



Obs' COP 2021

PRESENTATION OF THE FINDINGS OF THE INTERNATIONAL CLIMATE AND PUBLIC OPINION OBSERVATORY

*Mobilization, concern or indifference:
how do the citizens of 30 countries view
climate change ?*

Methodology

30 countries questioned on all 5 continents, representing 2/3 of the world population

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

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



- **24,000 individuals** (500 or 1000 according to countries)
- Representative of the population aged **16 and over** (quota method)



Research fieldwork carried out online from **30th August to 9th September 2021**



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Opinion and understanding of the climate issue

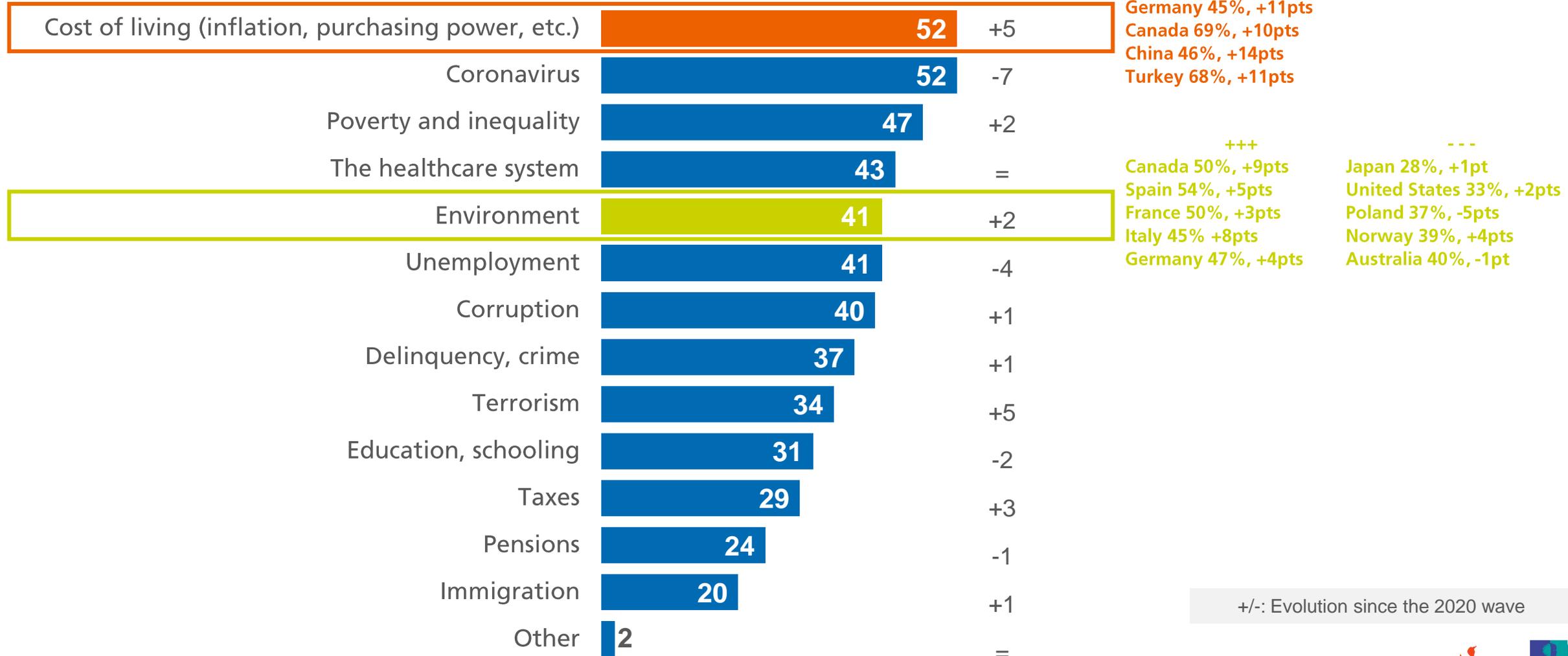
Despite increased pressure on purchasing power and persistent climate skepticism, people still want a pro-environment turnaround of the economy



Despite pressure on purchasing power on a global scale, people still want a pro-environment turnaround of the economy

Neither relegated, nor a priority: the environment is in competition with everyday life. On an international scale, the cost of living question moves up to first place this year in the ranking of priorities

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



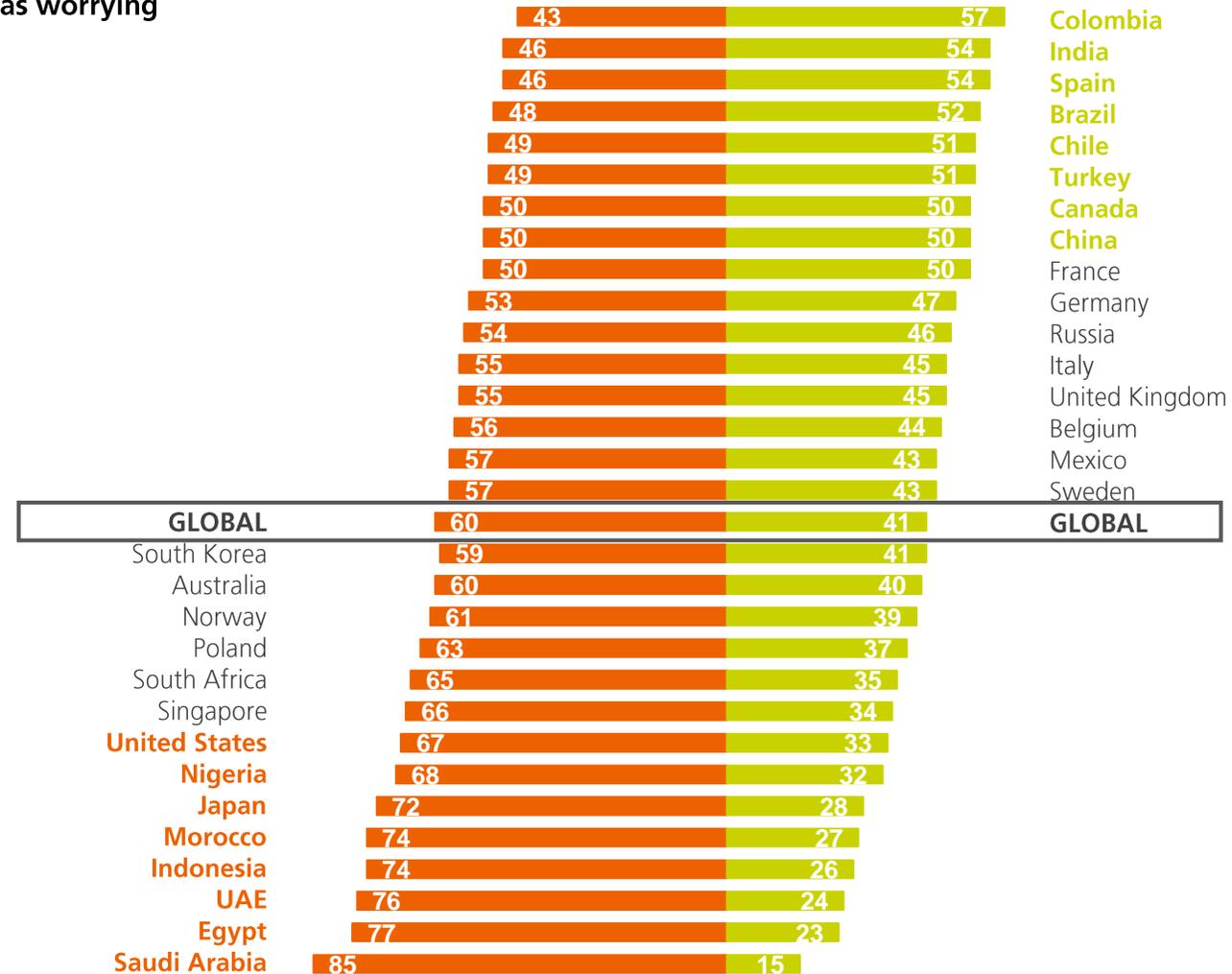
+/-: Evolution since the 2020 wave

The countries that quoted the environment as a worrying topic the most are mainly in South America; France is also at the top of the ranking

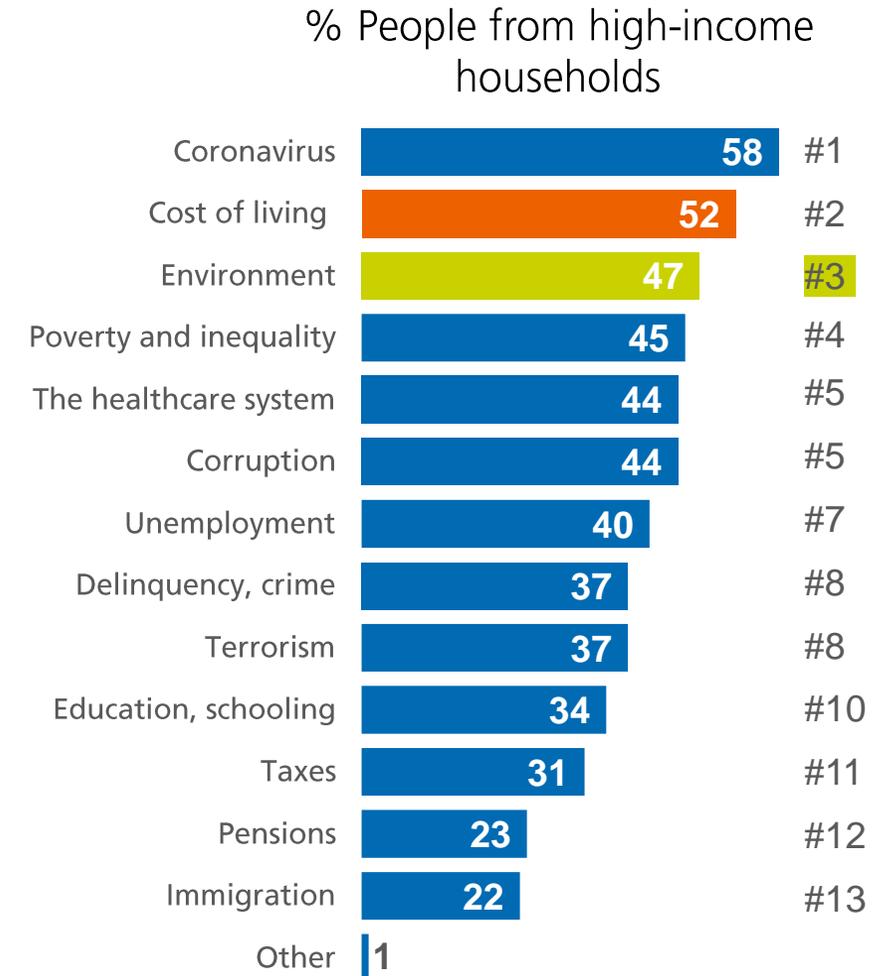
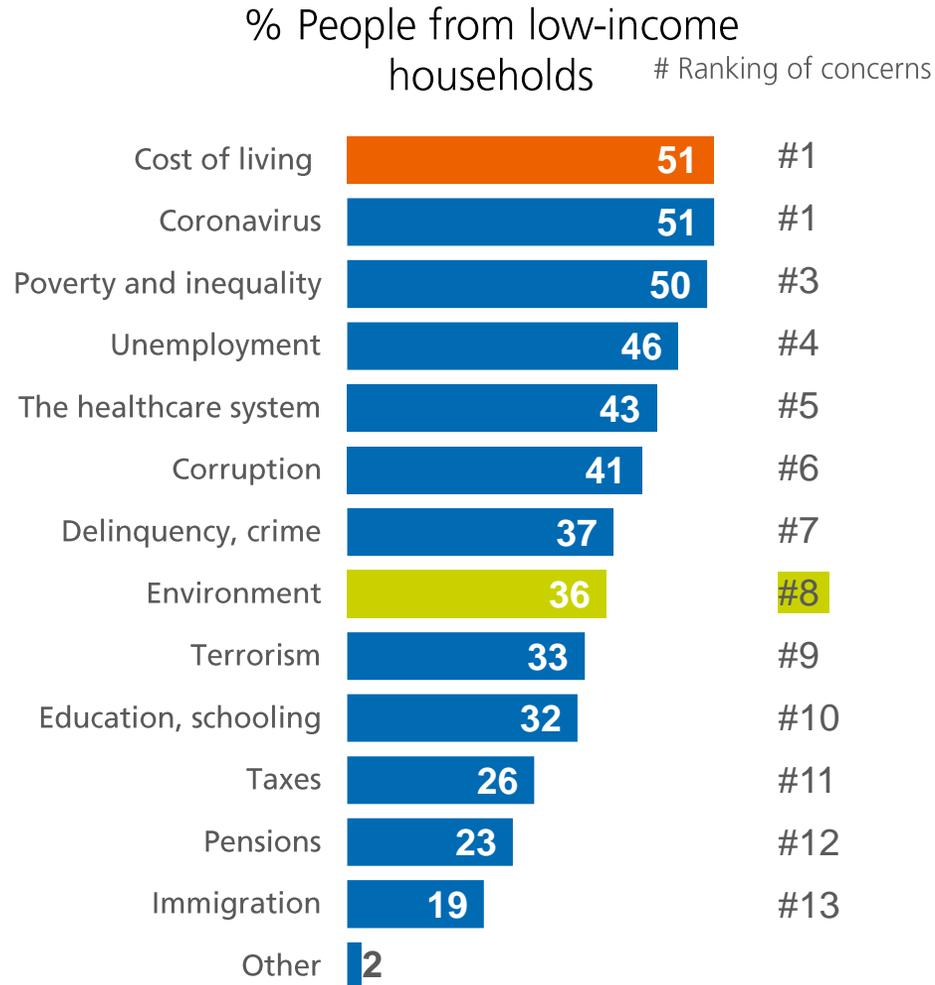
Q. From this list, which topics worry you the most?

