



Obs'COP 2023

World opinion in the face of climate change

FULL RESULTS OF THE
"OBSERVATOIRE INTERNATIONAL
CLIMAT ET OPINIONS PUBLIQUES"

Obs'COP 2023

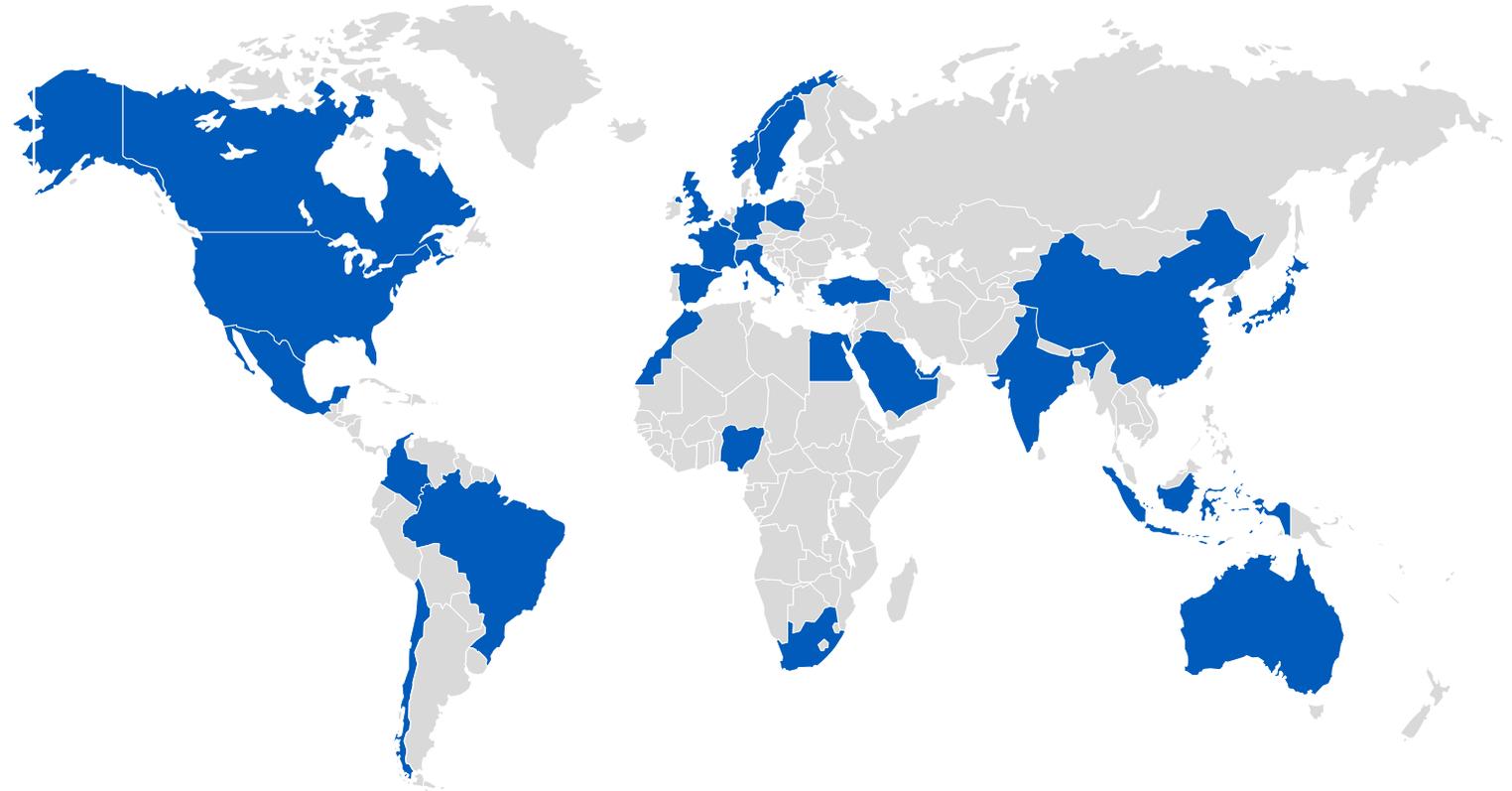
L'OBSERVATOIRE INTERNATIONAL
CLIMAT ET OPINIONS PUBLIQUES



29 countries questioned on 5 continents, representing 2/3 of the world's population

Selection of countries based on their CO2 emissions, their geographic location or their 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



23,433 individuals representative of the population aged 16 and over in each of the countries (quota method)



Fieldwork conducted by Ipsos **online** from **August 16 through October 2, 2023**

*This document presents all the questions asked and proposes an interpretation of the findings in the **29 countries**.*

Note that Russia was removed from the research scope for the 2023 wave, however, evolutions are presented in comparison to the entire scope of the 2022 wave (vs. 30 countries).

*All the findings are presented in **Base All Countries**.*

The GermanWatch© CRI index

Note on this index used as a contextual variable in analyzing certain questions in the survey

Extract from: **2021 International Climate Risk Index - Who suffers most from extreme weather events?** <https://germanwatch.org>

Germanwatch's CRI (**International Climate Risk Index**) is an analysis based on a series of the most reliable data on the impact of extreme weather condition¹ and the socio-economic data² associated with them. The 2021 CRI, conducted by Germanwatch, is the 16th edition of this annual analysis.

[...]

However, this index should not be confused with an exhaustive system for rating vulnerability³ to climate changes. It represents an important piece in the major-impacts puzzle relating to the climate and associated vulnerabilities, but for example does not take into account certain important aspects such as sea level, glacier melting or the acidification and warming of the oceans. It is established through data obtained from the past and should not be used for a linear forecast of future impacts linked to climate changes.

[...]

The CRI indicates the level of exposure and vulnerability to extreme phenomena. It is designed to be understood by States as a warning, with the goal of preparing for more frequent and/or more severe events in the future. The fact that a country is not mentioned in the CRI does not mean that it is not suffering impacts. The limits of the available data, in particular comparative data over the long term including socio-economic factors, do not allow for an analysis of all States, particularly certain island nations. Moreover, the data only reflect the direct impact (direct human and material losses) of extreme weather events, whereas a heatwave for example, a frequent phenomenon in African countries, often has a much bigger indirect impact (followed by a drought and a food shortage for example). Lastly, the CRI does not include the total number of people affected (in addition to deaths), due to the difficulty in comparing this type of data”.

¹ MunichRe NatCatService

² International Monetary Fund

³ We define vulnerability according to the IPCC definition (2014) as: “the propensity or predisposition to be adversely affected. Vulnerability encompasses a variety of concepts and elements including sensitivity or susceptibility to harm and lack of capacity to cope and adapt”.

The environment, climate change... What place does it have among other priorities?





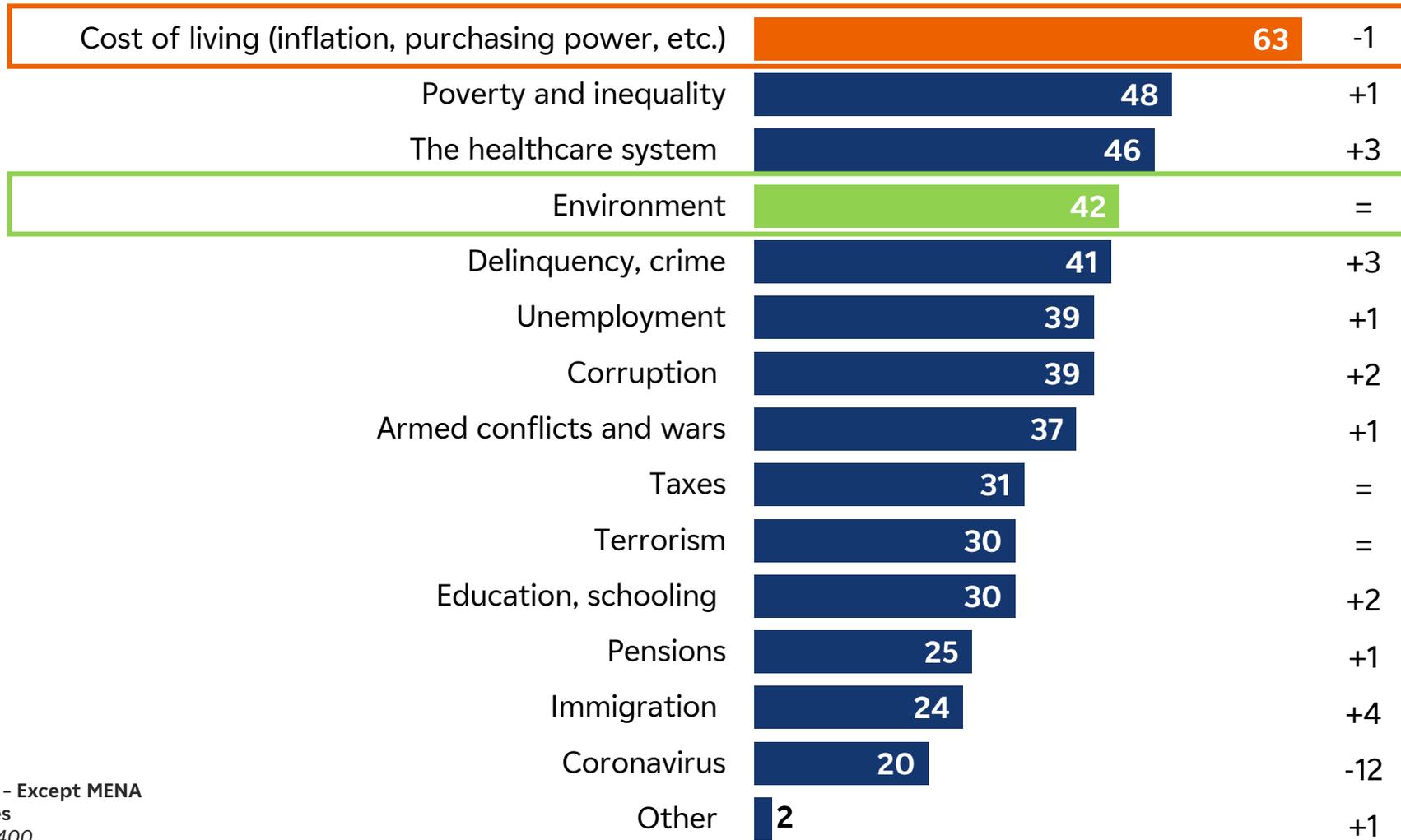
Is the environment holding up in relation to citizens' other concerns?



Place of the environment among citizens' concerns

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

In %



++ Countries with the highest results

- Canada **79%** +3 pts
- Australia **76%** -1 pt
- Singapore **74%** =
- United Kingdom **73%** -4
- France **72%** +4 pts
- Turkey **71%** +4 pts
- South Africa **70%** =
- Spain **70%** +1 pt
- USA **70%** +4 pts

This year the results for this question are not presented for Morocco, Egypt, the United Arab Emirates and Saudi Arabia since these countries were not exposed to the same list of items

+/-: Evolution since the 2022 wave

Evolution of the top 8 priorities: inflation is setting in, the coronavirus is disappearing, the environment is resisting

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

In %

70

60

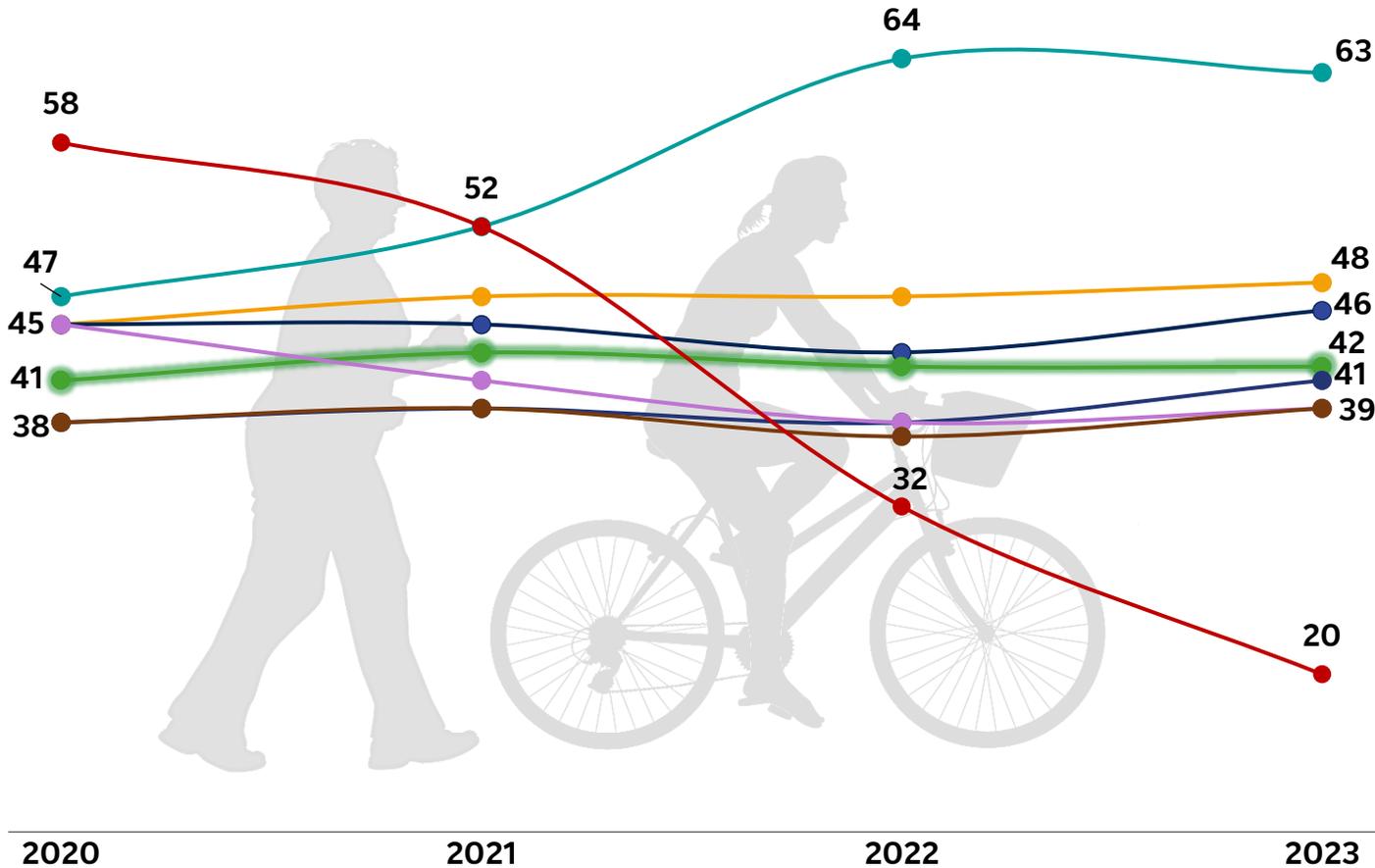
50

40

30

20

10



- Cost of living (inflation, purchasing power, etc.)
- Poverty and inequality
- The healthcare system
- Environment
- Delinquency, crime
- Unemployment
- Corruption
- Coronavirus

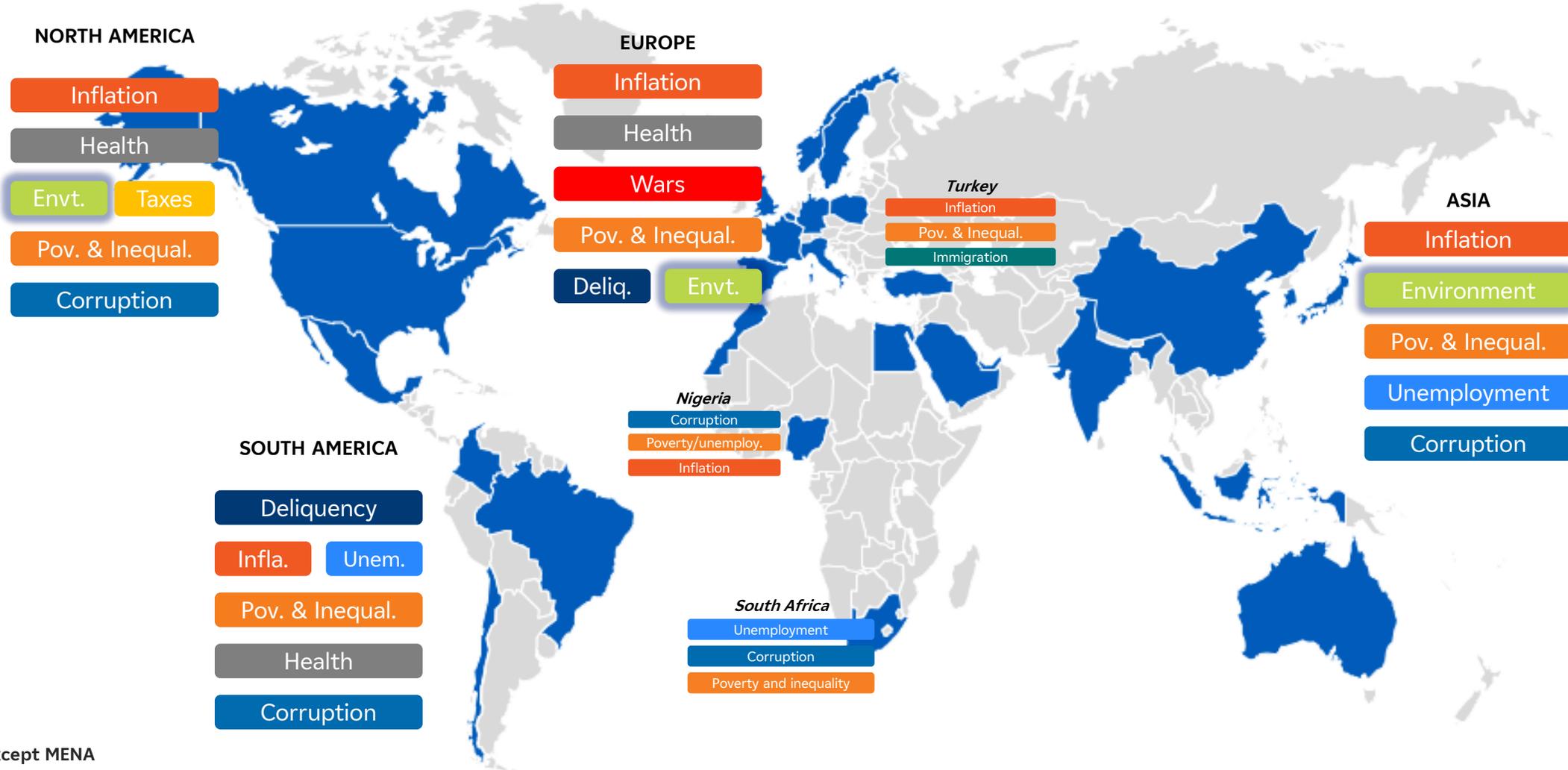
Evolution
In 3 years

- +16
- +3
- +1
- +1
- +3
- 6
- +1
- 38

This year the results for this question are not presented for Morocco, Egypt, the United Arab Emirates and Saudi Arabia since these countries were not exposed to the same list of items

While inflation is the dominant concern on all continents, the priorities diverge after that

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

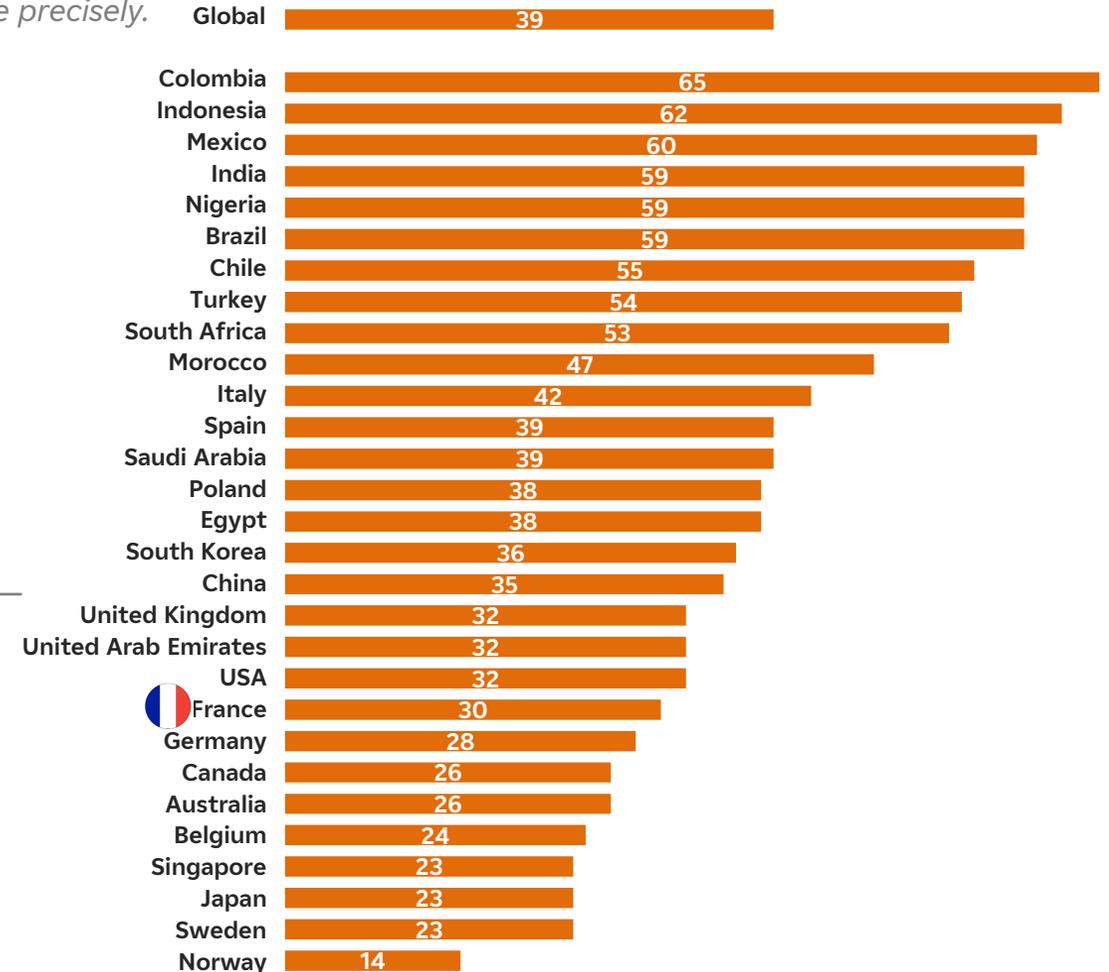
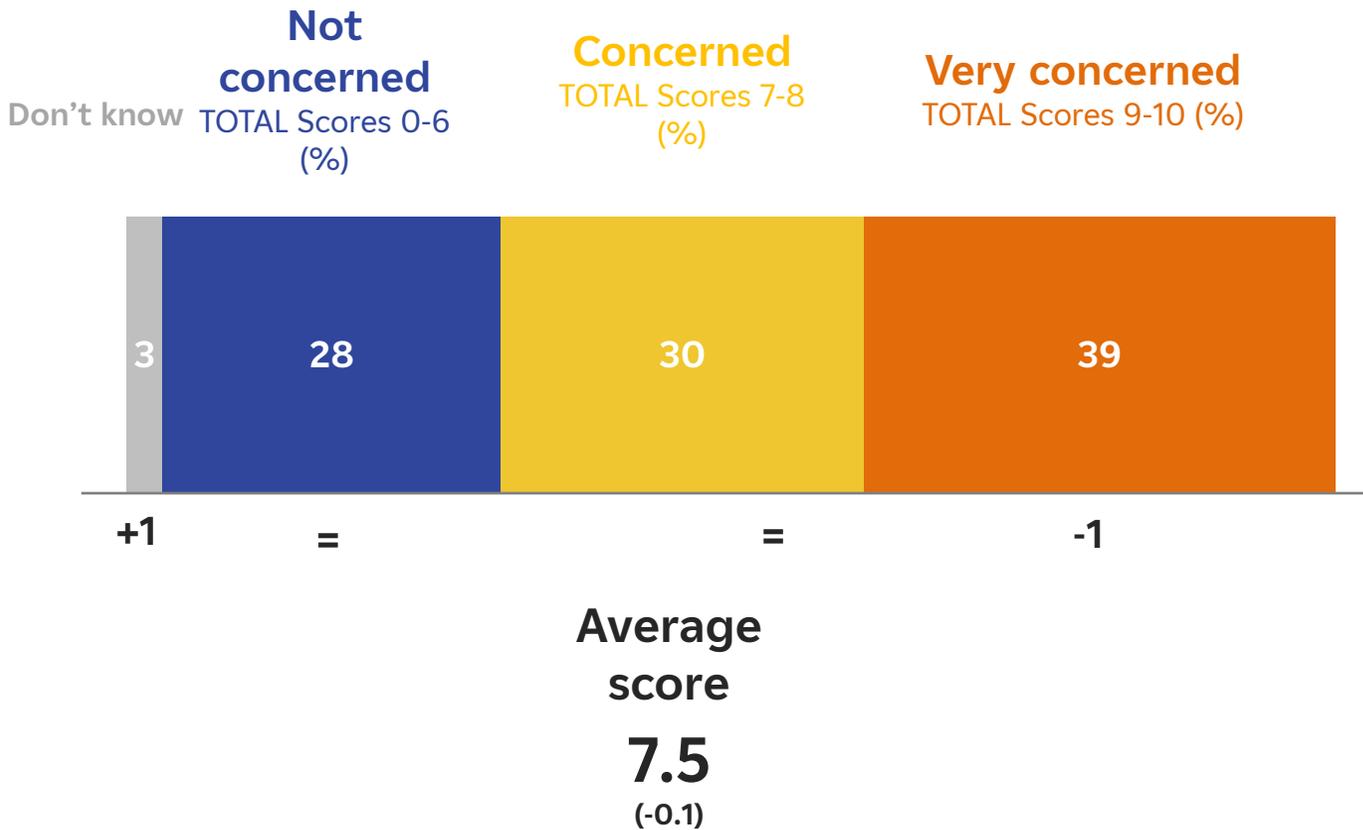


GLOBAL - Except MENA countries
Base : 21,400

The level of concern about the environment is high (with no progression)

Q. To what extent are you concerned about the environmental situation?

A score of 10 means that you are very concerned about the environmental situation, and a score of 0 means that you are not concerned at all. Scores in between can be used to express your opinion more precisely.



Global - All
Base : 23,433

+/-: Evolution since the 2022 wave

However, in most of the emerging countries, the level of concern is not sufficient to raise the environment to the top of their priority list

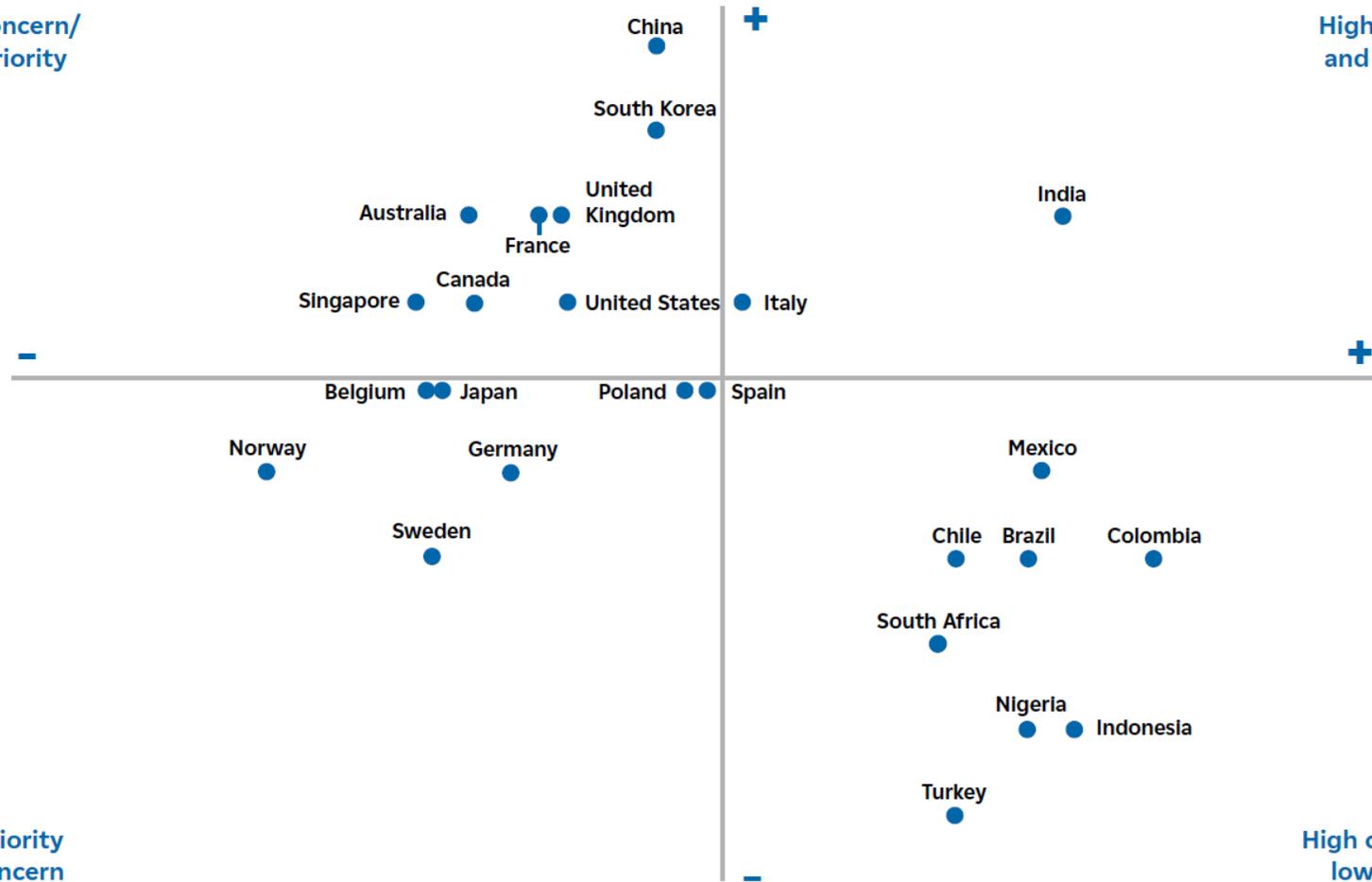
Q. To what extent are you concerned about the environmental situation? % “9-10 Very concerned”

Q. From this list, which topics worry you the most? Ranking of “Environment”

2023 (IN %)
Base: All

Low concern/
high priority

High priority
and concern



Low priority
and concern

High concern/
low priority



The “environment vs economic growth” debate



Giving priority to the environment remains dominant, and has gained ground this year (with the gap increasing further), driven by strong evolutions in Brazil, Mexico, Italy, Indonesia, Saudi Arabia.

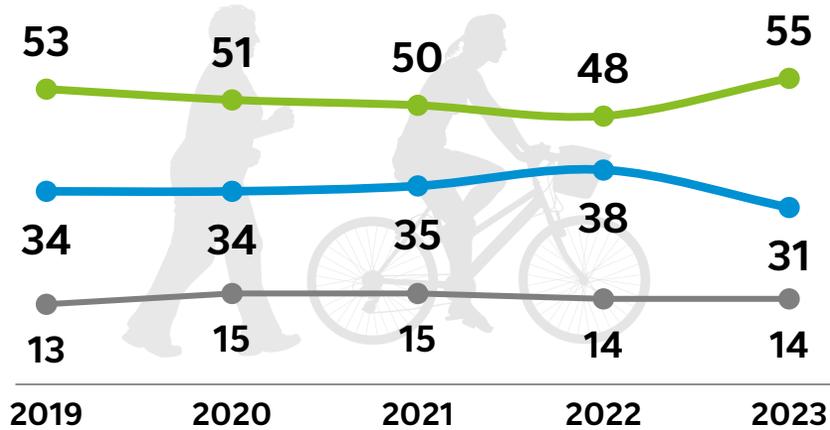
Q. Which of the following two statements do you agree with most?
In %

Priority should be given...

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

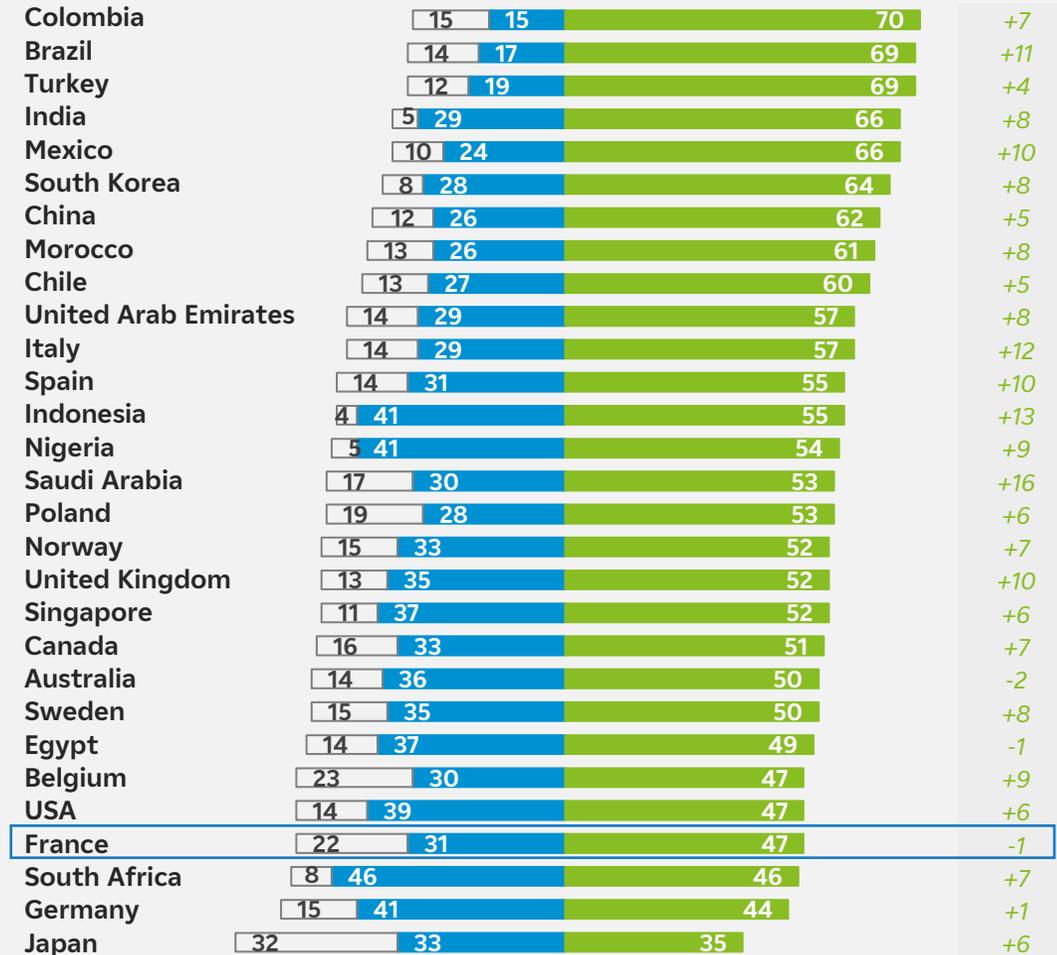
...to **ECONOMIC GROWTH** and jobs, even if it might have harmful consequences for the environment

You don't know



A high level of no opinion indicating that a part of the public cannot relate to this alternative, notably in Japan (32%), Belgium (23%), France (22%), Poland (19%), Saudi Arabia (17%).

