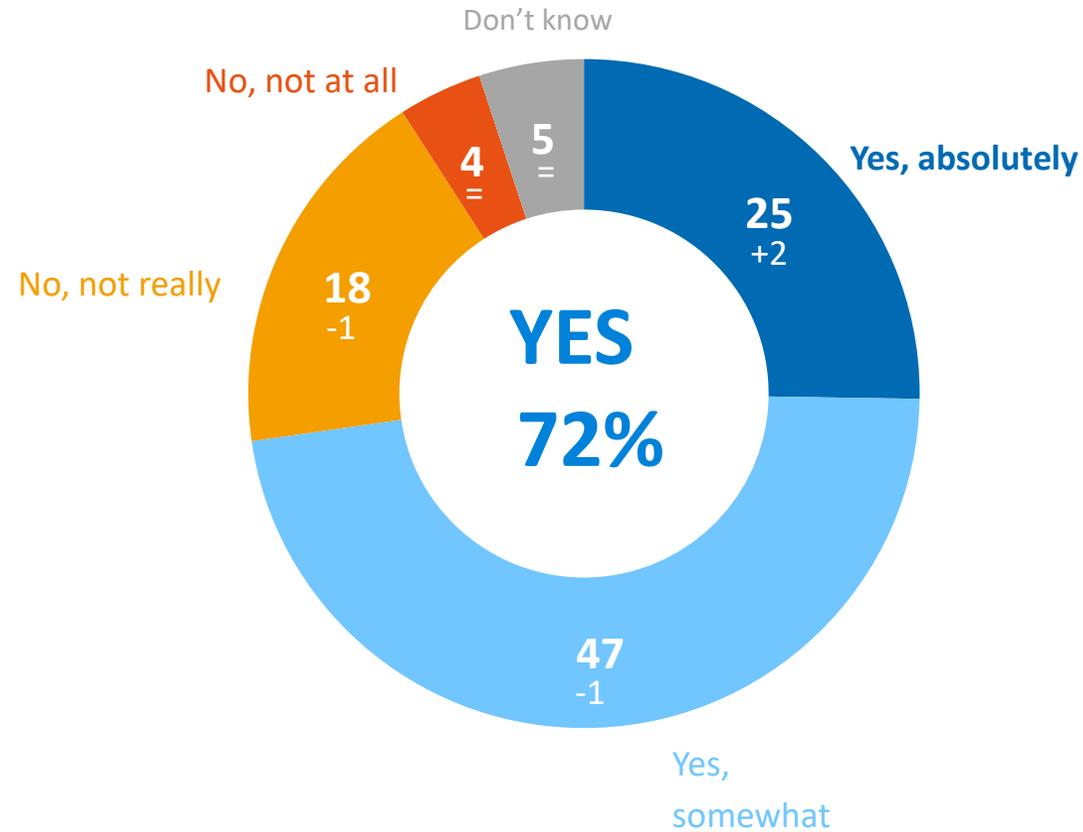


...but individuals are nevertheless taking action for the environment

The impression of being informed about what they can do on their own level is fairly high. Is that good or bad news?



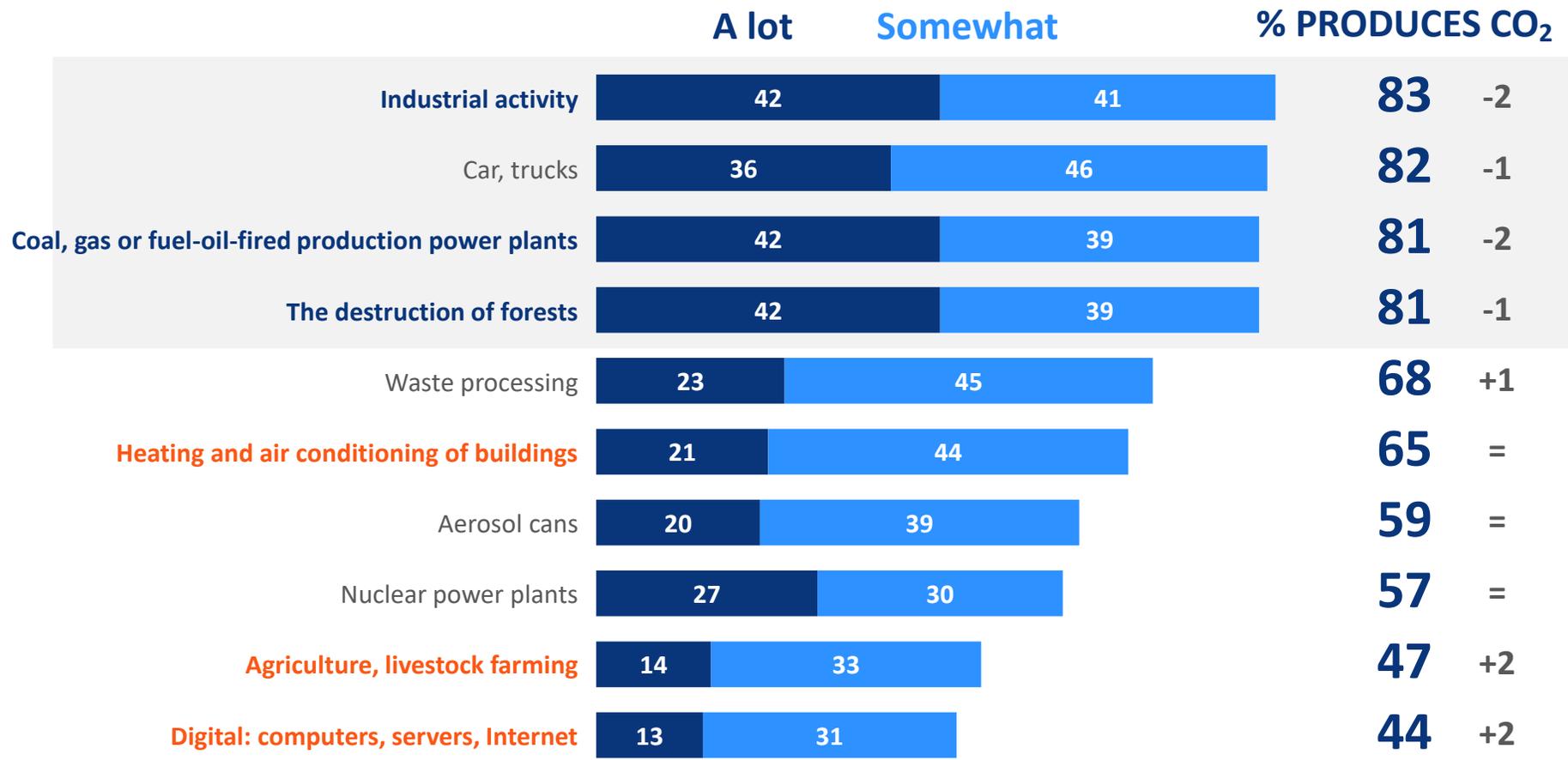
Q. Do you feel like you know what you can do on a personal level to fight climate change on a day-to-day level?