 No mention of the environment as worrying

 Mentions of the environment as worrying

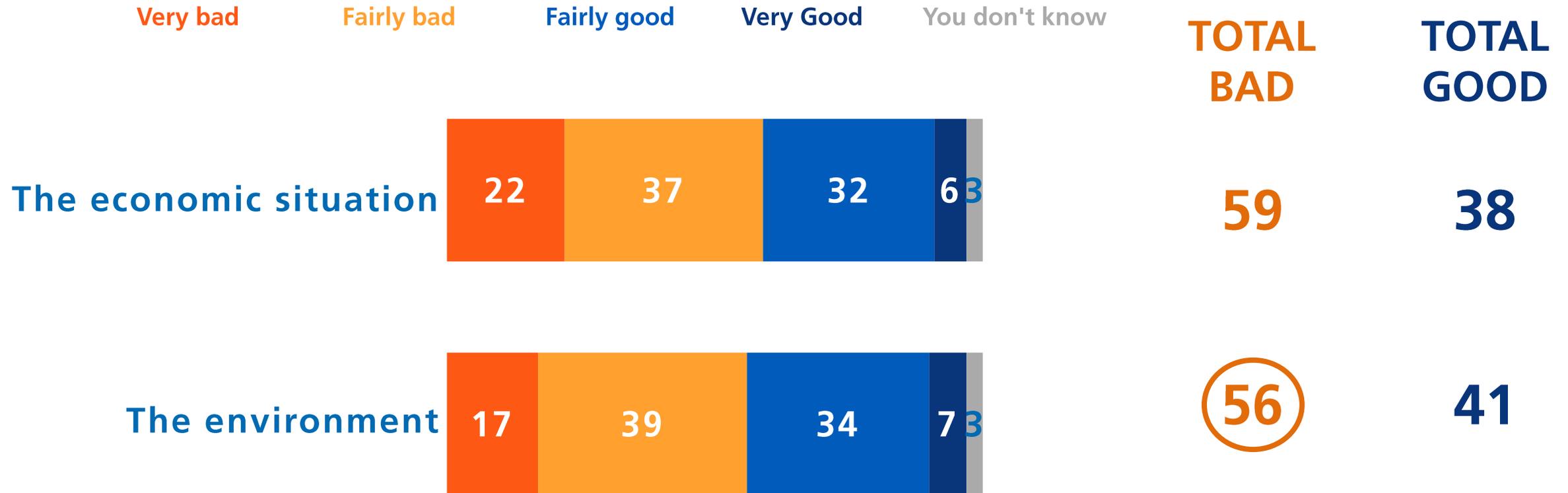


The environment, a long-term challenge regularly in competition with short-term priorities that are nevertheless vital for low-income populations: purchasing power

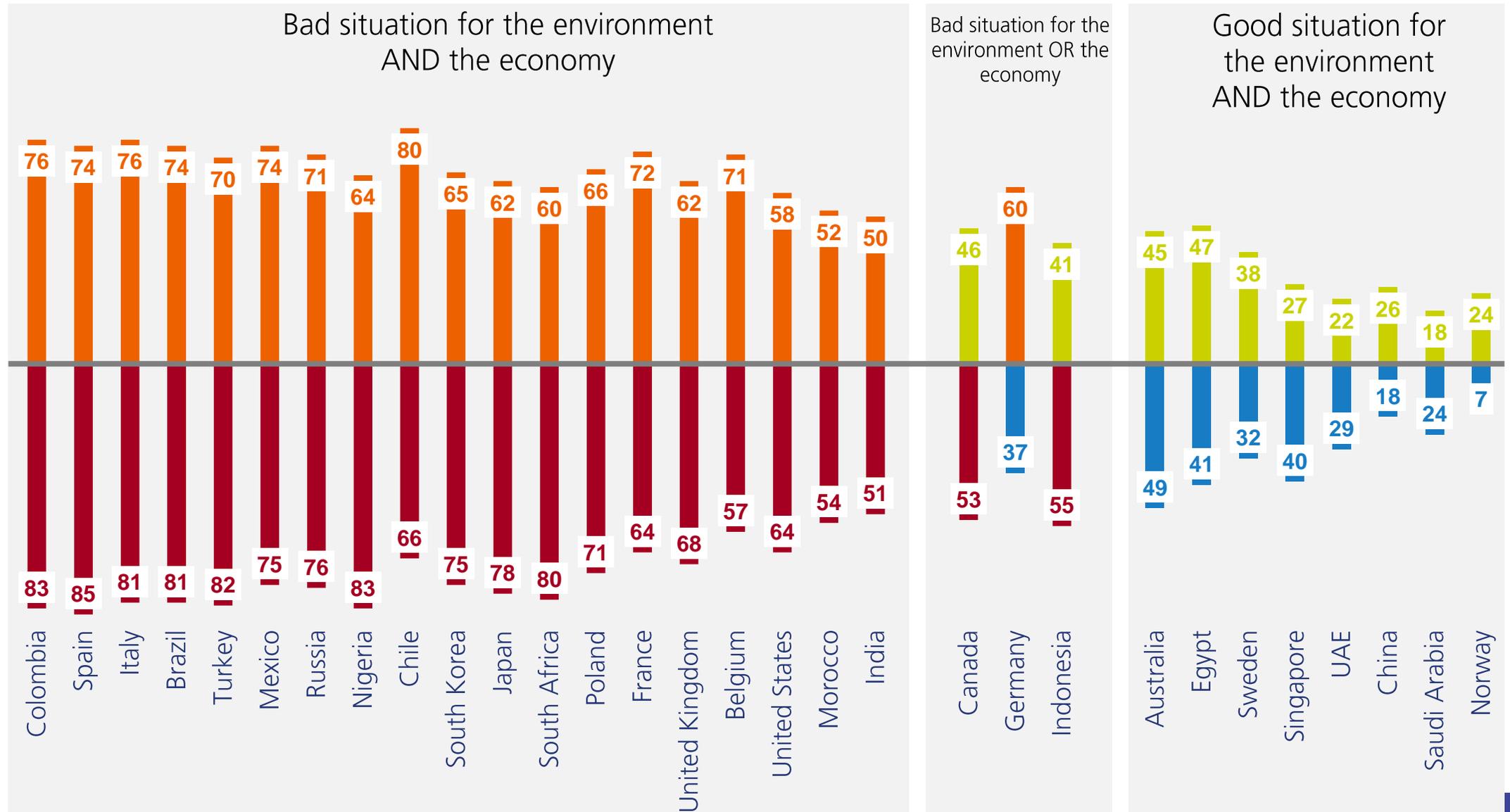


At the same time, a majority feel that they are living in a deteriorated environment

Q. For each of the following areas, tell me whether the situation in your country seems to you to be:



In most cases, citizens think that the environmental AND economic situation of their country has deteriorated



Priority to the environment or to growth: a small majority in favor of the environment, sign of a tough choice

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 economic growth in your country and cause job losses⁻¹

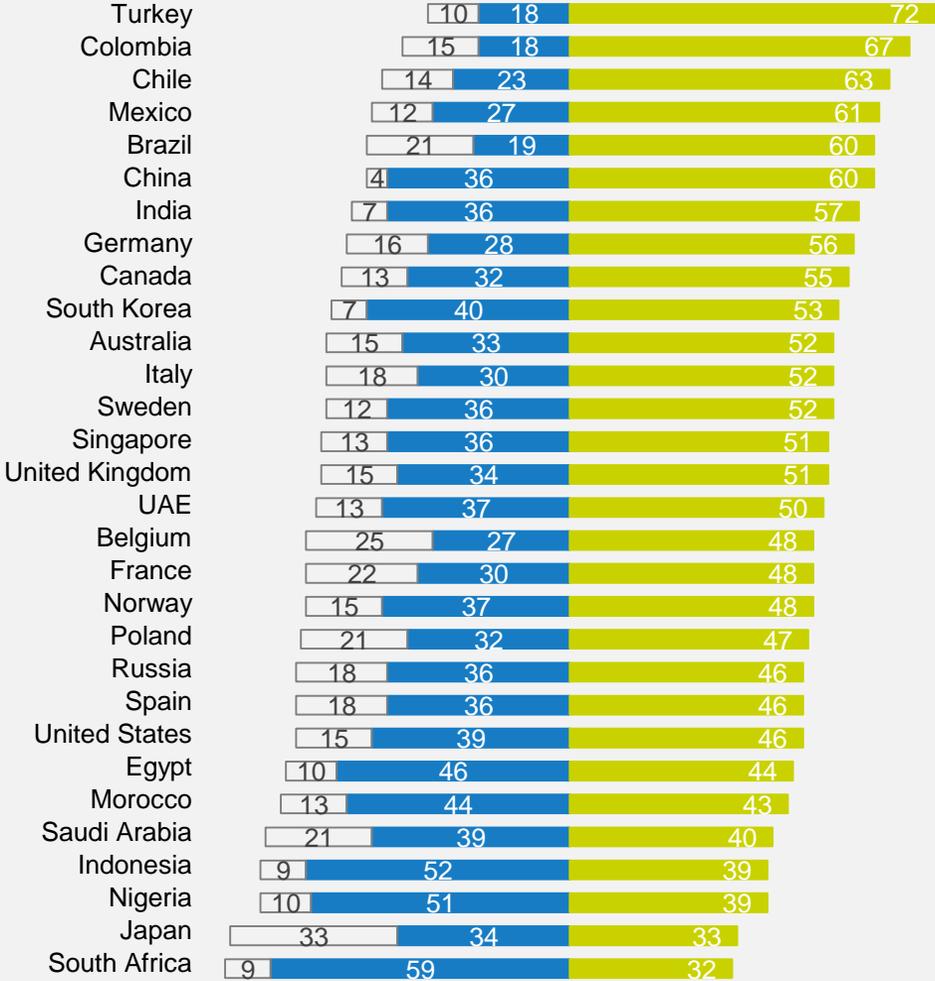


...**ECONOMIC GROWTH and JOBS**, even if it might have harmful consequences for the environment⁺¹



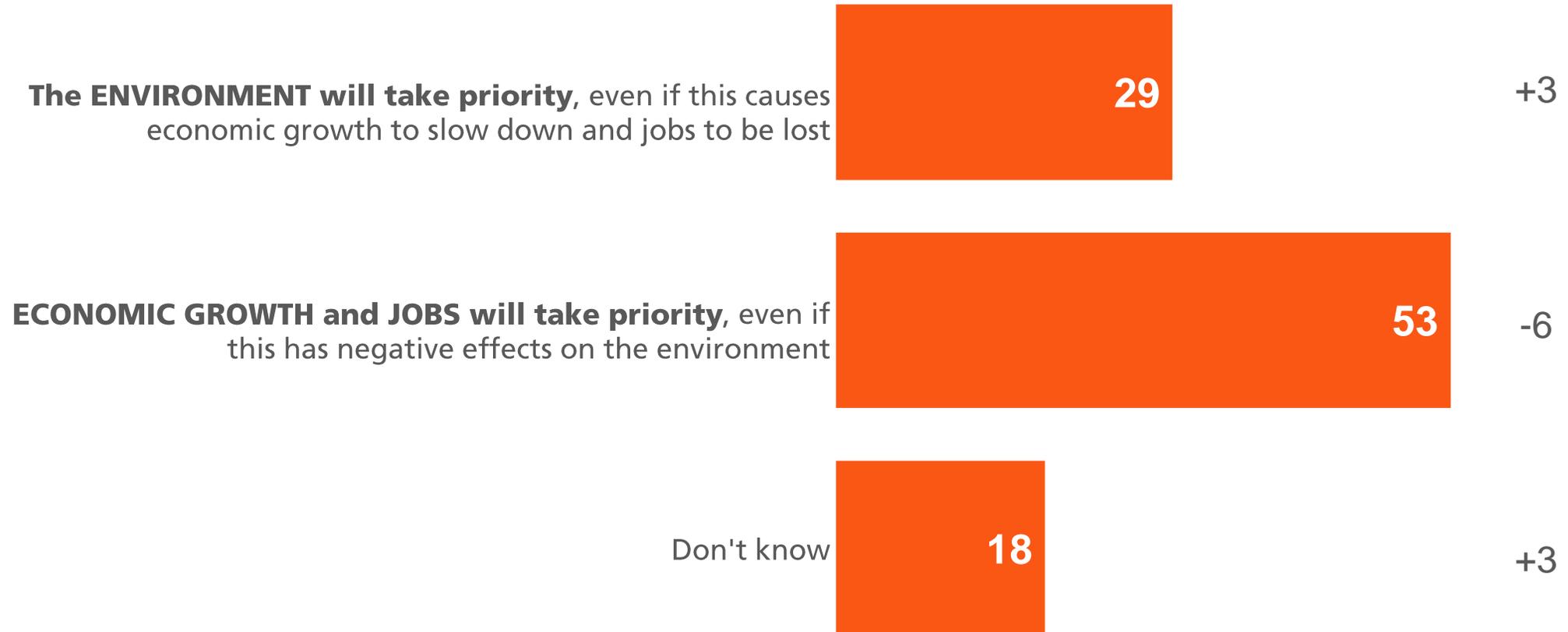
A high rate of no opinion indicating that a share of the public are unable to relate to this alternative, particularly in Japan (33%), France (22%), Belgium (25%), Brazil, Poland, and Saudi Arabia(21%).