Fairly big disparities



The environment seems to be gaining ground in fact

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

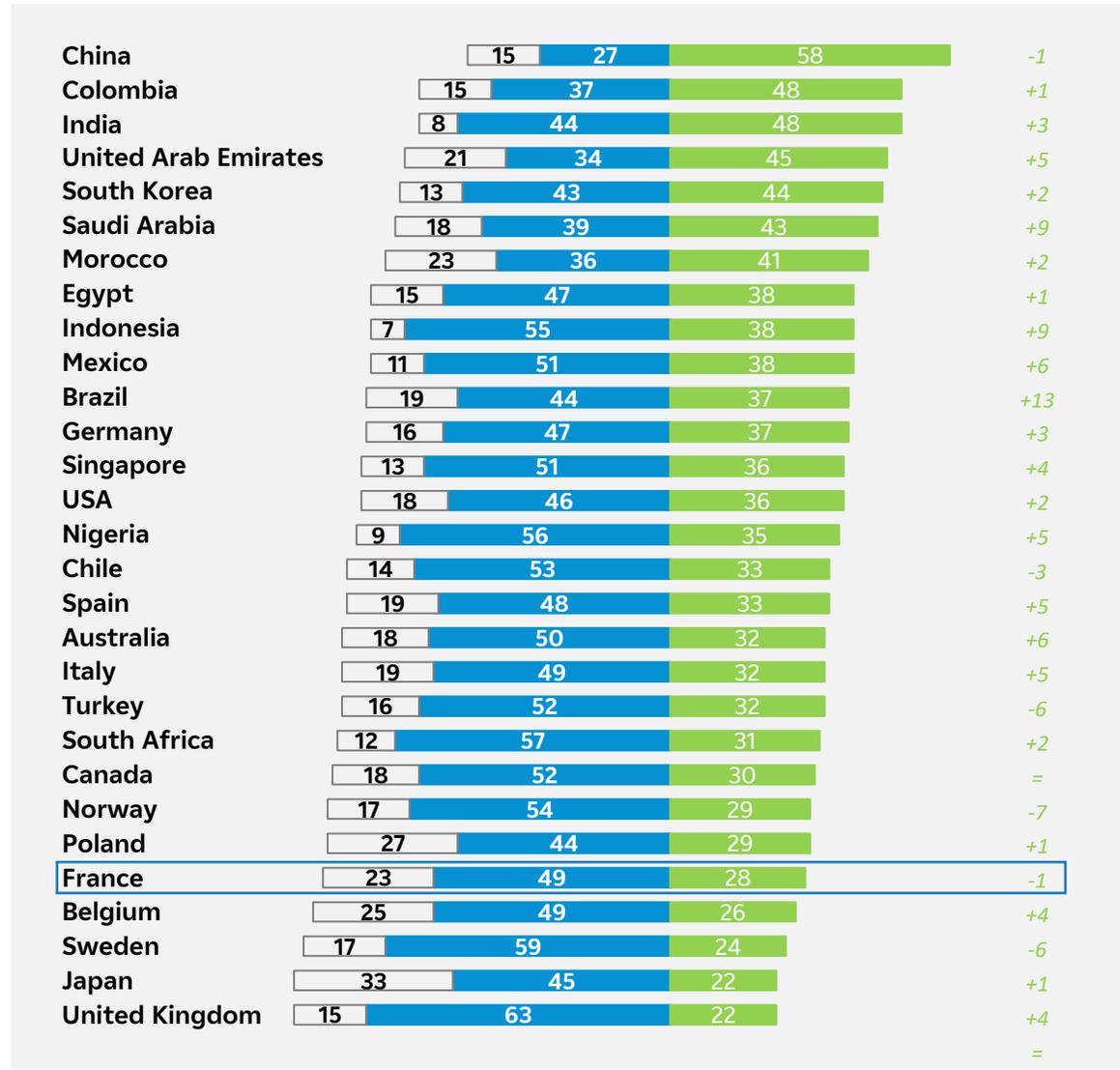
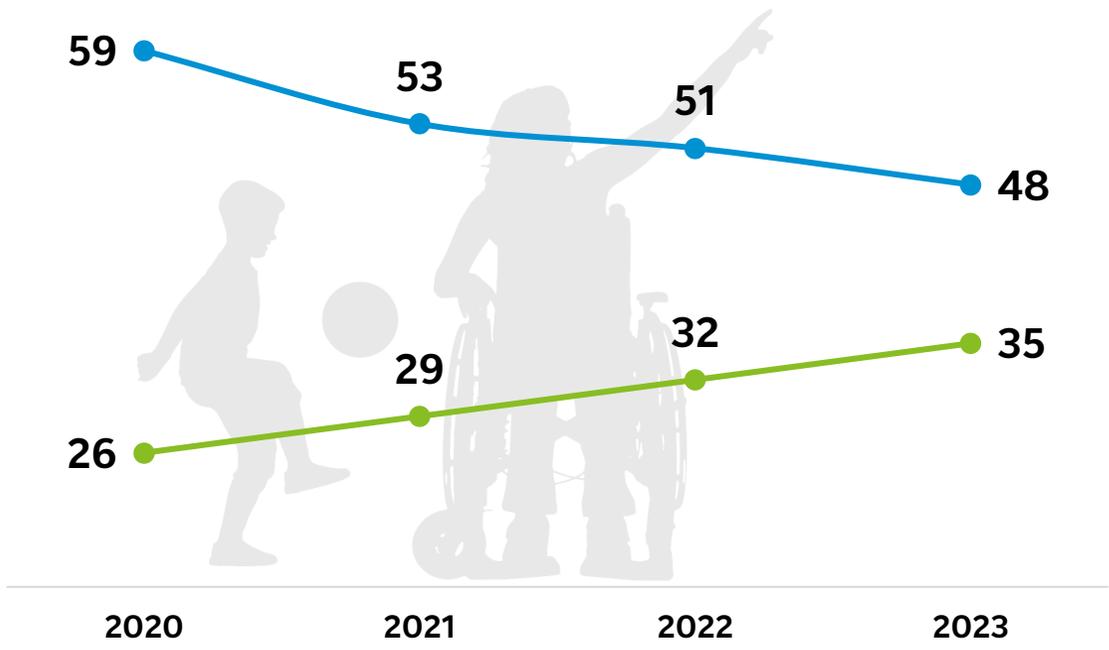
In %

In your country, priority will be given...

...to **THE ENVIRONMENT**, even if this causes economic growth to slow down and jobs to be lost

...to **ECONOMIC GROWTH** and jobs, even if this has negative effects on the environment

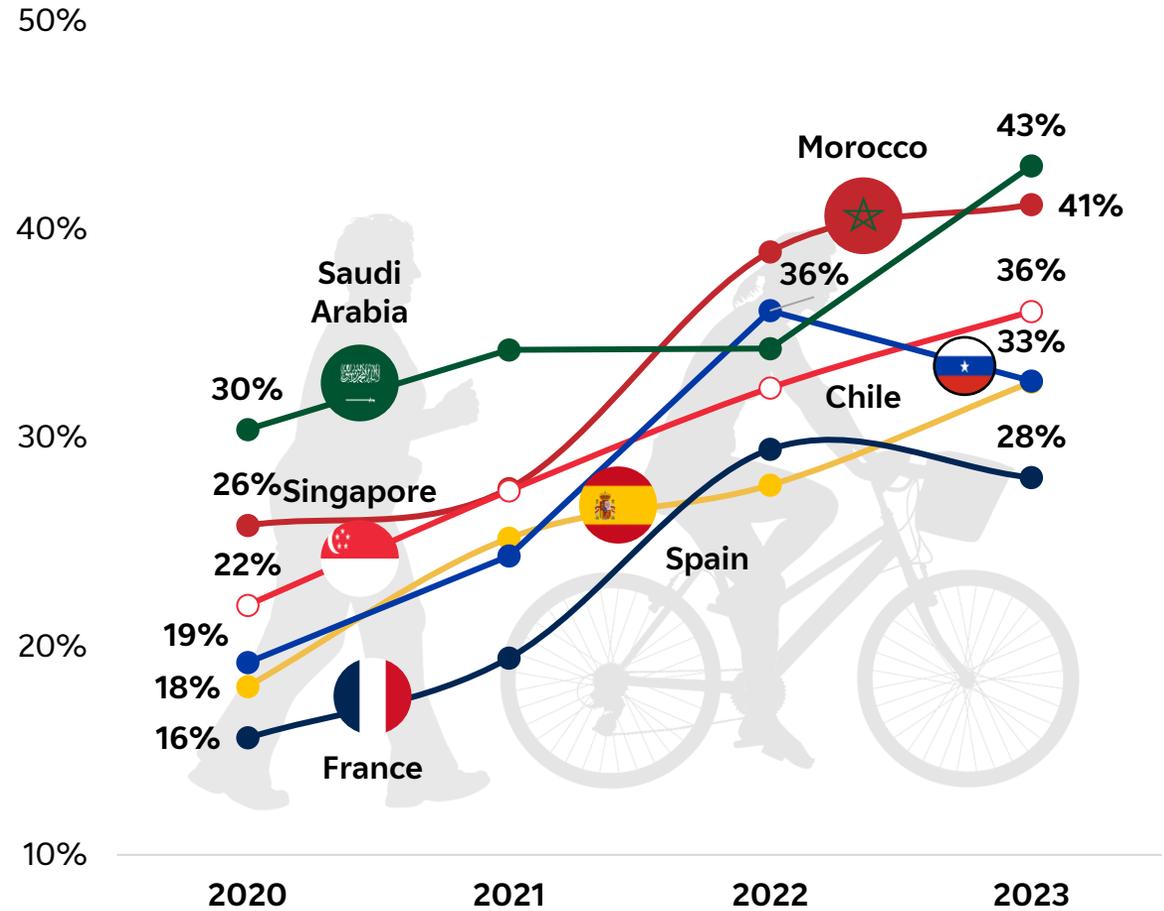
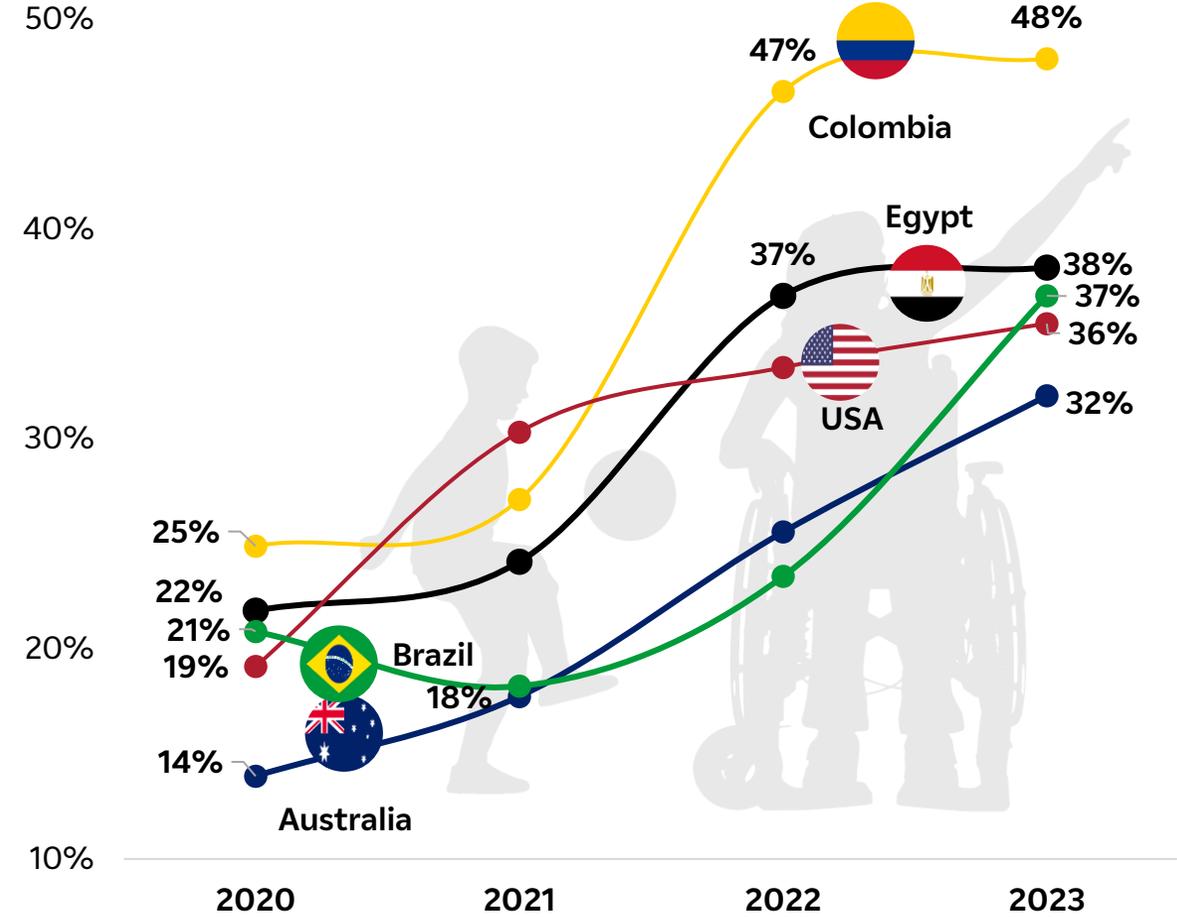
You don't know



The countries where the ecological transition has gained the most credibility



% of responses “In my country, the environment will take priority”

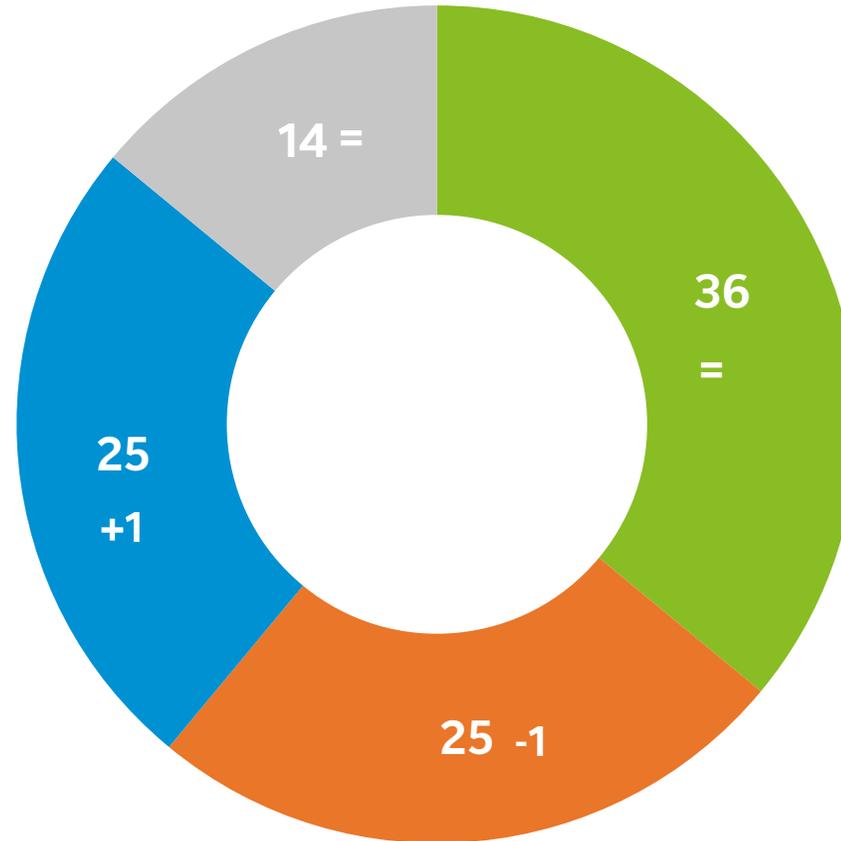


Global - All
Base : 23,433

Transition and employment: very segmented views

Q. If the decision was made to prioritize the environment in your country, do you think that:
In %

- It would **create** more jobs in your country than it would destroy
- It would **destroy** more jobs in your country than it would create
- It would have **no consequences** on employment in your country
- Don't know



Ecological transition and employment: North and South, two visions



Q. If the decision was made to prioritize the environment in your country, do you think that:

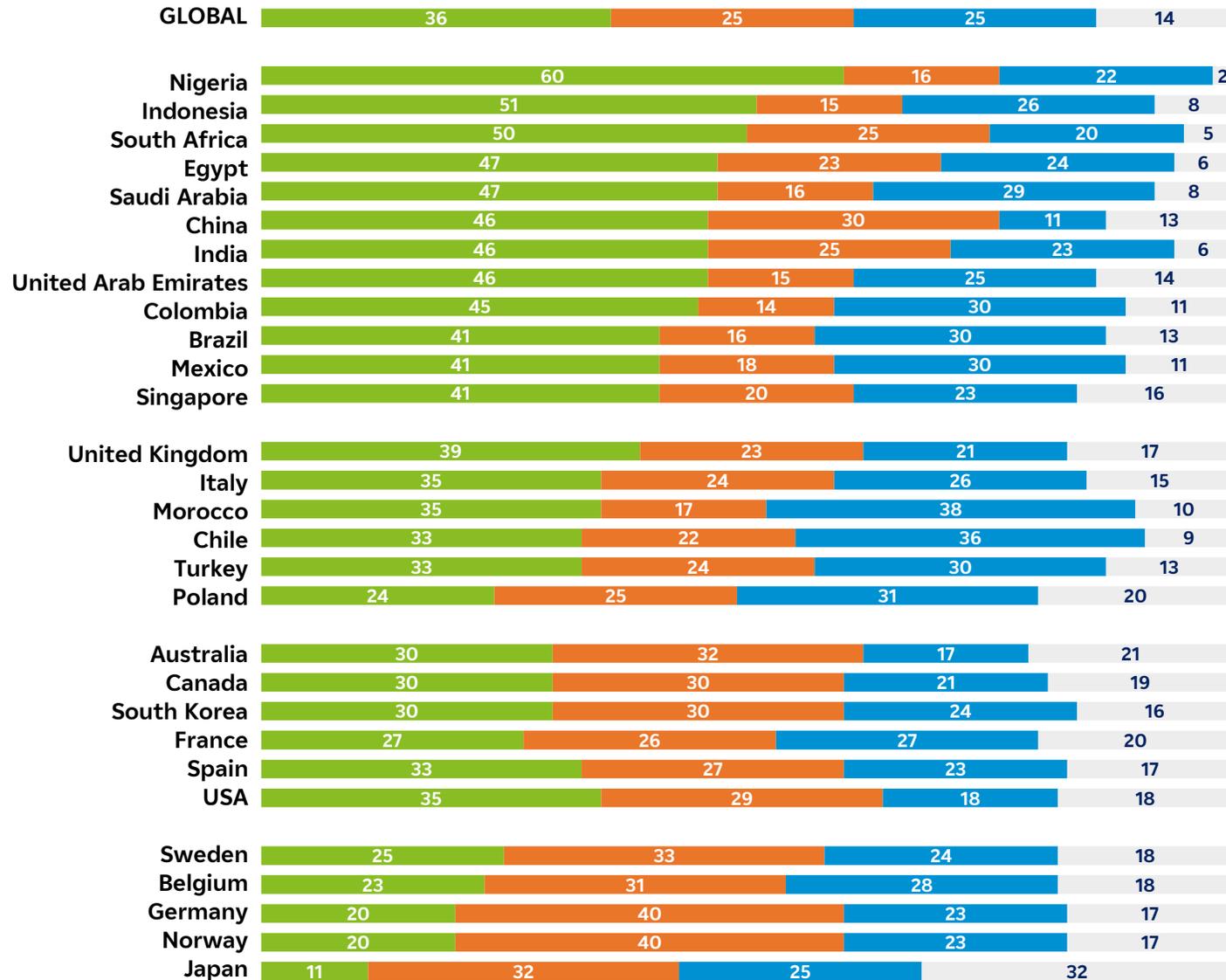
In %

■ It would **create** more jobs in your country than it would destroy

■ It would **destroy** more jobs in your country than it would create

■ It would have **no consequences** on employment in your country

■ Don't know



OPTIMISTIC countries

CONFIDENT countries

HESITANT countries

WORRIED countries

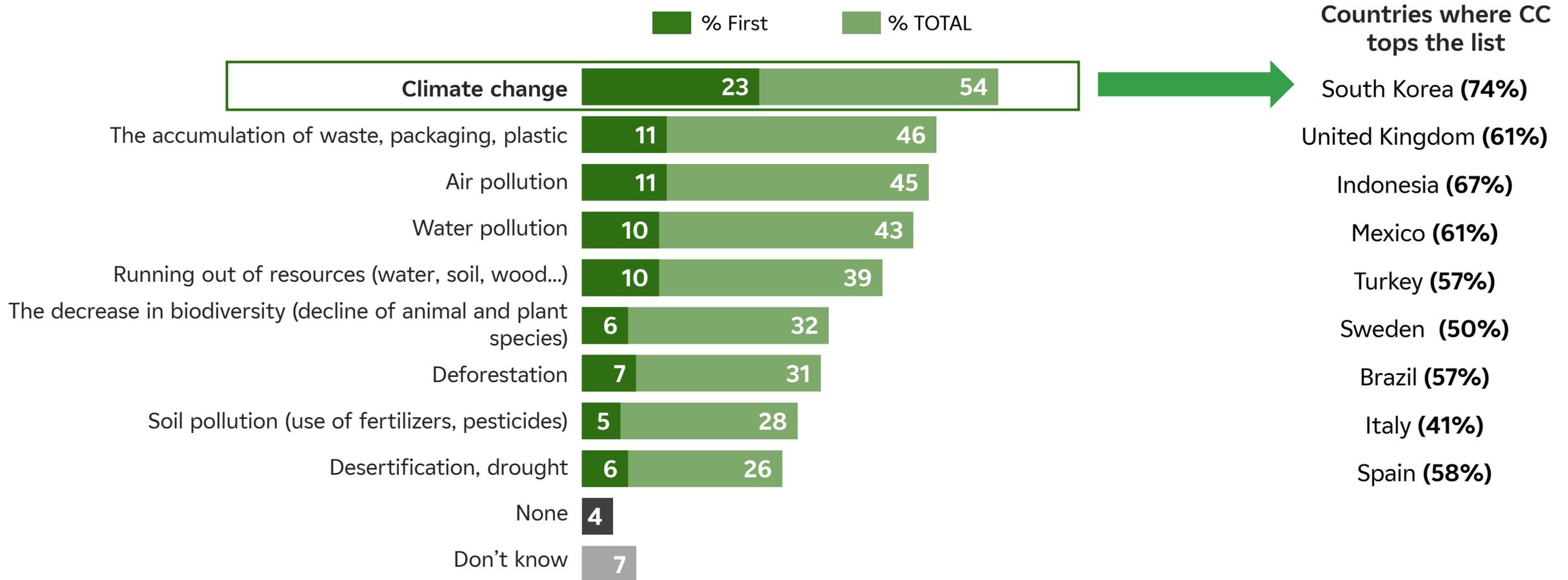


The climate, a priority in all countries?



Climate change tops the list of concerns relating to the environment, followed by waste and air pollution

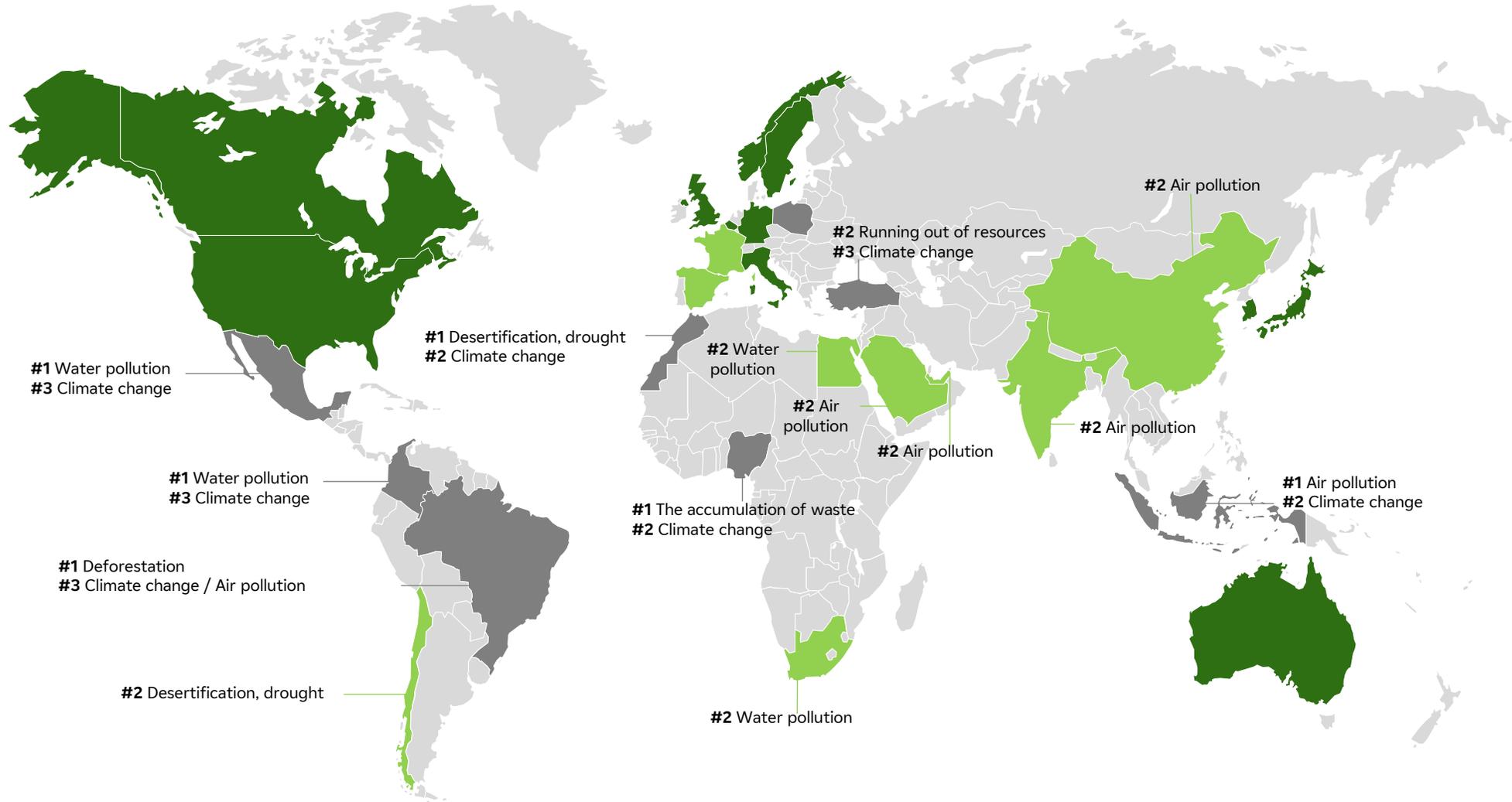
Q. From the following list, which environmental problems do you think are the most concerning in your country?



But it is not the first priority everywhere



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



2023
Base: all



CONCERN QUOTED
"FIRST"

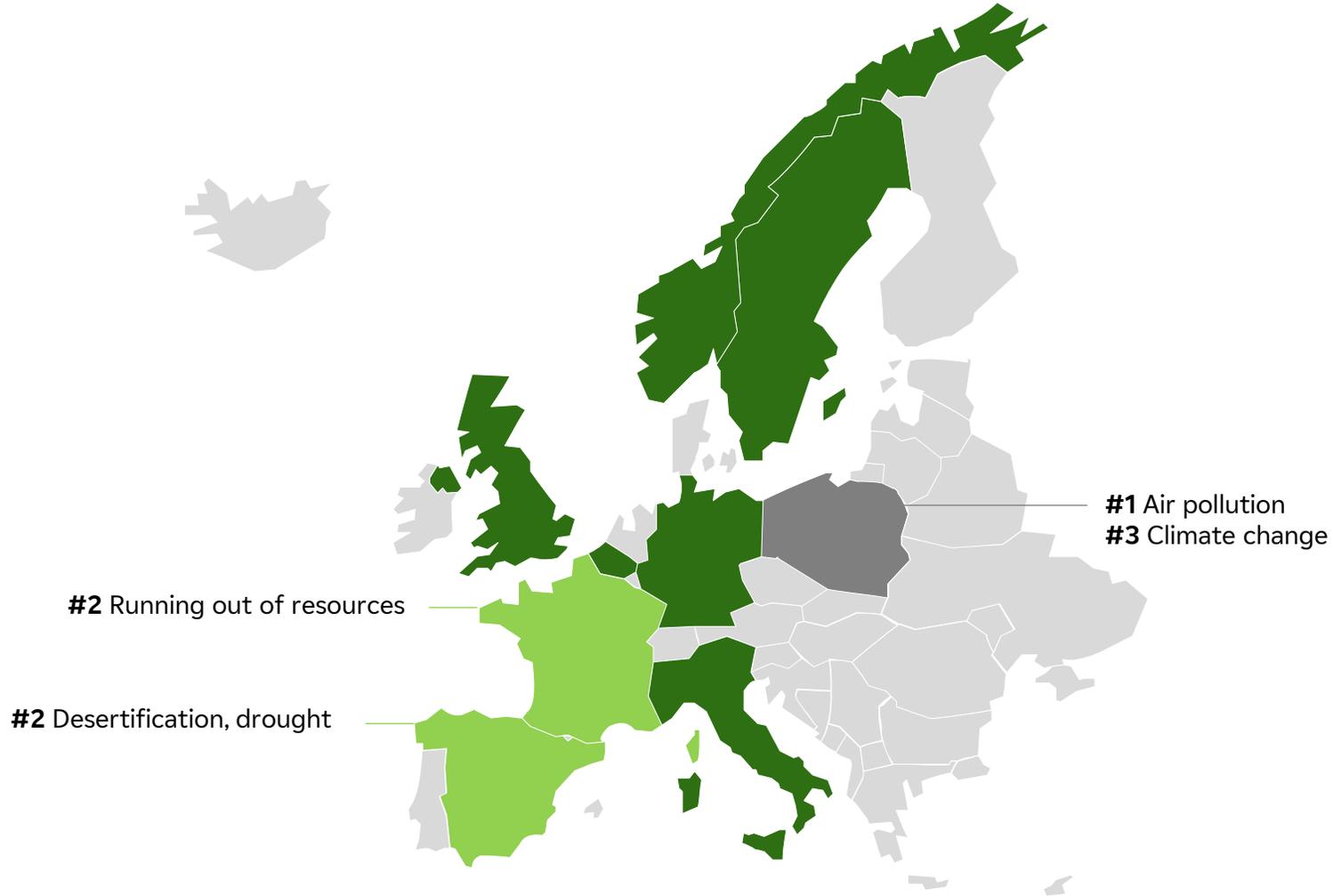
■ Climate change ranks first among concerns mentioned
Far ahead of the 2nd item mentioned

■ Climate change ranks first among concerns mentioned
Followed closely by the 2nd item

■ Climate change does not rank first among concerns mentioned

In Europe, the climate is the main priority, except in Poland

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



2023
Base: all



CONCERN MENTIONED
"FIRST"



Climate change ranks first among concerns mentioned
Far ahead of the 2nd item mentioned



Climate change ranks first among concerns mentioned
Followed closely by the 2nd item



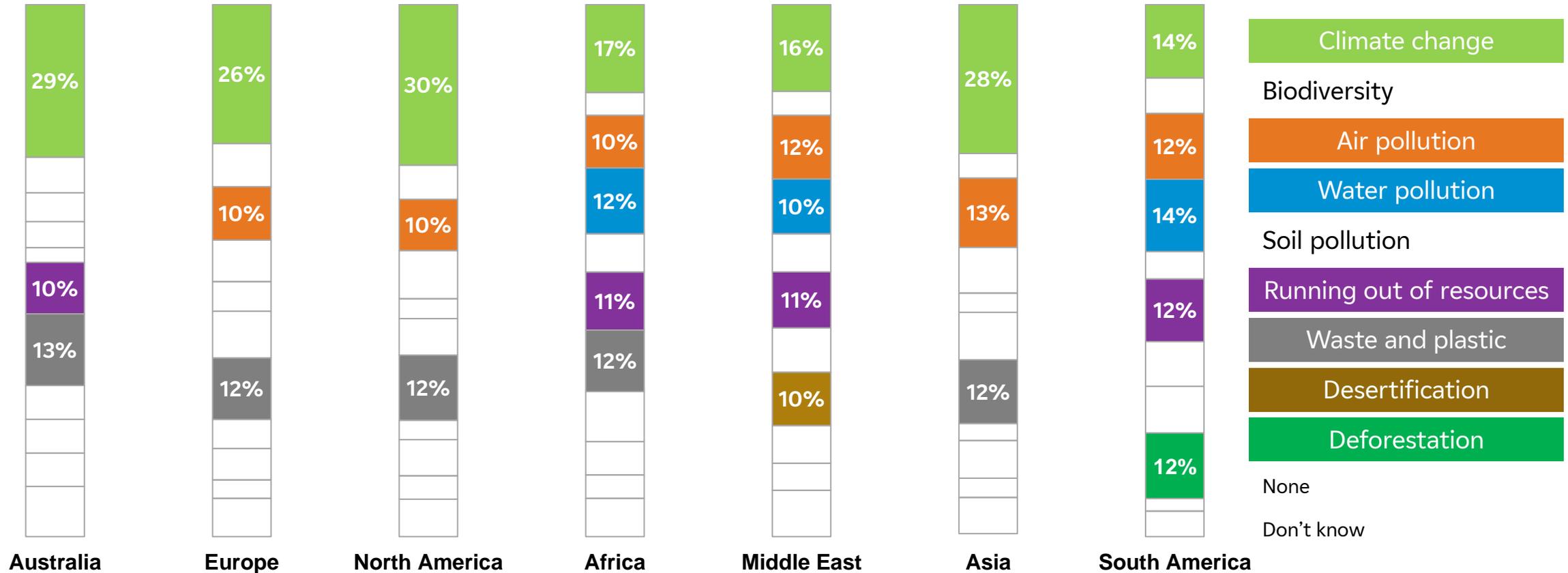
Climate change does not rank first among concerns mentioned

In the West and Asia, the climate issue is predominant. But in Africa, the Middle East and South America it faces competition from other environmental issues.

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

2023

Base: all



Climate change has established itself as a reality, with varying intensity according to countries



High temperatures and the deregulation of seasons are the most widely shared symptoms

Q. Where you live, have you experienced any of the following phenomena in recent years?



1% of respondents mentioned another phenomenon
10% none of these phenomena.