+/-: Change since the 2021 wave

With the exception of transports, the activities most associated with CO2 production are factors that consumers have no direct control over. Other sectors are under-estimated such as heating, agriculture and digital tech.

Q. For each of the following activities, tell me whether you think it produces a lot, quite a lot, not much, not much or no CO2, the greenhouse gas that causes climate change?



+/-: Change since the 2021 wave

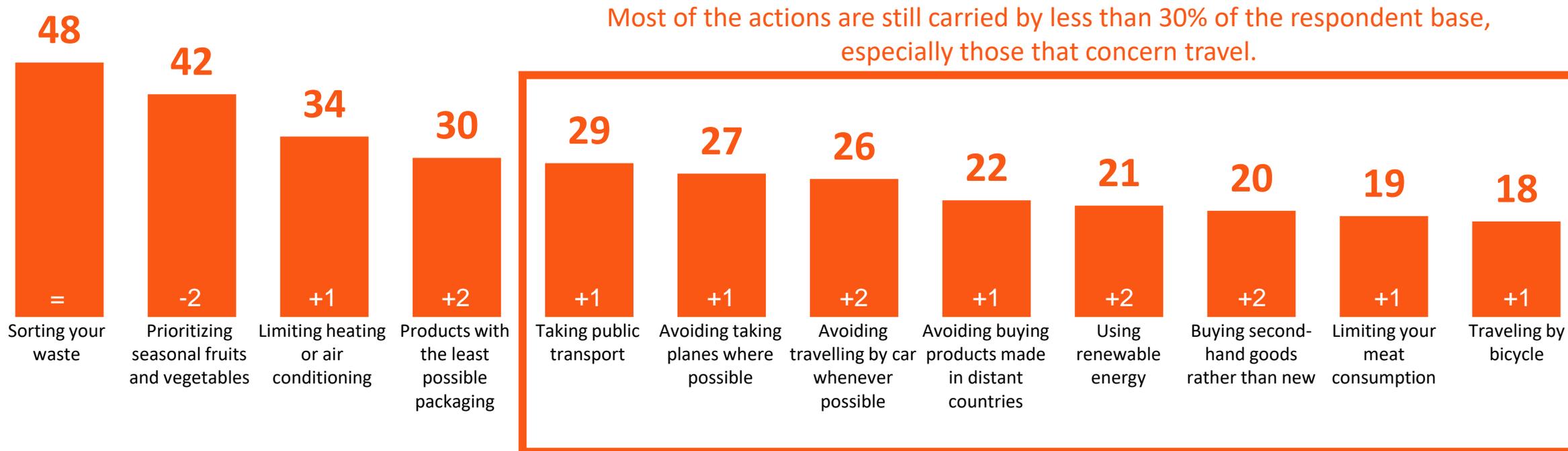
Most of the actions are carried out by one third of respondents. And that proportion has not changed much.



Q. Here are some individual actions that can help fight climate change. For each one, tell me if you do it systematically or almost:



% You do it systematically or almost



Among those who claim to know what to do individually to fight CC:

53	49	40	36	33	31	30	27	25	24	23	22
Difference c.f. overall population :											
+5	+7	+6	+6	+4	+4	+4	+5	+4	+4	+4	+4

+/-: Change since the 2021 wave



In four years, populations have changed their behaviors, particularly when it comes to use of individual transport.