Very big disparities



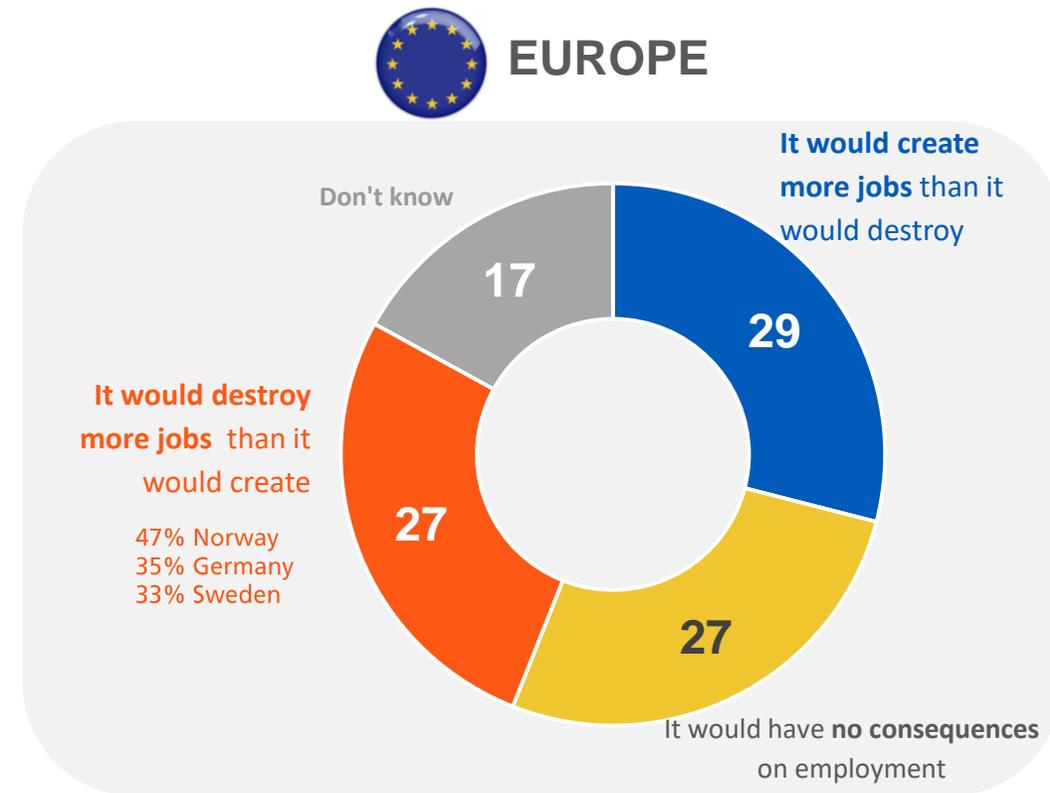
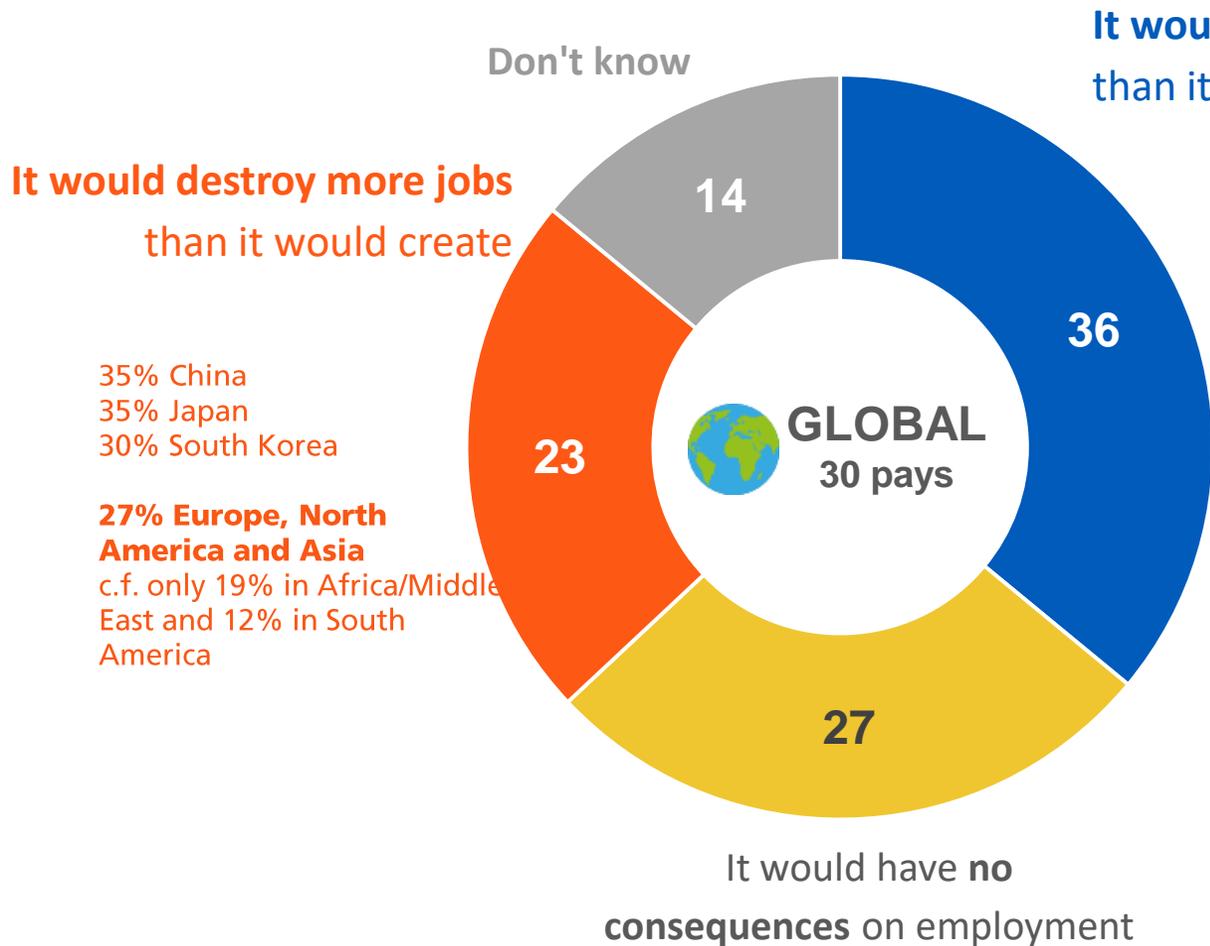
Their expectations will not be met in any case: only 29% think that priority will actually be given to the environment in their country in the years to come

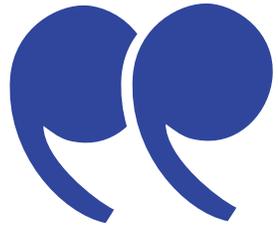
Q. And what do you think will happen over the next few months in your country?



The environment is not the enemy of jobs Europeans are more reserved on the subject

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

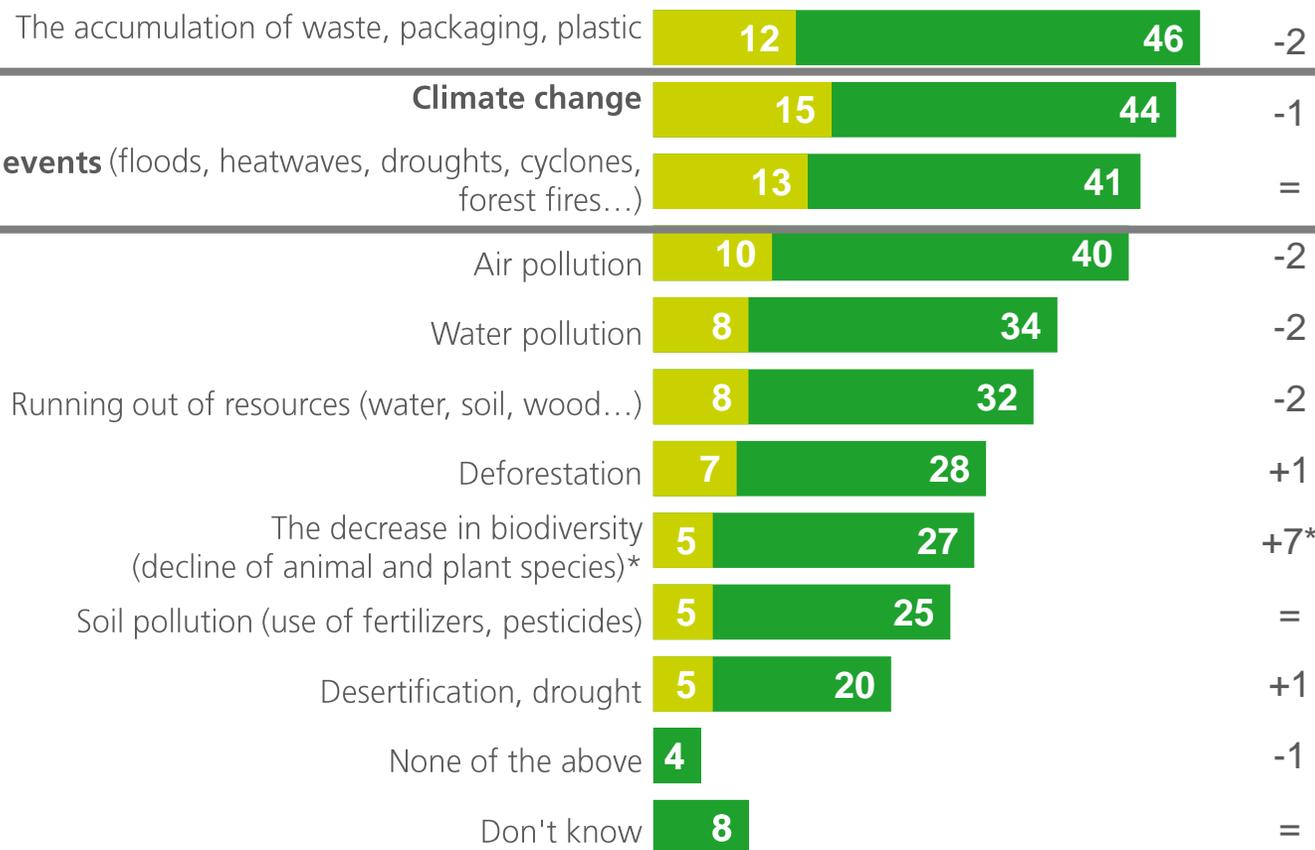




Faced with climate change, there is a definite feeling of worry

The climate issue is gradually establishing itself as a major environmental challenge .

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



■ First ■ Total

Heavy increases in Belgium, Germany and Canada:

Heavy increase in extreme climate events in these countries:

Colombia	38	+7
Spain	48	+6
Belgium	49	+6
Singapore	41	+6
Sweden	45	+6
Turkey	40	+5
Canada	53	+5
Germany	49	+5
Norway	44	+4
United Kingdom	49	+3

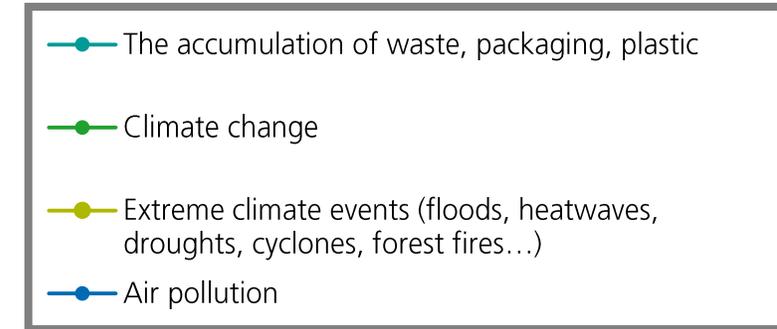
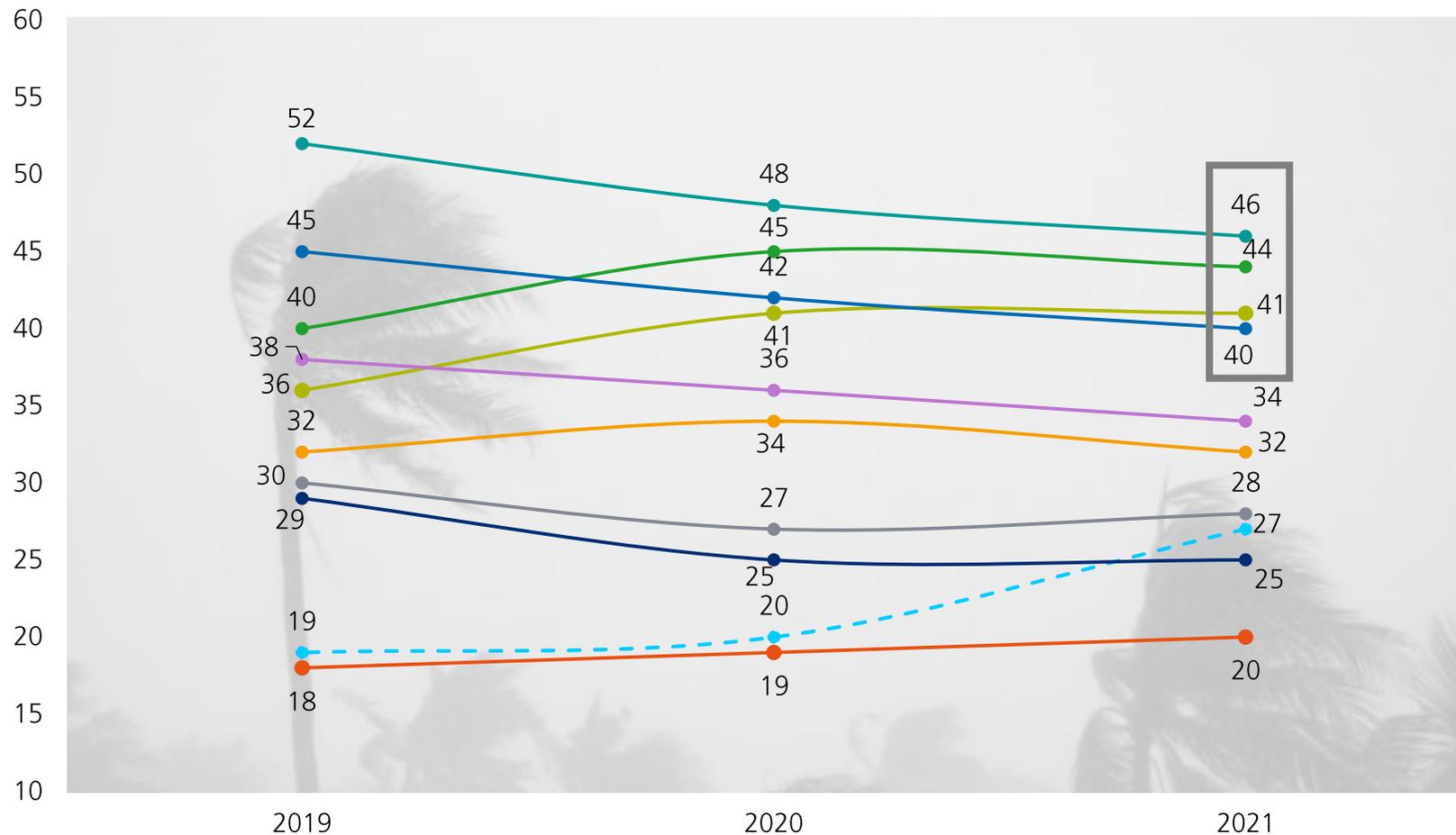
+/-: Evolution since the 2020 wave