High temperatures have left an impression on people across the planet



The French have been impacted by heatwaves and drought as much as the Moroccans, Spanish and Turks

Q. Where you live, have you experienced any of the following phenomena in recent years?

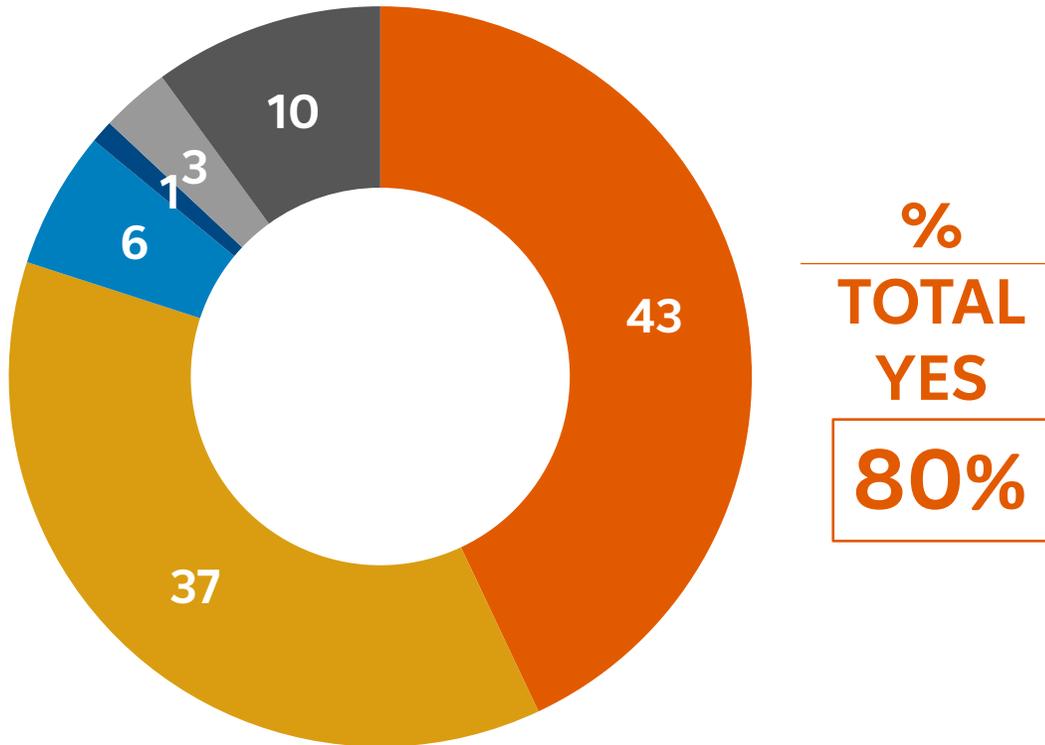
	 GLOBAL 29 countries	AUSTRALIA	EUROPE	 Of which: FRANCE	NORTH AMERICA	SOUTH AMERICA	AFRICA / MIDDLE EAST	ASIA
Intense heat	63%	47%	56%	72%	57%	73%	68%	67%
Disruption of the seasons	41%	36%	41%	44%	34%	43%	45%	38%
Storms	32%	34%	30%	24%	38%	28%	33%	33%
Drought	30%	28%	34%	50%	22%	34%	31%	25%
Floods	29%	34%	24%	15%	24%	29%	32%	35%
Declining water levels in waterways, lakes	29%	21%	30%	38%	23%	35%	34%	24%
Major forest fires	20%	29%	13%	13%	31%	29%	23%	17%

++ Results significantly higher than the GLOBAL average

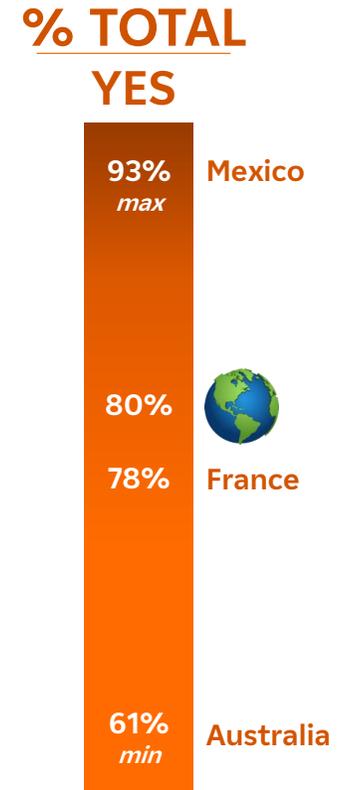
An overwhelming majority of citizens recognize the worsening role climate change is playing in the extreme phenomena observed

Q. Would you say that these phenomena in your country are increasingly caused or aggravated by climate change?

In %



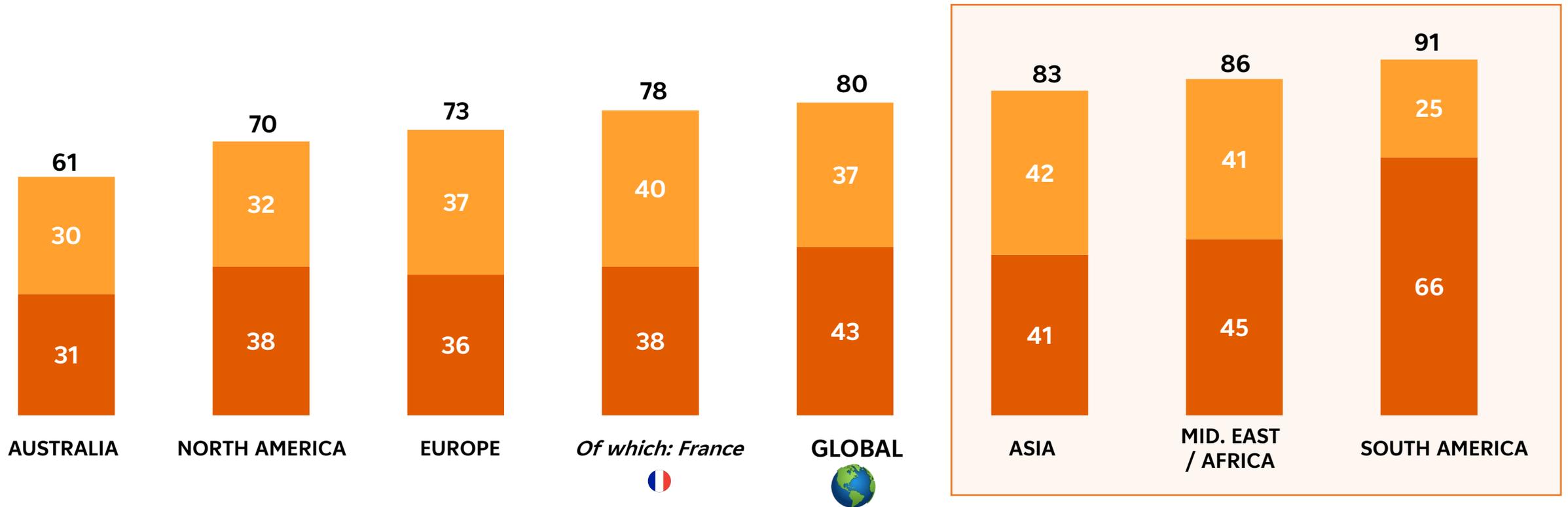
- Yes, absolutely
- Yes, somewhat
- No, not really
- No, not at all
- Don't know
- Not concerned



This is particularly the case in South America, Asia and the Middle East

Q. Would you say that these phenomena in your country are increasingly caused or aggravated by climate change?

In %



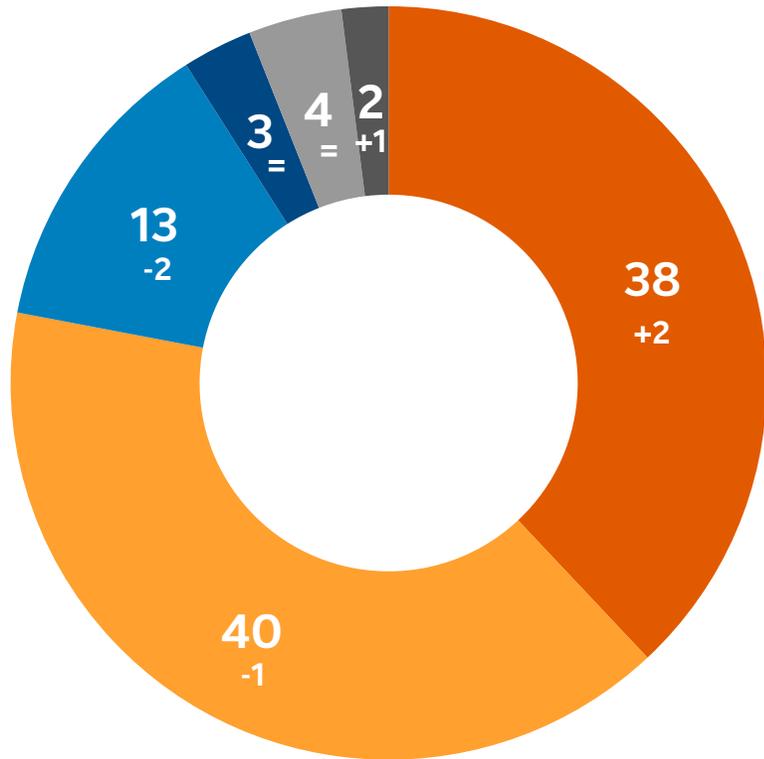
■ Yes, absolutely ■ Yes, somewhat

Observation of climate change is still broadly shared but has not increased this year



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

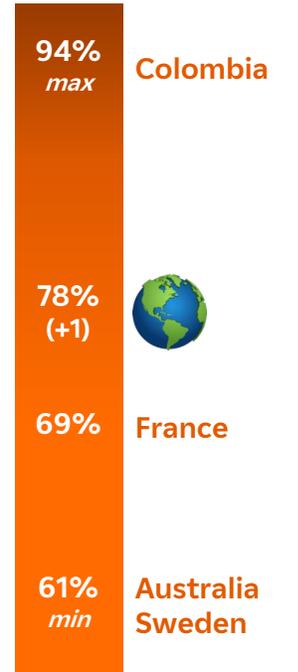
In %



%
TOTAL
YES
78%

- Yes, absolutely
- Yes, somewhat
- No, not really
- No, not at all
- Don't know
- Experience NO climate change

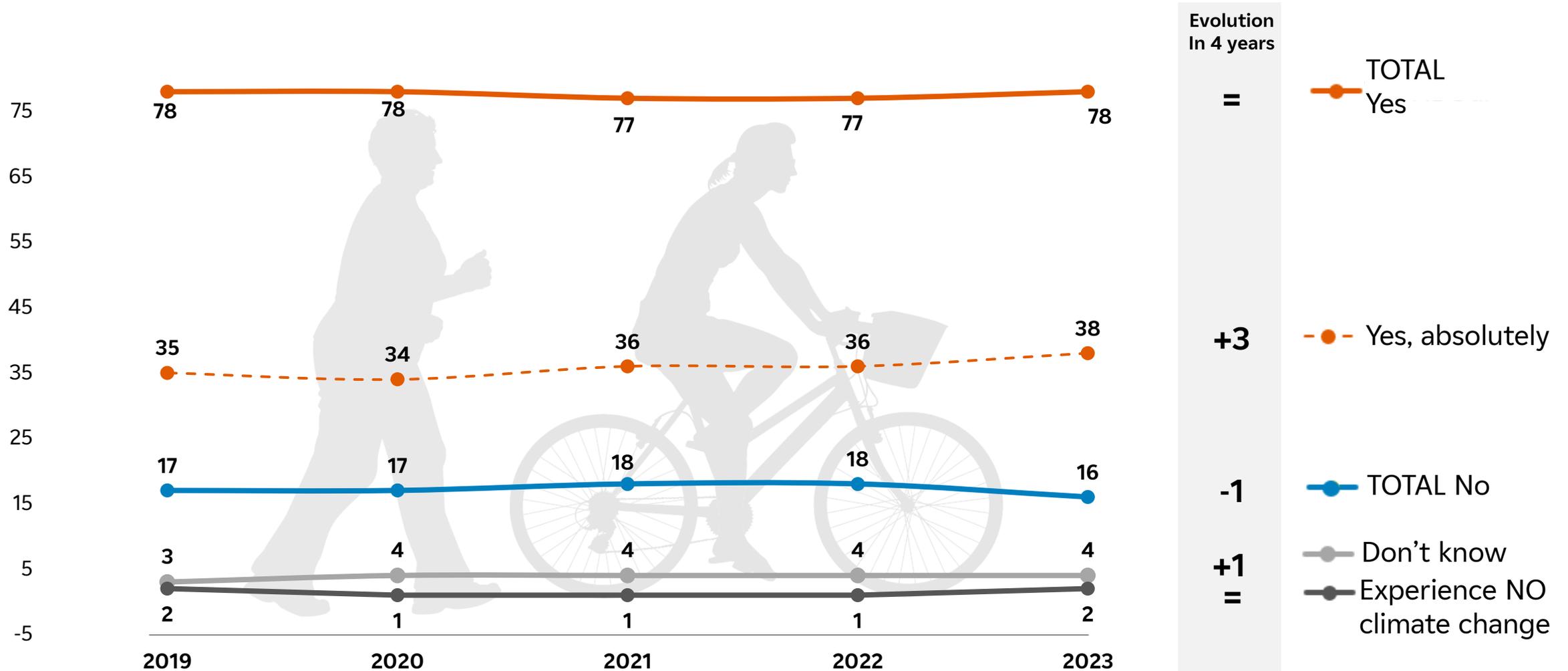
% TOTAL YES



+/-: Evolution since the 2022 wave

A fairly modest increase in intensity of feeling in the past 4 years (+3)

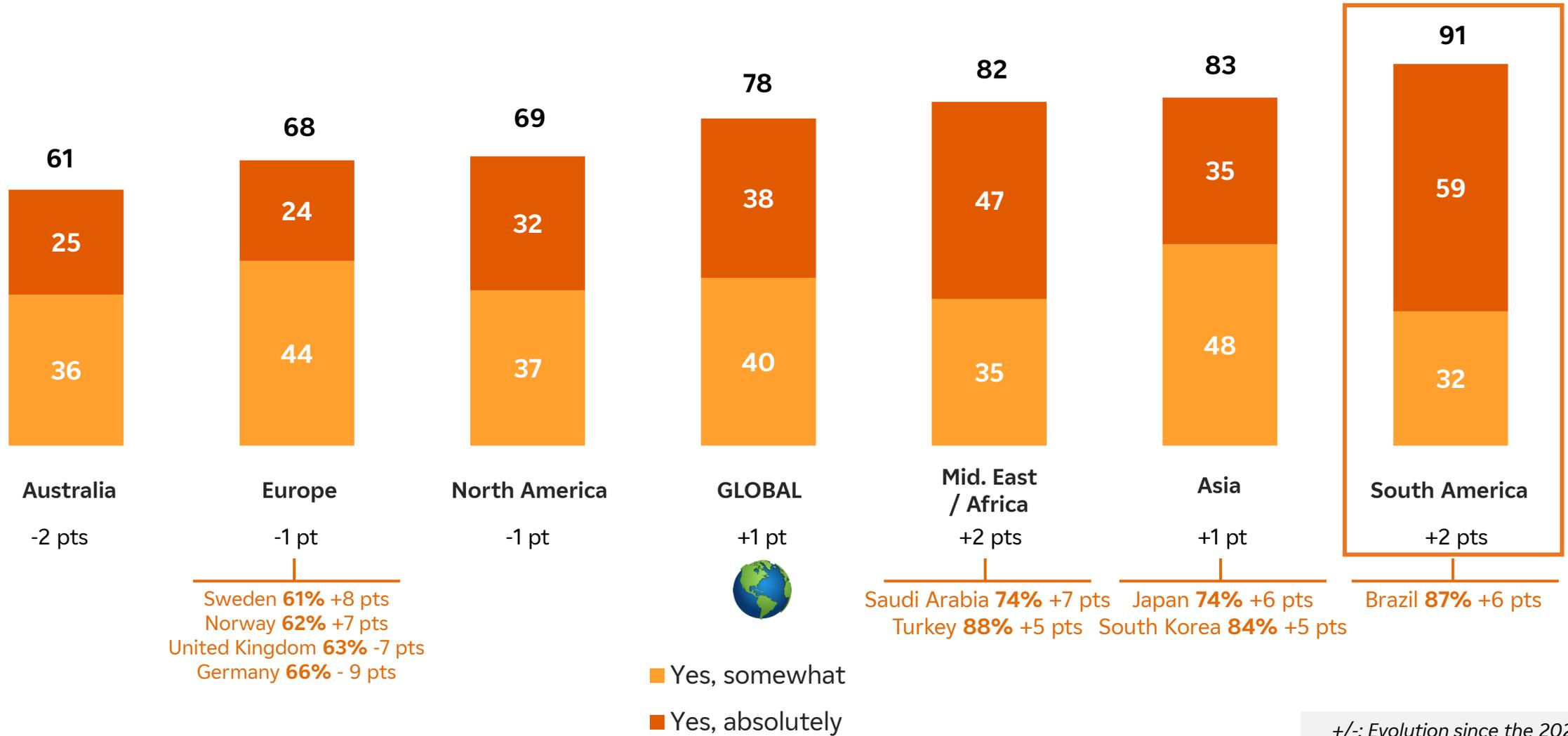
Q. On the whole, would you say that, in your region, you have already noticed the effects of climate change?
In %



Global - All
Base : 23,433

Climate change is not viewed with the same intensity in the Northern- and Southern-hemisphere countries

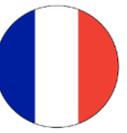
Q. On the whole, would you say that, in your region, you have already noticed the effects of climate change?
In %





The number of disasters is increasing. Why is observation of climate change not growing in intensity?

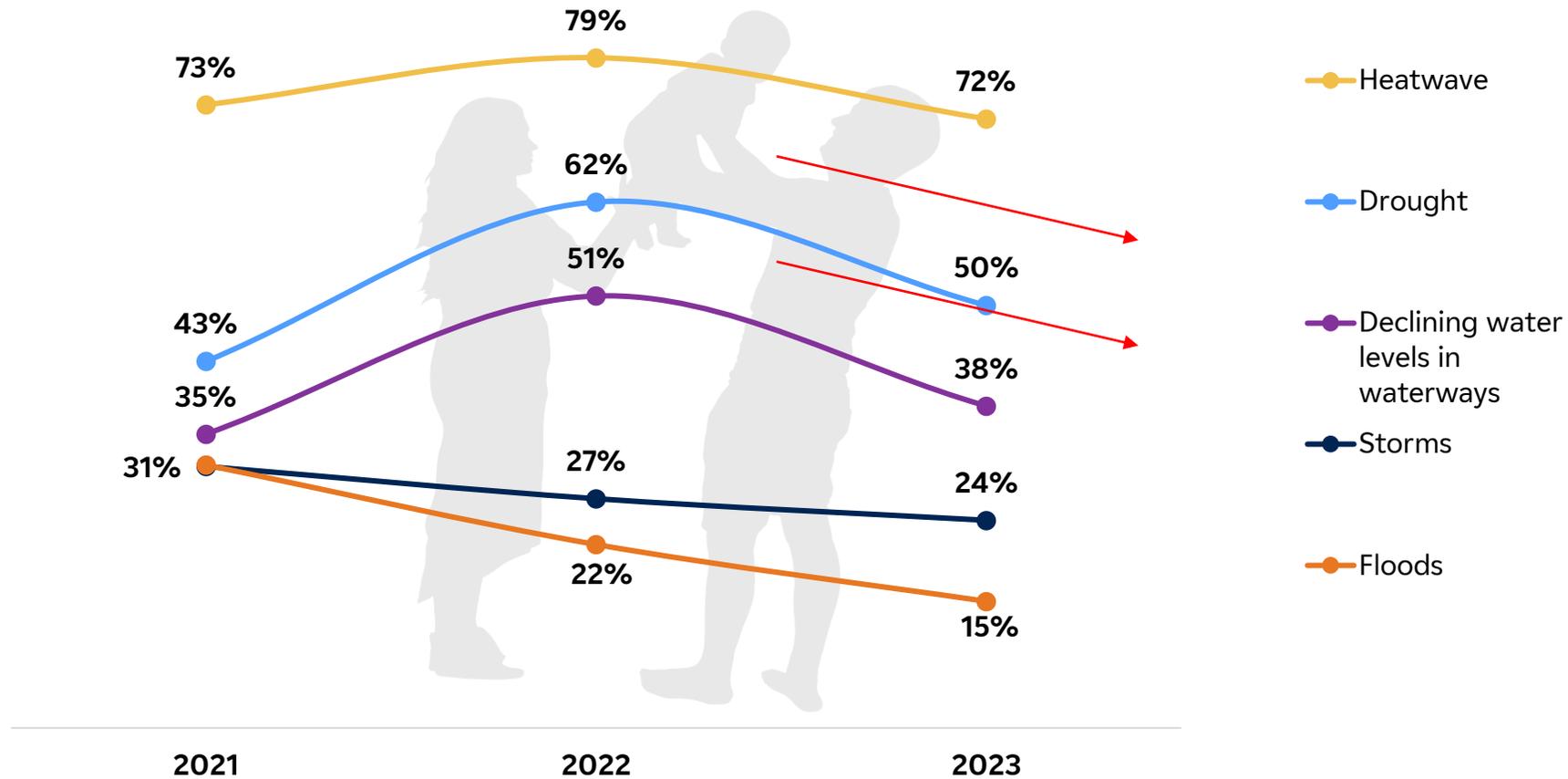




A troubling phenomenon: the capacity to “forget” disasters

The case of France: the 2022 drought was only mentioned by 50% in 2023

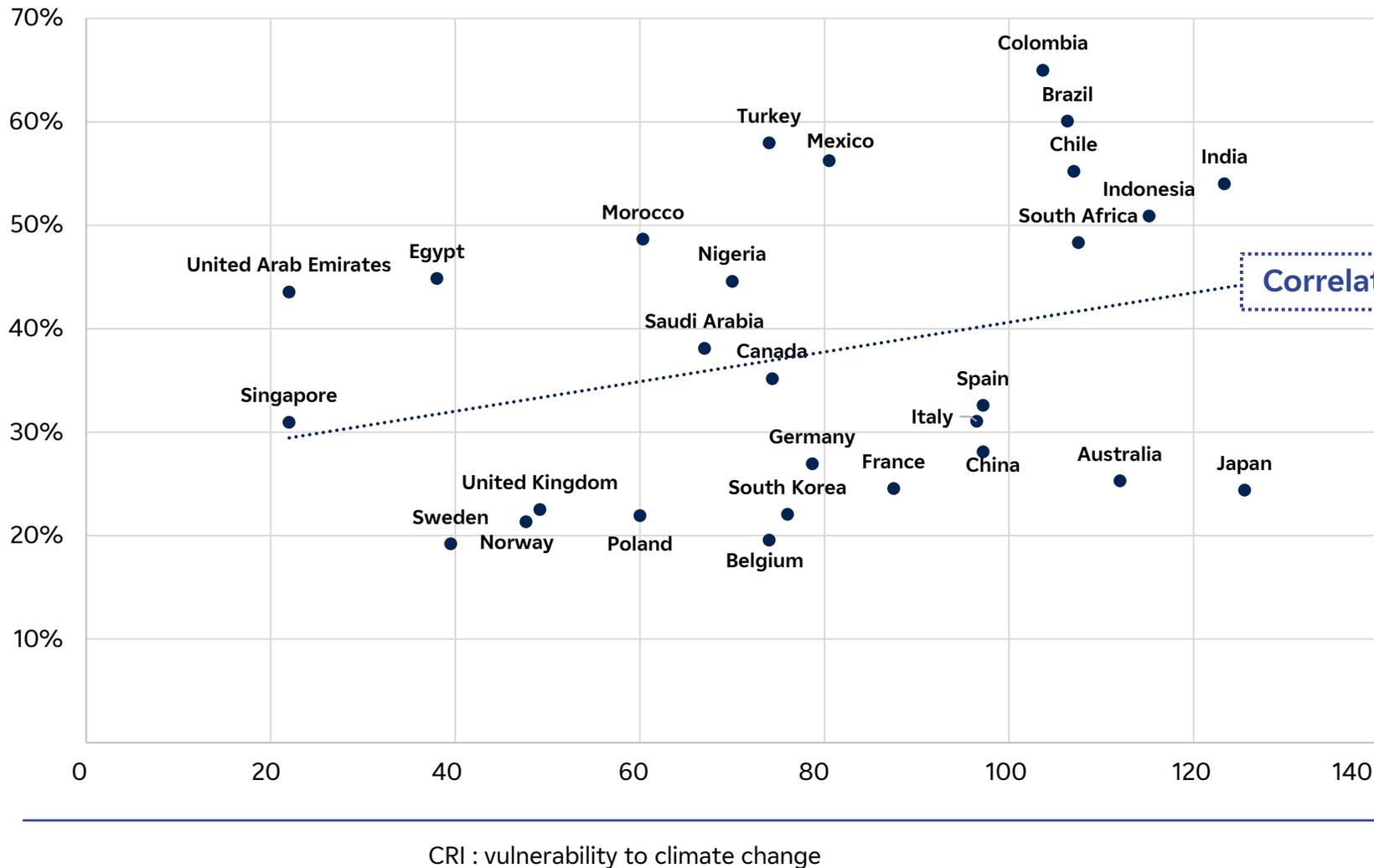
Q. Where you live, have you been impacted by any of the following phenomena in recent years? % YES



No link between observation of climate change and the series of disasters since 2019 (CRI index)



% has “absolutely” observed the effects of climate change



Correlation = 0,29

The CRI index attributes the highest values to the countries most exposed to climate disasters. Japan and India are thus very vulnerable countries; Singapore and the United Arab Emirates are, in contrast, fairly resilient.

What reactions to climate change?





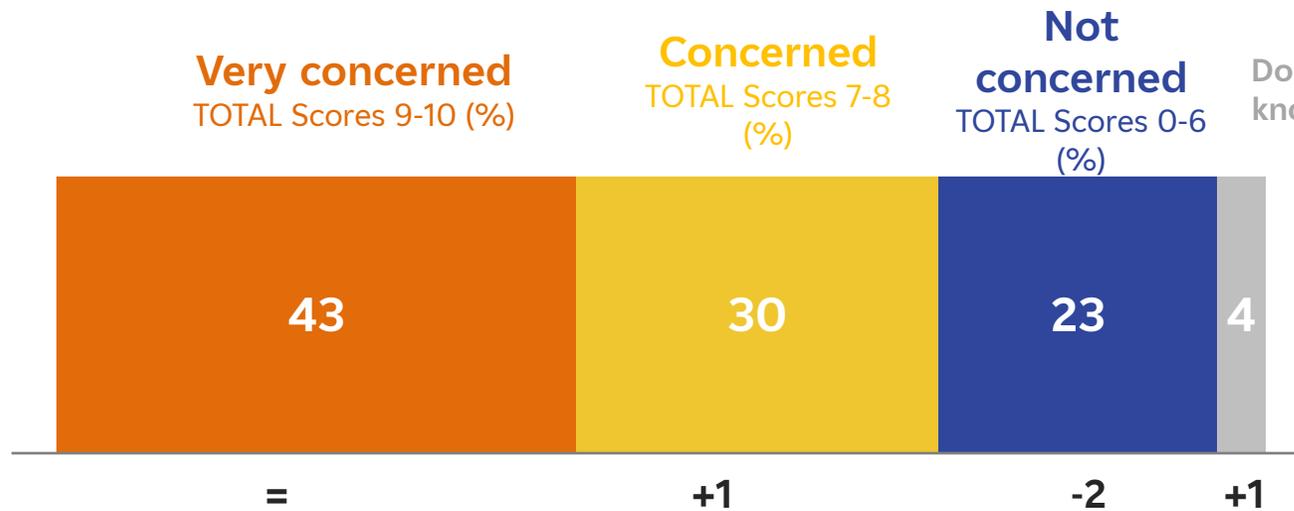
The climate, a concern for everyone?



Concern about climate change is stable

Q. To what extent are you concerned about climate change?

A score of 10 means that you are very concerned about climate change, and a score of 0 means that you are not concerned at all. Scores in between can be used to express your opinion more precisely



Average Score

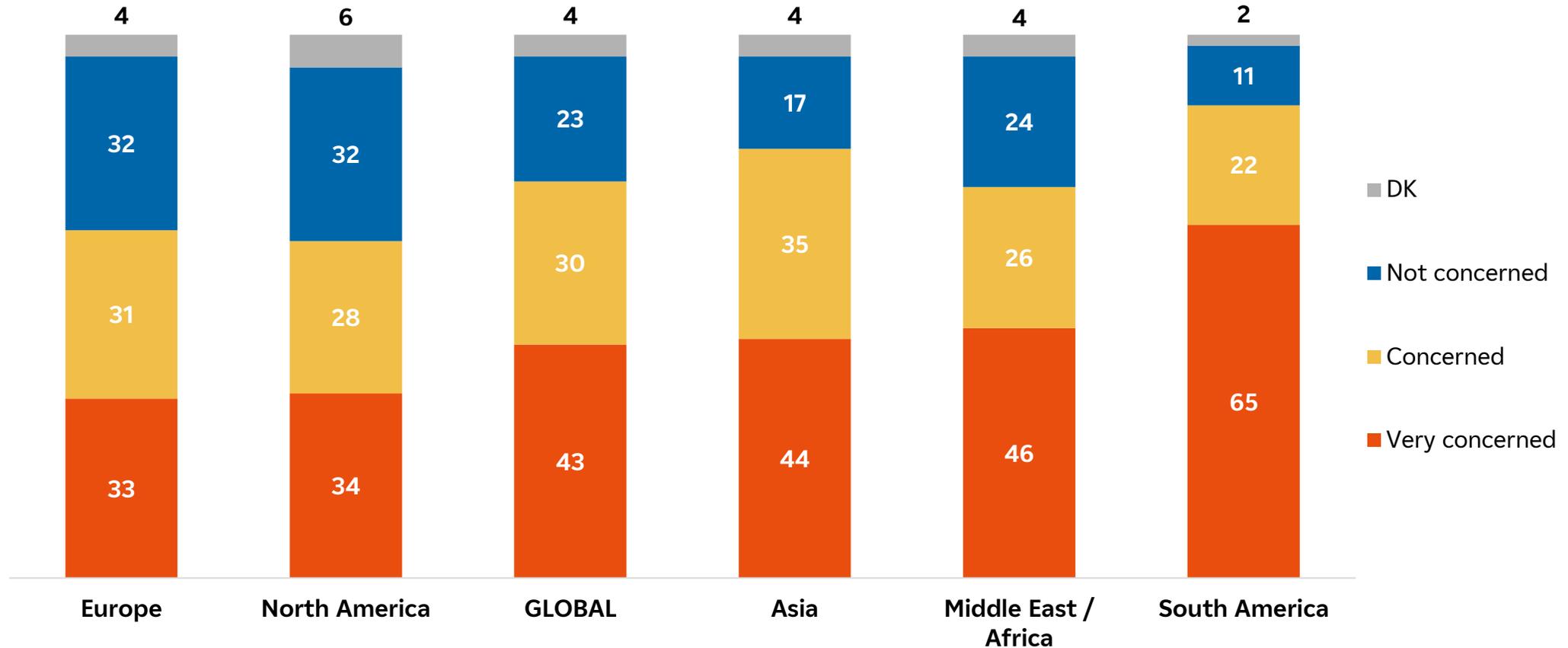
7.7
(=)



The most concerned regions are not the ones that have made the climate their main environmental challenge (Europe, North America, Asia)

Q. To what extent are you concerned about climate change?

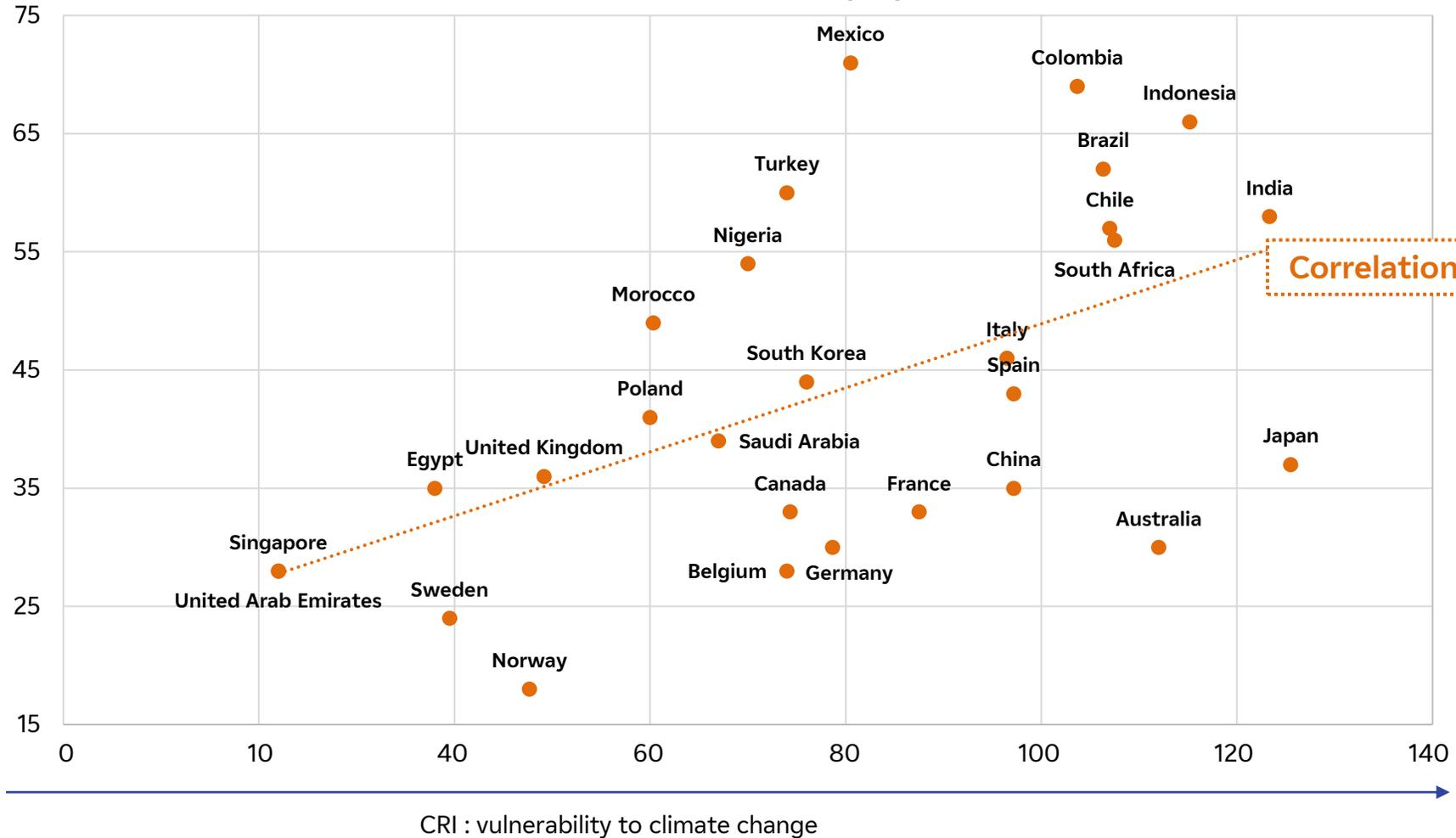
A score of 10 means that you are very concerned about climate change, and a score of 0 means that you are not concerned at all. Scores in between can be used to express your opinion more precisely



But there is a link between concern and the country's vulnerability



Correlation between the proportion of respondents “very concerned” about climate change and the Climate Risk Index (CRI)



The CRI index attributes the highest values to the countries most exposed to climate disasters. Japan and India are thus very vulnerable countries; Singapore and the United Arab Emirates are, in contrast, fairly resilient



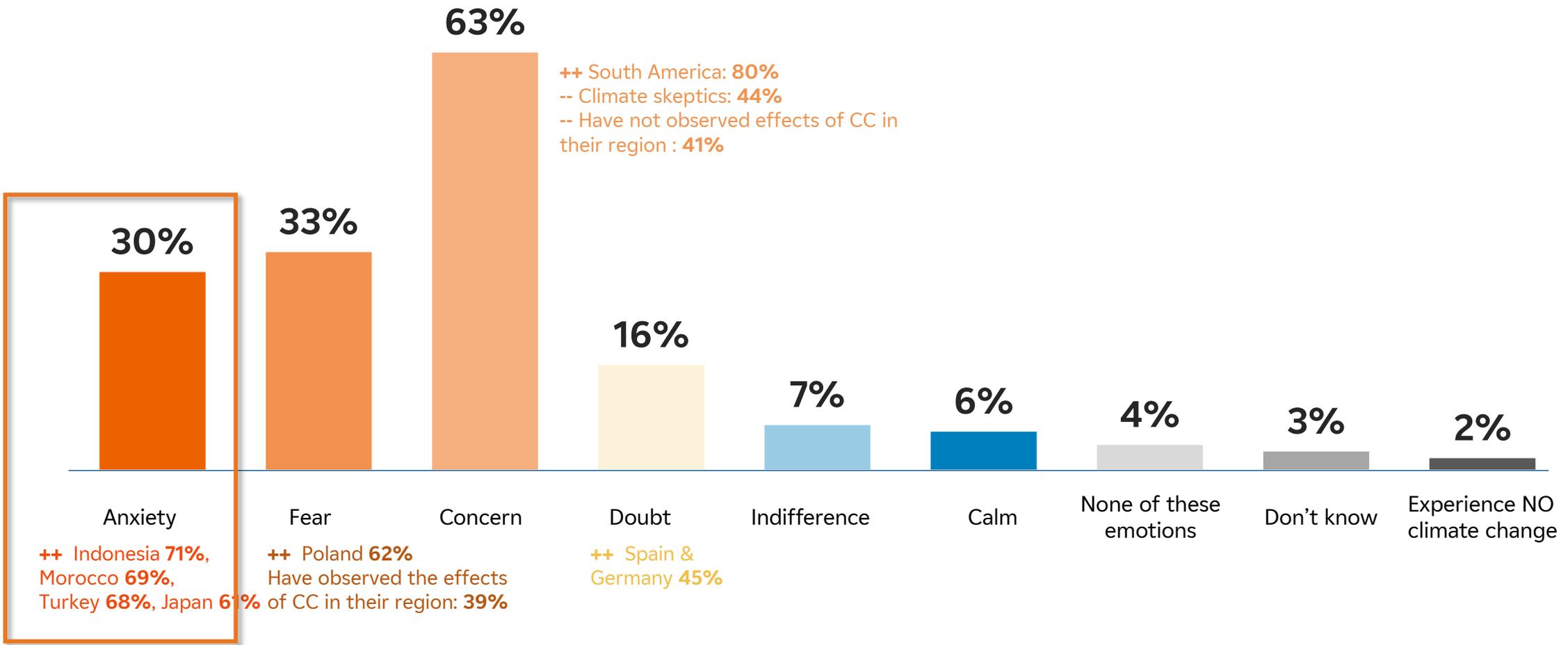
What feelings are people experiencing?