Q. Here are some individual actions that can help fight climate change. For each one, tell me if: you do it systematically or almost:



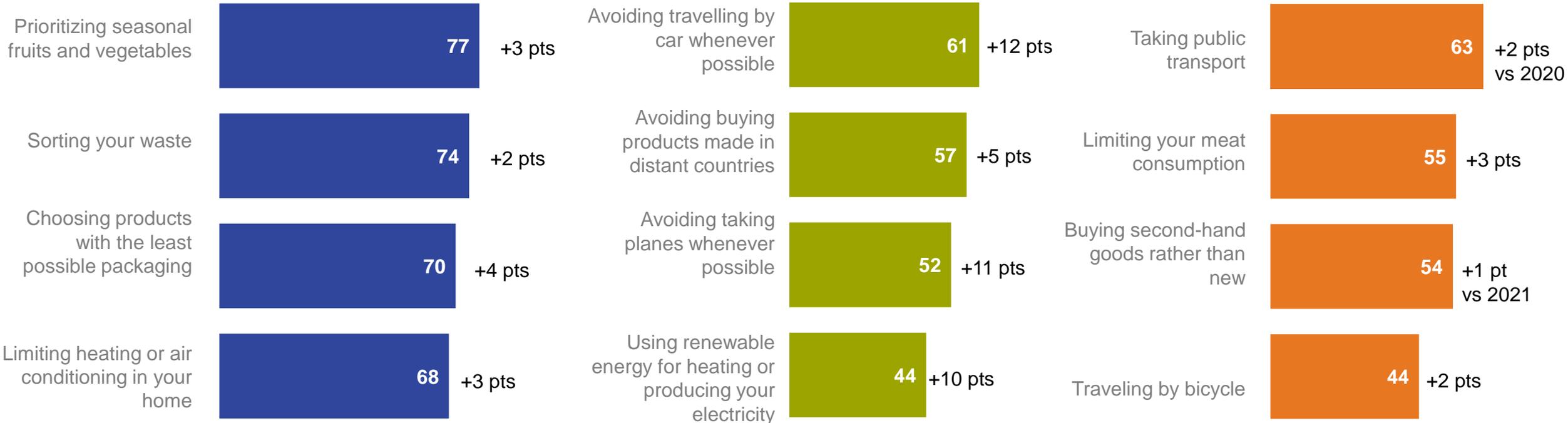
% You do this (systematically or almost + from time to time)

Changes in the past four years

Well established practices

Practices that are progressing

Practices that are stagnating



+/-: Change since the 2019 wave

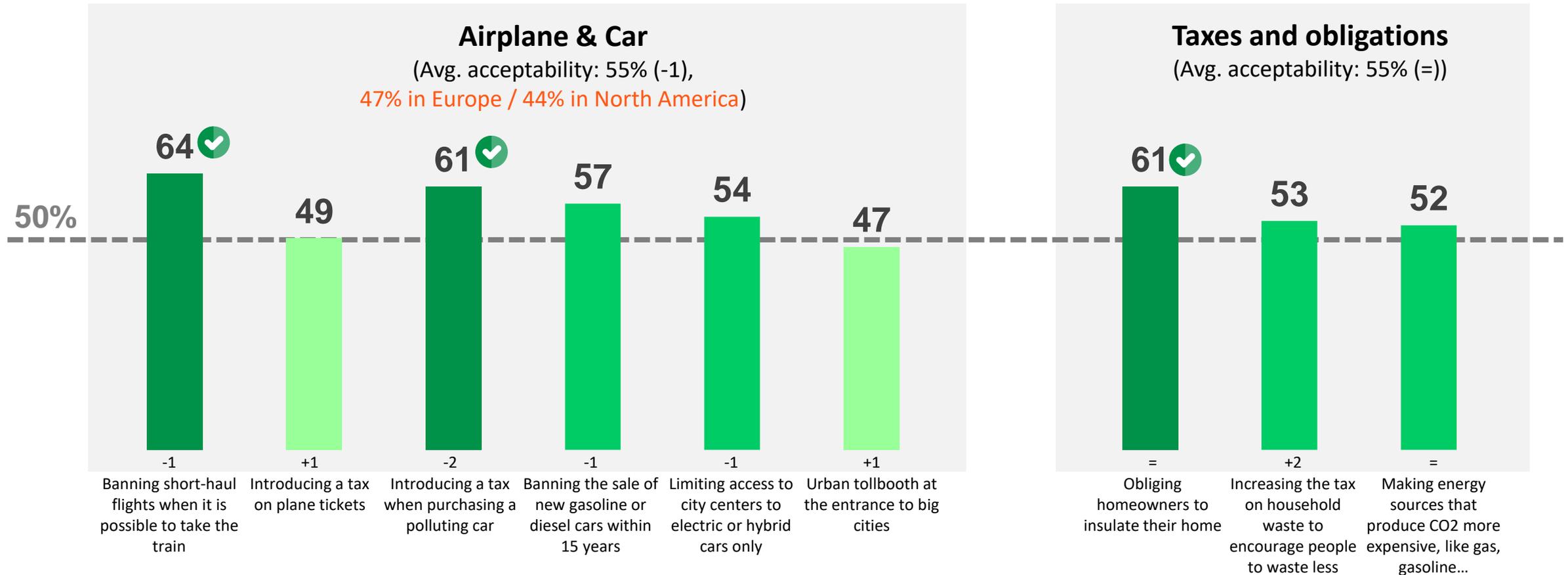


Constraints are still hard to accept



The level of acceptability of restrictive measures (incentives, bans or taxes) varies little, and is still lower in Europe and North America. Only three measures are accepted by six out of ten respondents.

