

Obs'COP 2022

Climate Change And Public
Opinion International Observatory

BAROMETER ON PERCEPTION OF CLIMATE CHANGE IN 30 COUNTRIES



PURCHASING POWER IS NOW THE KEY PRIORITY ON A GLOBAL LEVEL. DESPITE THE IMPORTANCE THEY ATTRIBUTE TO THE CLIMATE AND EXTREME WEATHER EVENTS, PEOPLE ARE LESS INCLINED TO BECOME INVOLVED AND ARE MORE DUBIOUS AS TO THE HUMAN ORIGINS OF THE PHENOMENON.

Paris, December 8th, 2022 - A key international player in the energy sector, committed to achieving carbon neutrality by 2050, EDF presents the findings of a large-scale opinion study conducted for the 4th consecutive year by Ipsos in 30 countries¹ across all five continents, covering two-thirds of the world's population and including the biggest CO2 emitters. Every year, EDF produces an international report on opinions, knowledge, expectations and commitment levels with regard to climate change, to support reflection on the subject and contribute to the constructive search for future solutions.

The findings are publicly available at: www.edf.fr/observatoire

1/ In a period marked by heavy inflation, economic concerns have been growing whereas environmental concerns have been stagnating on a global level

- **The increase in the cost of living is the main subject of concern on an international level (62%)** with further strong growth this year (+10 pts since 2021, +15 pts since 2020). Poverty and inequality also remain at the top of the list (46%), followed by health issues (42%).
- While worry over inflation predominates in all continents, **priorities tend to diverge after that**: health is a mobilizing factor in Europe and North America, whereas South Americans fear crime and delinquency more than anywhere else; Asia is still mobilized by the Coronavirus (2nd priority); unemployment continues to be a source of worry in Africa and South America, whereas it is no longer a concern in Europe and North America.
- **Ranking 4th, the environment is still a key concern**, at a stable level compared to 2021 (40%, -1 pt). It features among the top five concerns of inhabitants in almost all continents, with the exception of countries in Africa and the Middle East.
- **The environment is still a priority for the upper categories**: while it ranks 2nd (44%) among the most affluent households, just after the increase in the cost of living, it ranks only 6th among lower-income households (36%), behind poverty and inequality (49%), unemployment (44%), the health system (41%) but also corruption.

¹ Methodology: selection of countries based on their CO2 emissions in tons per year, depending on their geographic location, their exemplariness in fighting climate change and their socio-economic model: Australia, Belgium, Brazil, Canada, Chile, China, Colombia, Egypt, France, Germany, India, Indonesia, Italy, Japan, Mexico, Morocco, Nigeria, Norway, Poland, Russia, Saudi Arabia, Singapore, South Africa, South Korea, Spain, Sweden, Turkey, United Arab Emirates, United Kingdom, USA. Representative samples of the population of between 500 and 1000 individuals per country; quota method. Fieldwork conducted online between 30/08 and 26/09/22.

- Next, when asked about the social choice to be prioritized for the future, **between giving priority to the environment or to growth and employment**, a majority of respondents still chose the environment. But this majority, which was 53% for the environment in 2019 compared to 34% for growth, **is gradually shrinking**: it is 48% vs. 38% in 2022, a sign that economic difficulties are hampering a pro-environment turnaround in our economies.

2/ The sense of being a witness to climate change is growing in areas that have dealt with the high temperatures and droughts of 2022

- **2022 has been marked by major climate events**: unusually high temperatures, droughts and wildfires in Europe during the summer, flooding in Australia, high temperatures in India and Japan and drought in Chile earlier in the year... However on an international scale, the feeling of being “absolutely” or “somewhat” confronted with climate change has not grown since 2019, despite being very high (77%), particularly in South America (89%), Africa / the Middle East (80%) and Asia (82%).
- On the other hand, in the areas confronted with these events in 2022, including a part of Europe, populations feel that they have seen the effects of climate change much more than last year: +9 pts in China, +8 in Germany, Poland and the UK, +5 in France and Spain, +11 pts in India.
- Populations are not reacting in the same way everywhere. 55% of Australians (+24 pts) mentioned the flooding that hit their country this year. Nevertheless, their sense of being confronted with climate change is still lower than elsewhere and is not growing.
- The climate events of the past summer have had a strong impact on the French: the high temperatures (79%, +9 points vs 2021), drought (62%, +19 points vs 2021) and drying up of waterways (51%, +16 points vs 2021).