Climate change generates anxiety among 30% of citizens

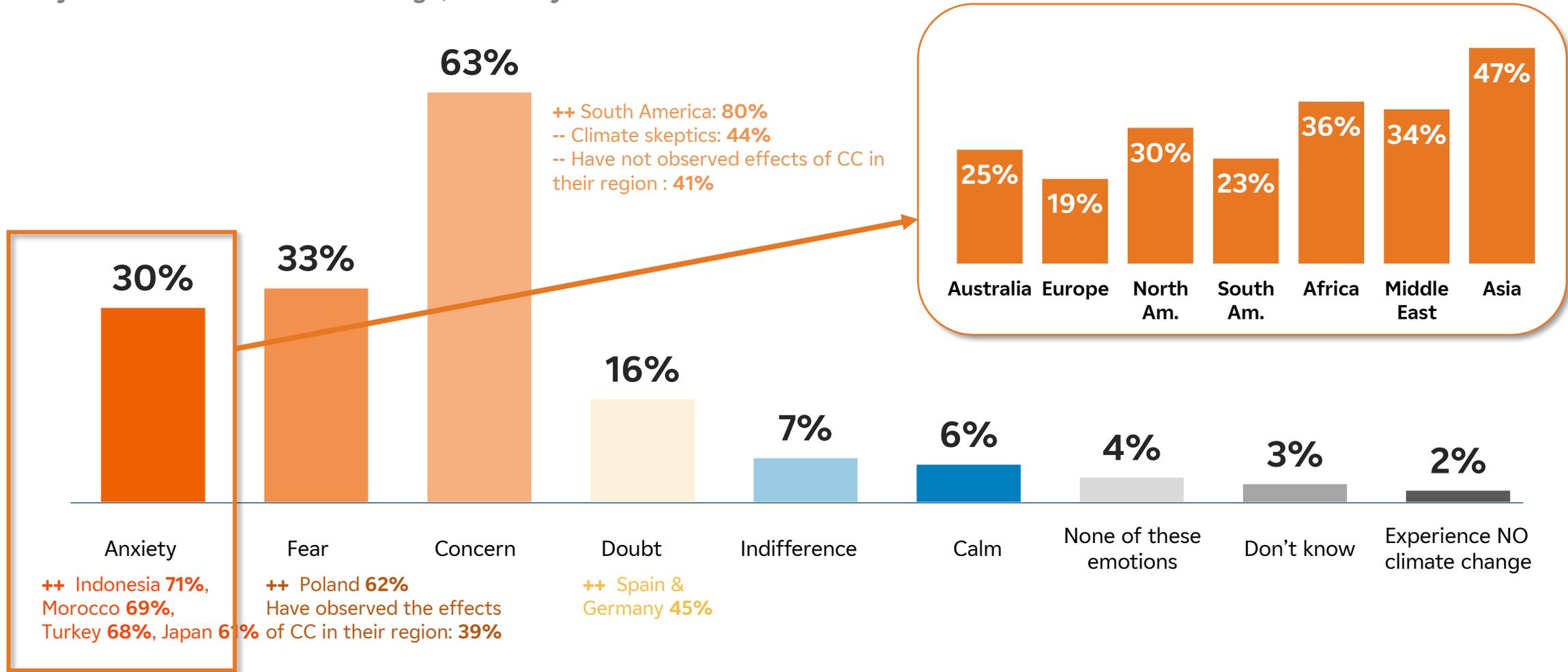
The concern is general

Q. When you think about climate change, what is your reaction?



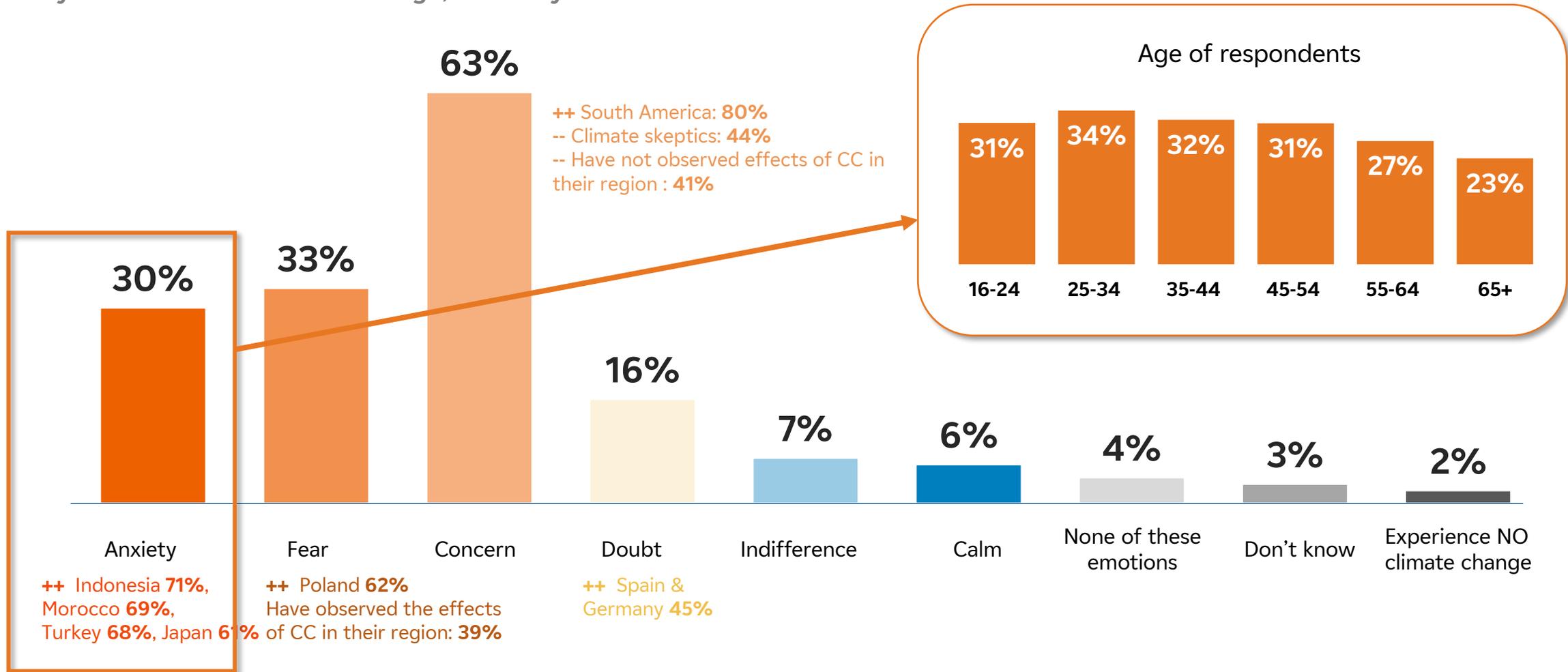
Anxiety is expressed more in Asia, Africa and the Middle East

Q. When you think about climate change, what is your reaction?

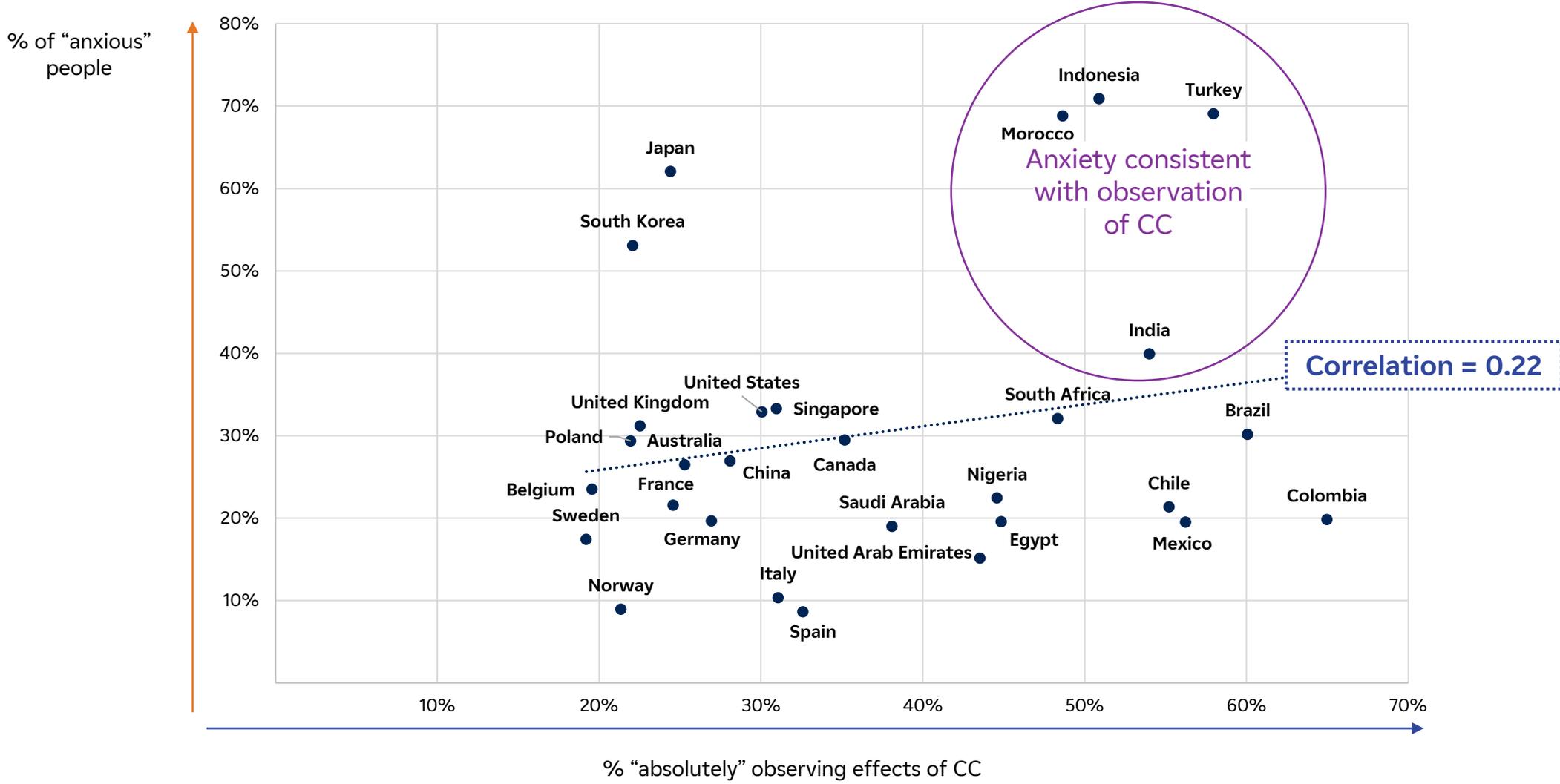


Young people are no longer the most anxious, although seniors feel less anxiety

Q. When you think about climate change, what is your reaction?



No major link between anxiety felt and observation of climate change: a more individual equation



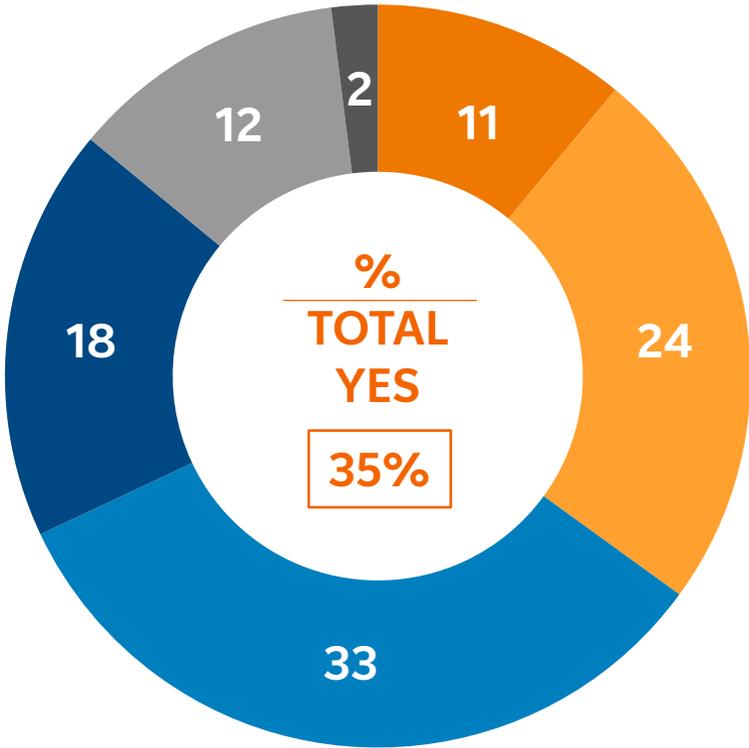
Climate migrations: rather gloomy prospects



One third of citizens think they will be forced to move in the mid-term because of climate change.

Q. Do you think that climate change will force you to move to another location within the next 10 years?
In %

- Yes, definitely
- Yes, probably
- No, probably not
- No, definitely not
- Don't know
- Experience NO climate change



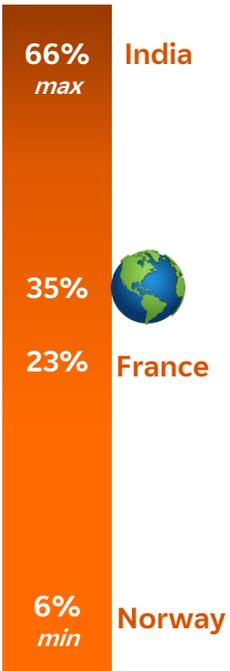
++ Countries anticipating the most movement

- India **66%**
- Egypt **62%**
- Indonesia **57%**
- Colombia / Turkey **55%**
- Nigeria **51%**
- Saudi Arabia / Mexico **50%**

-- Countries anticipating the least movement

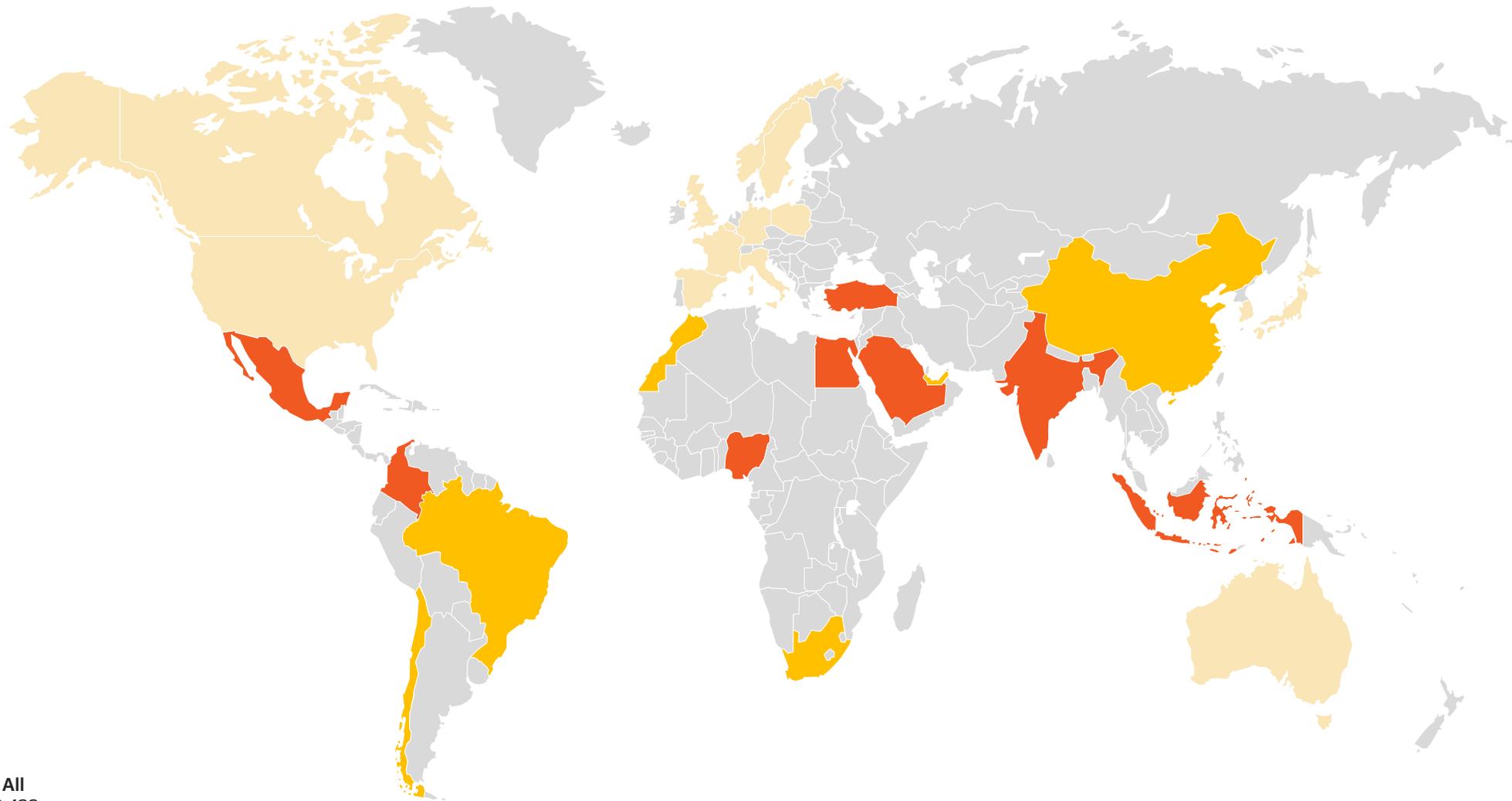
- Canada / United Kingdom / Japan: **17%**
- Poland **16%**
- Germany **13%**
- Sweden **12%**
- Norway **6%**

% TOTAL YES



Fear is heavily concentrated in the equatorial region

Q. Do you think that climate change will force you to move to another location within the next 10 years?



% TOTAL
YES
(definitely + probably)

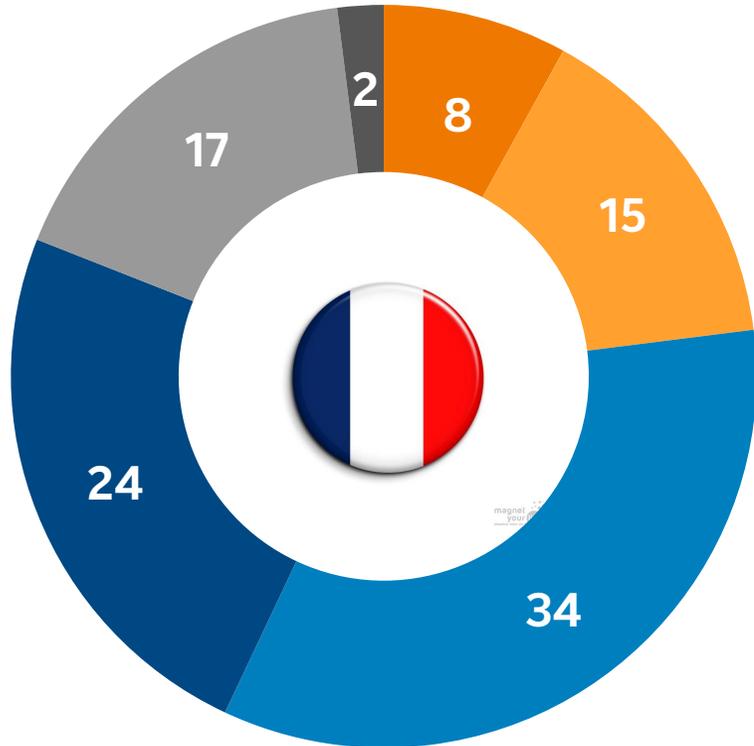
- Score \geq 50%
- Score 30%-49%
- Score < 30%



One out of four French people think they will be forced to move in the next 10 years because of climate change

Q. Do you think that climate change will force you to move to another location within the next 10 years?

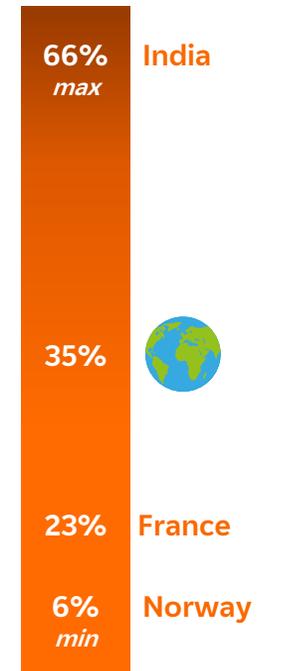
In %



%
TOTAL
YES
23%

- Yes, definitely
- Yes, probably
- No, probably not
- No, definitely not
- Don't know
- Experience NO climate change

% TOTAL YES

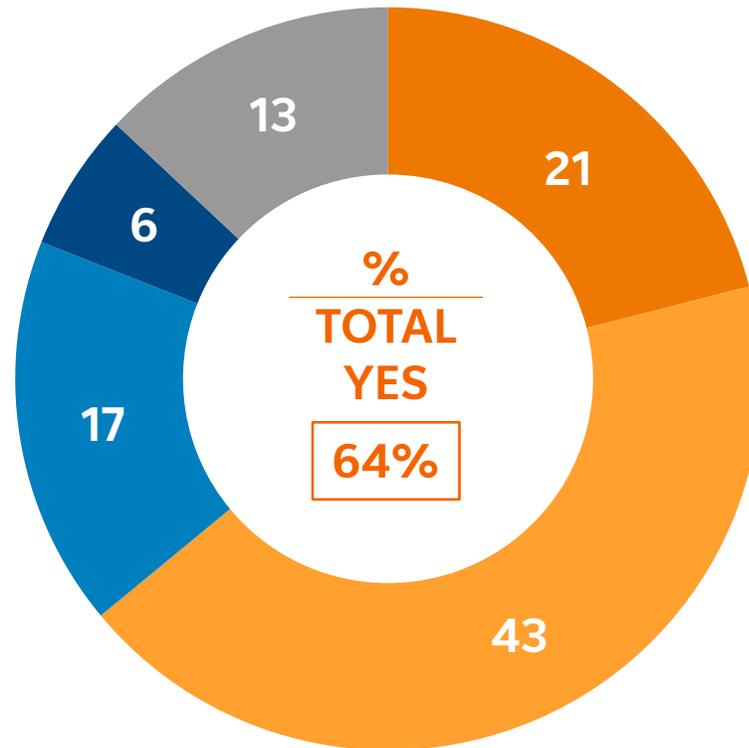


The prospect of a migration crisis is very real, particularly in Turkey, France, and South America

Q. Do you think that in the coming years, your country will have to cope with large numbers of migrants fleeing the consequences of climate change in their own countries?

In %

- Yes, definitely
- Yes, probably
- No, probably not
- No, definitely not
- Don't know



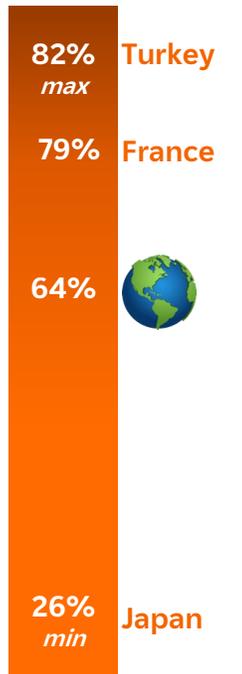
++ Countries most expecting to have to cope with climate migrants

Turkey **82%**
 France / Colombia **79%**
 Mexico **78%**
 Chile / Egypt **76%**

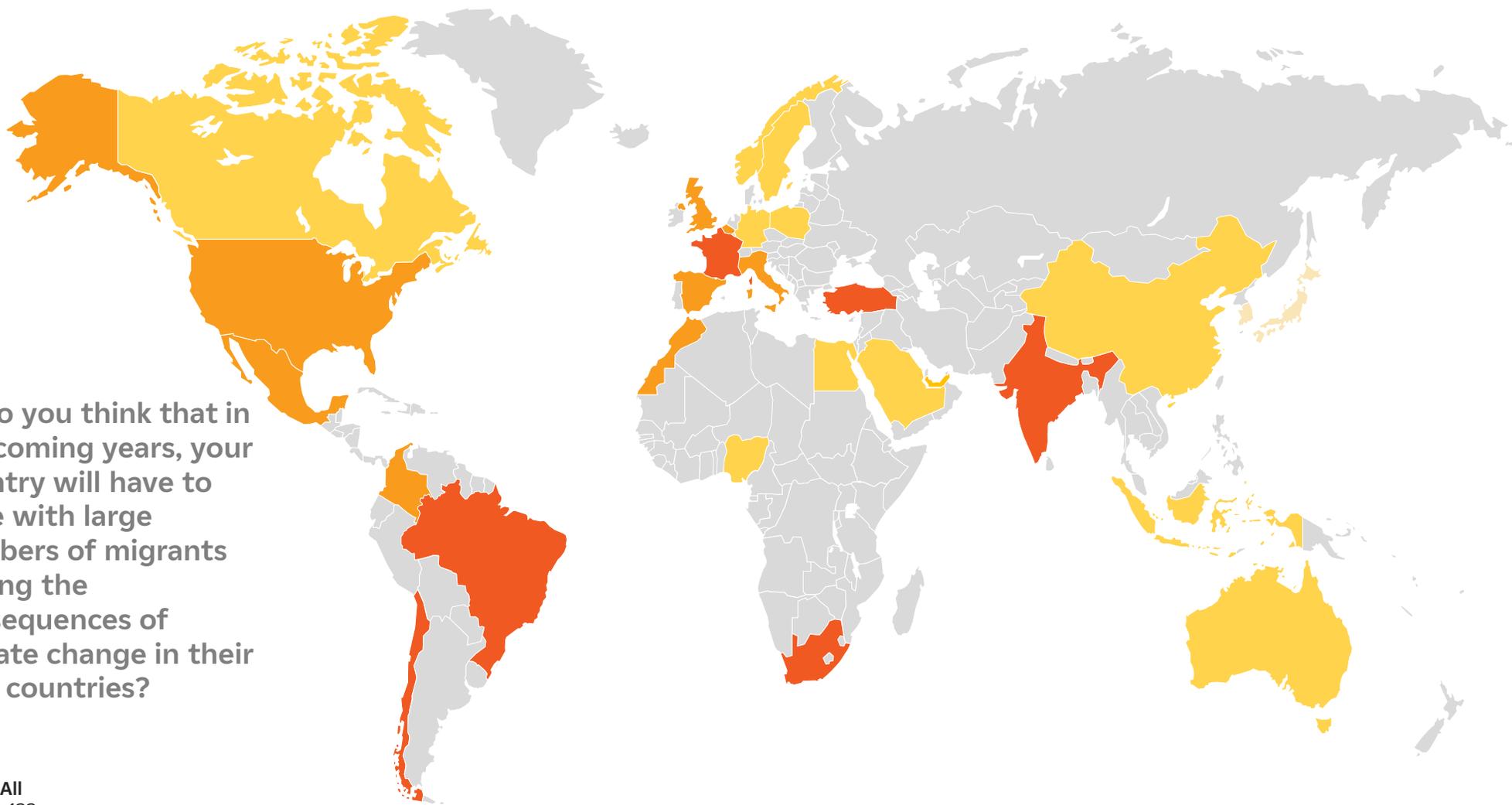
-- Countries least expecting to have to cope with climate migrants

China **47%**
 Singapore **44%**
 South Korea **40%**
 Japan **26%**

% TOTAL YES



The arrival of migrants concerns the Southern-hemisphere countries more, but also countries coping with migration pressure or located on migration routes (France, Spain, Turkey..)



% Definitely

- Score $\geq 30\%$
- Score 20%-29%
- Score 10%-19%
- Score <10%

Q. Do you think that in the coming years, your country will have to cope with large numbers of migrants fleeing the consequences of climate change in their own countries?

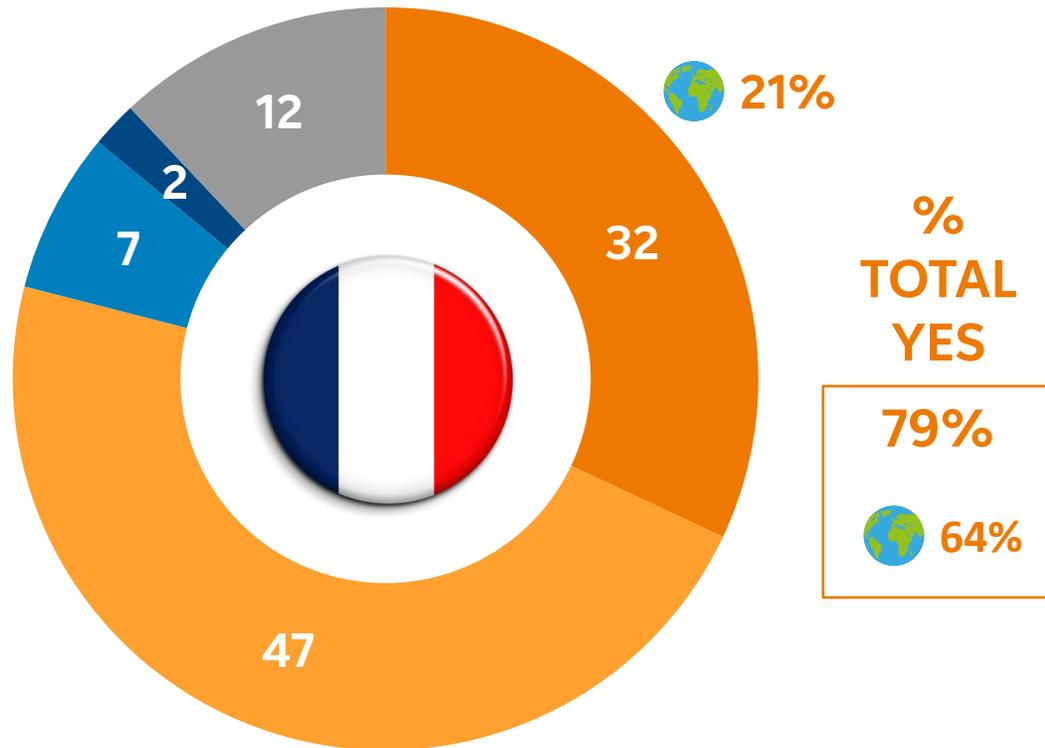
Global - All
Base : 23,433

[New question](#)

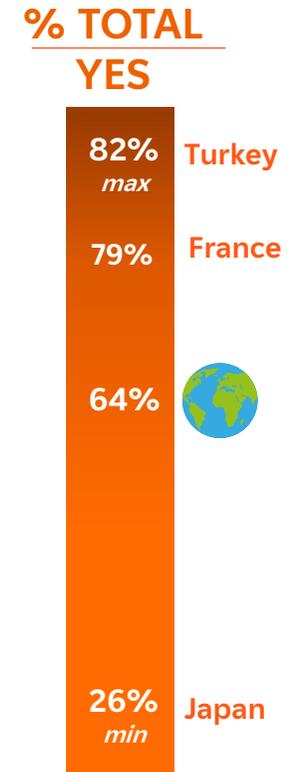


In France, a situation judged as “certain” by 32% (vs 21% World)

Q. Do you think that in the coming years, your country will have to cope with large numbers of migrants fleeing the consequences of climate change in their own countries?



- Yes, definitely
- Yes, probably
- No, probably not
- No, definitely not
- Don't know

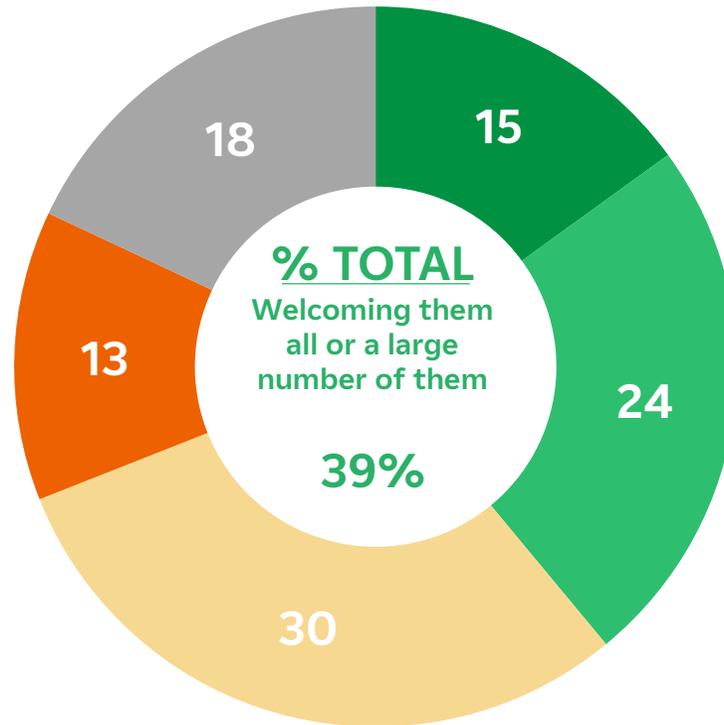


Reluctance to welcome these climate migrants in large numbers...

Q. If this were to happen, what policy should be adopted to deal with these migrants fleeing the consequences of climate change?

In %

- Welcoming them all
- Welcoming a large number of them
- Welcoming a small number of them
- Not welcoming them
- Don't know



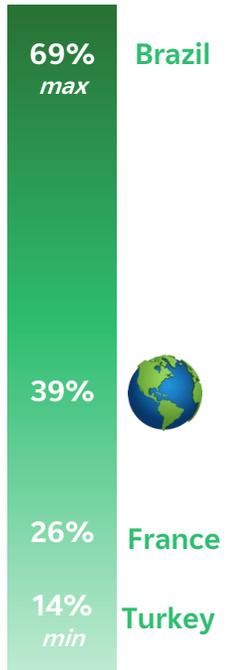
++ Countries most inclined to welcome climate migrants

- Brazil **69%**
- Egypt / United Arab Emirates **63%**
- Nigeria **62%**
- Saudi Arabia **60%**

-- Countries most reluctant to welcome climate migrants

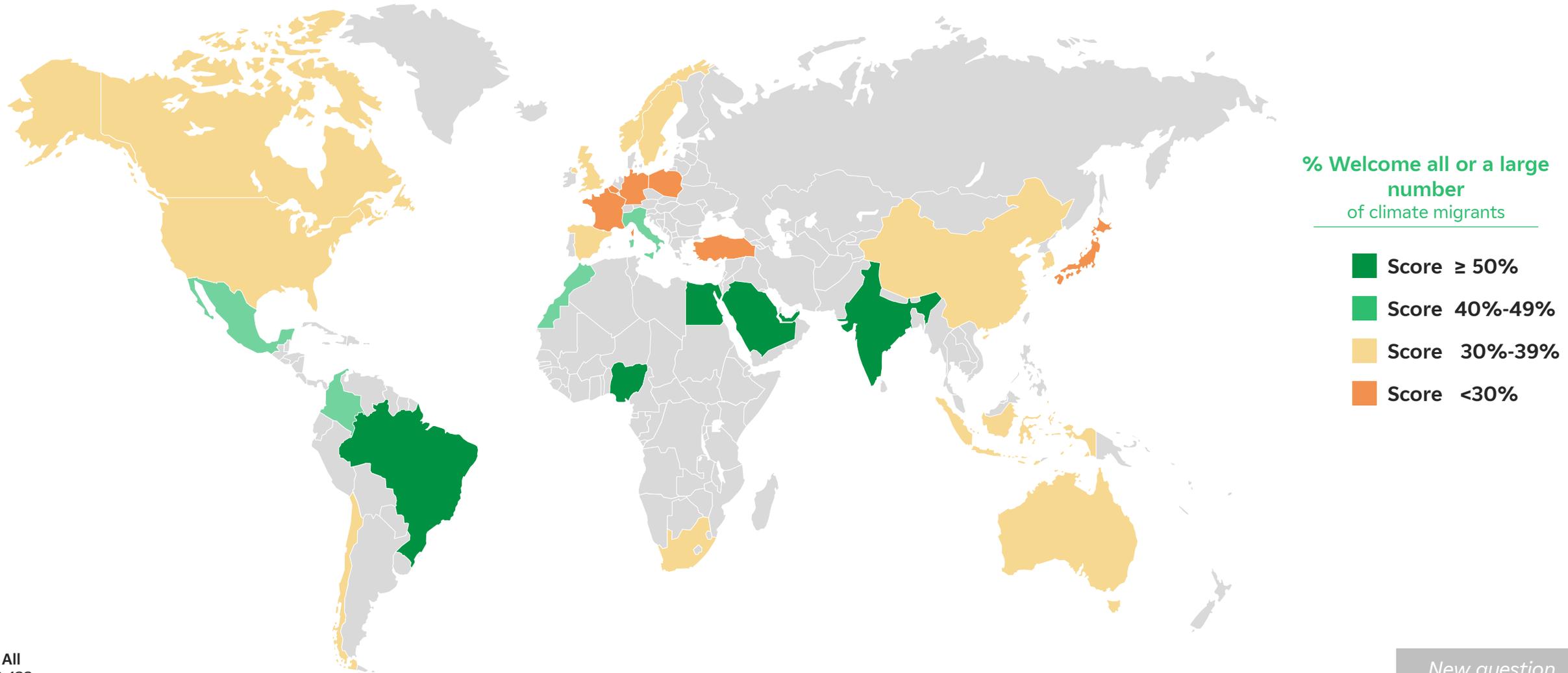
- Turkey **14%**
- Poland **21%**
- Japan / Germany **22%**
- Singapore **24%**
- France / Belgium **26%**

% TOTAL
Welcome all or a large number of them



...once again with disparities between countries

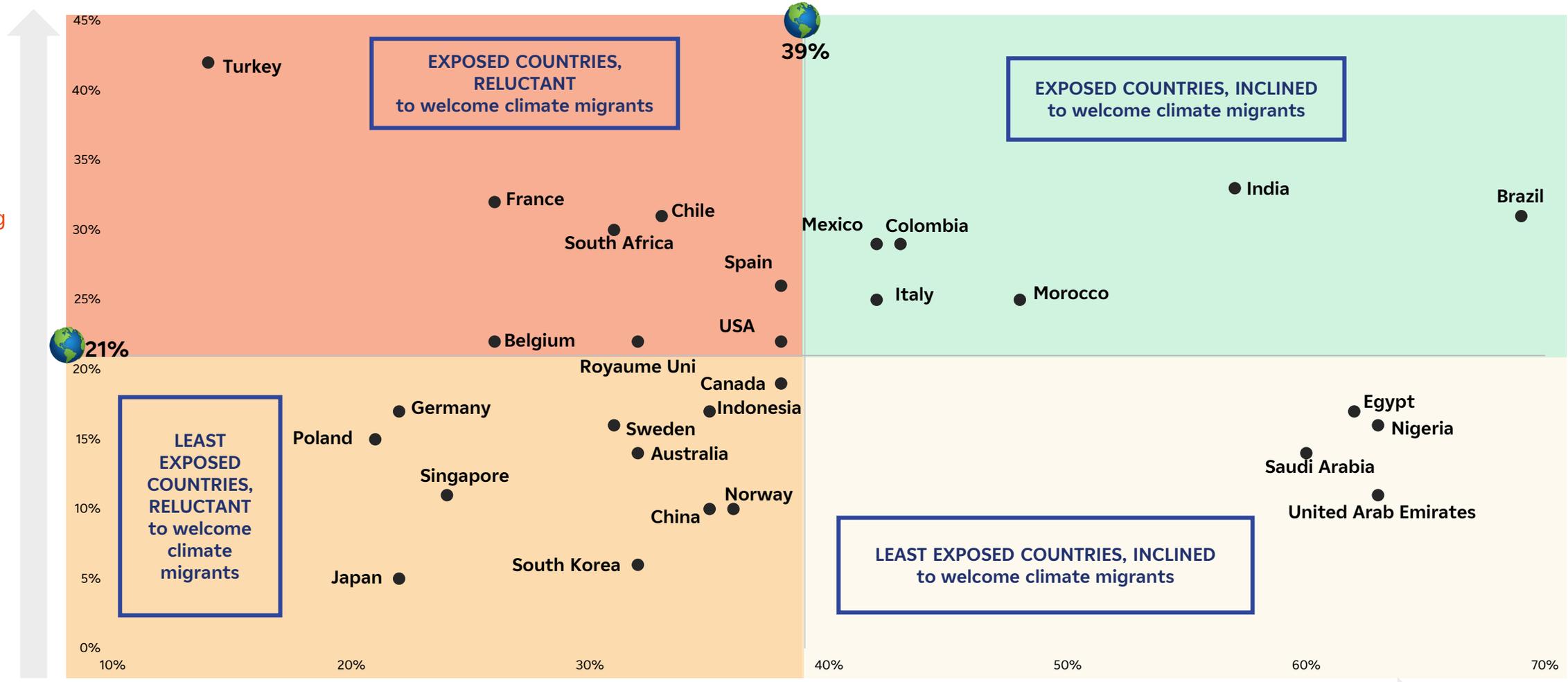
Q. If this were to happen, what policy should be adopted to deal with these migrants fleeing the consequences of climate change?