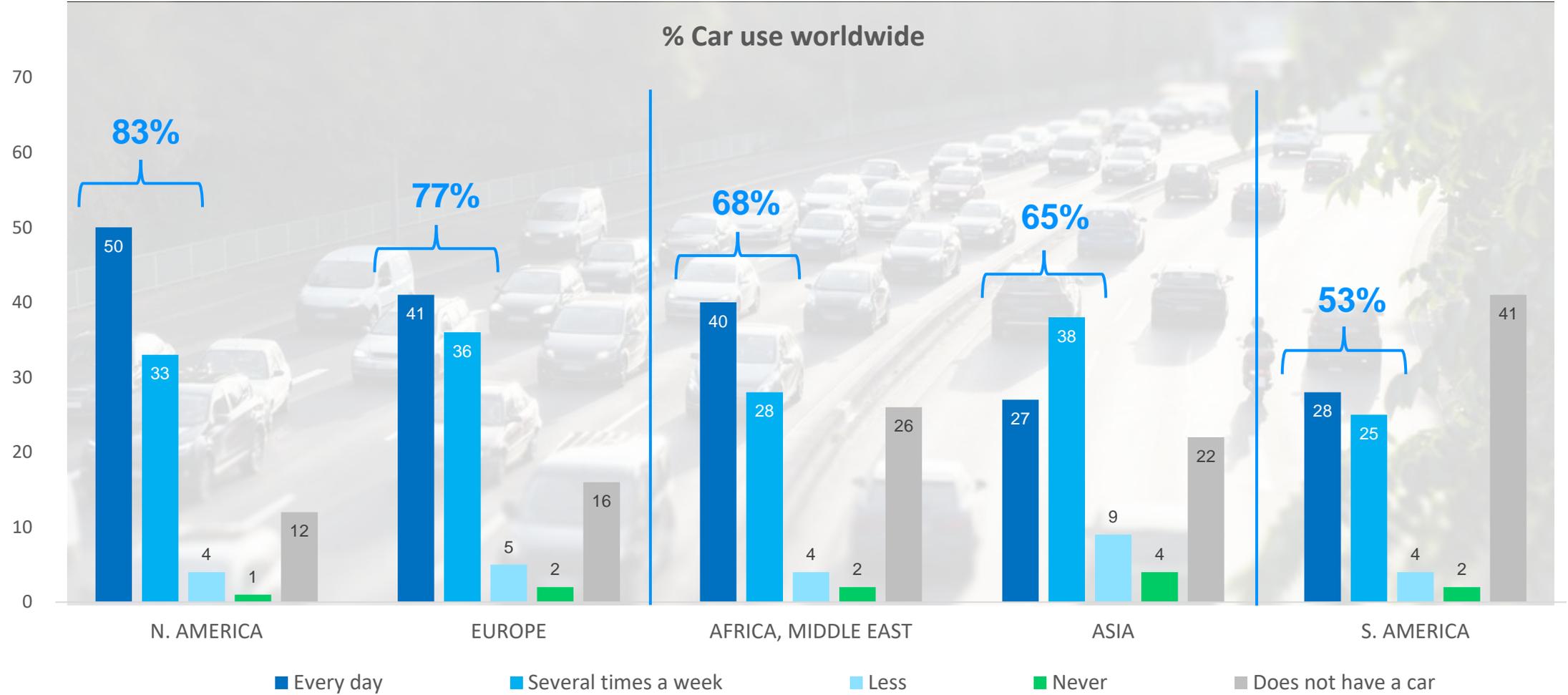
Q. Here are some measures that could be adopted in your country to reduce greenhouse gas emissions. For each one, tell me whether it seems to you to be: 'Acceptable' answers



The lower acceptability of measures impacting travel by car in Europe and North America is due to the higher rate of car use in these regions.