**Evolution to be interpreted with caution.*

Last year, the item was worded as follows: The decline in biodiversity [not specified]

Climate change has progressed by 4pts since 2019, accompanied by “extreme climate events” (+5pts). Today there are four main ecological threats: waste, climate, disasters, pollution

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

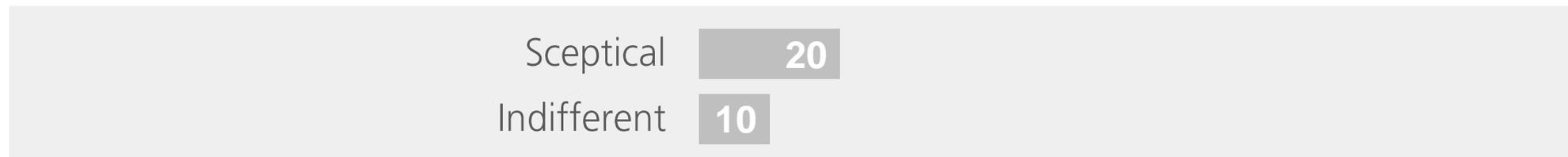
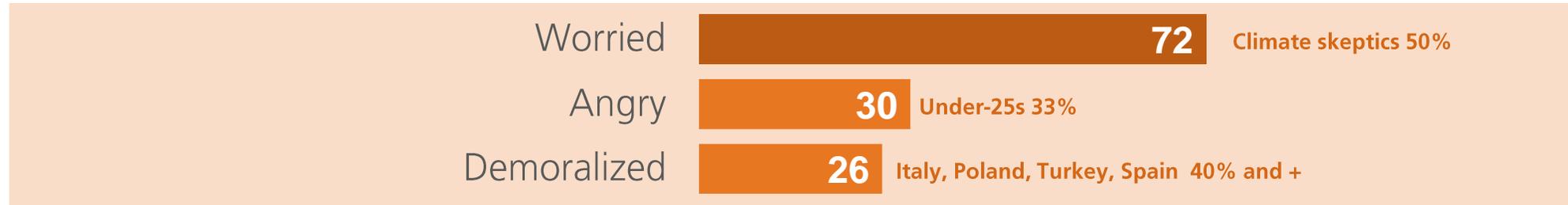


- Water pollution
- Running out of resources (water, soil, wood...)
- Deforestation
- The decrease in biodiversity (decline of animal and plant species)*
- Soil pollution (use of fertilizers, pesticides)
- Desertification, drought

**Evolution to be interpreted with caution.*
 Last year, the item was worded as follows: The decline in biodiversity [not specified]

The climate is a big source of worry, even generating anger and demoralization

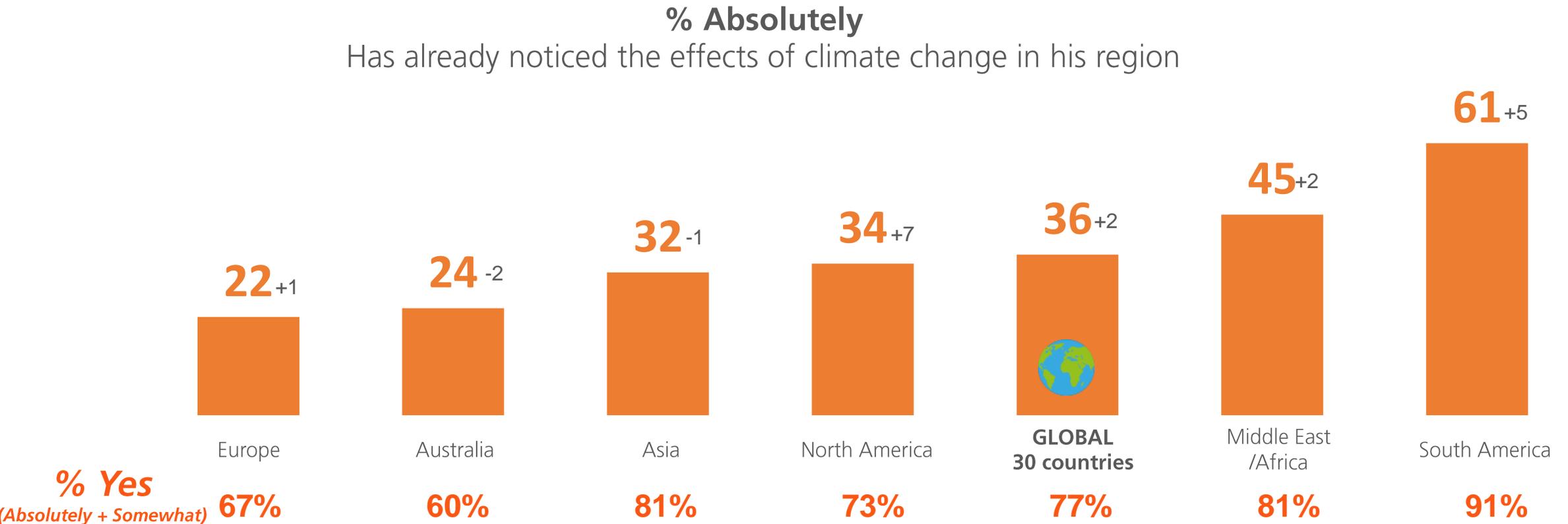
Q. Personally, when you think about climate change, what goes through your mind? Do you feel... (Several answers possible - Total over 100%)



None of the above 11

Climate change is being noticed by the population: it is still a tangible reality in their region, especially in the Southern countries.

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



Climate change primarily takes the form of heatwaves (phenomenon the most widely observed regardless of location) and deregulation of the seasons

Q. Where you live, in recent years, have you been affected by the consequences of the following listed climatic disturbances? *only asked to those who had already noticed the effects of climate change*

Intense heat, rising temperatures, heatwave

69%

Canada 83%

Middle East/Africa 70%

Disruption of the seasons

49%

Europe 53%

Storms, high winds, cyclones, etc.

33%

North America 44%

Floods, rising water levels

33%

Asia 41%

Declining water levels in waterways, lakes, etc.

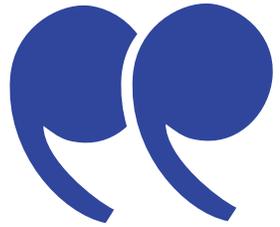
33%

South America 44%

Drought

30%

South America 41%

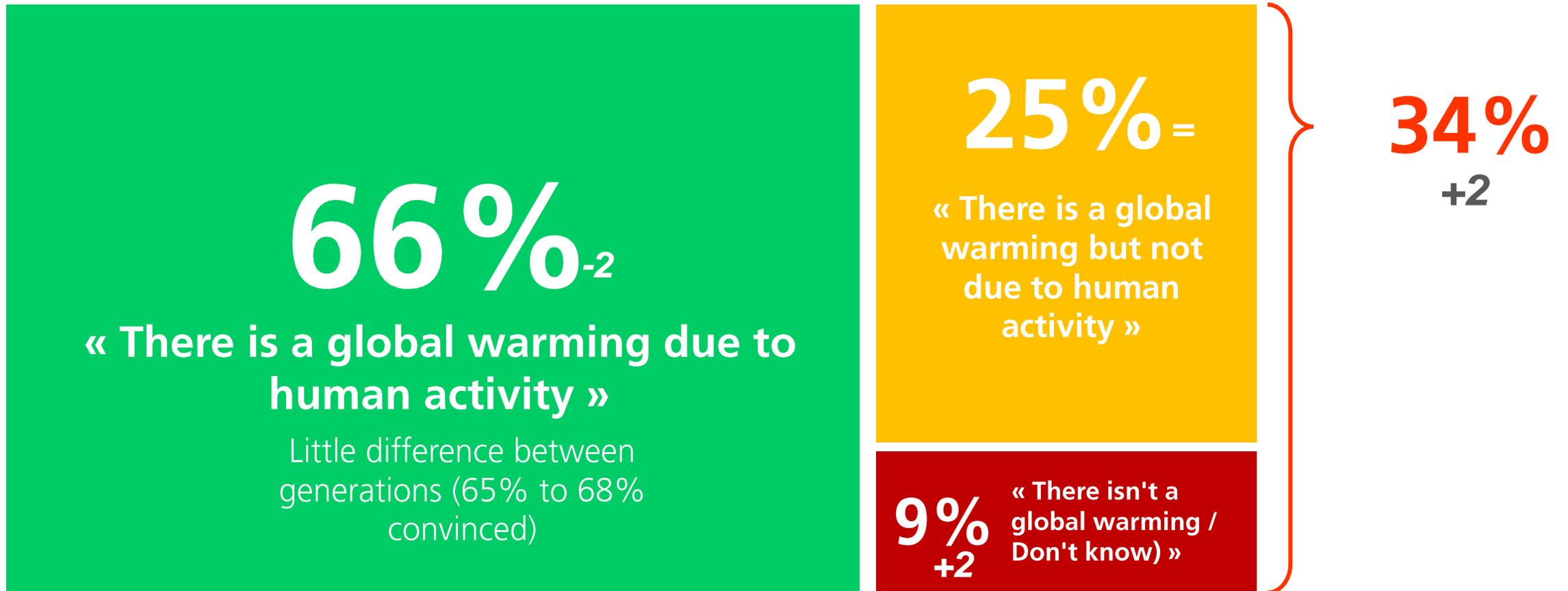


And yet, climate skepticism is growing

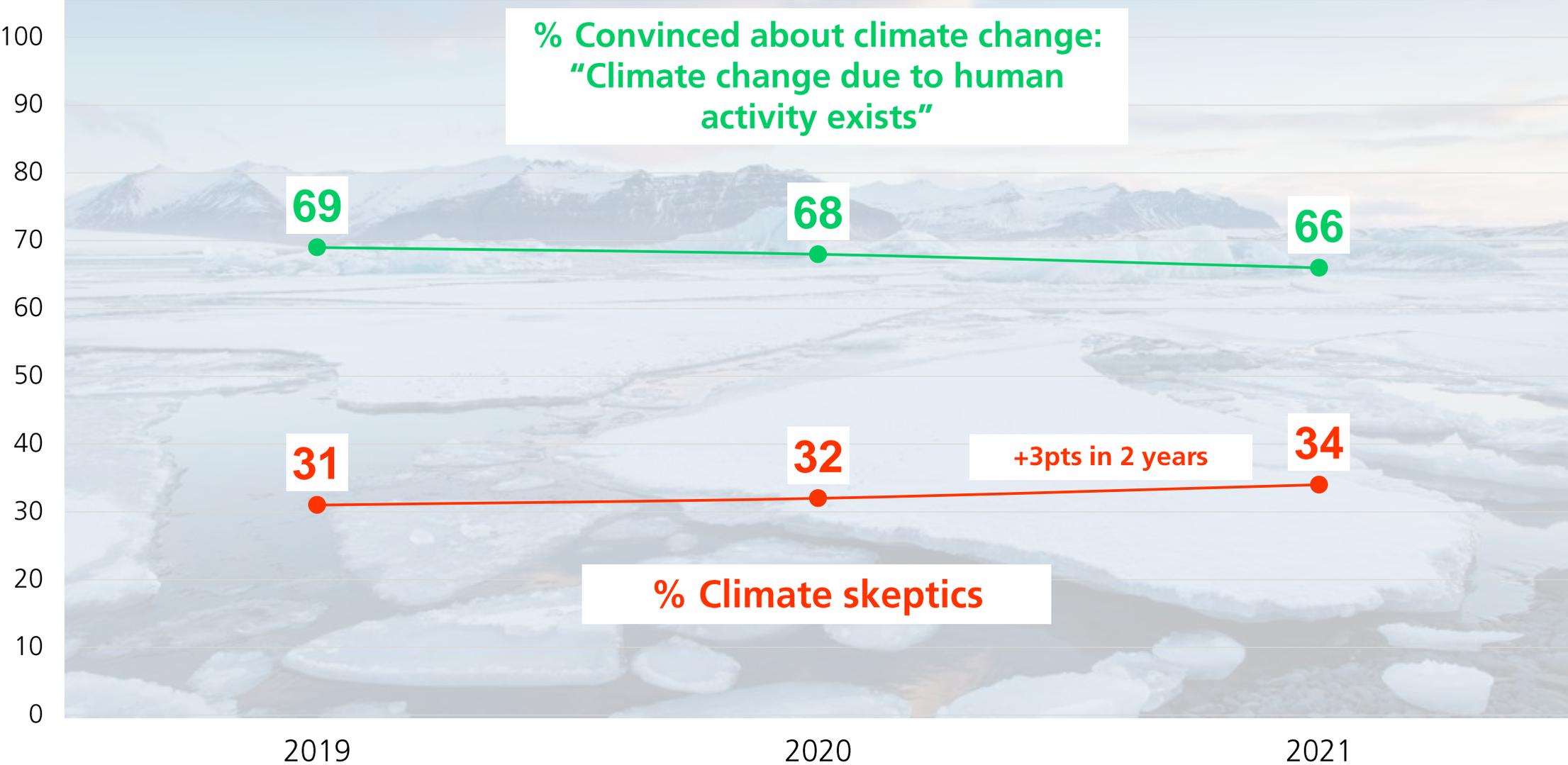
And yet, climate skepticism has tended to grow

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

Q. 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?



The balance of power between climate change believers and climate skeptics has evolved in defiance of all logic in the past two years