Among the most exposed countries, some are more open to welcoming climate migrants.

New question

% Think they will **definitely** have to cope with a large number of migrants fleeing the consequences of climate change



% Think that they would need to welcome all or a large number of migrants fleeing the consequences of climate change

Climate-skepticism: what is the current situation?





Climate skepticism persists among a part of the population



Climate skepticism remains stable 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:



64%⁺¹

« That it is mainly due to human activity »

37% among those who have not observed the effects of CC in their region

Very little difference between generations (62% to 64% convinced)

27%⁻¹

« That it is mainly due to a natural phenomenon, like the ones the Earth has experienced throughout its history »

9%
= « That there is no way to know »

36%
⁻¹

63% among those who are not observing the effects of CC in their region

Positioning of countries in relation to the causes of climate change (5 survey waves)

« That it is mainly due to human activity»

« That it is mainly due to a natural phenomenon»

« That it is mainly due to a natural phenomenon»

« No climate change»

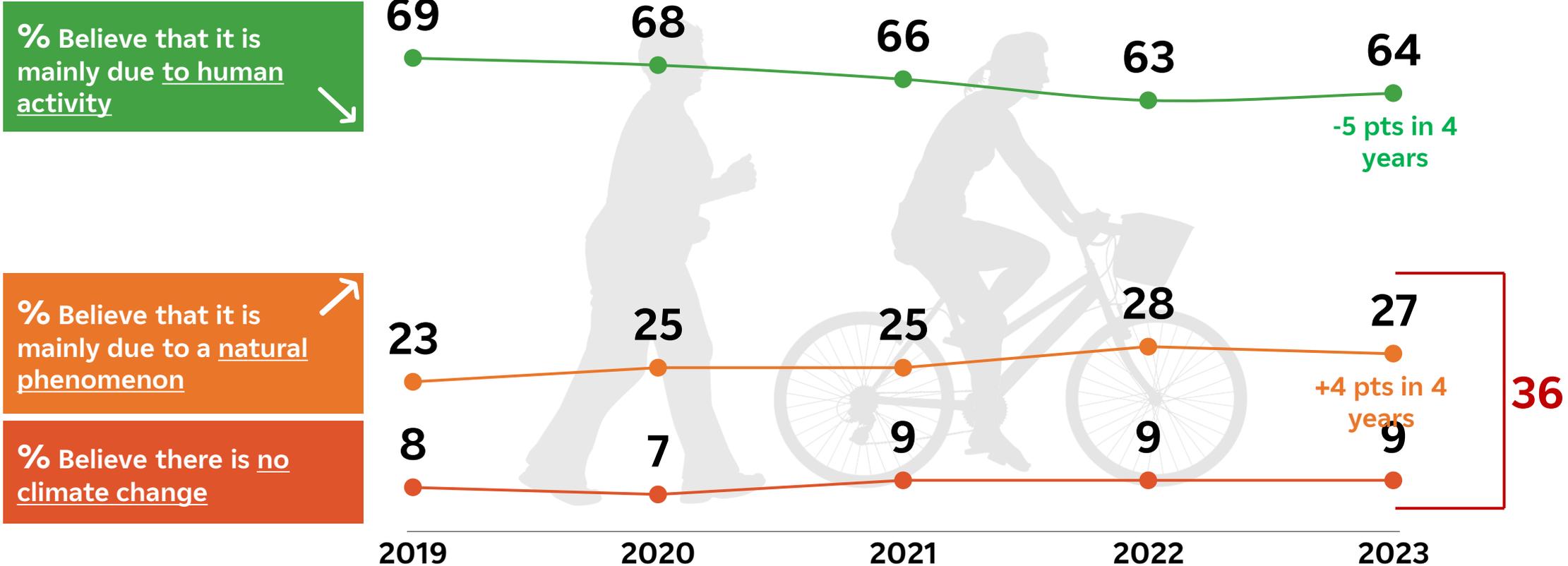
« No climate change»

Countries most convinced of human origin	Countries with greater support for natural causes	Countries with greater support for natural causes and denial	Countries with greater support for denial
Chile	Japan	Norway	Australia
Colombia	Morocco	Saudi Arabia	Sweden
Brazil	Russia	United Arab Emirates	
Mexico		United States	
Italy		China	
South Korea			
Turkey			
Singapore			

When analyzed over time, for the past 4 years, attribution to human origin is tending to erode

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:



% Believe that it is mainly due to human activity

% Believe that it is mainly due to a natural phenomenon

% Believe there is no climate change

2019 2020 2021 2022 2023

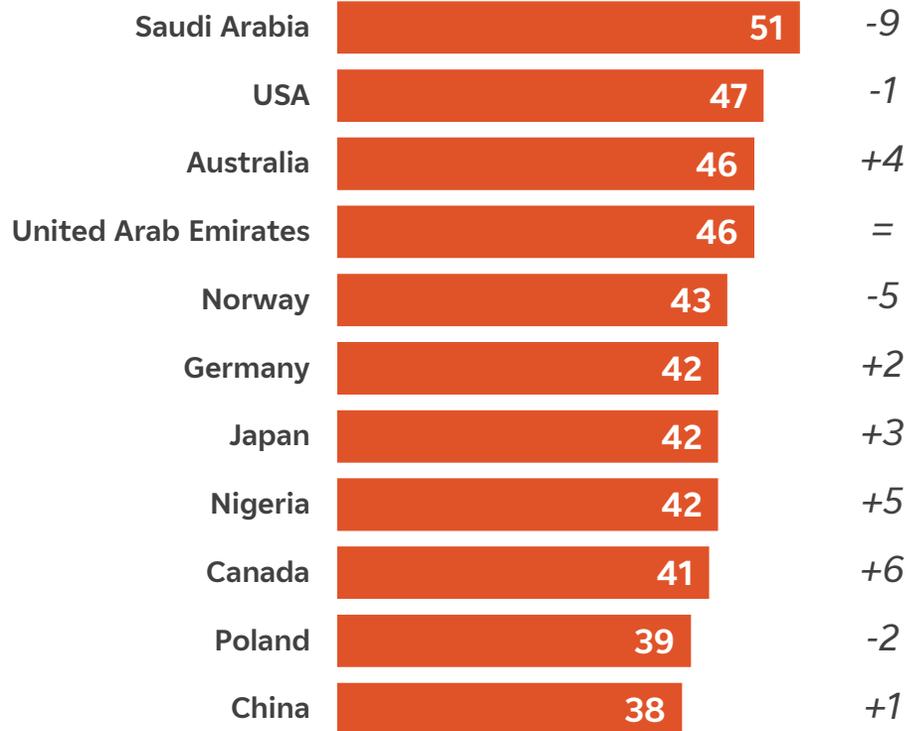
Climate skepticism is more established in fossil-fuel-producing countries

Notable progressions in some countries, including Canada.

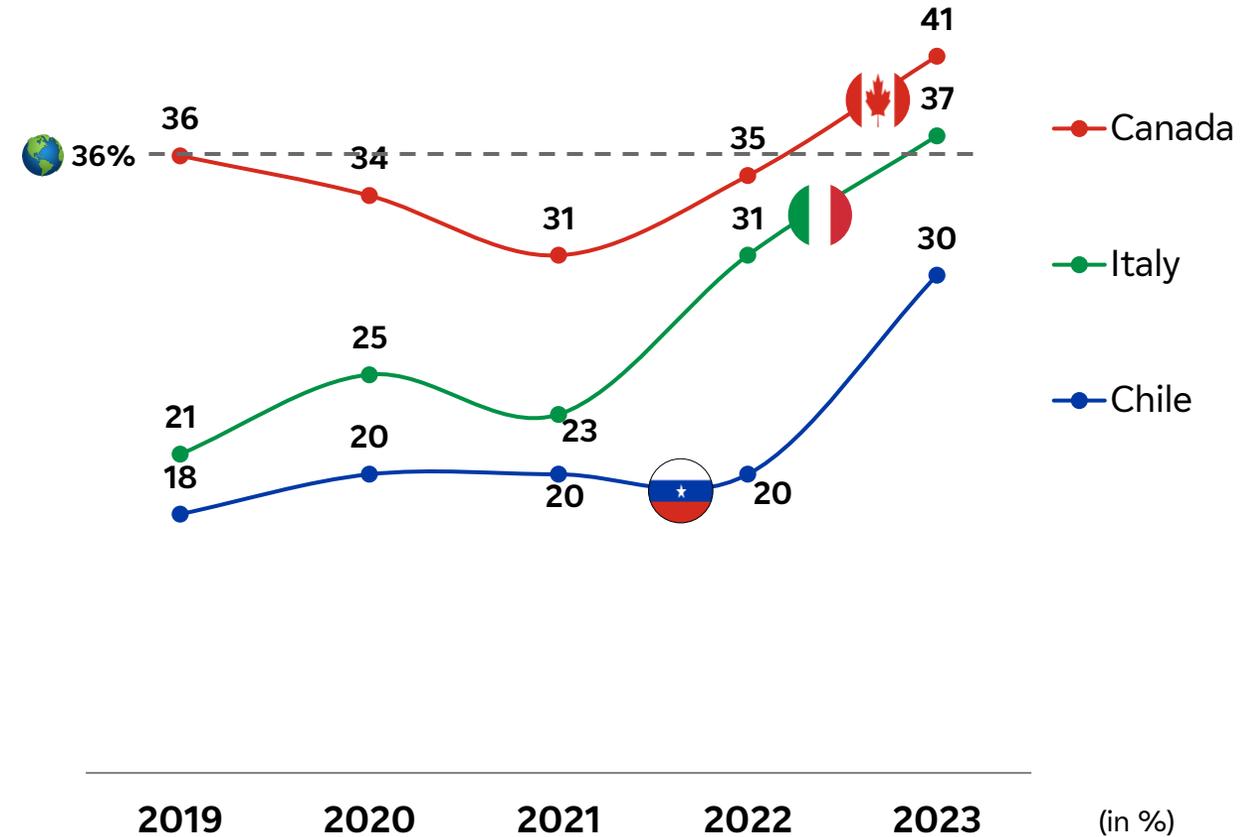


GLOBAL
36%

++ The most climate-skeptical countries



The biggest increases in climate skepticism between 2022 and 2023

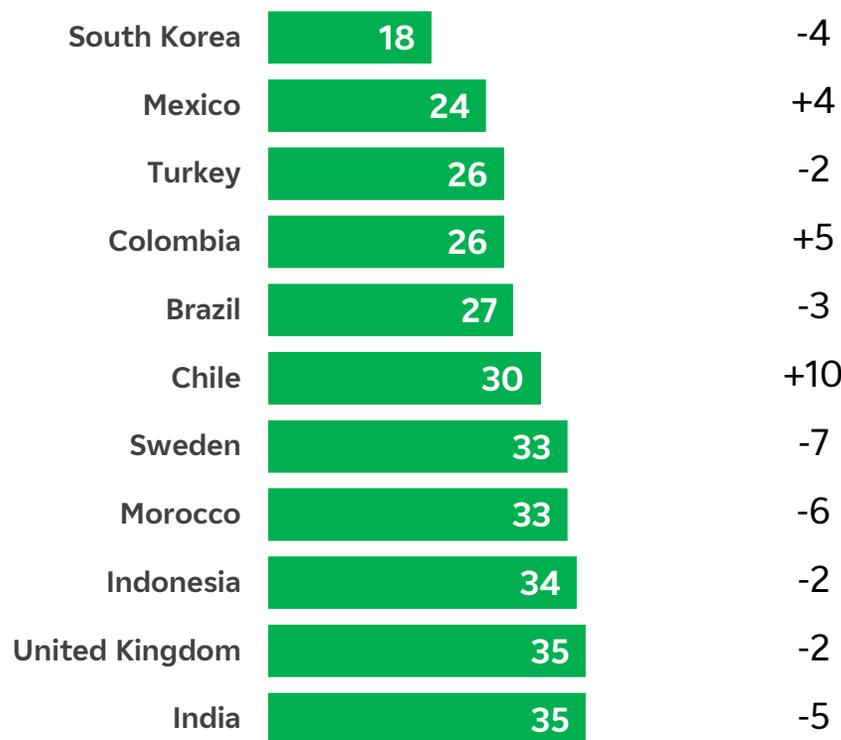


Climate skepticism is not as high in South America

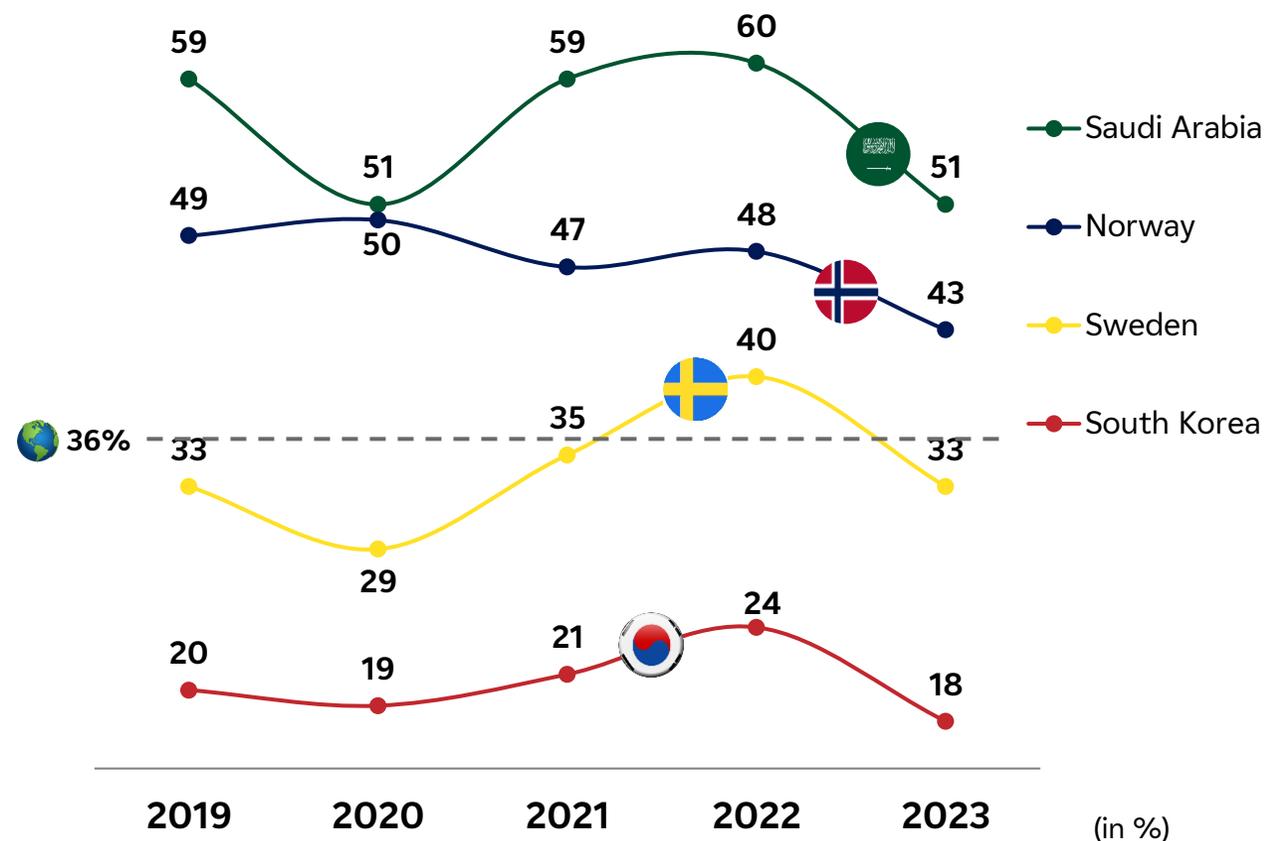


GLOBAL
36%

- - The least climate-skeptical countries



The biggest drops in climate skepticism between 2022 and 2023





In France, the opinion gap between the elites and the middle- and low-income categories is growing

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

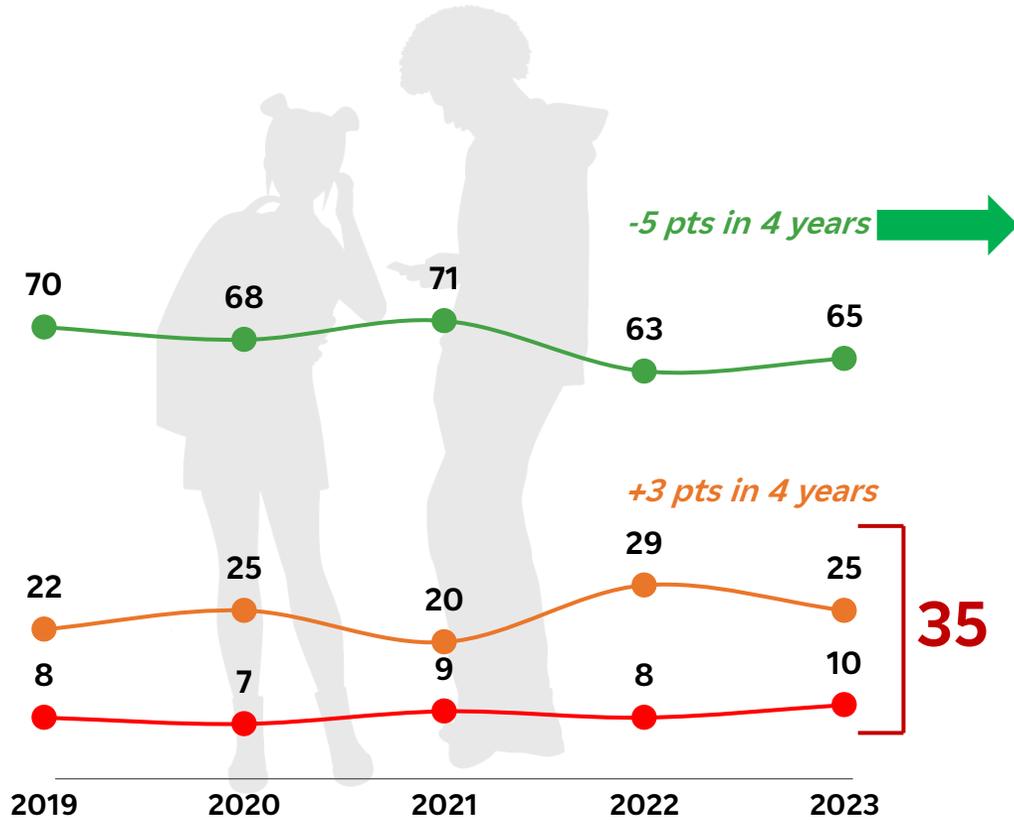
Q. And concerning this climate change that we hear about, would you say:

In %

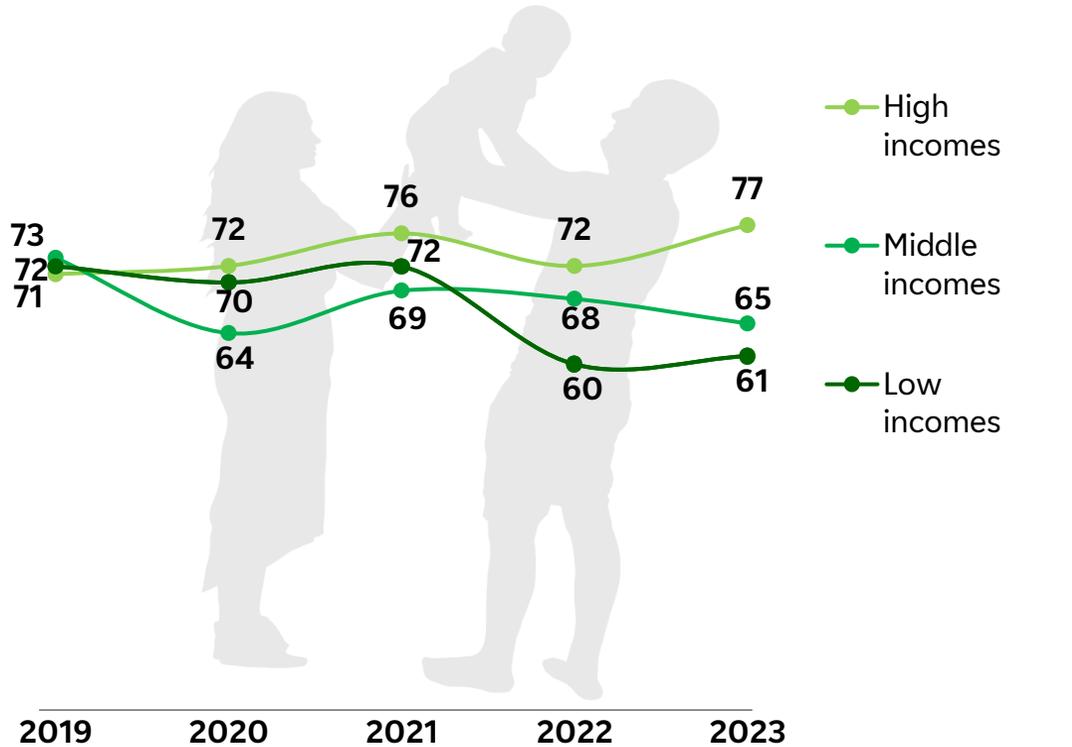
% Believe that it is mainly due to human activity

% Believe that it is mainly due to a natural phenomenon

% Believe there is no climate change



% Believe that it is mainly due to human activity : Evolution by income category



FRANCE - All
Base : 1000



Does climate skepticism lead to certain behaviors?



Climate-skeptics are not climate-irresponsible

Believing that climate change is of human origin leads to more individual actions being carried out, but the gaps are fairly small

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:

Q. Here are some individual actions that can help fight climate change. For each one, tell me if: “You do it systematically or almost systematically” or “You do it from time to time”

	0 to 4 individual actions	5 to 7 individual actions	8 to 9 individual actions	10 and + individual actions	Total
Total	21%	28%	23%	28%	100%
Human origin	14%	28%	26%	32%	100%
Natural origin (or DK)	24%	31%	21%	24%	100%
Does not acknowledge climate change	60%	22%	10%	7%	100%

Source : D.Boy, *Perception du changement climatique : une évolution inattendue*, in Witkowski, D., & Boy, D. (2023). Une planète mobilisée ? L’opinion mondiale face au changement climatique. EDF. <https://www.edf.fr/groupe-edf/observatoire-international-climat-et-opinions-publiques>



Climate-skeptics are not climate-irresponsible

Believing that climate change is of human origin leads to more individual actions being carried out, but the gaps are fairly small

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:

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: “Very acceptable”

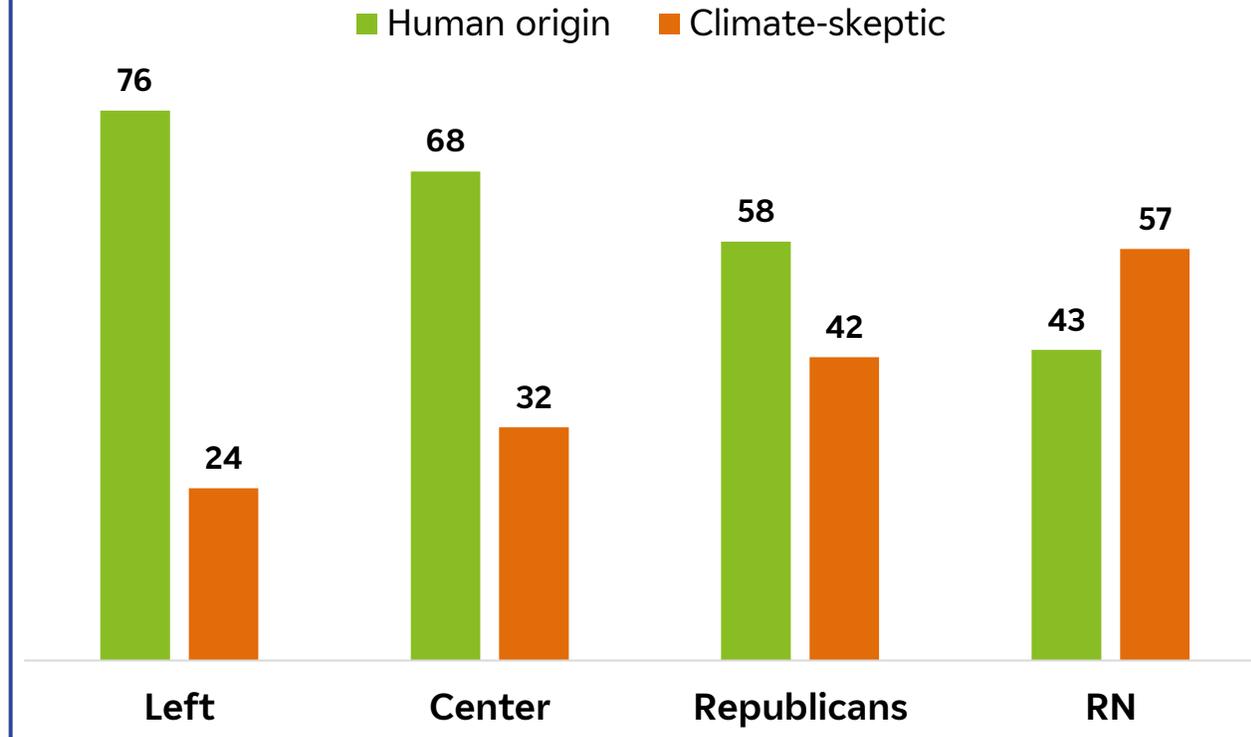
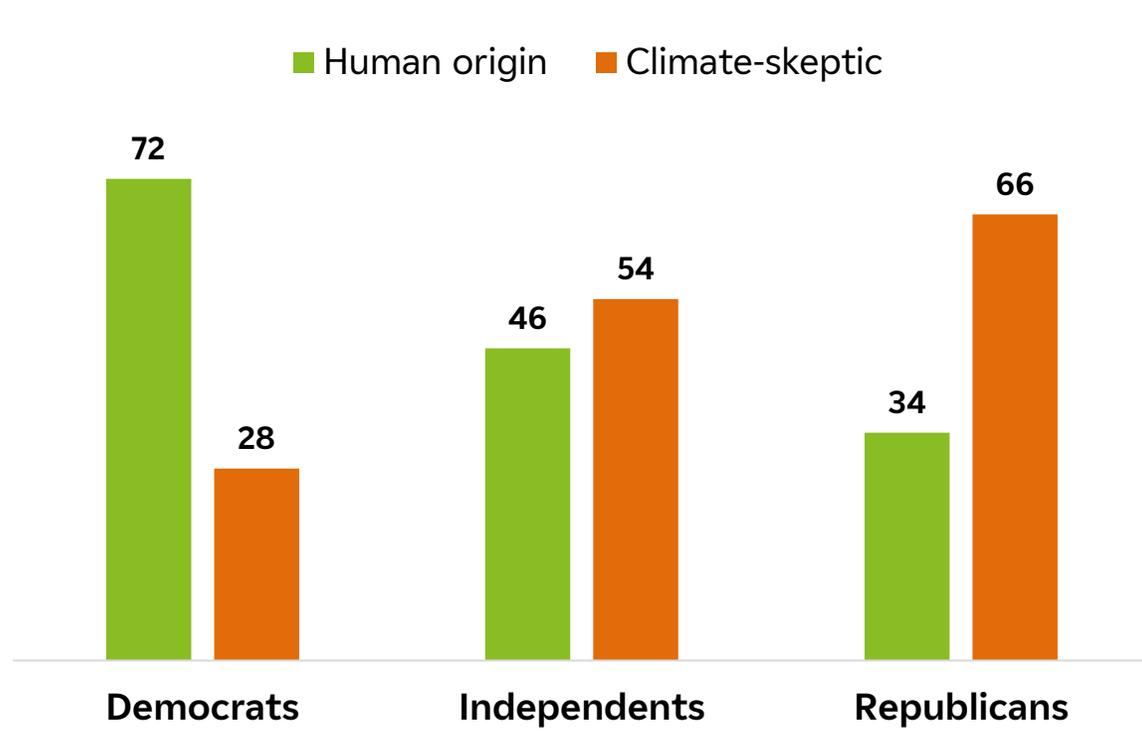
	0 to 5 measures	6 to 8 measures	9 to 11 measures	12 and + measures	Total
Total	23%	23%	25%	29%	100%
Human origin	15%	23%	29%	33%	100%
Natural origin (or DK)	29%	25%	21%	26%	100%
Does not acknowledge climate change	63%	19%	10%	8%	100%

Source : D.Boy, *Perception du changement climatique : une évolution inattendue*, in Witkowski, D., & Boy, D. (2023). Une planète mobilisée ? L’opinion mondiale face au changement climatique. EDF. <https://www.edf.fr/groupe-edf/observatoire-international-climat-et-opinions-publiques>



Political polarizations differ greatly according to countries (e.g. France vs USA)

In the USA, climate skepticism has become a component of the left/right split. This is much less the case in France.





Another reality: climate relativism



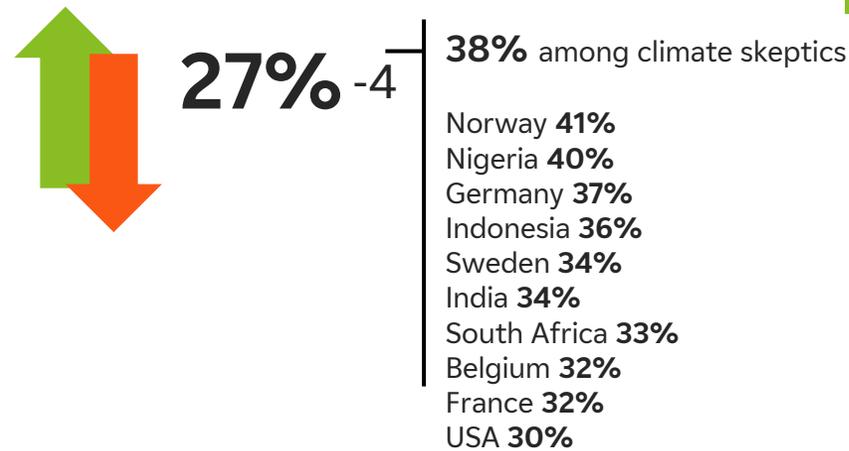
Not just negative consequences: a perception that is losing ground, but still shared by 40% of world opinion

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

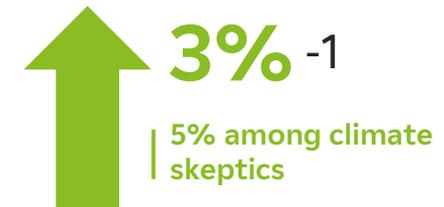
MAINLY NEGATIVE CONSEQUENCES



BOTH NEGATIVE AND POSITIVE CONSEQUENCES



MAINLY POSITIVE CONSEQUENCES



DK

11% +1



52% +1

32% +1

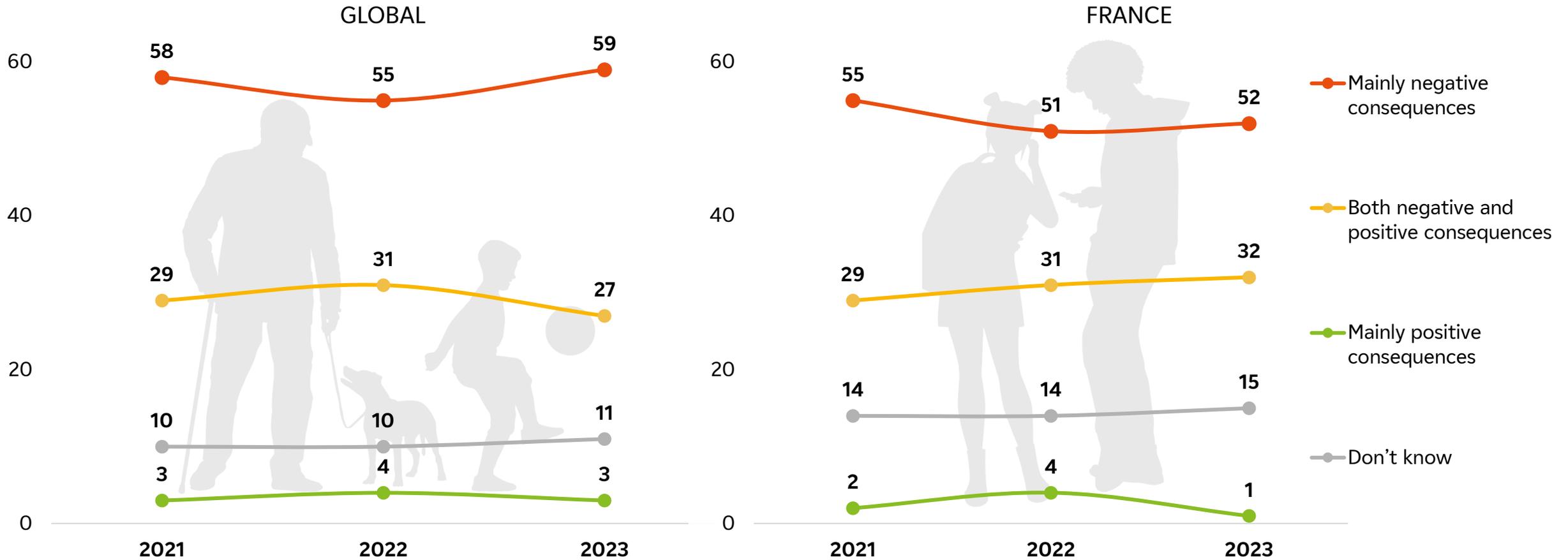
1% -3

15% +1

When observing the trend over 2 years, the scores come close to the 2021 scores.