Q. On average, how often do you use your car?



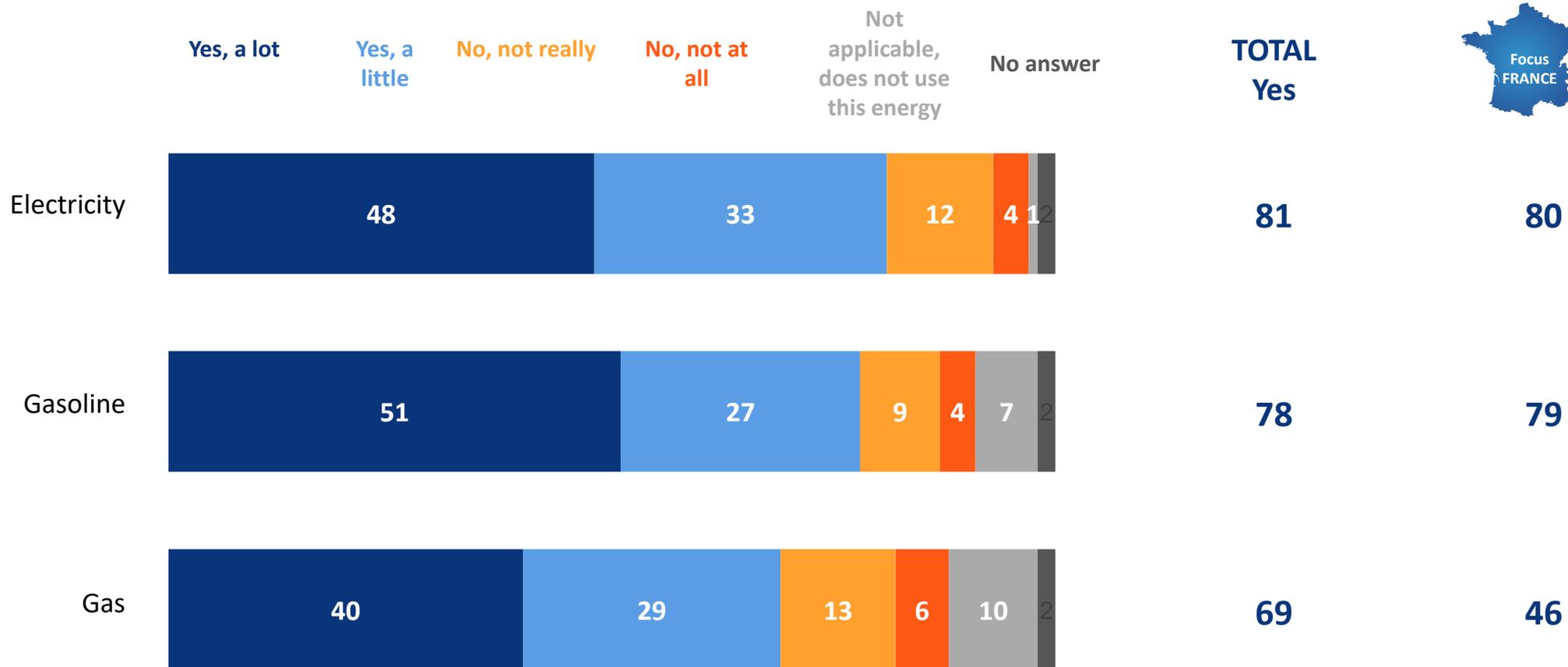
ELECTRICITY CONSUMPTION AND PRODUCTION



Six months after the start of the war in Ukraine and within a context of tension over energy supplies, the sudden rise in prices is seen as a great hardship.

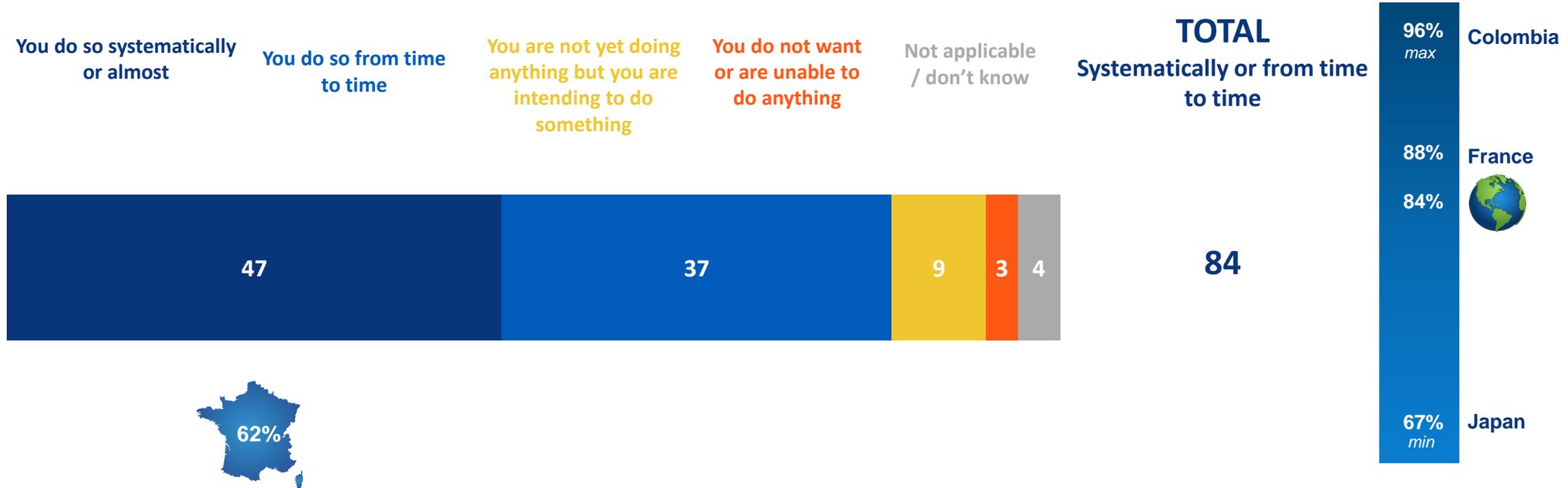


Q. In recent months, in your household, have you been affected by rising prices for each of the following energy sources?



Efforts to control energy consumption are very widespread: almost half of respondents claim to systematically make efforts...