3/ Despite topping the list of environmental priorities, climate change is not generating greater concern and climate skepticism² is growing

- **Climate change (46%, +2 points vs. 2021) and extreme climate events (43%, +2 points vs. 2021) have become the key reasons for environmental concern this year on a world level**, although this is also due to the drop in concern about waste and plastic (41%, -5 points vs 2021) and air pollution (37%, -3 points vs 2021). Nevertheless, if the two items are combined, 66% of the world’s population still view the climate as a priority issue (60% in 2019).
- **At the same time, climate change is not generating greater concern this year and climate skepticism is growing**:
 - The level of concern about climate change remains high (69%) but is tending to drop (-3 pts on an international scale and -6 pts in France compared to last year).
 - In France 16-24-year-olds are less worried than the population as a whole (45%), but they are either more indifferent (16% vs 7% overall), or on the contrary express greater demoralization (38% vs 27% overall).
 - **Unexpectedly, climate skepticism has consistently grown over the past 3 years (37%, +6 pts in 3 years), and is particularly striking in France this year (37%, +8 pts in one year)²** whereas concern about the environment is particularly strong in that country. More specifically, the idea that has progressed the most is not a denial of change, but the notion that it is “mainly due to the kinds of natural phenomena that the Earth has experienced throughout its history”. So fewer people than before consider that it is due to human activity: 63% c.f. 69% in 2019. However, France remains less concerned by climate skepticism than the fossil-fuel-producing countries (Saudi Arabia: 60%, Norway: 48%, Russia: 48%, United Arab Emirates: 46%, USA (48%)).

² A reminder that climate skeptics as we define them in the survey are individuals who reject the actual reality of climate change (9%) and those who, without denying that it exists, consider that it was not caused by human activity (25%), i.e. 34% of the population questioned.

- **Age does not appear to be a divisive criterion on this subject:** the level of climate-skepticism is very similar in all age categories. **Political tendency is more decisive on the other hand:** in the seven countries where this political question was asked¹, 28% of supporters of the left turned out to be climate skeptics as opposed to 50% of supporters of the right.
- So, it would seem that populations **are noting** the occurrence of extreme climate events and place them at the top of the list of current environmental problems, while at the same time, **this is not making them more concerned nor is it convincing them of the human origins of the phenomenon**, as if “nature” seemed to be increasingly causing its own deregulation.

4/ Individuals are less certain of the need to act on an individual level and are leaving things to public and private decision-makers, who they now view less severely. However, certain everyday consumer practices are evolving

Individuals are more reluctant to act and to change their lifestyle...

- More than was the case in the past, individuals **have the feeling that political and economic leaders are taking action on climate change**. This is the case for governments (54%, +6 pts in 3 years) **but above all for local authorities** (48%, +12 pts in 3 years). It is also the case for **private companies** (45%, +6 pts in 3 years). **This trend is more obvious in France** (government: 33%, +10 in 3 years, local authorities: 39%, +13 pts in 3 years; political leaders: 27%, +9 pts in 3 years and companies: 34%, +16 pts in 3 years).
- People are making this observation while, at the same time, *they are less inclined to act on an individual level*: a year ago, 45% considered that it was up to them to take action, whereas that figure is 42% today. **In France**, the drop in the sense of individual duty is very heavy in 2022 (from 61% to 49%) after regularly increasing in the three previous years. **Manual workers and the under-25s** are the least inclined to assign a duty of action to consumers.
- **In order to resolve the climate equation, should we alter our lifestyles or place our trust in technology? Or is it too late anyway?** Only 11% actually express a fatalistic attitude. The majority of respondents are split between two unequal camps: 50% think that lifestyles need to be changed, whereas 31% are leaving it to technology. But once again, the “lifestyle” response has tended to decline in four years (from 53% to 50%), and particularly in France, although still higher than the world average (from 64% to 57%).