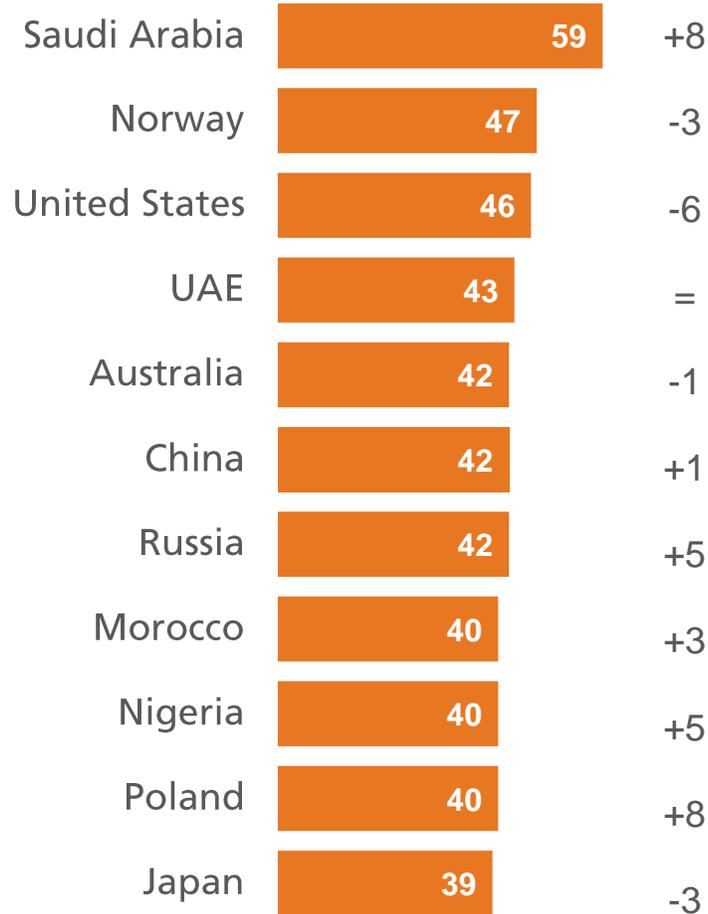


Climate-skepticism remains very strong in fossil-fuel-producing countries and in the USA

Most global warming skeptic countries

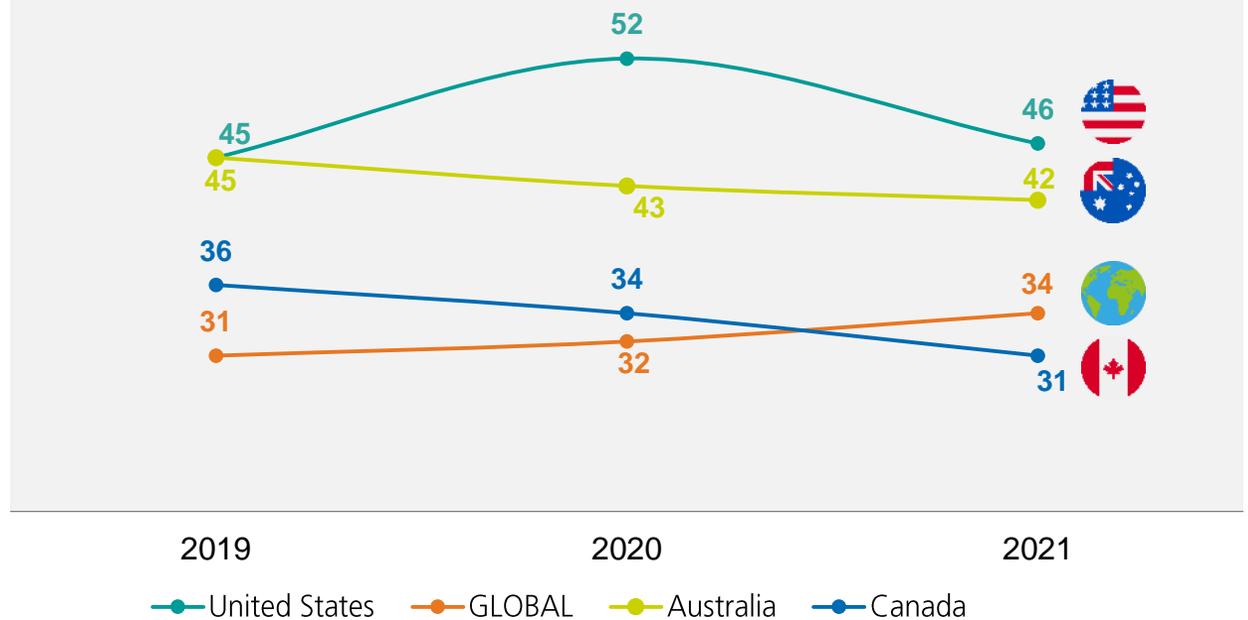
Global Average

34%



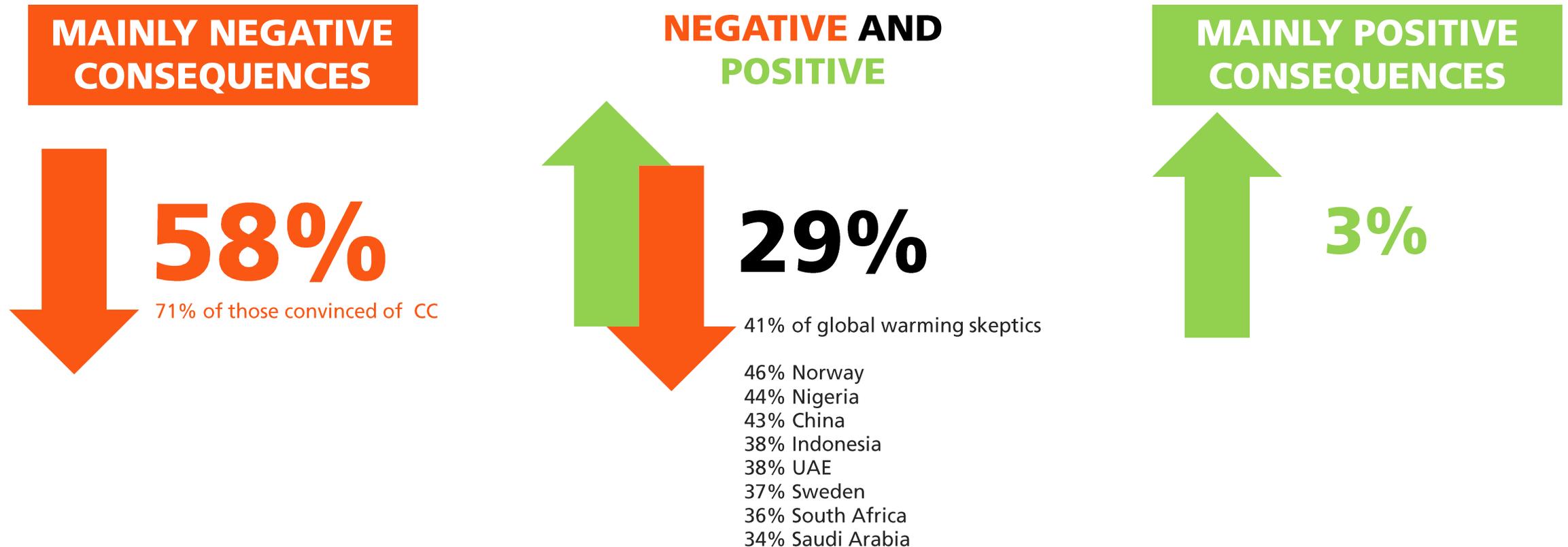
The United States, which has returned to its 2019 level of skepticism after skyrocketing at the end of the Trump presidency, still counts among the most climate skeptic countries in the world. In Australia and in Canada, countries that have experienced extreme climate events in recent years that can be attributed to climate change, awareness is growing, but slowly:

% Global warming skeptics



Almost one third of respondents can also see positive consequences of climate change

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

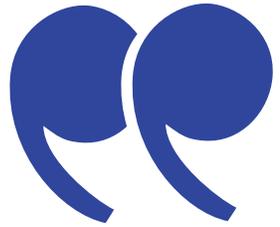




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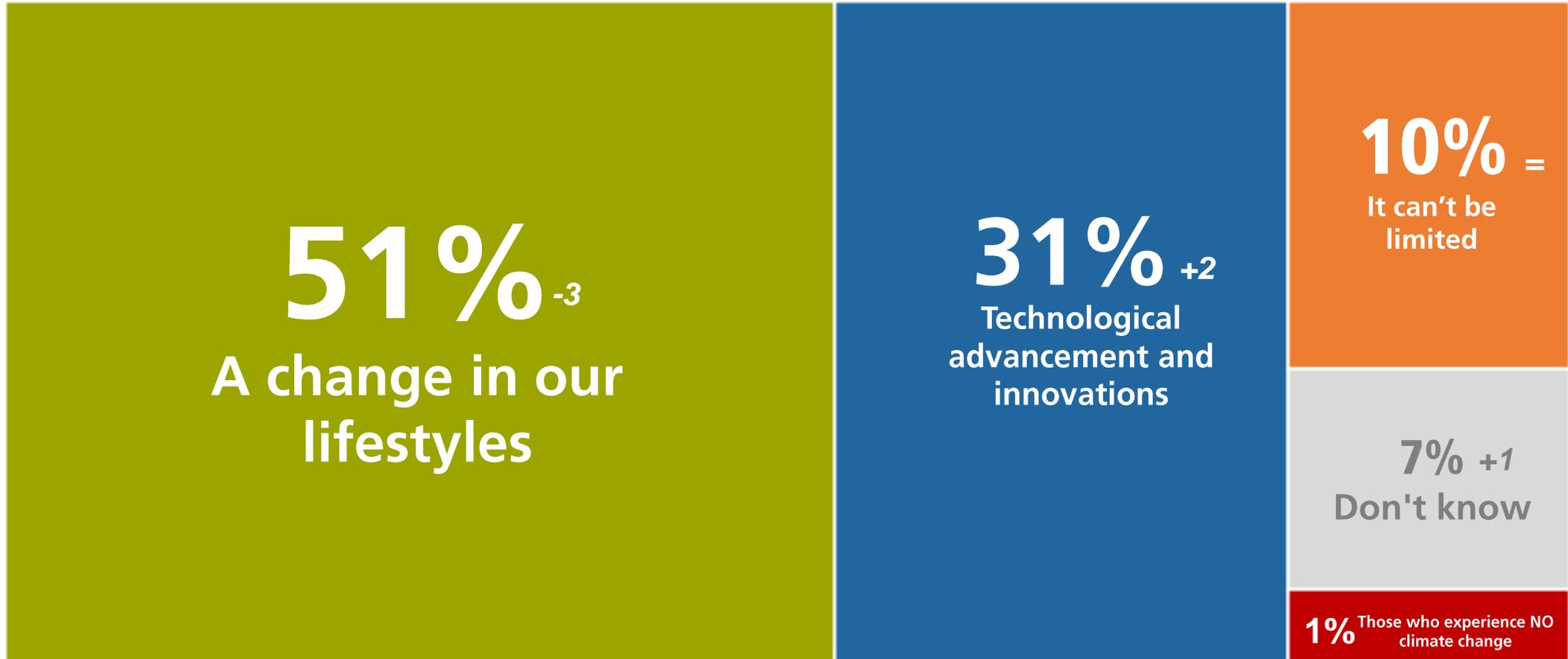
Taking action on climate change:
who should take action? and to
do what?



Life styles: is it really up to us to take action?

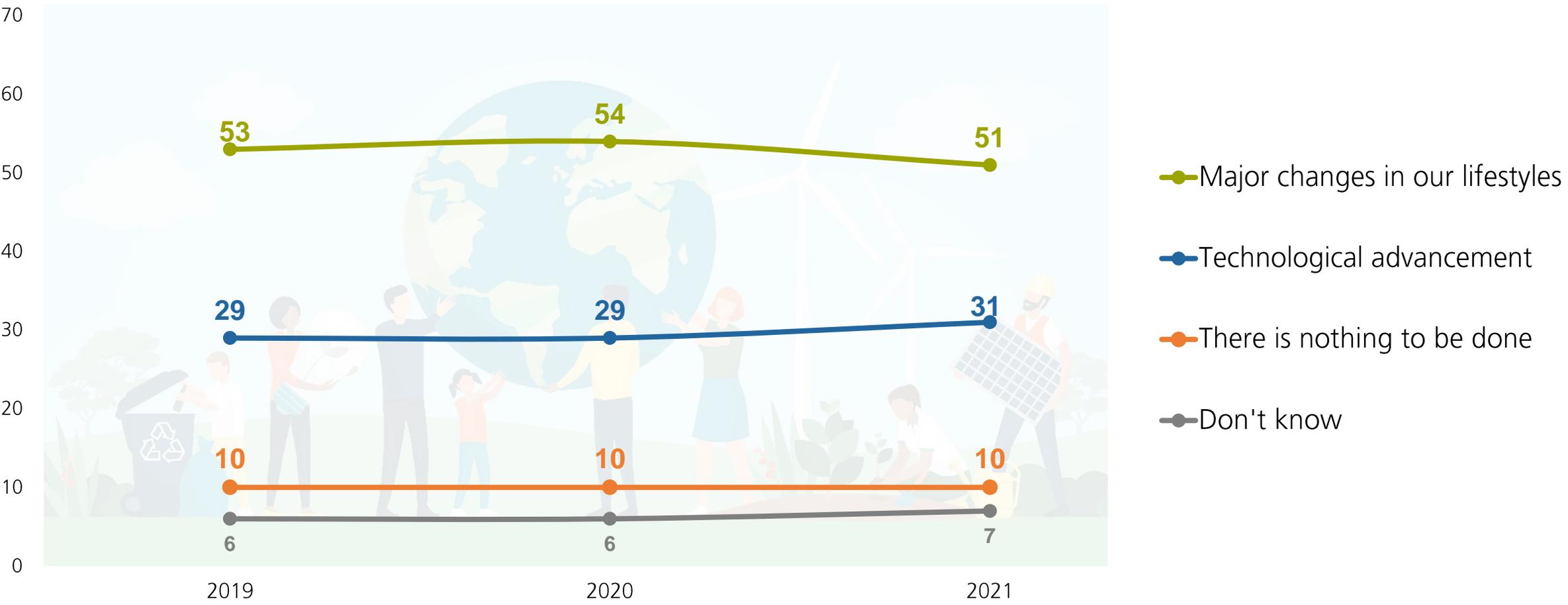
The impression that individuals must act on their own level has not made significant progress