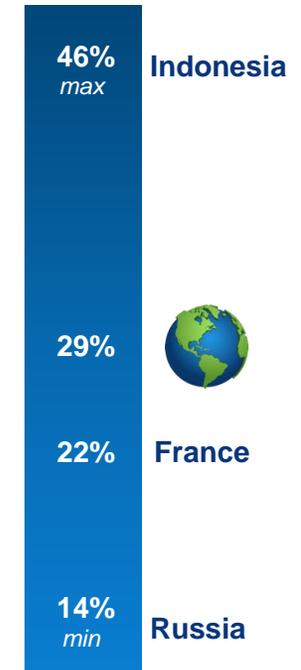
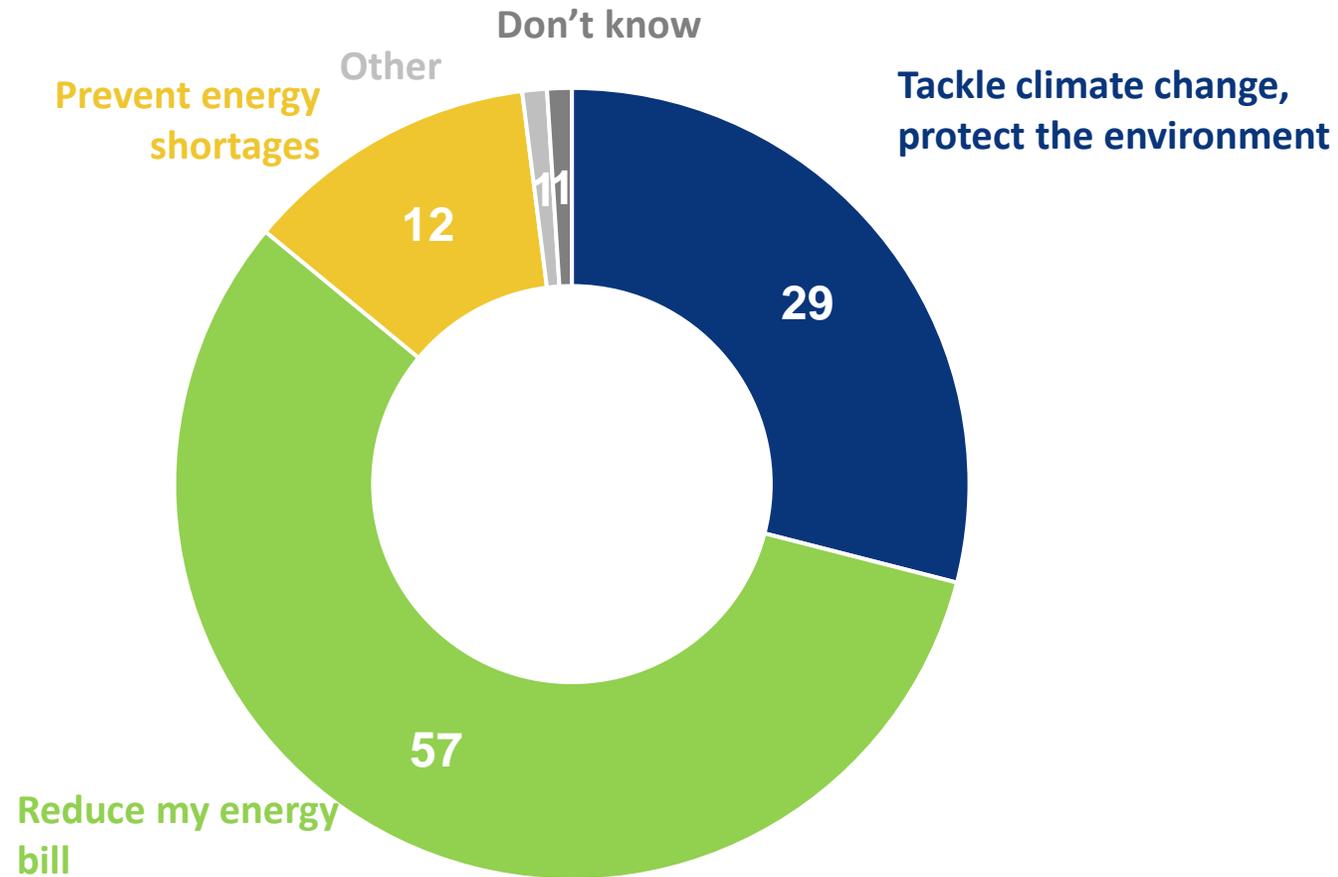
Q. Are you making efforts to control energy consumption in your home?



...but primarily for financial reasons.