France is evolving differently and becoming more relativist than the average

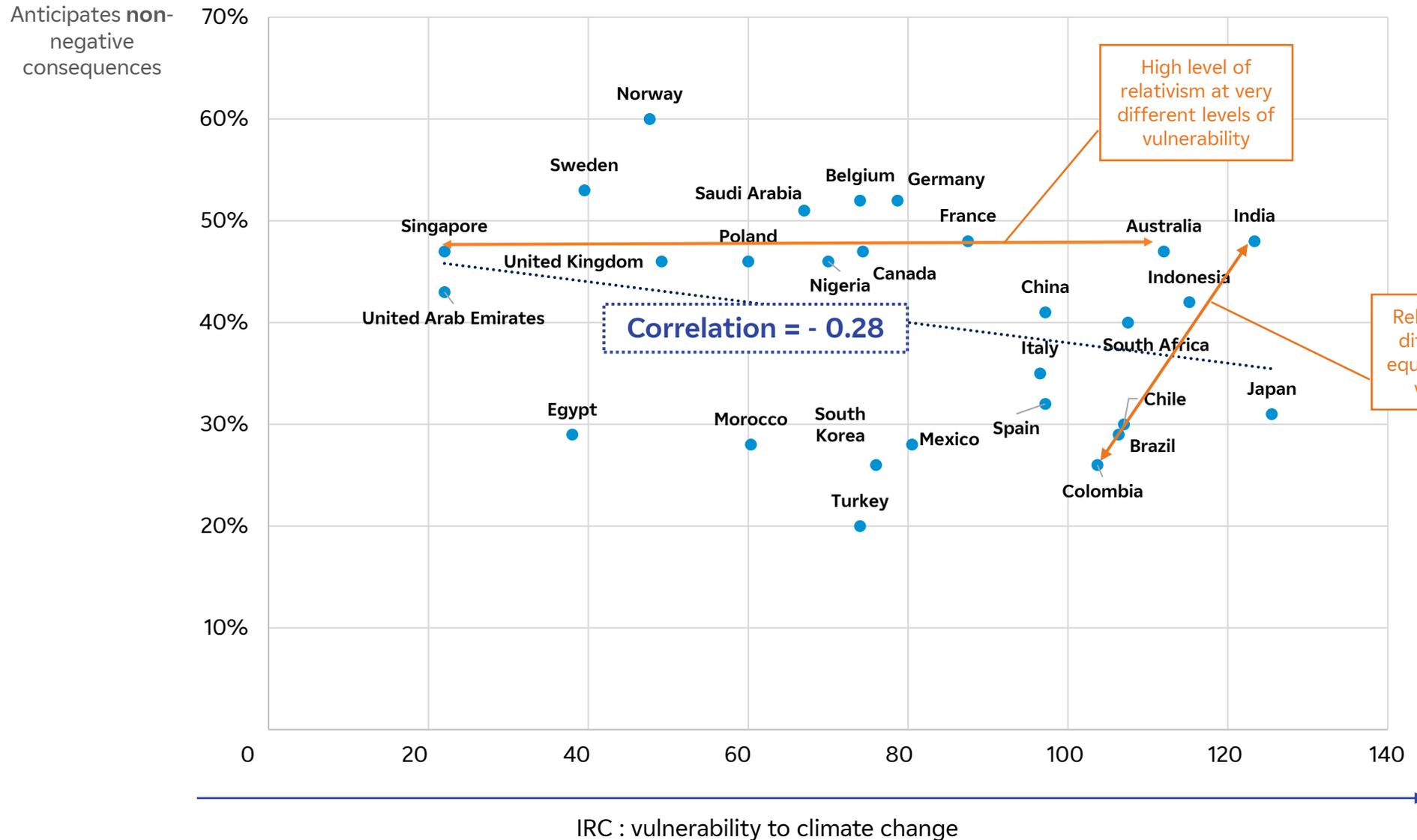
Q. In your opinion, what consequences will climate change have where you live?
In %



Global - All
Base : 23,433

Vulnerability does not lead to greater lucidity

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



High level of relativism at very different levels of vulnerability

Relativism is very different for an equivalent level of vulnerability

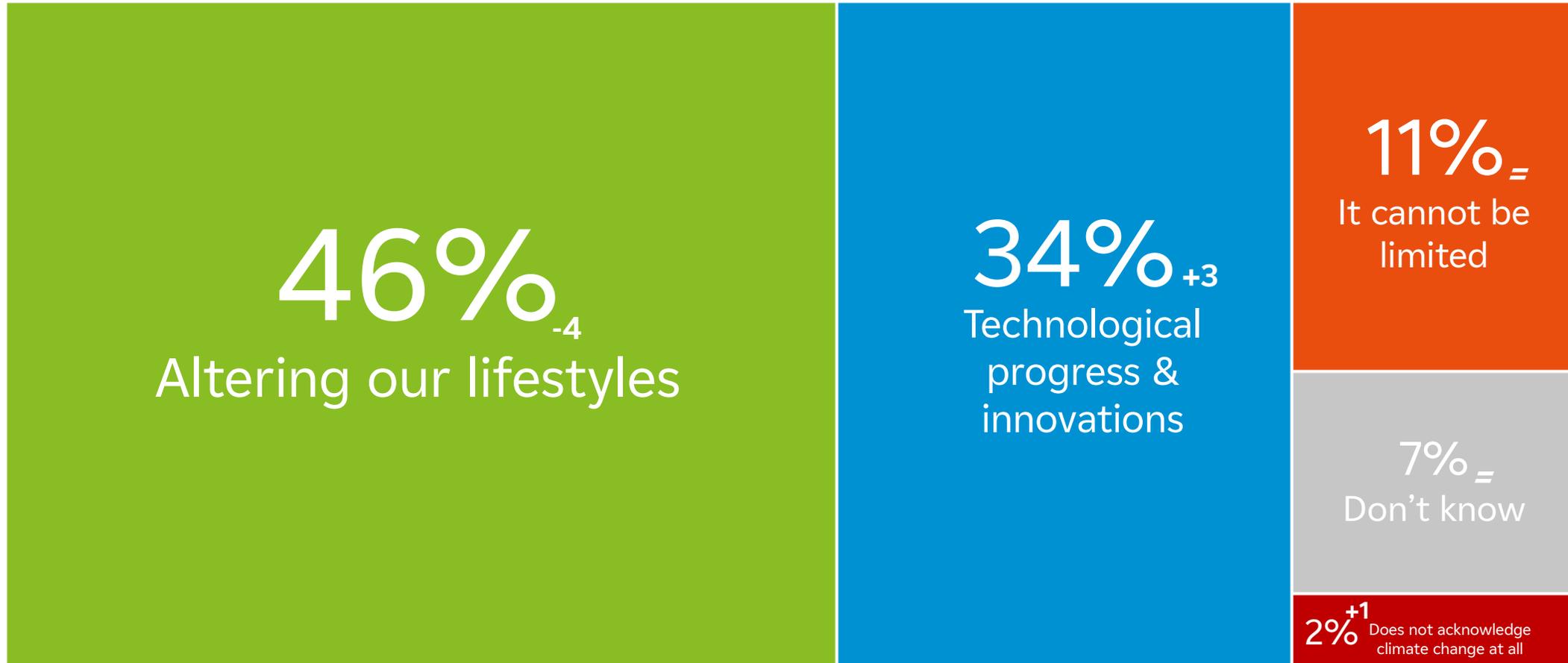
The CRI index attributes the highest values to the countries most exposed to climate disasters. Japan and India are thus very vulnerable countries; Singapore and the United Arab Emirates are, in contrast, fairly resilient.

Changing life style: a requirement that is becoming less accepted



A drop in thinking that we need to alter our lifestyles this year, in favor of technological progress / innovation.

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



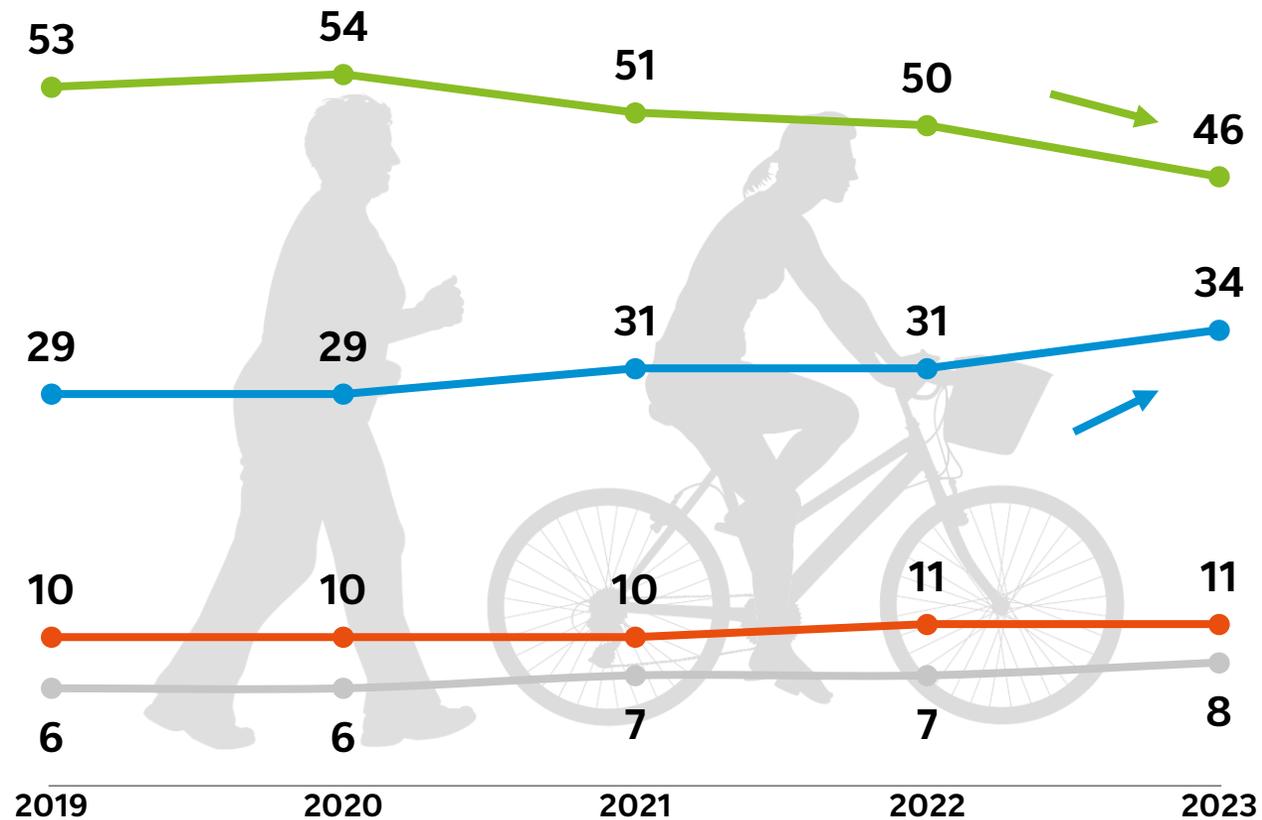
Reminder of full wording:

- 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 do anything to limit climate change

A trend that has been confirmed in the past 5 years: altering our life styles is tending to lose ground in favor of technological progress

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

In %



- It is mainly through **major changes in our lifestyles** that climate change will be limited
- It is mainly through **technological advancement and scientific innovation** that we will find solutions to climate change
- There is **nothing to be done**, we can no longer do anything to limit climate change
- Don't know or experience NO climate change

Reminder of full wording:

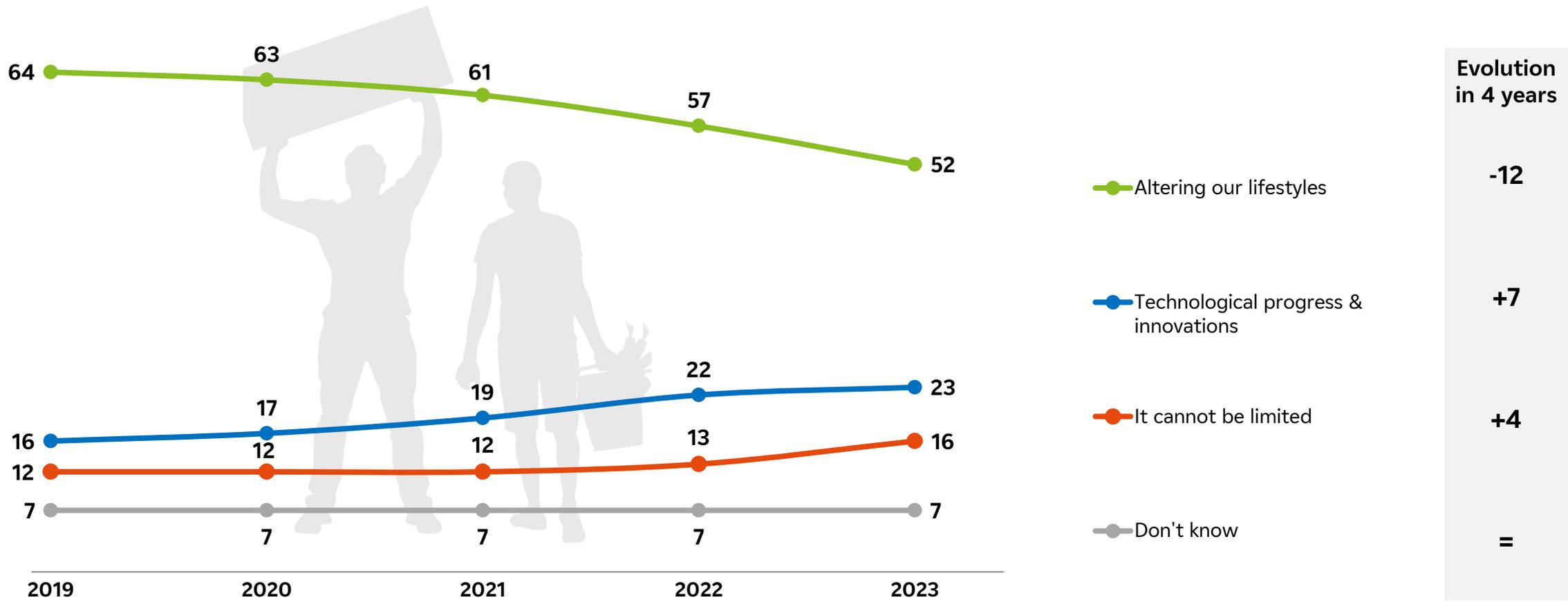
- It is mainly through technological advancement and scientific innovation that we will find solutions to climate change
- It is mainly through major changes in our lifestyles that climate change will be limited
- There is nothing to be done, we can no longer do anything to limit climate change



In France, an argument that is still heard, although dropping sharply

There are also more defeatists: 16% (vs 11% World)

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



- Reminder of full wording:
- 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 do anything to limit climate change

Once again it is in Latin America that the need to change life styles is the strongest.

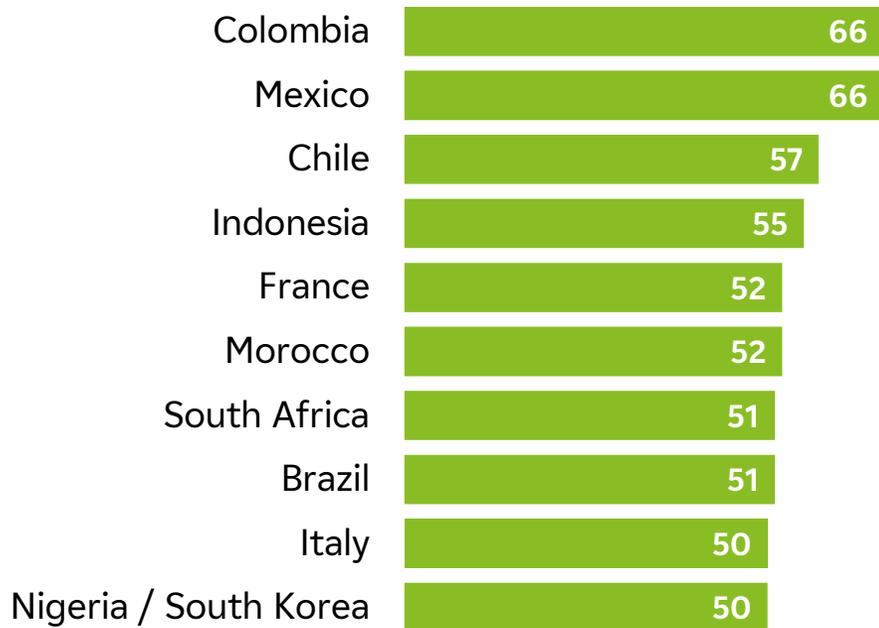


Q. Which of these three opinions is closest to your own?

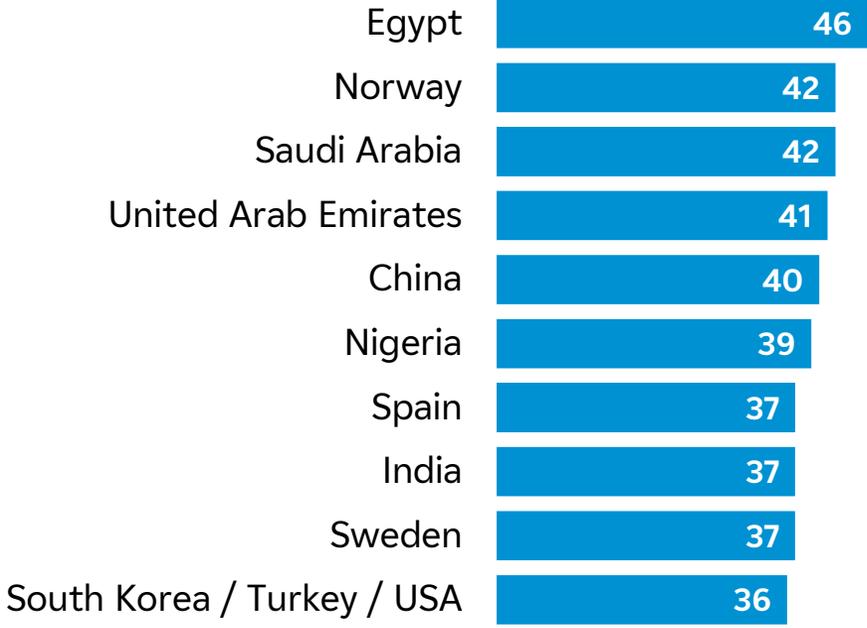
In %

To fight climate change...

% Countries where it is most believed that the solution will come through a **change in our life styles**



% Countries where it is most believed that the solution will come through **technological progress and innovation**



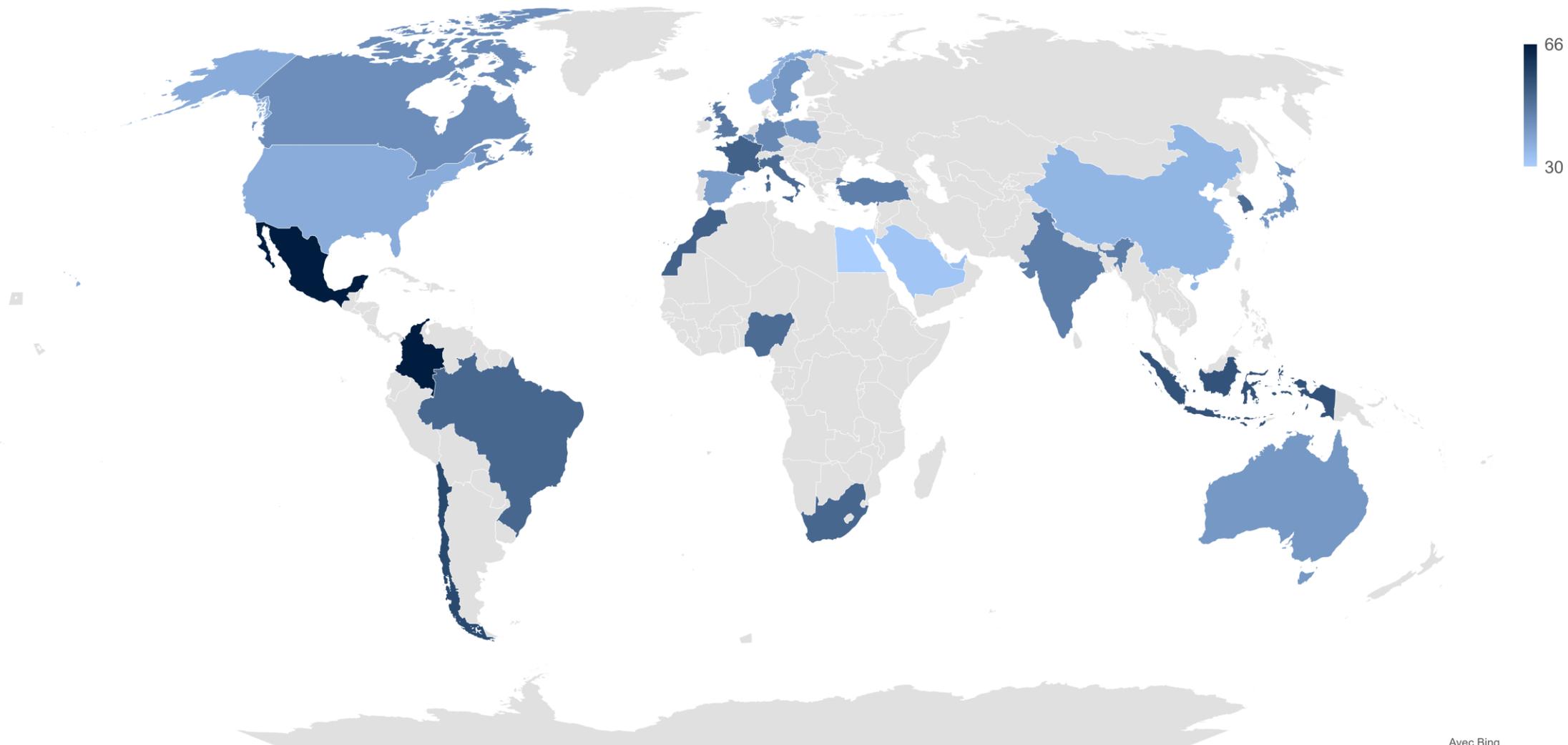
Reminder of full wording:

- 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 do anything to limit climate change

Changes in our lifestyles

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

« It is mainly through major changes in our lifestyles that climate change will be limited »



Global - All
Base : 23,433

Avec Bing
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Public players are expected to take action while being a little less criticized for their inaction

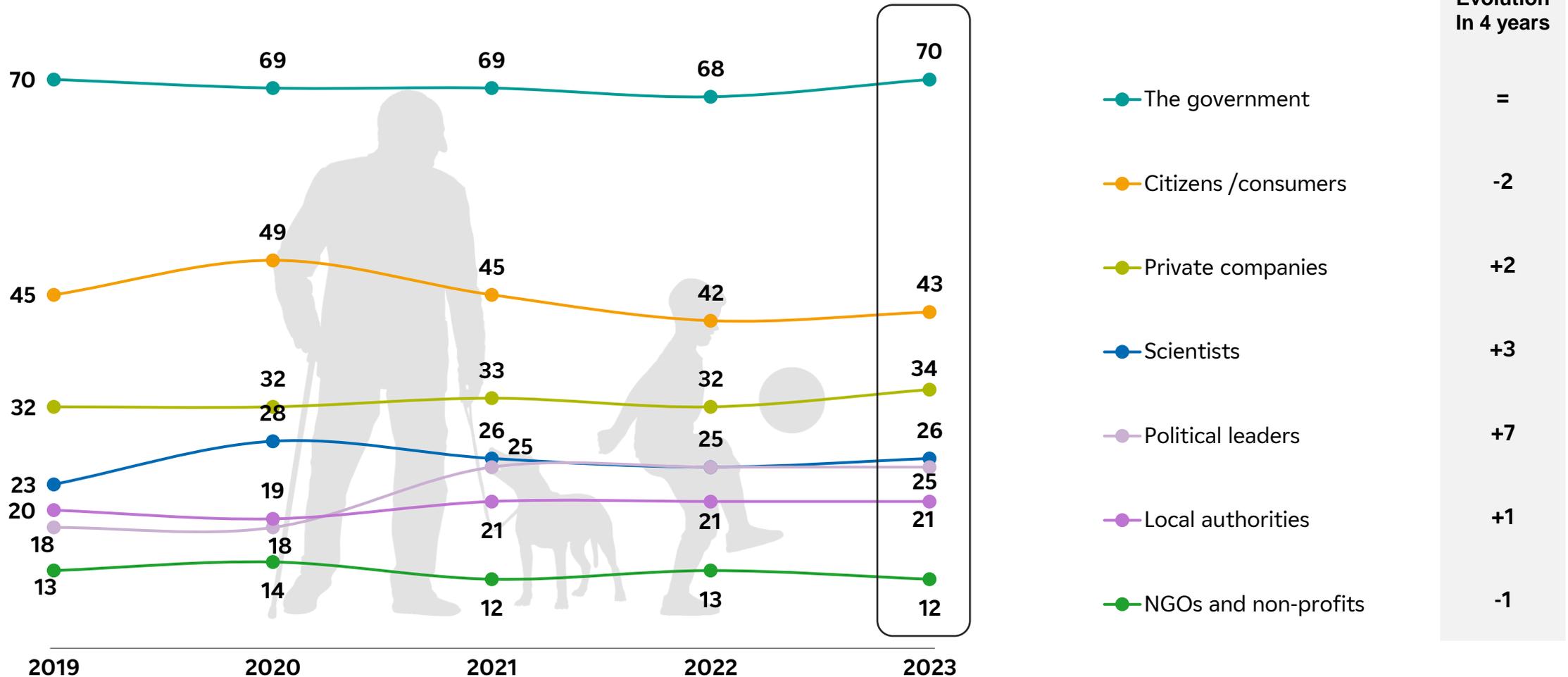


Who should take action?

The government as a priority, citizens next

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

In %



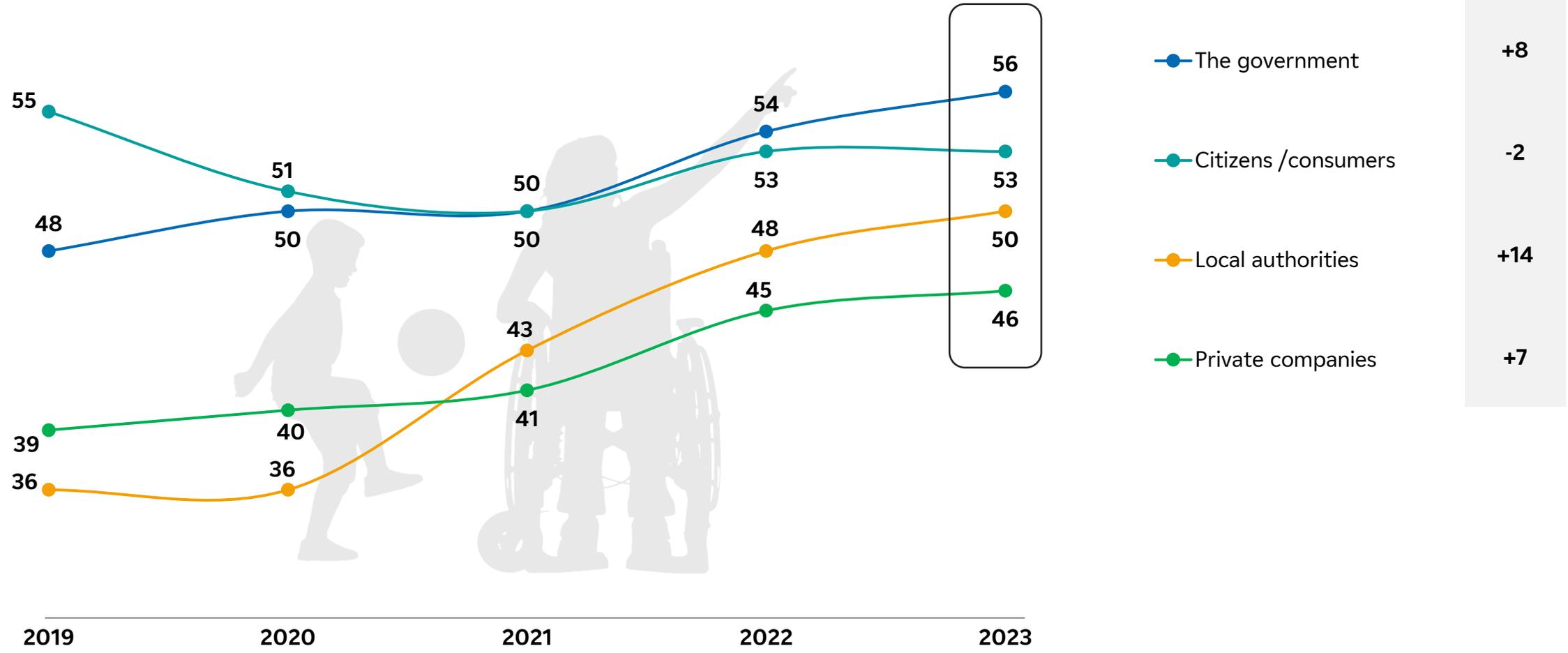
Global - All
Base : 23,433

Who is taking action?

The feeling that mobilization is becoming more widespread

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

% TOTAL Take action a lot or somewhat



Global - All
Base : 23,433

The government is still the leading player expected to take action

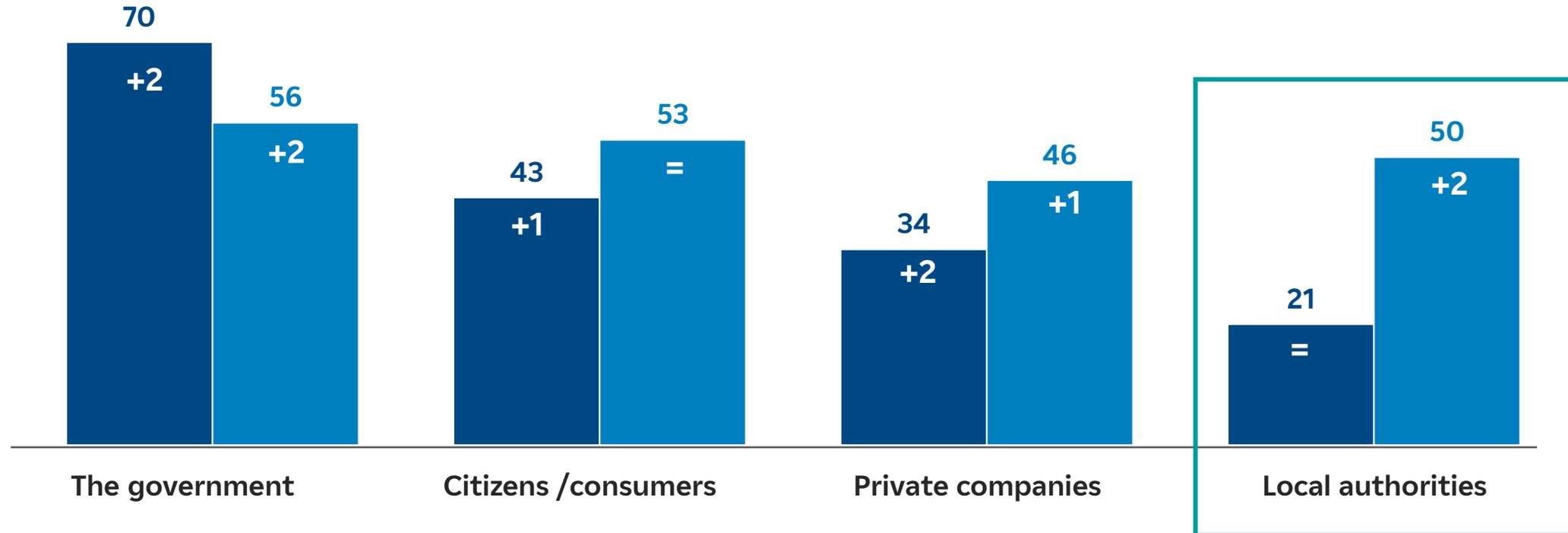
Local authorities are seen as taking action whereas this was not expected of them

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

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

% SHOULD BE
ACTING

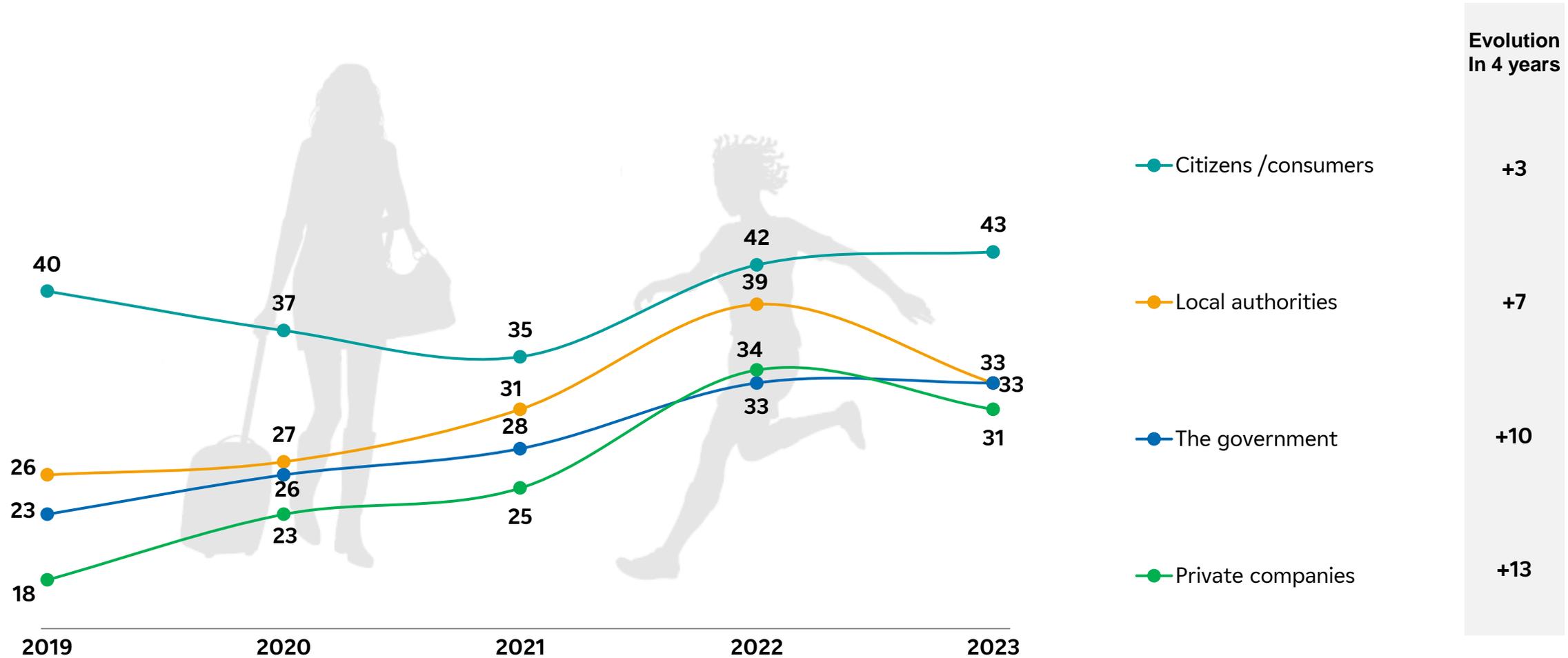
% IS
ACTING



In France, consumers are the ones taking action (the institutions are making progress, but still lagging behind)



Q. And for each of the following players, do you think that they are taking action to fight climate change in your country?
% TOTAL Take action a lot or somewhat



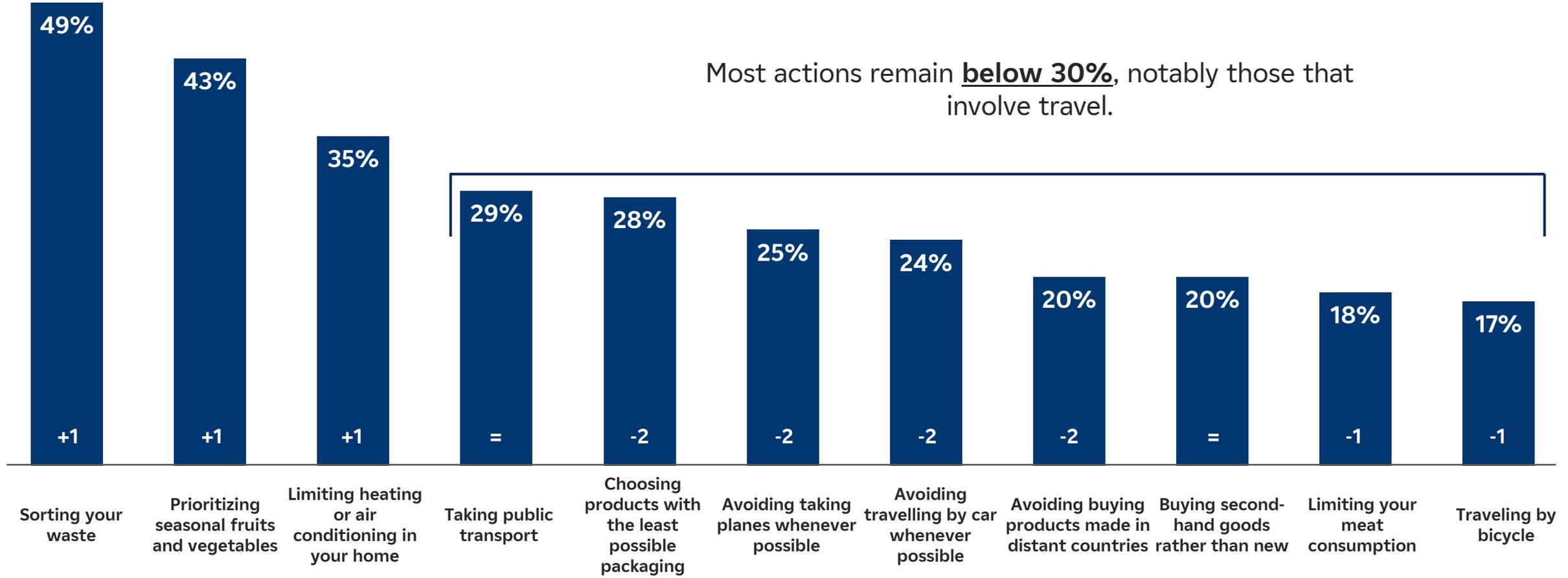
Individual actions:
changes are slow
France is doing relatively
well



The real levers for action on warming are not the ones most commonly engaged in

Q. Here are some individual actions that can help fight climate change. For each one, tell me if:

% You do it systematically or almost systematically



Among the well-established individual actions: prioritizing seasonal fruits/vegetables and sorting waste.