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



Evolutions in the past two years are not moving in the direction of change

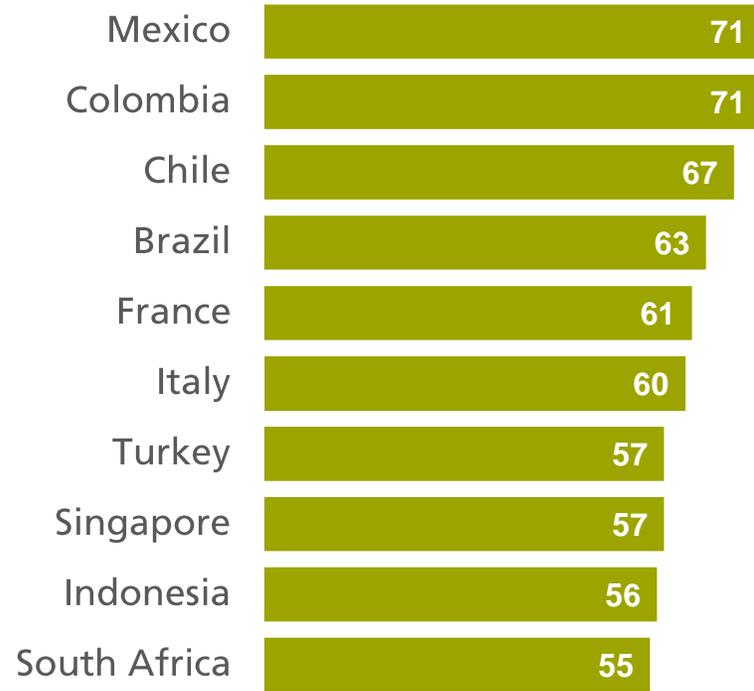
Q. Which of these three opinions is closest to your own?



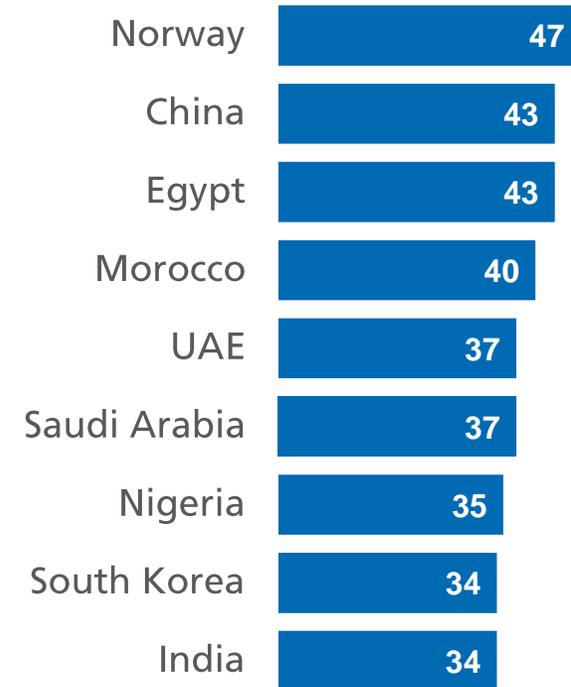
This opinion is most widespread in South America

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

Countries that consider that the solution lies in a **change in our lifestyles**



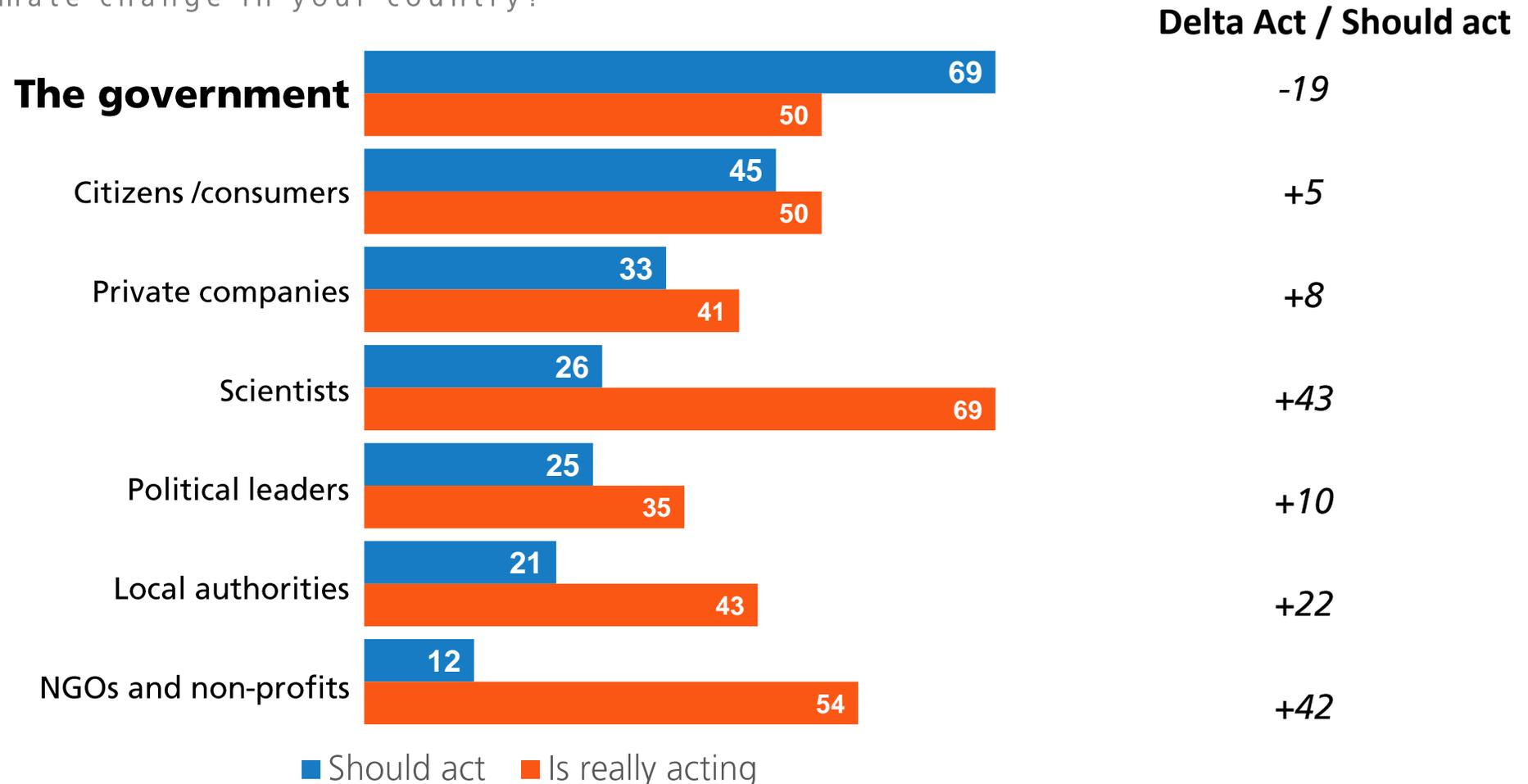
Countries that consider that the solution lies in **technological advancement and innovation**



One of the factors behind this is that the climate issue is still primarily seen by the public as a matter for governments, thus attributing great weight to regulation.

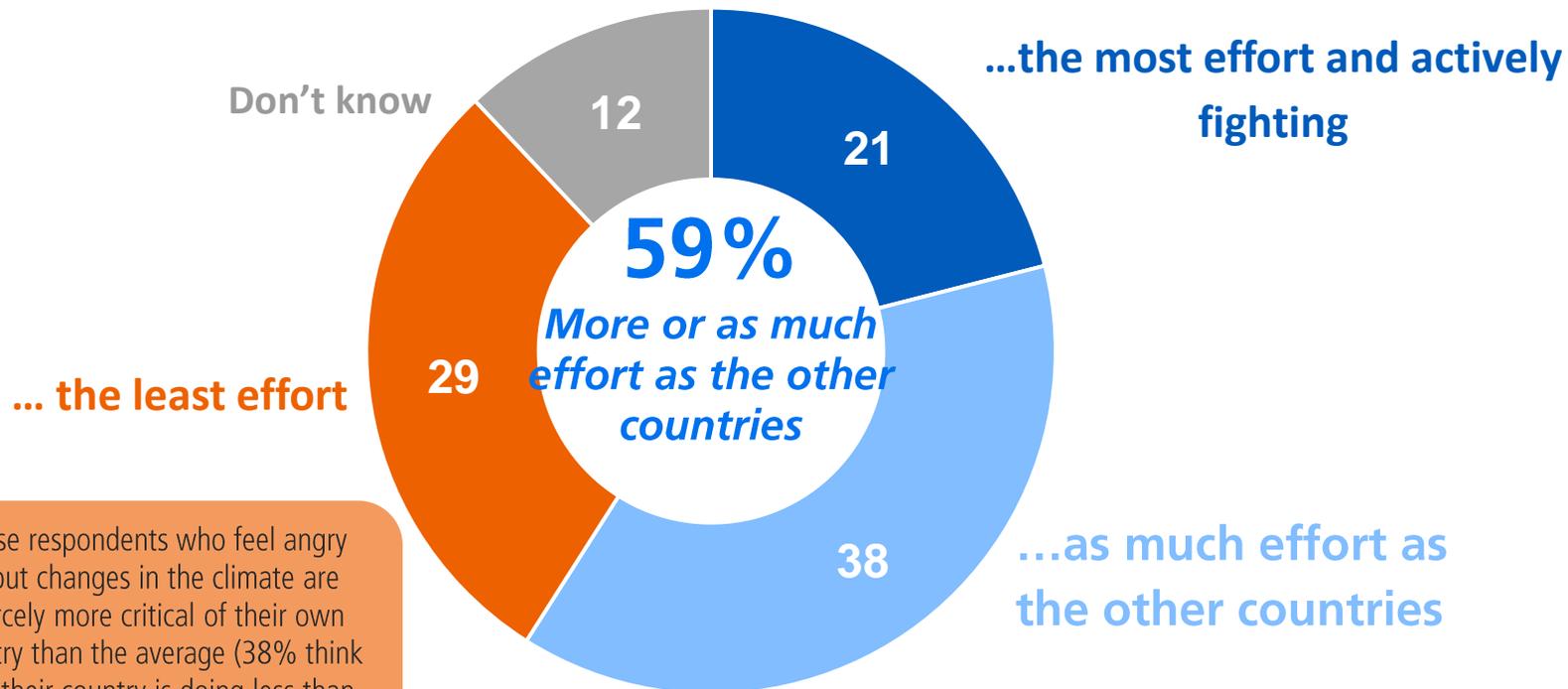
Citizens feel that they are doing their part and ultimately little is expected of private companies

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



Citizens think that their country is making as much – or even more – effort as others to combat climate change, which neutralizes the feeling of lagging behind of or being an exception

Q. In your opinion, what is the situation of your country in terms of the fight against climate change? In the fight against climate change, your country is among those that are making:



Those respondents who feel angry about changes in the climate are scarcely more critical of their own country than the average (38% think that their country is doing less than the others c.f. 29% on average).

% My country is making as much or more effort than the others

China	90
Sweden	88
Norway	79
Germany	74
Morocco	74
UAE	74
India	73
Canada	71
France	71
Saudi Arabia	71
Singapore	70
United Kingdom	70



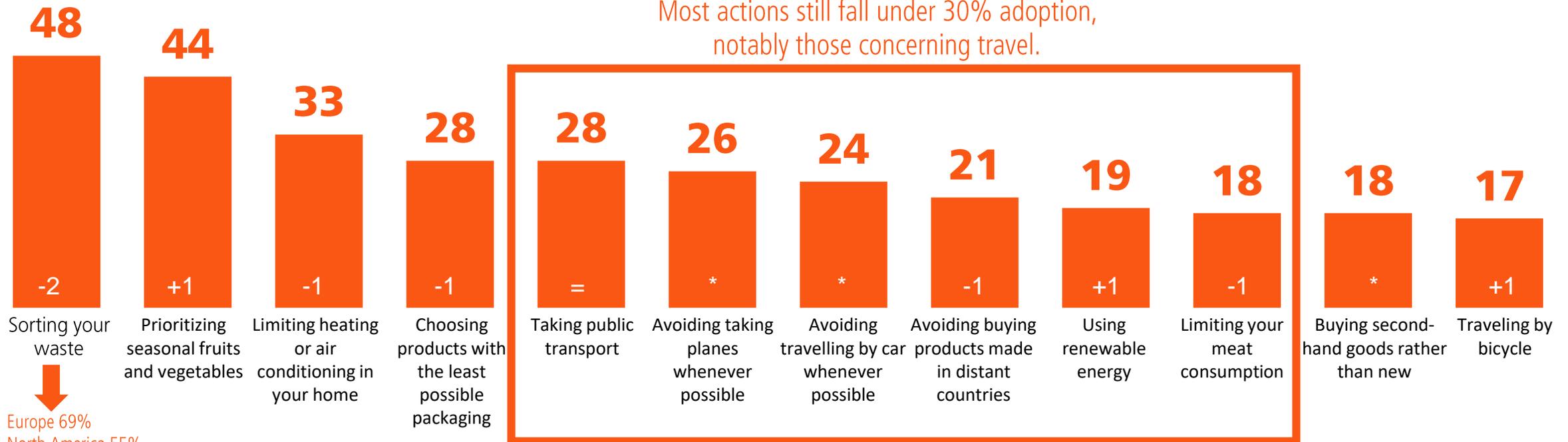
On a day-to-day basis, actions are still not very centered on the climate, and are evolving slowly