...but are acting in favor of the environment all the same

- People claim that they have changed their behavior. This phenomenon is most obvious in relation to **the use of individual transport**: the number of individuals claiming to avoid taking their car at least occasionally went from 49% to 61% between 2019 and 2022, and those who avoid taking the plane from 41% to 52%. Another important development can be seen in relation to **using renewable energies for heating**: from 34% to 44%.
- Less strikingly, consumers seem more attentive to **products sourced in distant locations**: 57% claim to avoid them (+5). The other eco-gestures already engaged in widely are the ones that don’t have the greatest impact on climate change (sorting waste, avoiding excess packaging, seasonal fruits). On the other hand, the **consumption of meat**, which has a big impact on the climate, does not seem to be dropping based on respondents’ claims. Agriculture and digital technology are also underestimated as CO2 producers.
- **The youngest respondents** do not claim to engage in any more virtuous practices than the population as a whole.

Constraints are still hard to accept

- **The level of acceptability of restrictive measures** (incentives, bans or taxes) **varies little, and remains lower in Europe and North America**. Only 3 measures convince at least 6 out of 10 respondents on a global level: a ban on short-haul flights when it is possible to take the train, a tax on the purchase of polluting vehicles and obliging owners to correctly insulate their homes.

5/ Electricity consumption and production: with tension over energy supplies, there is great concern about prices

- **Six months after the start of the war in Ukraine and within a context of tension over energy supplies**, the steep rise in prices has been very hard on individuals, and this applies worldwide for the different energy sources. 48% of households claim to be impacted by a heavy rise in electricity prices (37% in France), 51% by the increase in gasoline prices (53% in France) and 40% by the increase in natural gas prices (only 22% in France).
- **And confronted with the threat of an electricity shortage, the acceptability of “non-renewable” energies has progressed quite sharply, especially in Europe:**
 - **The proportion of respondents in favor of nuclear power has progressed worldwide** (+7 pts) and in many European countries (+10 pts in France, +15 pts in Germany, +13 pts in Spain, +17 pts in Italy, +13 pts in the UK vs 2-21).
 - **But the acceptability of gas-fired power stations (+4 pts vs 2021) and coal-fired power stations (+6 pts vs 2021) has also progressed, particularly in Europe.**

ObsCOP expert analysts

Contact them for more insights on the subjects they worked on for Obs’COP:

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Jérôme JAFFRÉ, CECOP, CEVIPOF: political divisions and climate change

Olivier GALLAND, CNRS: generation climate

Mathieu BRUGIDOU, **Jérémy BOUILLET**, **Jérôme CUBILLÉ**, **Mathieu Durand-DAUBIN**, EDF R&D: the climate change audience

Patrick PERETTI-WATEL, INSERM – SESSTIM: the consequences of climate change and their impact on public opinion

Simon PERSICO, Sciences Po Grenoble: choosing between economy / environment

Emiliano GROSSMAN, Charlotte HALPERN, Isabelle GUINAUDEAU, Sciences Po, CEE: acceptability of public climate policies

Stéphane LA BRANCHE, Sciences Po Grenoble, Arina SUSA, independent researcher: the rationales behind behavioral change in France, consumption practices: the rationales behind mobilization in Europe

Vincent KAUFMAN, EPFL, Guillaume DREVON, LISER: the acceptability of life style changes in the mobility field

Analyses by country:

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Marc LAZAR, Sciences Po: Italy

Richard BALME, Sciences Po, EEC: China

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About EDF

A key player in energy transition, the EDF group is an integrated energy company operating in all areas of the sector: production, transport, distribution, trading, and the sale of energies and energy services. A world leader in low-carbon energies, the Group has developed a diversified production mix based mainly on nuclear and renewable power (including hydroelectric) and is investing in new technologies to assist with the energy transition. EDF's goal is to build a CO2-neutral energy future that combines protection of the planet, well-being and development, thanks to electricity and to innovative solutions and services. The Group supplies power and services to around 38.5 million customers (1), including 29.3 million in France (2). In 2021 it achieved consolidated sales of 84.5 billion euros. EDF is listed on the Paris Stock Market.

(1) Since 2018, customers have been counted by delivery site; one customer may have two delivery points: one for electricity and another for gas.

(2) Including ÉS (Électricité de Strasbourg) and SEI.

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