Q. Here are some individual actions that can help fight climate change. For each one, tell me if:



% You do it systematically or almost systematically

Some well-established habits:

Evolution in 4 years

+1

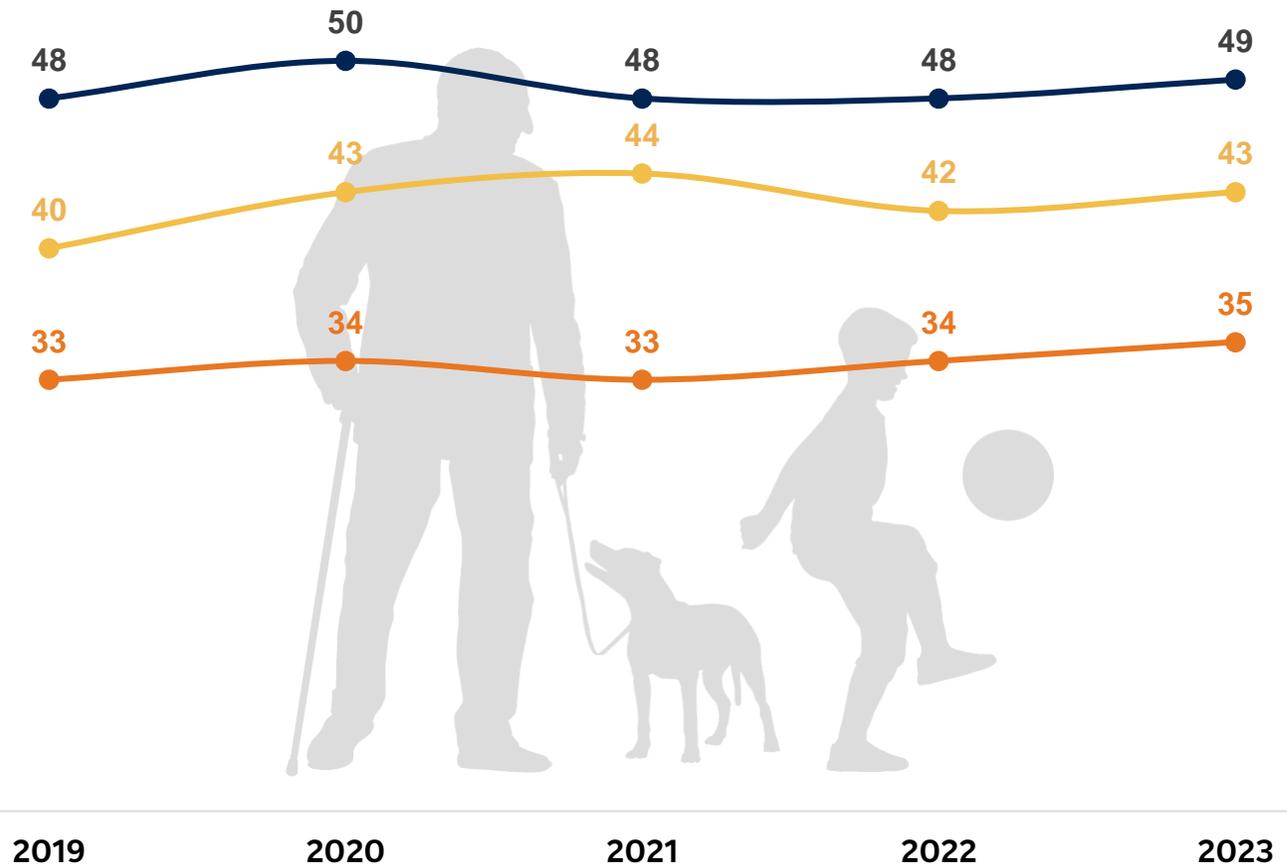
● Sorting your waste

+3

● Prioritizing seasonal fruits and vegetables

+2

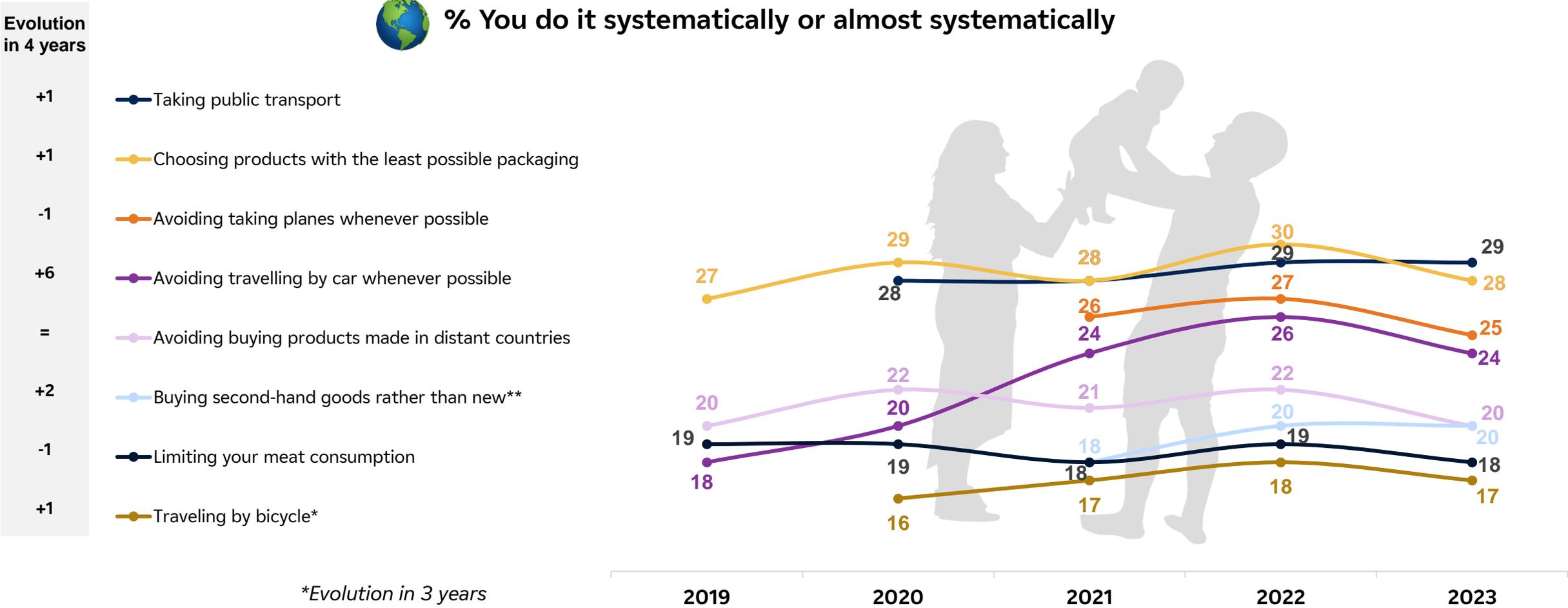
● Limiting heating or air conditioning in your home



As concerns the most decisive actions for the climate, on a global scale, the efforts noted in 2022 have tended to reappear in 2023



Q. Here are some individual actions that can help fight climate change. For each one, tell me if:

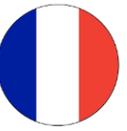


*Evolution in 3 years

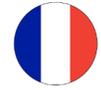
**Evolution in 2 years

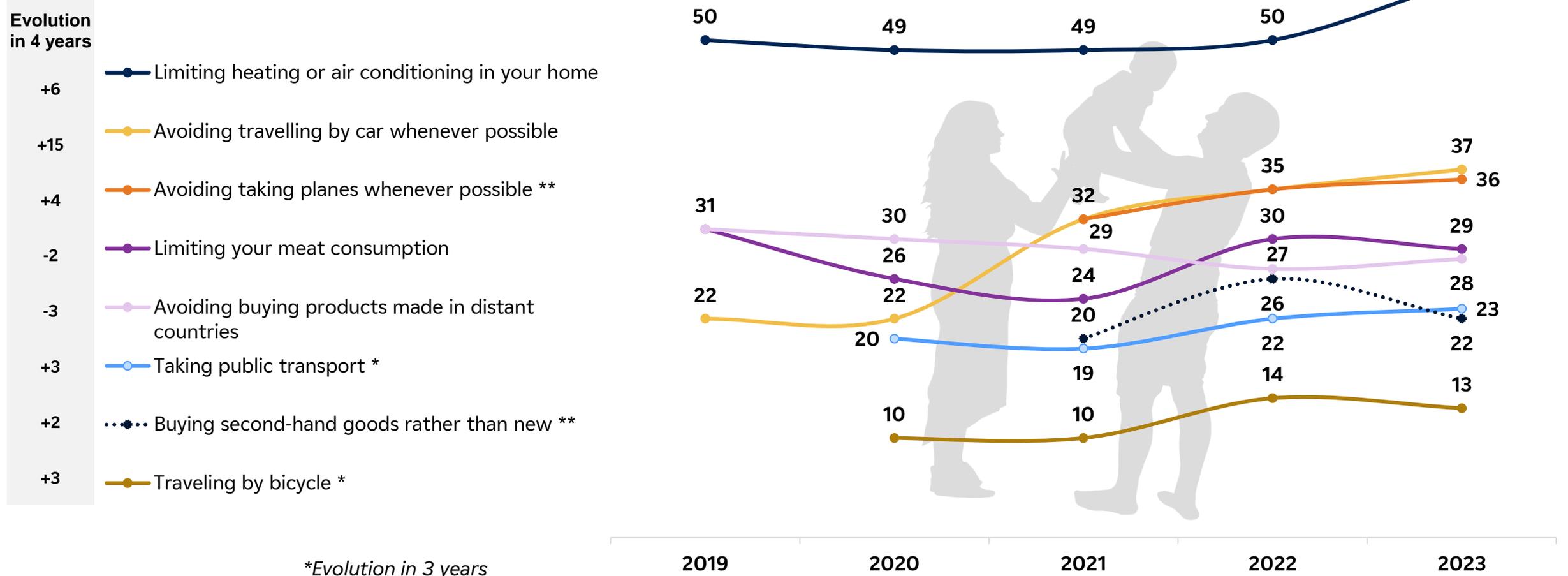
Global - All
Base : 23,433

In France, notable progress in relation to the car and heating



Q. Here are some individual actions that can help fight climate change. For each one, tell me if:

 % You do it systematically or almost systematically



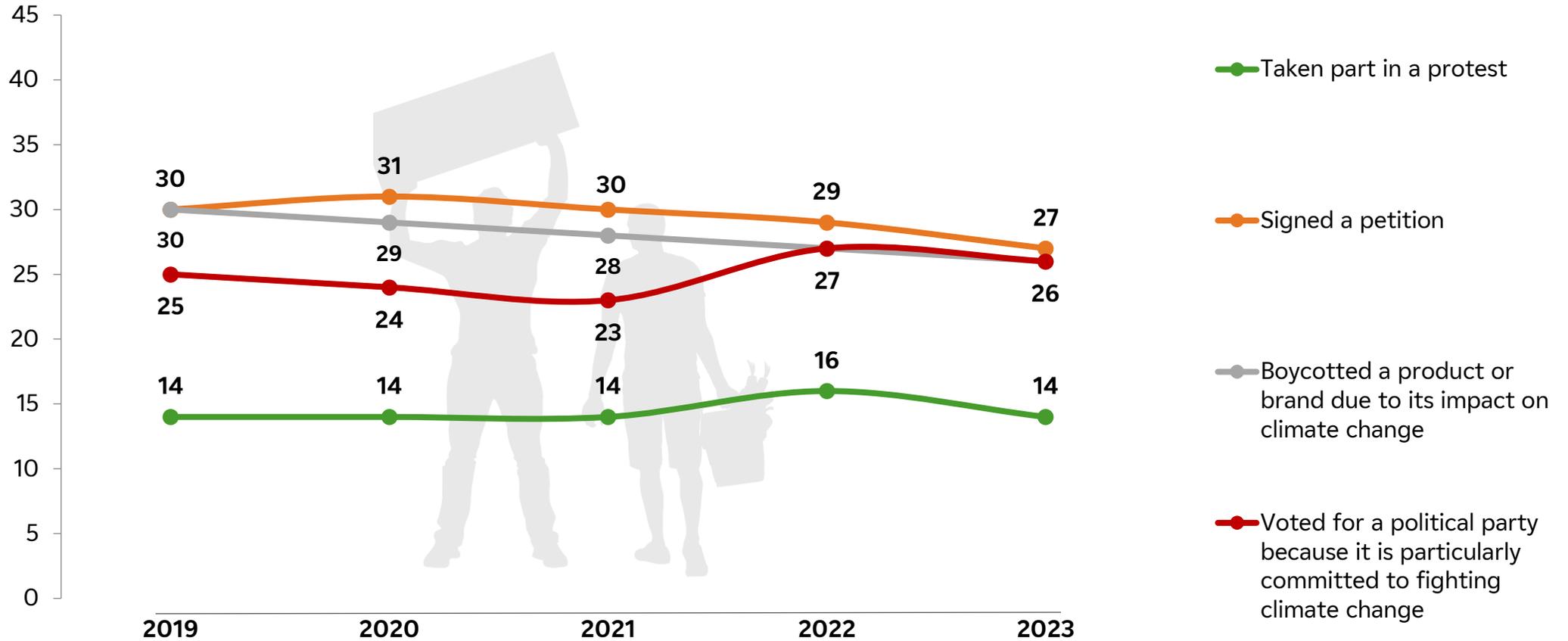
Evolution in 4 years

- +6
- +15
- +4
- 2
- 3
- +3
- +2
- +3

*Evolution in 3 years
 **Evolution in 2 years

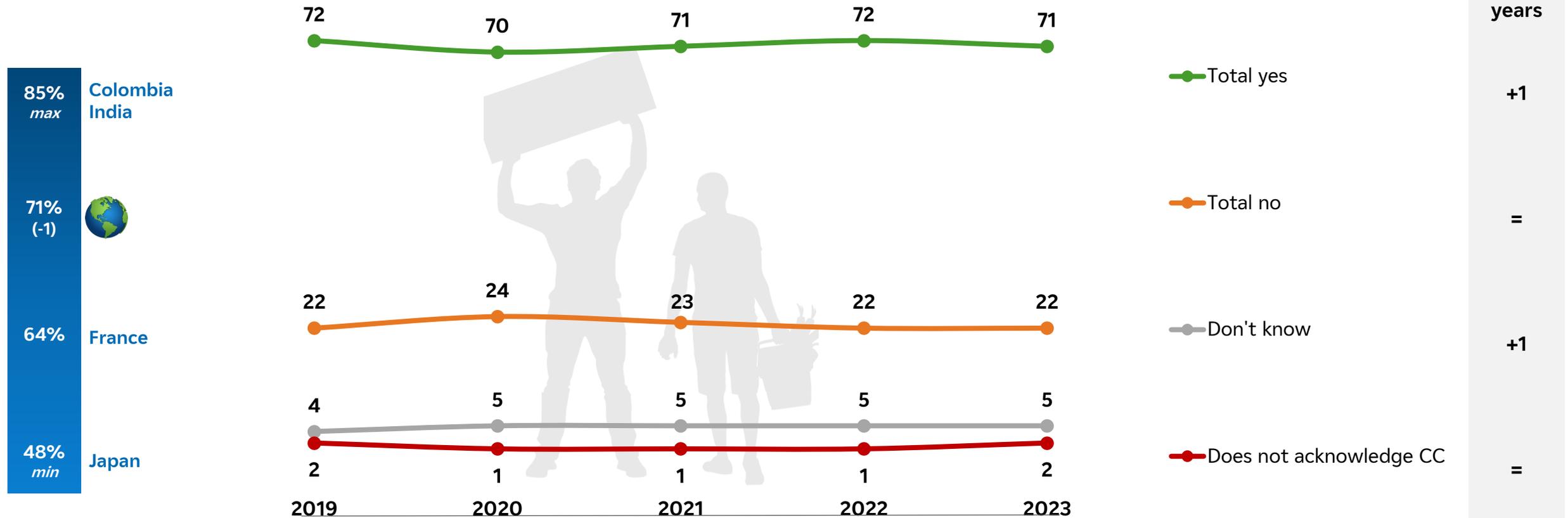
Citizen mobilization is not growing

Q. When it comes to fighting climate change, have you personally ever:
In %



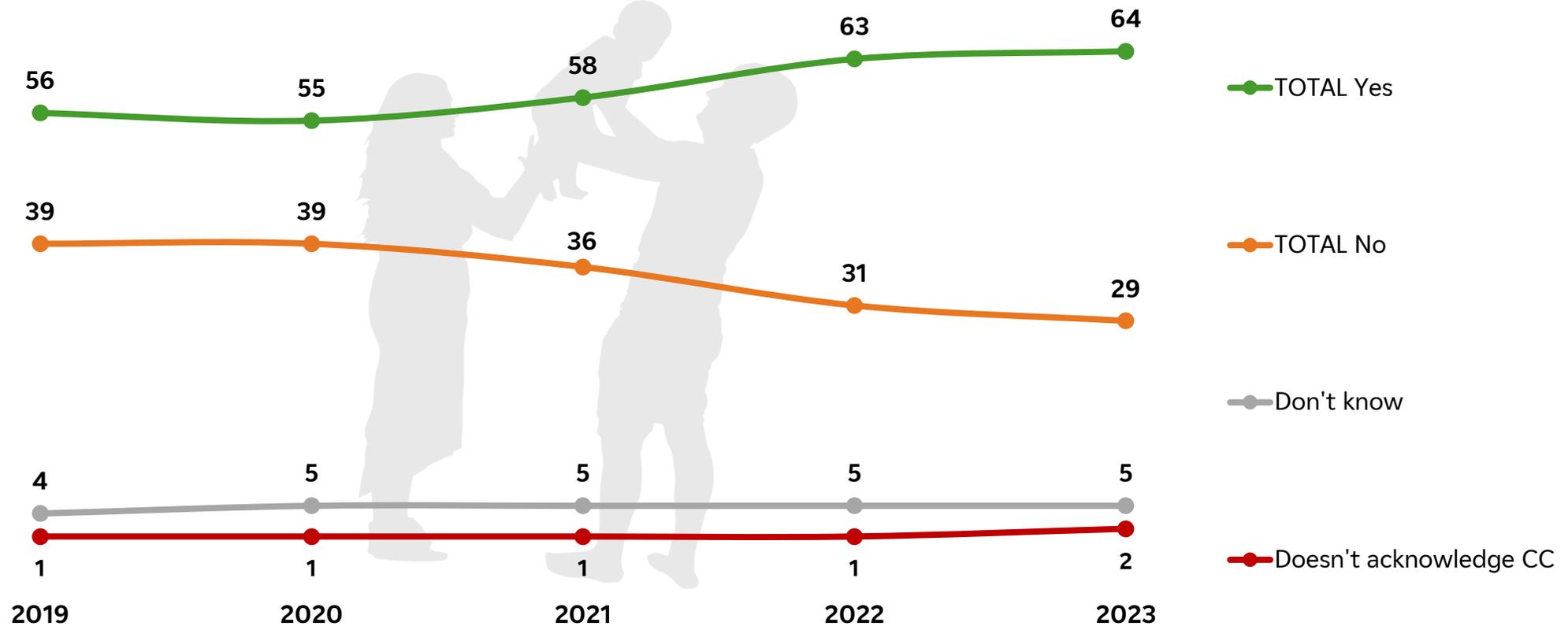
A level of feeling informed is high and stable

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



In France, the feeling of being informed is progressing

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

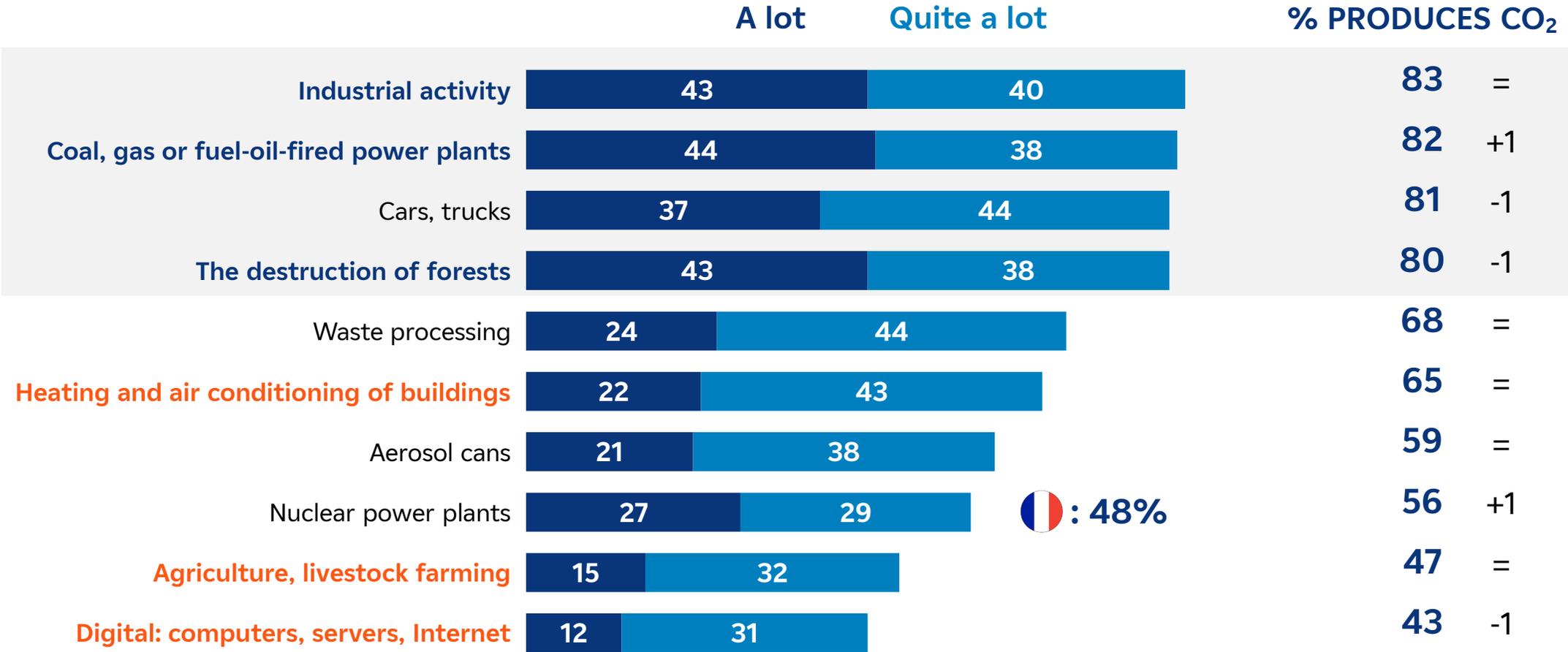


Continued difficulty in identifying all the major causes of CO₂ emissions



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

In %

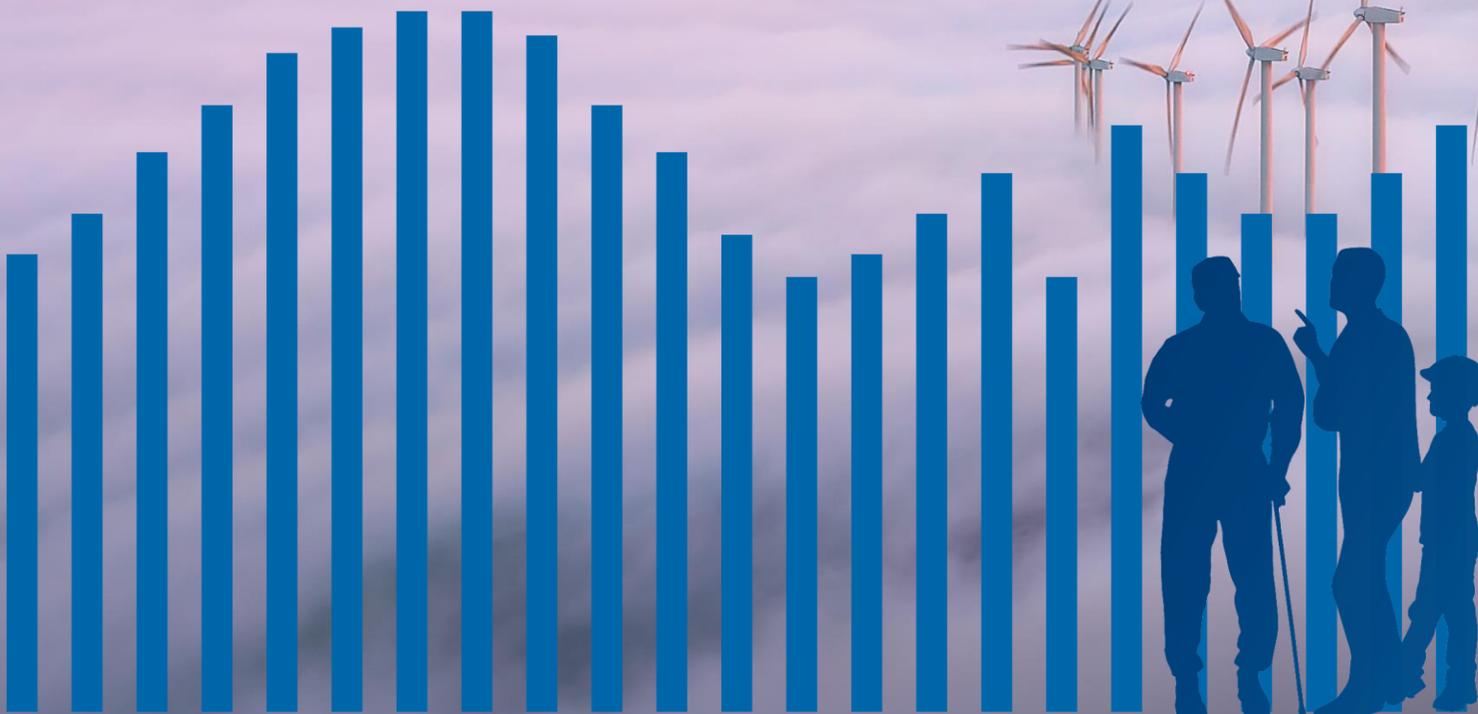


Global - All
Base : 23,433

+/-: Evolution since the 2022 wave



Climate policies: governments' margins for maneuver are shrinking France is on edge





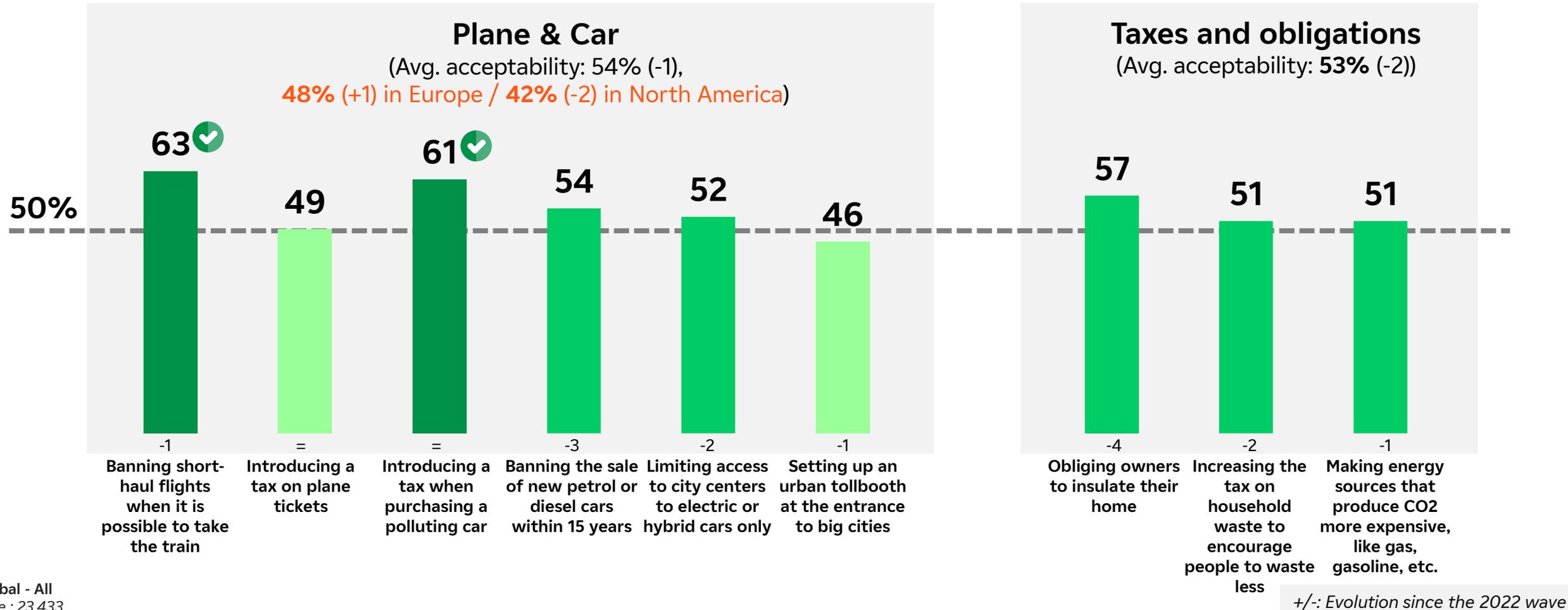
*Restrictive measures: problematic
acceptability in the developed countries*



The acceptability of restrictive measures remains generally stable, with the exception of the obligation to insulate homes, which is dropping.

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:

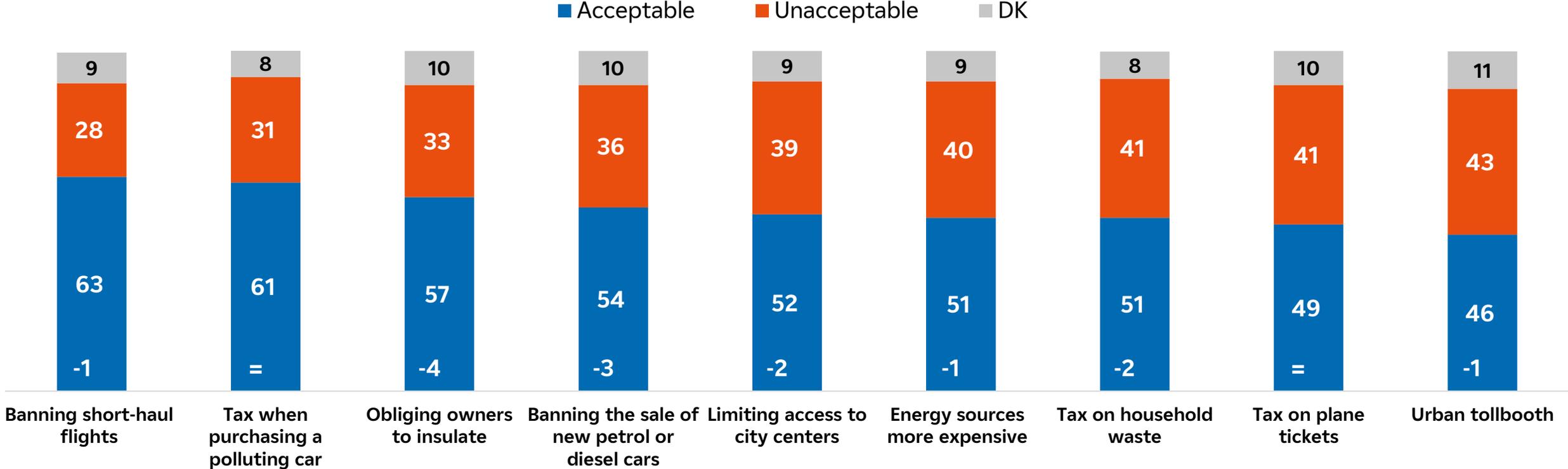
% TOTAL 'Acceptable'



Acceptability of possible measures for reducing greenhouse gas emissions



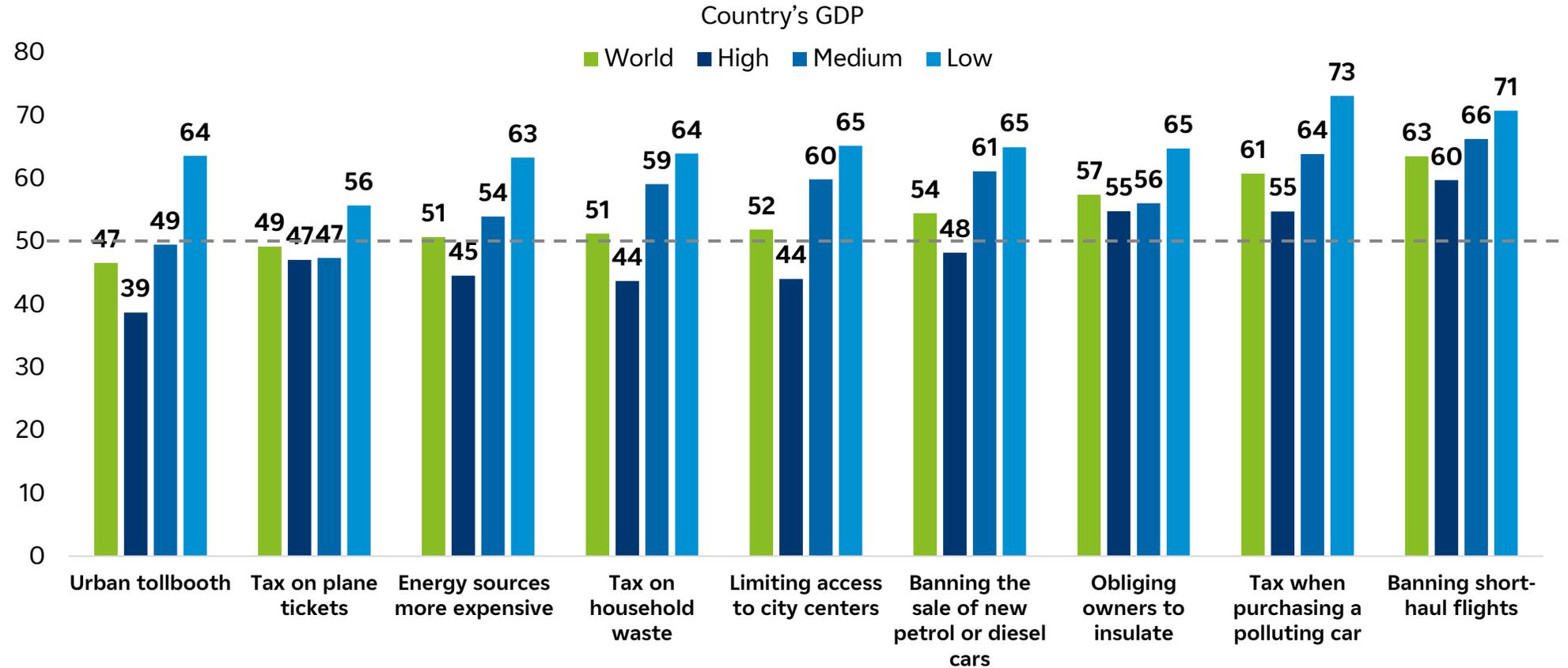
Q. Here are some measures that could be adopted in your country to reduce greenhouse gas emissions. For each one, tell me whether it seems to you to be:
In %



Global - All
Base : 23,433

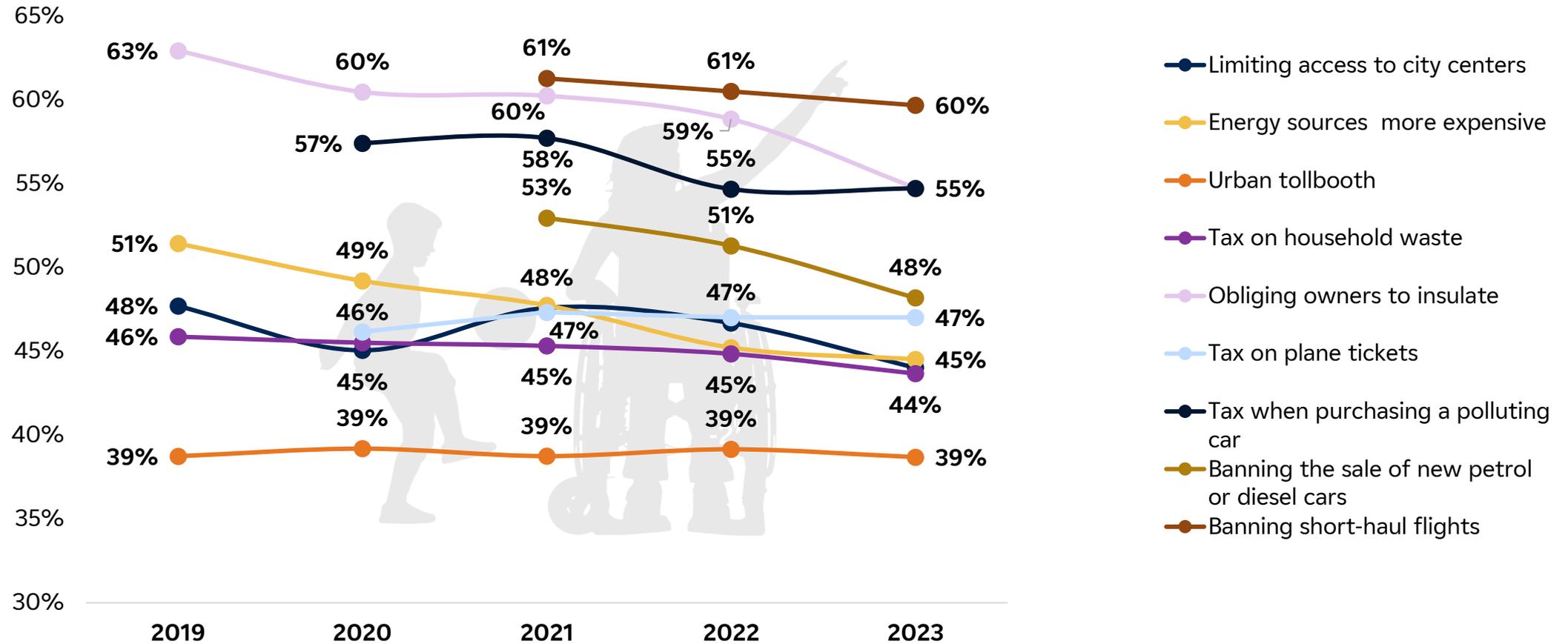
Acceptability of measures based on country GDPs

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: “very acceptable” or “somewhat acceptable”
In %