On a day-to-day basis, the actions most commonly taken are not the most effective actions for fighting climate change, whereas actions with a greater impact such as consuming less meat have still only been adopted by a minority

Q. D3. Here are some individual actions that can help fight climate change. For each of these, tell me if you do it systematically or almost systematically

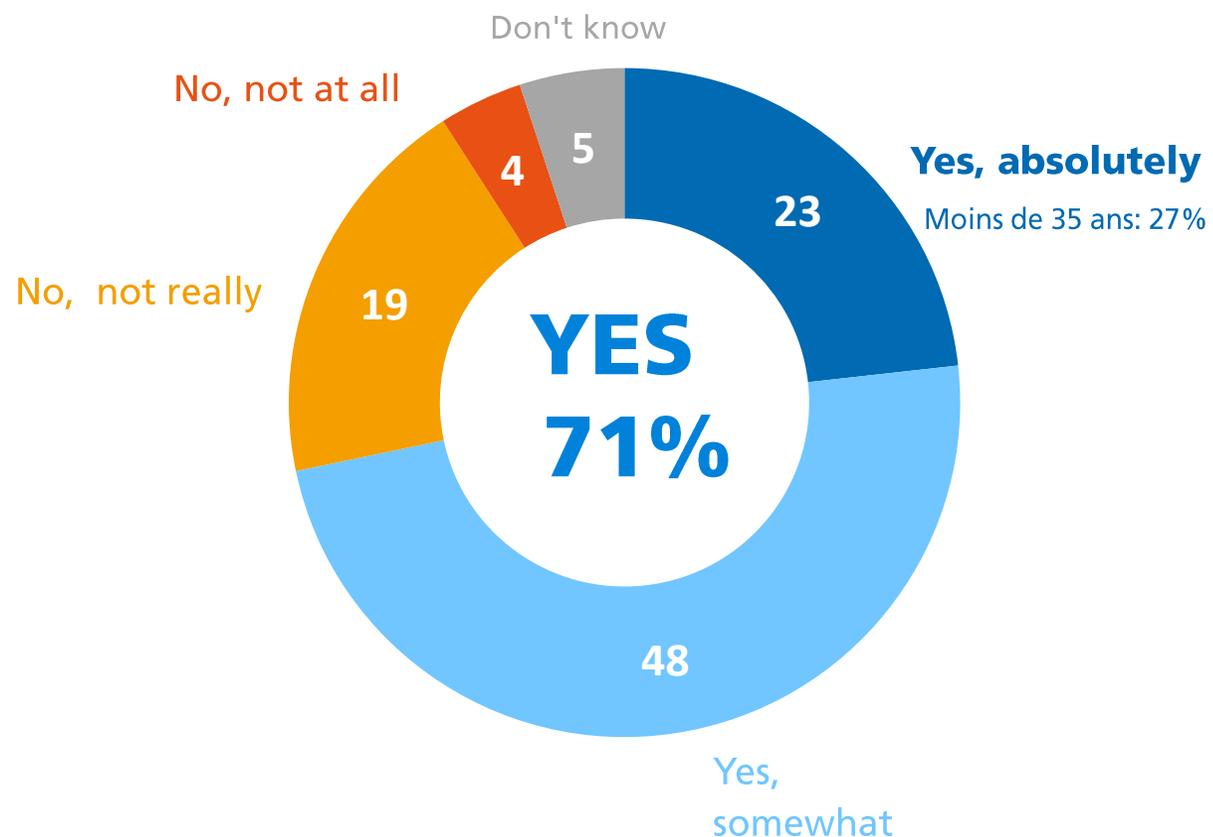
% You do it systematically or almost systematically

Most actions still fall under 30% adoption, notably those concerning travel.



This gap between the urgency felt in favor of the climate and everyday actions that are ultimately not very effective probably stems from a lack of information about the causes of climate change, whereas individuals are not aware of being ill-informed.

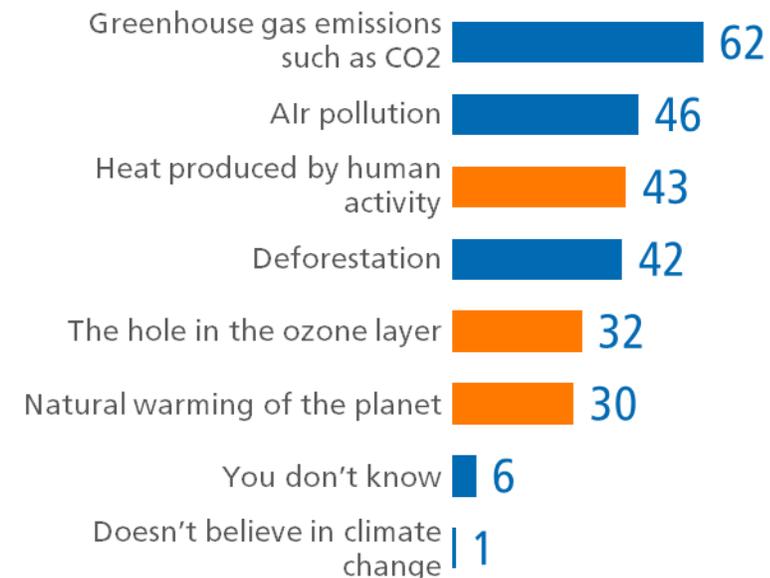
Q. Do you feel like you know what you can do on a personal level to fight climate change?



Reminder ObsCop 2020

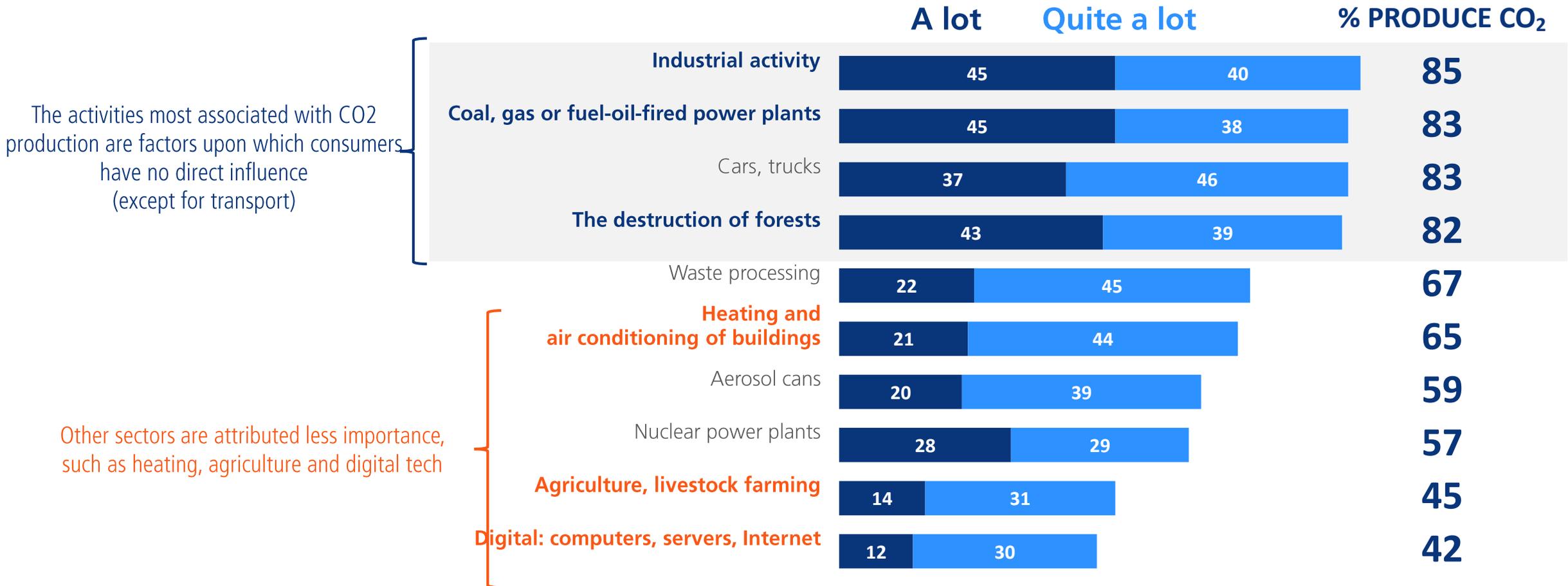
In the 2020 study, CO2 emissions, for example, were mentioned by only 62% as a cause of climate change, whereas inaccurate factors such as heat production or the hole in the ozone layer were still mentioned by 43% and 32% respectively.

Q. What is or what are the causes of climate change?



There is also some difficulty in identifying what is really harming the climate, with the best identified activities (industry, power plants, etc.) falling outside citizens' scope of influence

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



*Item modified compared to the previous wave

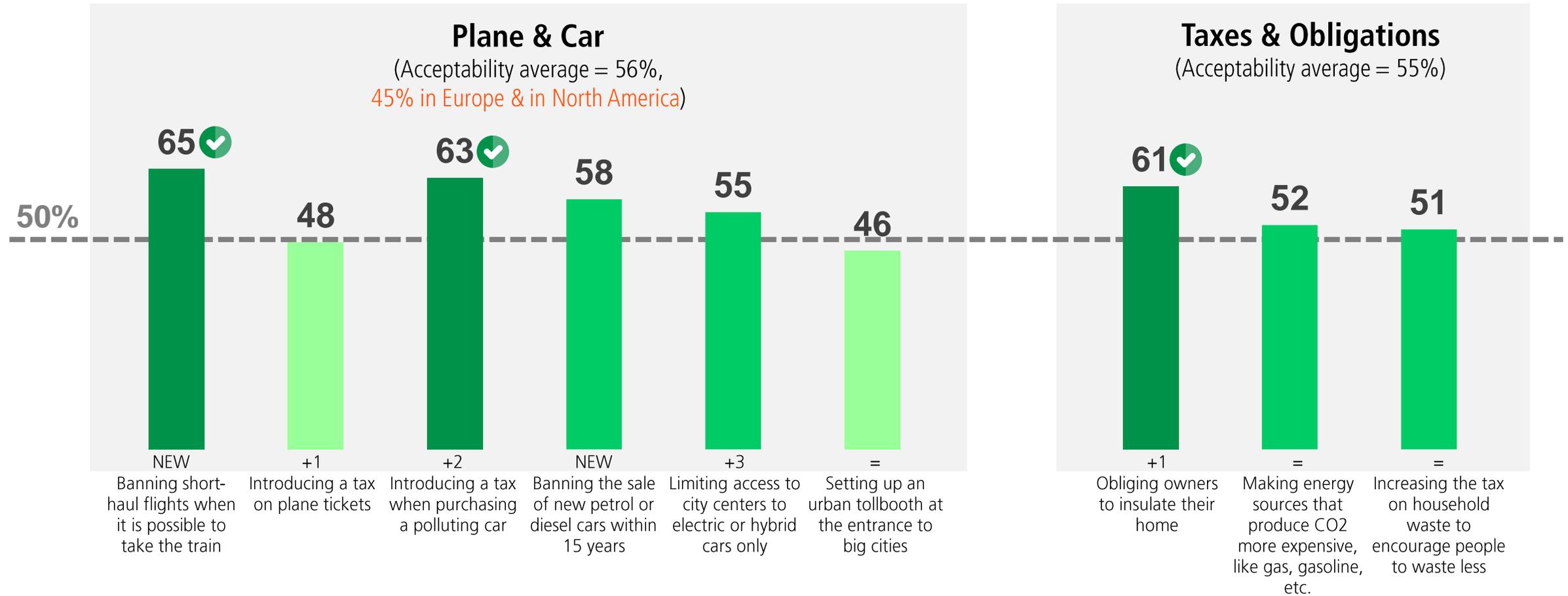
**Evolution to be interpreted with caution, in 2020 the item was worded as follows: Industry



On the one hand, governments are expected to take action and pass legislation, while on the other, there is limited tolerance for constraints

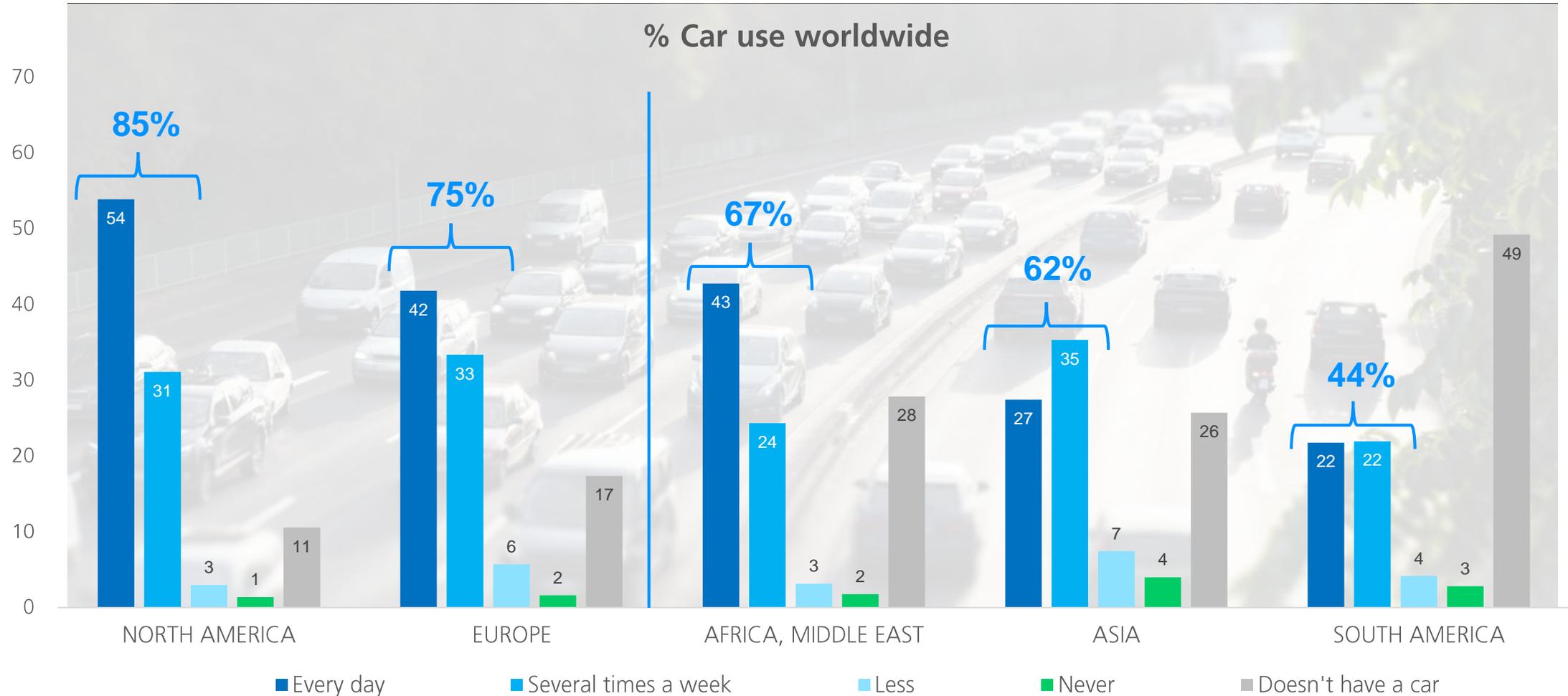
The level of acceptability of the conceivable measures remains low when their impact on citizens is very restrictive, particularly for Europeans. Three measures are better accepted however.