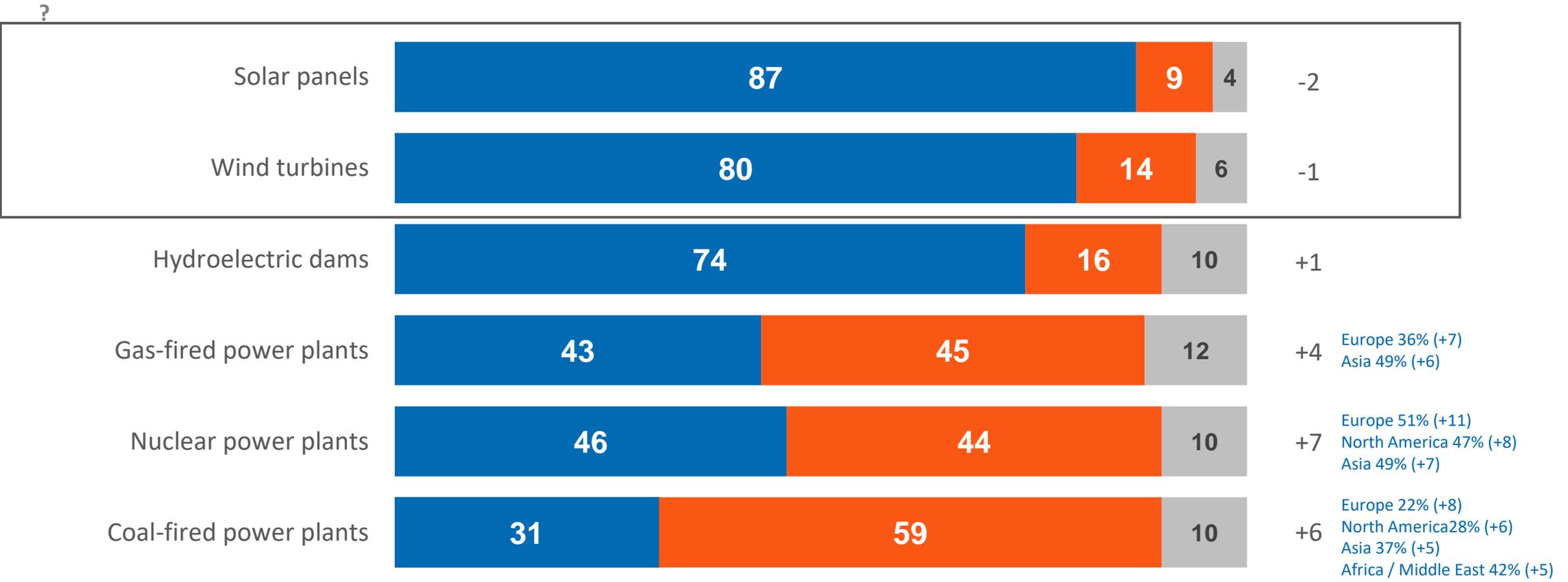
Q. What is the main reason for you making efforts or planning to make efforts to control energy consumption in your home?



Faced with the threat of an electricity shortage, the acceptability of “non-renewable” energies has progressed quite sharply, especially in Europe.



Q. To produce the electricity that you will need in the future in your country, are you in favor of or against each of the following production methods?



+/-: Change since the 2021 wave

■ In favor of ■ Against ■ Don't know

APPENDIX AND TECHNICAL SPECS



THANK YOU

Floor open for discussion...





Professional codes, quality certification and data protection

Ipsos is a member of the following French and European professional Market Research and Opinion bodies:

- **SYNTEC** (www.syntec-etudes.com), French Union of Market Research companies
- **ESOMAR** (www.esomar.org) the European Society for Opinion and Market Research

Ipsos France is consequently committed to applying **the ICC/ESOMAR code** for opinion and market research. This code of conduct defines the ethical rules for Market Research professionals and sets out the protection offered to participants.

Ipsos France complies with the applicable laws. Ipsos has appointed a Data Protection Officer and has implemented a compliance plan to GDPR (Règlement (UE) 2016/679). For more information about the Ipsos Data Protection & Privacy Policy relative to personal data : <https://www.ipsos.com/en/privacy-data-protection>

The retention period applicable to interviewees' personal data be as follows, unless otherwise agreed with the client :

- 12 months upon Ad Hoc Study completion
- 3 years upon each wave completion of a Continuous Study.



Ipsos France has received ISO 20252: 2012 certification by AFNOR CERTIFICATION

- This document was drawn up in accordance with these international Codes and Quality standards. The technical elements relative to the execution of the project are described in methodological approach or survey overview in the report.
- This project was carried out in accordance with these international Codes and Quality standards



Survey overview

CAWI survey – Online panel



SAMPLE

- **Target** : Male/female aged 18 y.o and older
- **Selection of the respondent** : participant selection using a quota method
- **Sample representativeness** : gender, age, occupation, region, city size



DATA COLLECTION

- **Fieldwork dates** : 30th August - 26th September
- **Sample achieved** : 24001 interviews
- **Data collection** : online
- Loyalty program with points- based award system for panelists
- Response quality control methods: monitoring of participants' response behaviour (identification of responses that are too quick or careless, e.g. ticked in a straight or zigzag line)
- Checking of IP and consistency of demographic data.



DATA PROCESSING

- Weighted sample
- Method used: Rim Weighting Method
- Weighting criteria: gender, age, region, occupation

RELIABILITY OF RESULTS :

Self completion online surveys IIS

To ensure the overall reliability of a survey, all possible error components must be taken into account. That is why Ipsos imposes strict controls and procedures at each stage of the survey process.

UPSTREAM OF THE DATA COLLECTION

- **Sample** : structure and representativeness
- **Questionnaire** : the questionnaire is worded by following an editing process with 12 compulsory standards. It is proofread and approved at a senior level and then sent to the client for final validation. The programming (or questionnaire script) **is tested by at least 2 people and validated.**
- **Data collection** : the interviewers are trained in survey techniques through a dedicated training module prior to any participation in a survey. In addition, they receive or attend a detailed briefing at the start of each survey.