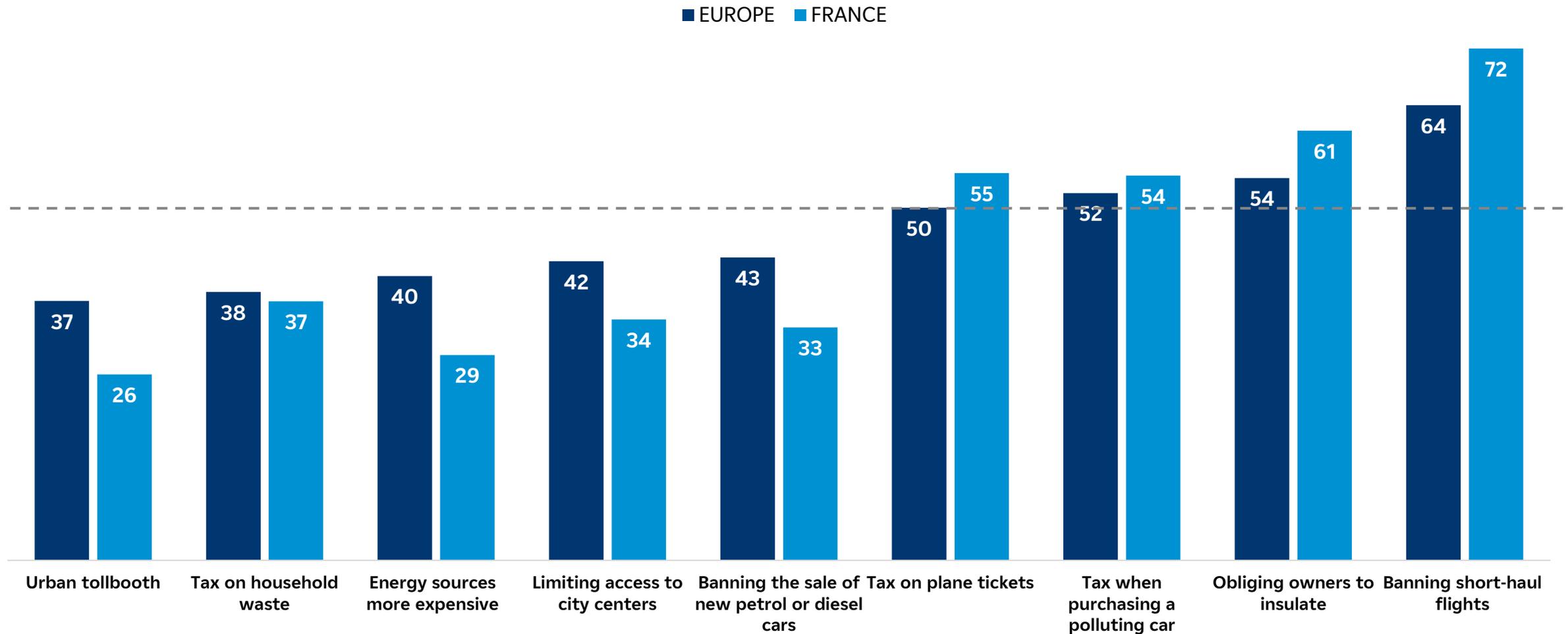


Acceptability of measures in the wealthy countries: a fairly general drop

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: “very acceptable” or “somewhat acceptable”
In %



In relation to the car: the French are toughening their stance



Acceptability of possible measures to reduce greenhouse gas emissions



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:

% Total Acceptable

	 GLOBAL 29 countries	AUSTRALIA	EUROPE	 Of which: FRANCE	NORTH AMERICA	SOUTH AMERICA	AFRICA / MIDDLE EAST	ASIA
Banning short-haul flights when it is possible to take the train	63%	43%	64%	72%	48%	68%	68%	62%
Introducing a tax when purchasing a polluting car	61%	42%	52%	54%	49%	63%	68%	70%
Obliging owners to insulate their home	57%	64%	54%	61%	65%	40%	65%	62%
Banning the sale of new petrol or diesel cars within 15 years	54%	44%	43%	32%	45%	67%	61%	60%
Limiting access to city centers to electric or hybrid cars only	52%	34%	42%	34%	34%	60%	63%	57%
Making energy sources that produce CO2 more expensive	51%	41%	40%	29%	43%	52%	61%	57%
Increasing the tax on household waste to encourage people to waste less	51%	36%	39%	37%	43%	57%	60%	60%
Introducing a tax on plane tickets	49%	34%	50%	55%	40%	45%	49%	58%
Setting up an urban tollbooth at the entrance to big cities	46%	28%	37%	26%	35%	44%	60%	54%

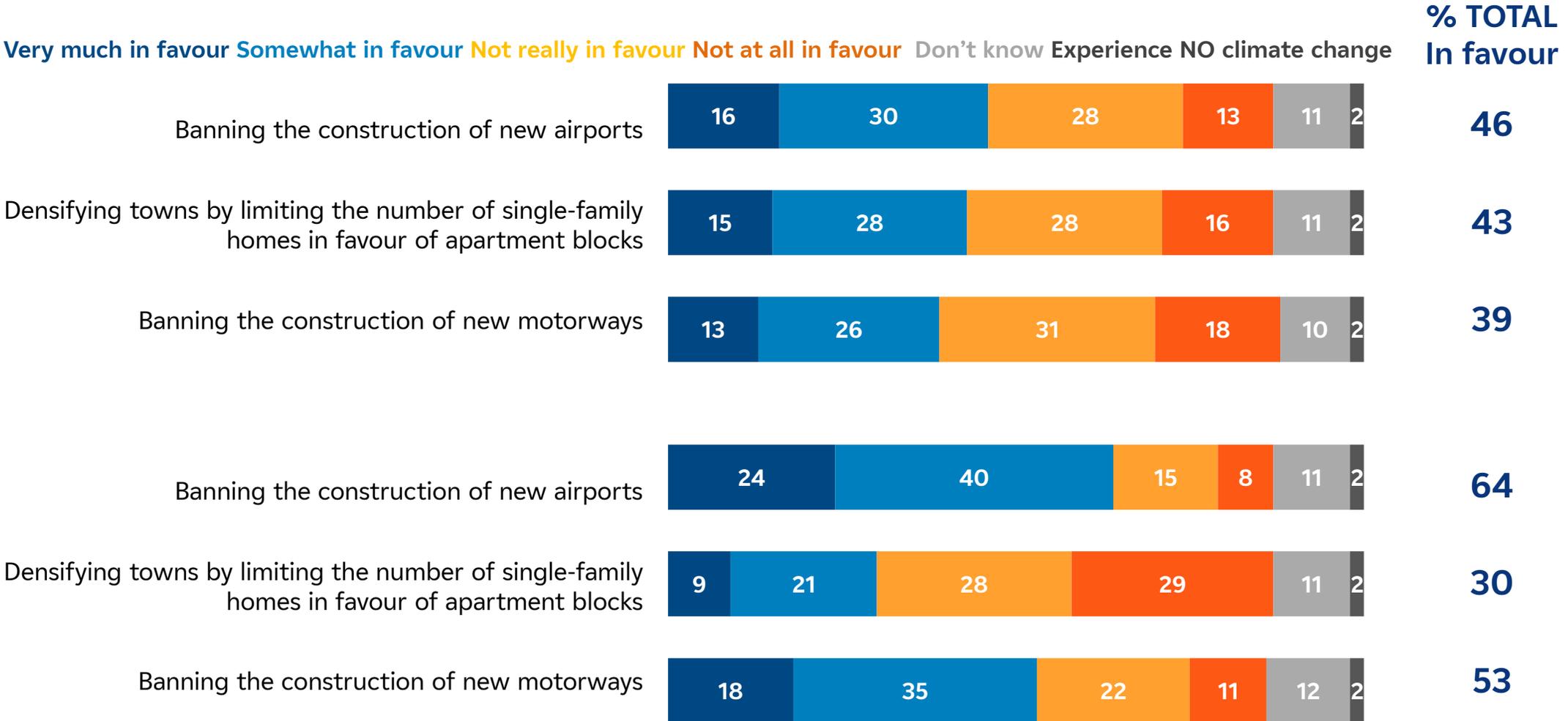
++ Results significantly higher than the GLOBAL average

Transport and housing infrastructures: the specific situation of France

In France, attachment to individual houses, but an open discussion about highways and airports

Q. And here are some other measures that could be adopted in your country to reduce greenhouse gas emissions. For each one, would you say you are...?

In %

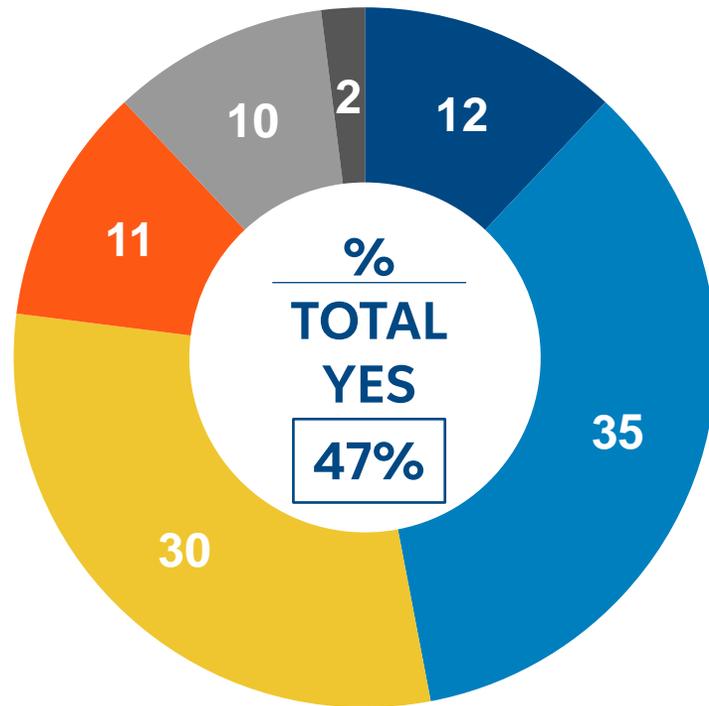


Adaptation to the consequences of climate change does not seem to be really happening yet

Q. Would you say that the government or local authorities are taking steps in your country to adapt to the consequences of climate change (abandoning certain coastal areas, greening towns, changing certain crop species, etc.) ?

In %

- Yes, completely
- Yes, somewhat
- No, not really
- No, not at all
- Don't know
- Experience NO climate change



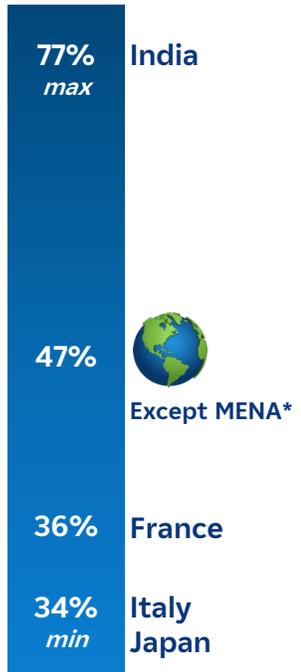
++ Countries that have most observed an adaptation to climate change

- India **77%**
- Singapore **76%**
- Indonesia **72%**
- China **71%**

-- Countries that have least observed an adaptation to climate change

- France **36%**
- Belgium **35%**
- Italy **34%**
- Japan **34%**

% TOTAL YES



Energy policies renewables are still consensual – nuclear power confirms its return to favor





Support for electricity production methods



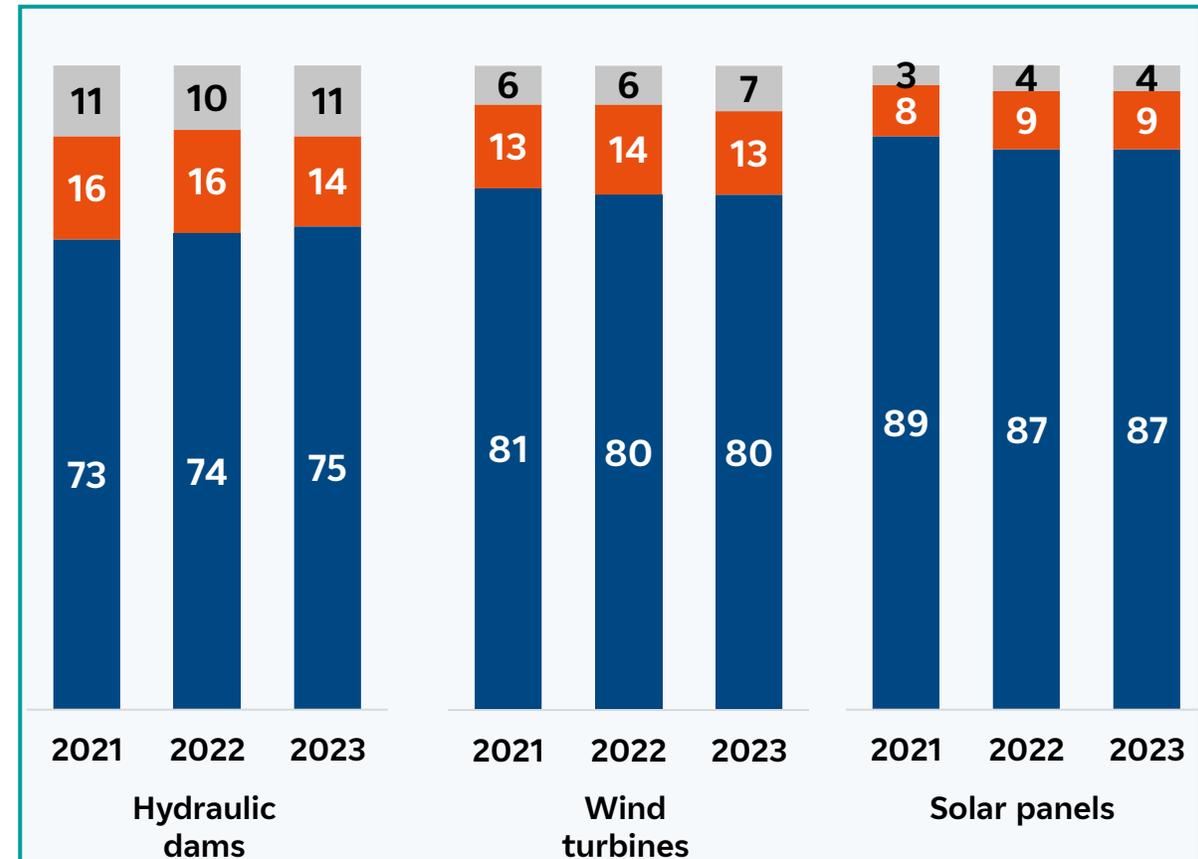
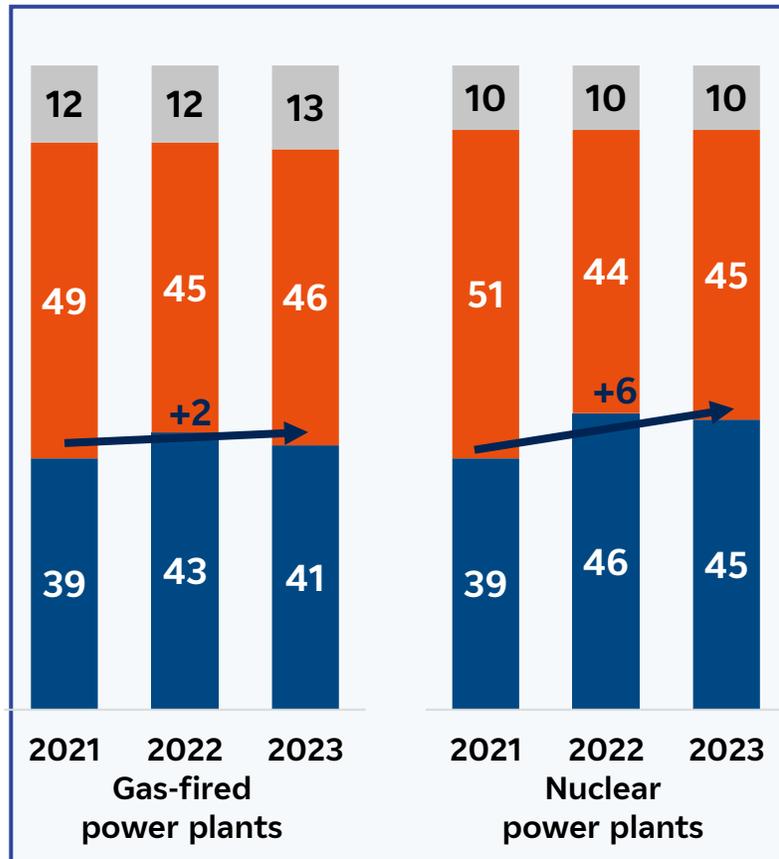
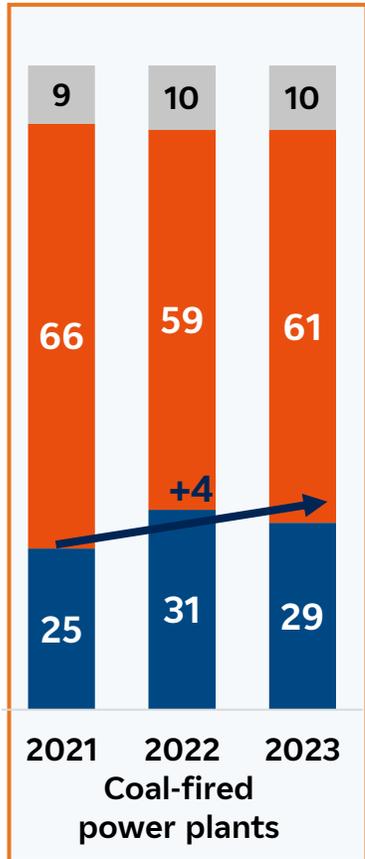
Opinion on electricity production methods: a tripolar world



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

In %

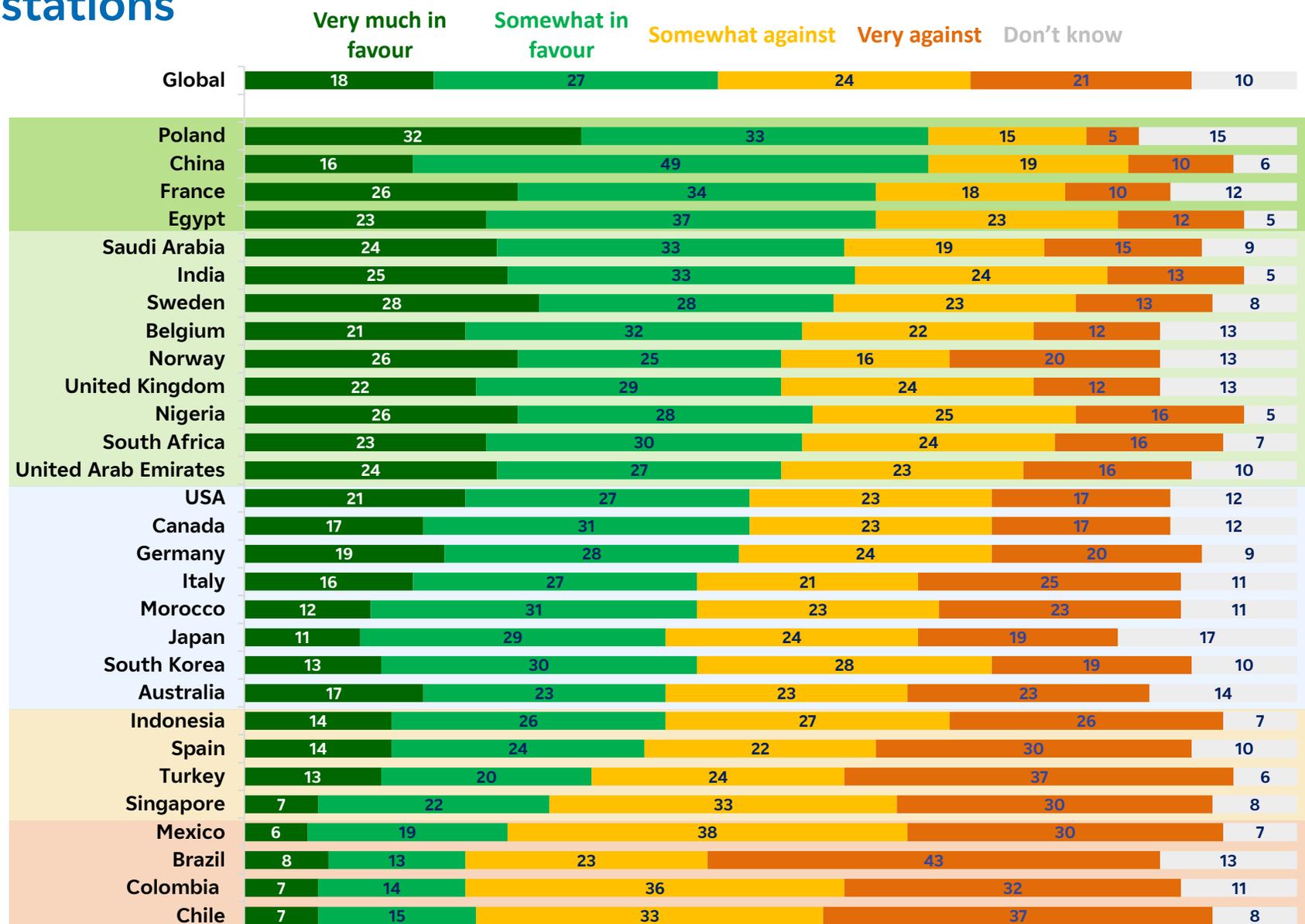
■ In favour ■ Against ■ DK



Support for electricity production methods: Nuclear power stations



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



Supporters

Favorable

Undecided

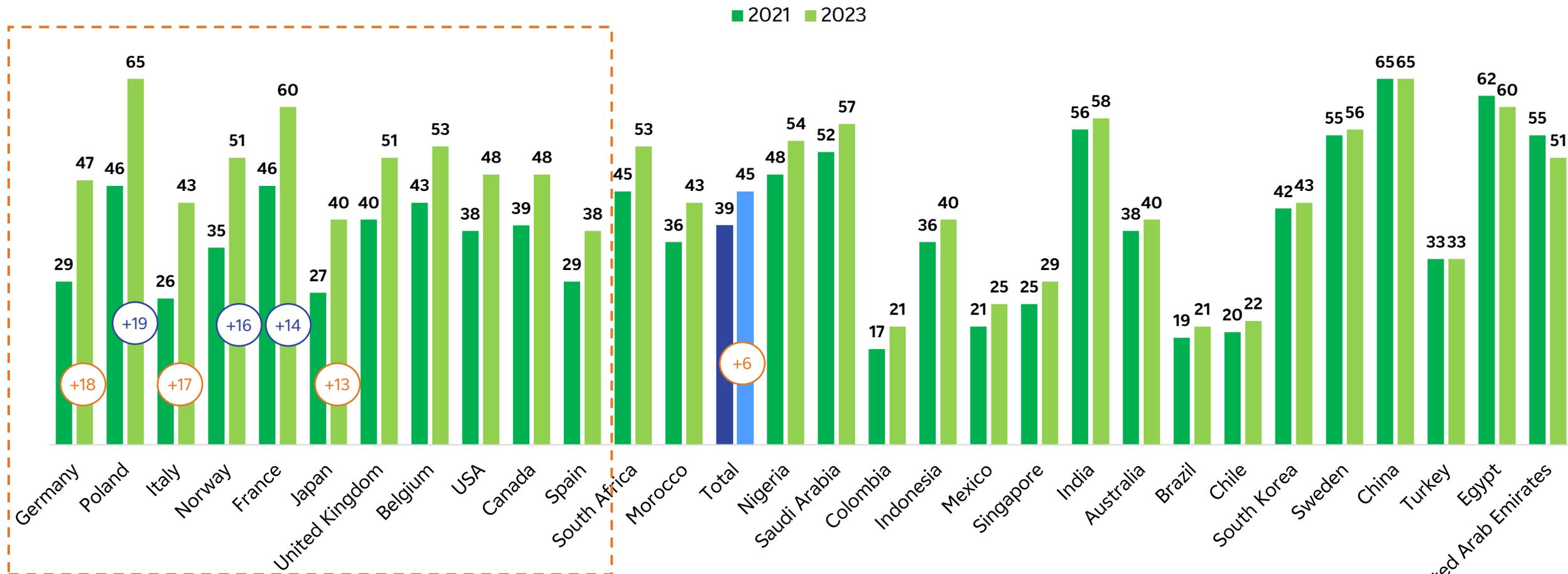
Unfavorable

Resistant

Evolution in support for nuclear power stations between 2021 and 2023



Q. To produce the electricity that you will need in the future in your country, are you in favour of or against each of the following production methods? Nuclear power plants- % in favour



Avg. Europe : +13

Global - All
Base : 23,433



Build, replace: the possible options

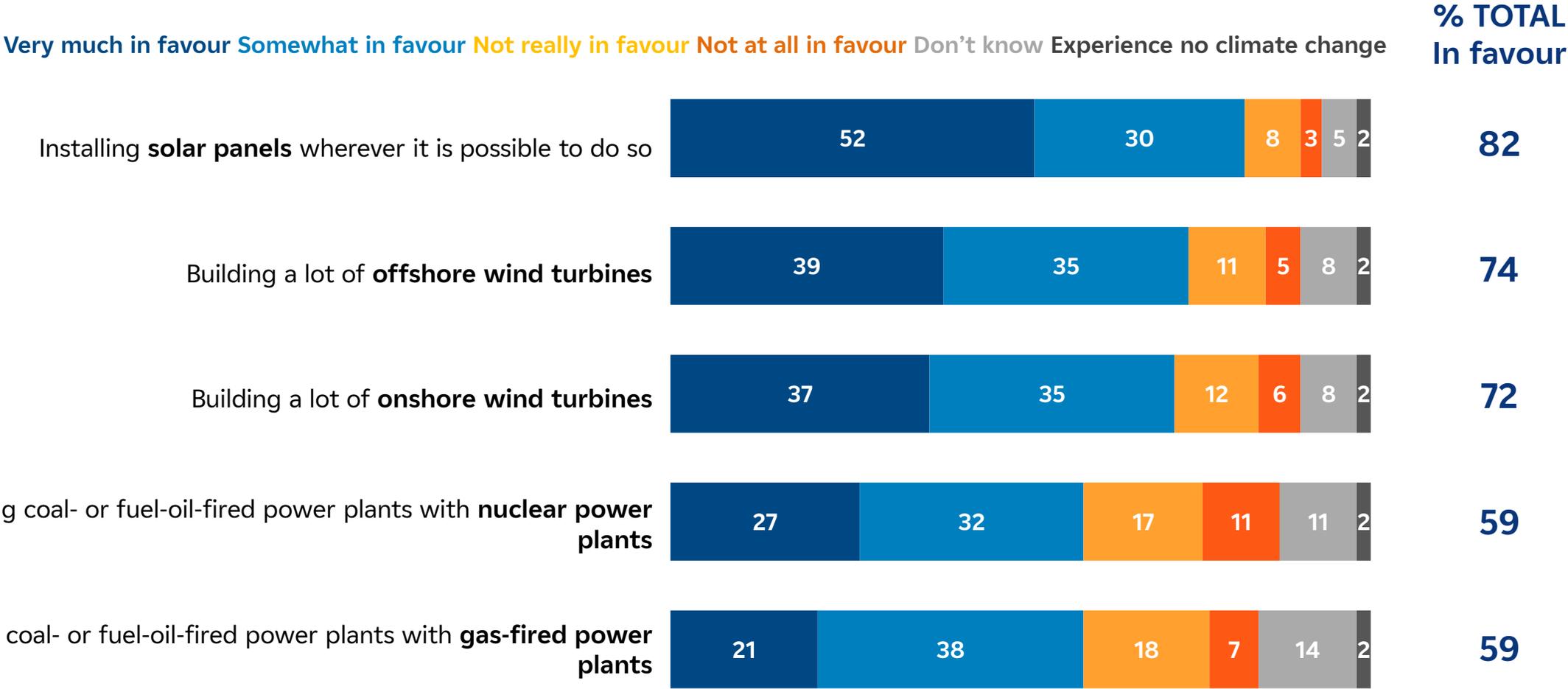


All the options for decarbonizing electricity production are accepted



Q. And here are some other measures that could be adopted in your country to reduce greenhouse gas emissions. For each one, would you say you are...?

In %



Global - All
Base : 23,433

[New question](#)



French public opinion is fairly favorable to nuclear power, but more divided over wind turbines



Q. And here are some other measures that could be adopted in your country to reduce greenhouse gas emissions. For each one, would you say you are...?

New question

% Total In favour



- Installing solar panels wherever it is possible to do so
- Building a lot of offshore wind turbines
- Building a lot of onshore wind turbines
- Replacing coal- or fuel-oil-fired power plants with nuclear power plants
- Replacing coal- or fuel-oil-fired power plants with gas-fired power plants

82%
74%
72%
59%
59%

	AUSTRALIA	EUROPE	Of which: FRANCE	NORTH AMERICA	SOUTH AMERICA	AFRICA / MIDDLE EAST	ASIA
Installing solar panels wherever it is possible to do so	78%	81%	78%	79%	89%	88%	75%
Building a lot of offshore wind turbines	64%	71%	63%	70%	69%	81%	74%
Building a lot of onshore wind turbines	62%	67%	59%	69%	75%	81%	71%
Replacing coal- or fuel-oil-fired power plants with nuclear power plants	48%	59%	66%	59%	50%	70%	56%
Replacing coal- or fuel-oil-fired power plants with gas-fired power plants	47%	51%	44%	54%	57%	72%	64%

-- Results significantly lower than the GLOBAL average

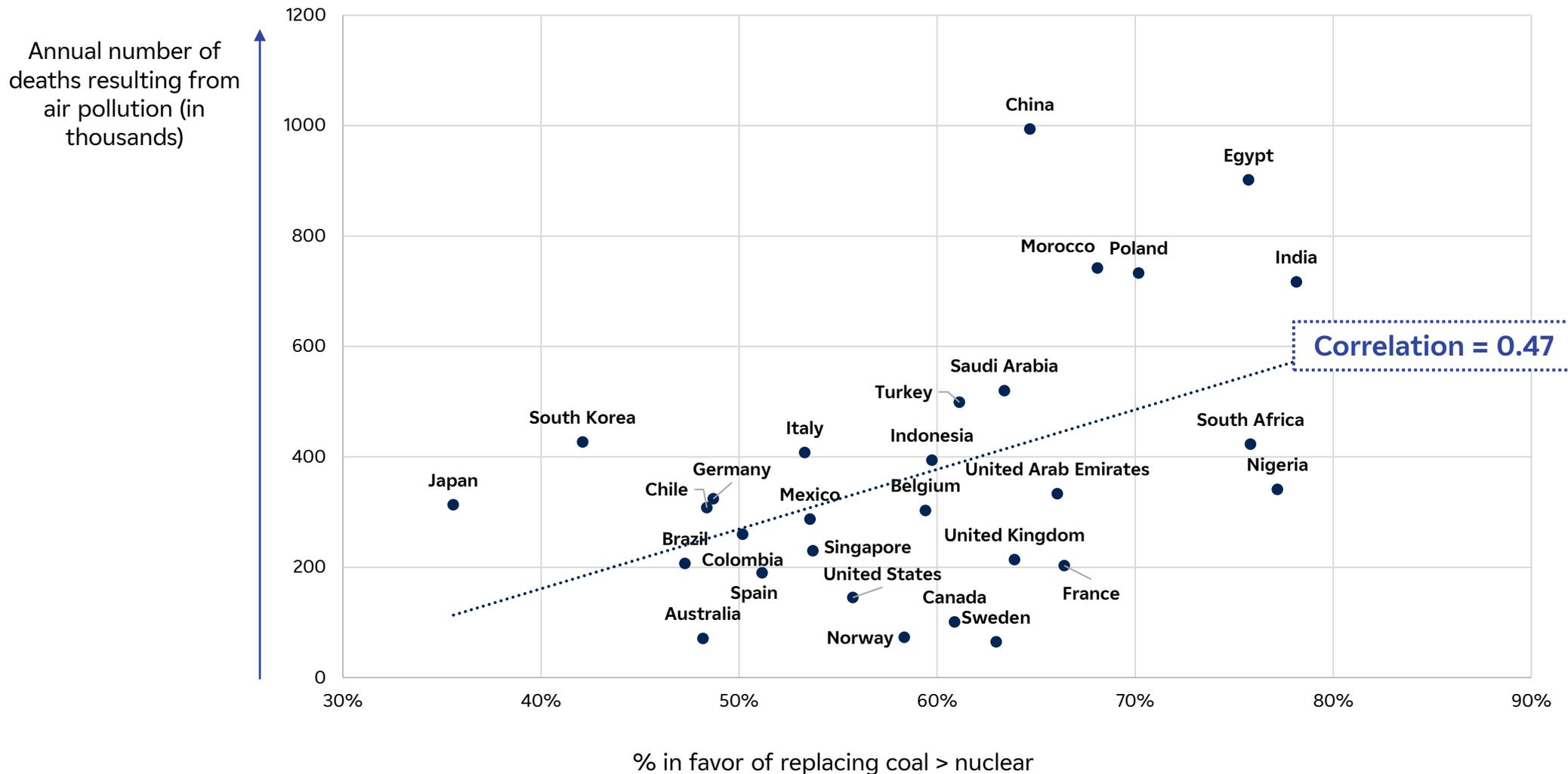
++ Results significantly higher than the GLOBAL average



A link between mortality due to air pollution and support for replacing coal-fired power stations with nuclear power stations



Q. And here are some other measures that could be adopted in your country to reduce greenhouse gas emissions. For each one, would you say you are...? - Replacing coal- or fuel-oil-fired power plants with nuclear power plants -



APPENDIX AND TECHNICAL INFO





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



TECHNICAL INFO



SAMPLE

- **Target population:** Men/women aged 16+. Representative samples of the population aged 16 and over in each country.
- **Sample creation:** samples created through random selection from the base of panelists eligible for the study.
- **Criteria and sources of representativeness (according to countries):** gender, age, region, profession, social category or status, agglomeration size.



DATA COLLECTION

- **Fieldwork dates:** August 16 through October 2, 2023
- **Final sample size:** 23,433 individuals, 500 or 1000 individuals questioned in each country.
- **Collection method:** Online collection
- **Type of incentive :** Loyalty development program with reward system through an accumulation of points for panelists
- **Methods for controlling the quality of responses:** monitoring of panelists' response behaviors (Spotting responses that are too fast or neglected [checked with a straight line or zigzag for example])
- Control of the IP and consistency of demographic data.



DATA PROCESSING

- Weighted sample
- Weighting method used: marginal calibration
- Weighting criteria (according to countries) : gender, age, region, profession, social category or status, agglomeration size.

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.

TECHNICAL INFO

Organization (Research using online panel)



ACTIVITIES CONDUCTED OR COORDINATED BY IPSOS TEAMS IN FRANCE

- Design and methodology
- Preparation of questionnaire / validation of scripting
- Coordination and validation of translations
- Coordination of data collection
- Data processing
- Validation of statistical analyses
- Preparation of research report
- Design of presentation of findings
- Formatting of results
- Oral presentation
- Analyses and summary



ACTIVITIES CONDUCTED BY LOCAL IPSOS TEAMS, EXPERTS IN THE FIELD

- Scripting
- Sampling
- Emailing



ACTIVITIES ENTRUSTED TO OUR REFERENCE PARTNERS

- Translation

RESEARCH MATERIALS



Questionnaire



Adobe Acrobat
Document

Contacts



Guillaume Petit
Director Corporate Reputation
Guillaume.petit@ipsos.com

Estelle CHANDEZE
Assistant Director Corporate Reputation
Estelle.chandeze@ipsos.com

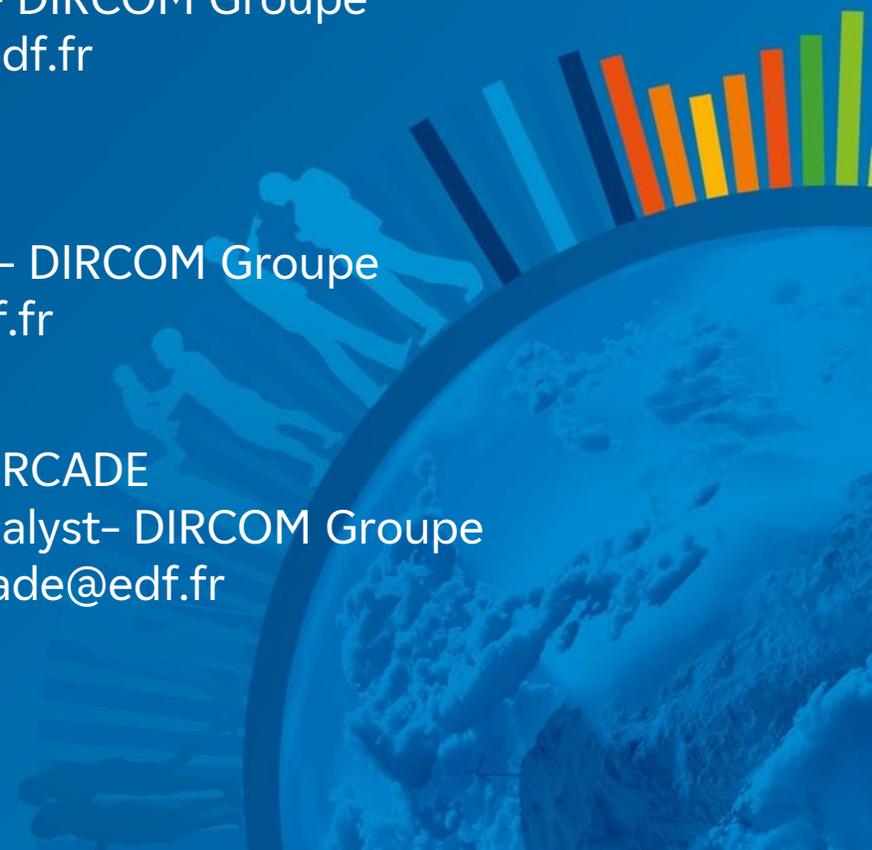
Margaux Schmitt
Senior Researcher Corporate Reputation
Margaux.schmitt@ipsos.com



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

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

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



À PROPOS D'IPSOS

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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 index and is eligible for the Deferred Settlement Service (SRD).

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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.