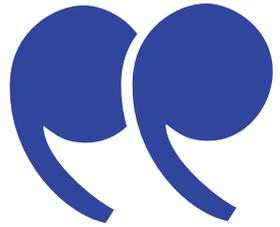
Q. Here are some measures that could be adopted in your country to reduce greenhouse gas emissions. For each one, tell me whether it seems to you to be acceptable



It is on the European and North American level that reluctance appears to be greatest, in other words where the rates of car usage are highest

Q. On average, how often do you use your car (outside of the Covid-19 pandemic)?

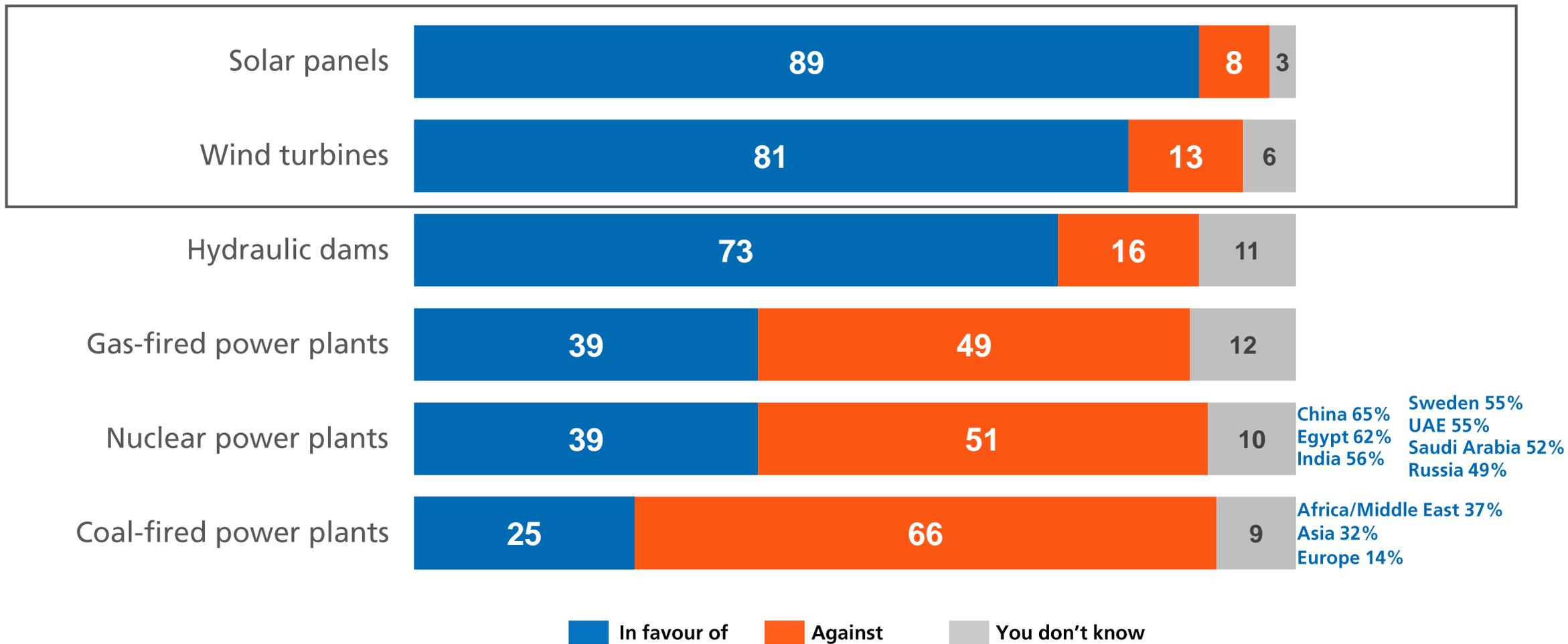




Electricity production: do everything possible to replace fossil fuels

Renewable energies are very favorably welcomed

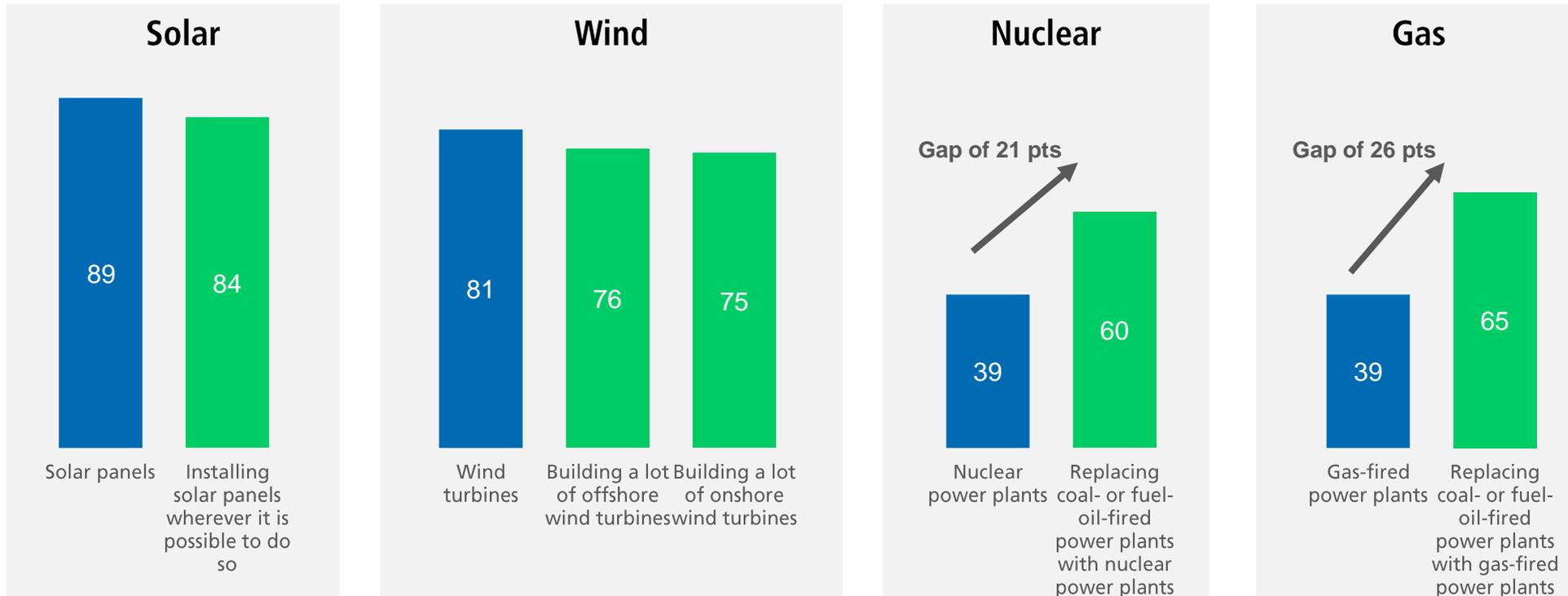
Q. To produce the electricity that you will need in the future in your country, are you in favor of or against each of the following production methods?



When the construction of different types of power plant is presented as being useful "to reduce greenhouse gas emissions", levels of support rise sharply in favor of gas and nuclear

Q. Here are some measures that could be adopted in your country to reduce greenhouse gas emissions. For each one, tell me whether you find it acceptable/Q. To produce the electricity you will need in the future in your country, are you in favor of or opposed to each of the following production methods?

■ Is in favor of using this type of energy
 ■ Considers the construction of the means of production acceptable



Gap of 21 pts

Gap of 26 pts

A measure viewed as acceptable in 26 out of 30 countries. Germany and Japan remain hostile.

High levels of acceptance in Turkey, India, Nigeria, Egypt, Chile...

1. Opinion and understanding of the climate issue

- **Despite pressure on purchasing power on a worldwide scale, people still want a pro-environment turnaround in the economy**

Neither relegated, nor a priority: the environment (a long-term challenge) is in competition with everyday life. On an international level, the cost of living question moves up to first place in the ranking of priorities this year (52%, +5pts), whereas 41% claim to be worried about the environment (+2pts). At the same time, a majority feel that they are living in a deteriorated environment (56% judge the environmental situation in their country as bad).

Even so, we see that in most countries, citizens think that the environmental AND economic situation of their country has deteriorated (majority impression in 19 out of 20 countries).

If they have to choose between giving priority to the environment or to the economy, a small majority opt for the environment (50%) while 35% want to prioritize the economy. Sign of a tough choice, a large number of people were unable to make a choice (15% no opinion). Their expectations will not be met in any case since only 29% think that priority will actually be given to the environment in their country in the years to come.

- **Faced with climate change, there is a definite sense of worry...**

The climate question is gradually establishing itself as one of the major environmental challenges, one of a group of four ecological threats, each mentioned by between 40% and 46%: waste (46%), climate (44%, +4pts since 2019), extreme climate events (41%, +5pts since 2019), air pollution (40%).

The climate is a big source of worry for the population (72%, including climate skeptics – 50%), and can even generate anger (33%) and demoralization (26%).

Climate change is being noticed by the population and remains a tangible reality in their region, especially in the Southern countries. It primarily takes the form of heatwaves (69%, phenomenon most widely observed regardless of location) and disruption of the seasons (49%).

Despite this context, climate skepticism has tended to grow in recent years (34%, +3pts since 2019). Climate skepticism is still very strong in the USA and in the fossil-fuel-producing countries (Saudi Arabia, Norway, UAE, etc.).

More generally, climate change is associated with mainly negative consequences, although one third of respondents see it as having positive consequences.

2. Taking action against climate change: who should take action? and to do what?

- **Life styles: is it really up to us to take action?**

The necessity to act on an individual level to combat climate change has not made **significant progress** (51%, -3pts), whereas 31% think that in order to fight climate change the solution will come from technological advancement and innovation. (33%).

One of the factors behind this is that the climate issue is still a matter for governments in the eyes of the public, thus attributing great weight to regulation (69% think that the government should act, 50% think that it is actually taking action). Citizens feel that they are doing their part (50% think that citizens are taking action) while little is ultimately expected of private companies

Moreover, citizens have the feeling that their country has made as much – or even more – effort as others to fight climate change, which neutralizes the feeling of lagging behind or being an exception (59%).

- **On a day-to-day basis, actions are still not very focused on the climate, and are evolving slowly**

On a day-to-day basis, the most common actions are not the ones with the greatest leverage in fighting climate change (sorting waste, seasonal fruits and vegetables, limiting heating), whereas actions with a greater impact such as consuming less meat are still only adopted by a minority (less than 20%). This gap between the urgency felt in favor of the climate and everyday actions that are ultimately not very effective probably stems from a lack of information on the causes of climate change, whereas individuals are not aware of being ill-informed. Hence, 71% think they know what must be done to act on climate change, and at the same time greenhouse gas emissions were quoted as a cause of climate change in 2020 by only 62% of the people questioned.

There is also some difficulty in identifying what is really harming the climate: the best identified activities (industry, power plants, etc.) fall outside the scope of individual citizens and the importance of other sectors is diminished (agriculture, digital tech).

- **On the one hand, governments are expected to act and to legislate but, on the other, there is limited tolerance for constraints**

The level of acceptability of the conceivable measures remains low when their impact on citizens is very restrictive, particularly among Europeans. Three measures are better accepted however: a ban on short-haul flights whenever the train provides an alternative (65%), a tax on the purchase of a polluting vehicle (63%), and obliging homeowners to correctly insulate their homes (61%).

It is on the North American and European levels that reluctance appears to be strongest when it comes to measures that impact travel, in countries where the rates of car usage are the highest (45% average acceptability in Europe and North American c.f. average of 56% globally).

- **Electricity production: do everything possible to reduce fossil fuels**

Renewable energies are welcomed very favorably (89% for solar panels and 81% for wind turbines). Also, when the construction of different types of power plant is useful “to reduce greenhouse gas emissions”, the levels of support are much higher in favor of gas (39% vs 65% when this is justified to fight CC) and nuclear (39% vs 60%).

Appendices and survey overview



OUR COMMITMENT

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 16-75
- **Selection of the respondent** : participant selection using a quota.
- **Sample representativeness (depending on countries)** : gender, age, social-economic category of individual/head of household, region/market size



DATA COLLECTION

- **Fieldwork dates** : 30th of August – 21st of September 2021
- **Sample achieved** : 24 000 interviews
- **Data collection** : on line
- **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 (depending on countries) : gender, age, social-economic category or status of individual/head of household, region/market 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.

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

- Scripting
- Sampling (IIS panel)
- Emailing



ACTIVITIES ENTRUSTED TO OUR APPROVED PARTNERS

- Translation

SURVEY MATERIAL

Questionnaire



Questionnaire in
english

À PROPOS D' 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.

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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.

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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.

**BE
SURE.
GO
FURTHER.**

GAME CHANGERS



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