DURING THE DATA COLLECTION

- **Sampling** : Ipsos imposes very strict operating rules for its selection frame in order to maximize the random nature of the sample selection : random selection from telephone listings, quota method, etc.

- **Fieldwork monitoring** : collection is monitored and checked (exclusive link, IP validation, panelists' behavior monitoring penetration, interview length, consistency of responses, participation rate, number of reminders, etc.)

DOWNSTREAM OF THE DATA COLLECTION

- The results are analyzed in accordance with the statistical analysis methods (confidence interval versus sample size, significance tests). The first results are systematically checked against the raw results from the data collection. The consistency of results is also checked (particularly the results observed versus comparison sources in our possession).
- In cases where sample weighting is used (margin calibration method), this is checked by the processing teams (DP) and then validated by the survey teams.

Survey overview

Organization (CAWI survey - Online panel)



ACTIVITIES CARRIED OUT OR COORDINATED BY IPSOS TEAMS IN FRANCE

- Design and methodology
- Conception and design of questionnaire/ validation of scripting
- Coordination and validation of translation
- Coordination of data collection
- Data processing
- Validation of the statistical analyses
- Creation of survey report
- Results presentation design
- Formatting of results
- Oral presentation Analyses and summary



ACTIVITIES CARRIED OUT BY IPSOS EXPERT LOCAL TEAMS

- Translation
- Scripting
- Sampling (IIS panel)
- Emailing
- Data collection
- Data Map

RESEARCH MATERIALS



The survey



Adobe Acrobat
Document

Contacts



Guillaume Petit
Service Line Leader - Corporate Reputation
Guillaume.petit@ipsos.com

Estelle CHANDEZE
Service Line Leader - Corporate Reputation
Estelle.chandeze@ipsos.com

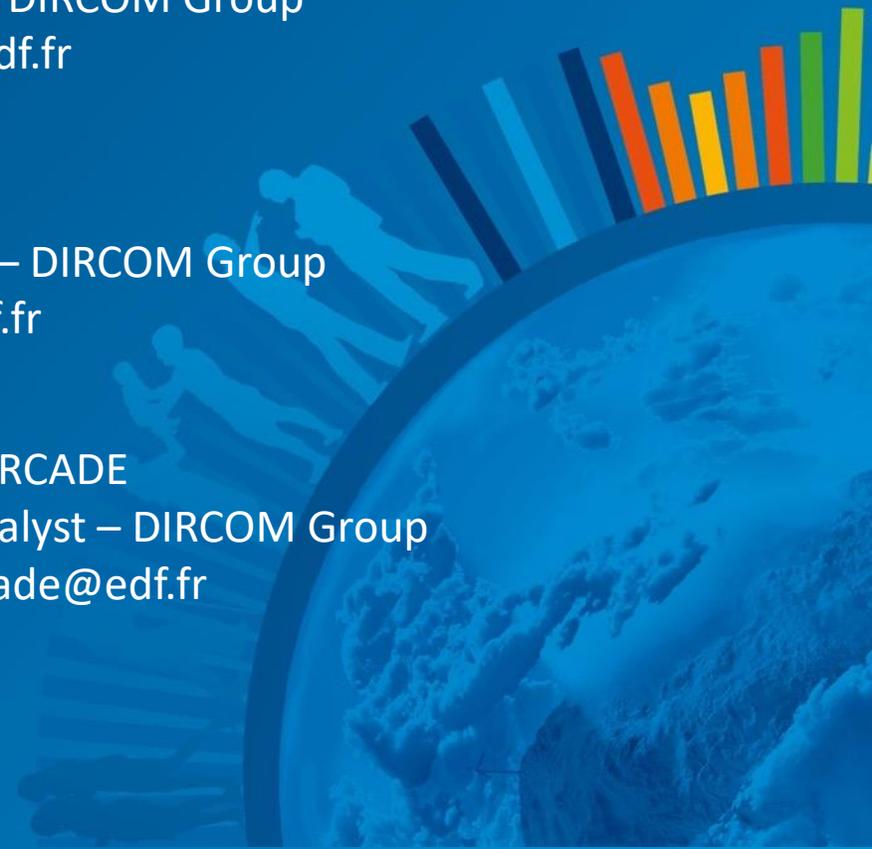
Margaux Schmitt
Senior Research Executive - Corporate Reputation
Margaux.schmitt@ipsos.com



Didier WITKOWSKI
Research Director – DIRCOM Group
didier.witkowski@edf.fr

Arnaud TAGGER
Research Manager – DIRCOM Group
arnaud.tagger@edf.fr

Anne-Cécile LAFOURCADE
Research Senior Analyst – DIRCOM Group
anne-cecile.lafourcade@edf.fr



ABOUT IPSOS

Ipsos is the world's third largest market research company, present in 90 markets and employing more than 18,000 people.

Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. We serve more than 5000 clients across the world with 75 business solutions.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 Indiac and is eligible for the Deferred Settlement Service (SRD).

ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP
www.ipsos.com

GAME CHANGERS

In our world of rapid change, the need of reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth:
You act better when you are sure.