

Obs'COP 2025

World opinion in the face of climate change

RESULTS OF THE CLIMATE AND PUBLIC OPINIONS
INTERNATIONAL OBSERVATORY

Obs'COP 2025

CLIMATE AND PUBLIC OPINIONS
INTERNATIONAL OBSERVATORY



30 countries questioned across 5 continents, representing 63% of the world's population

Research methodology



23,500 individuals representative of the population aged 16 and over

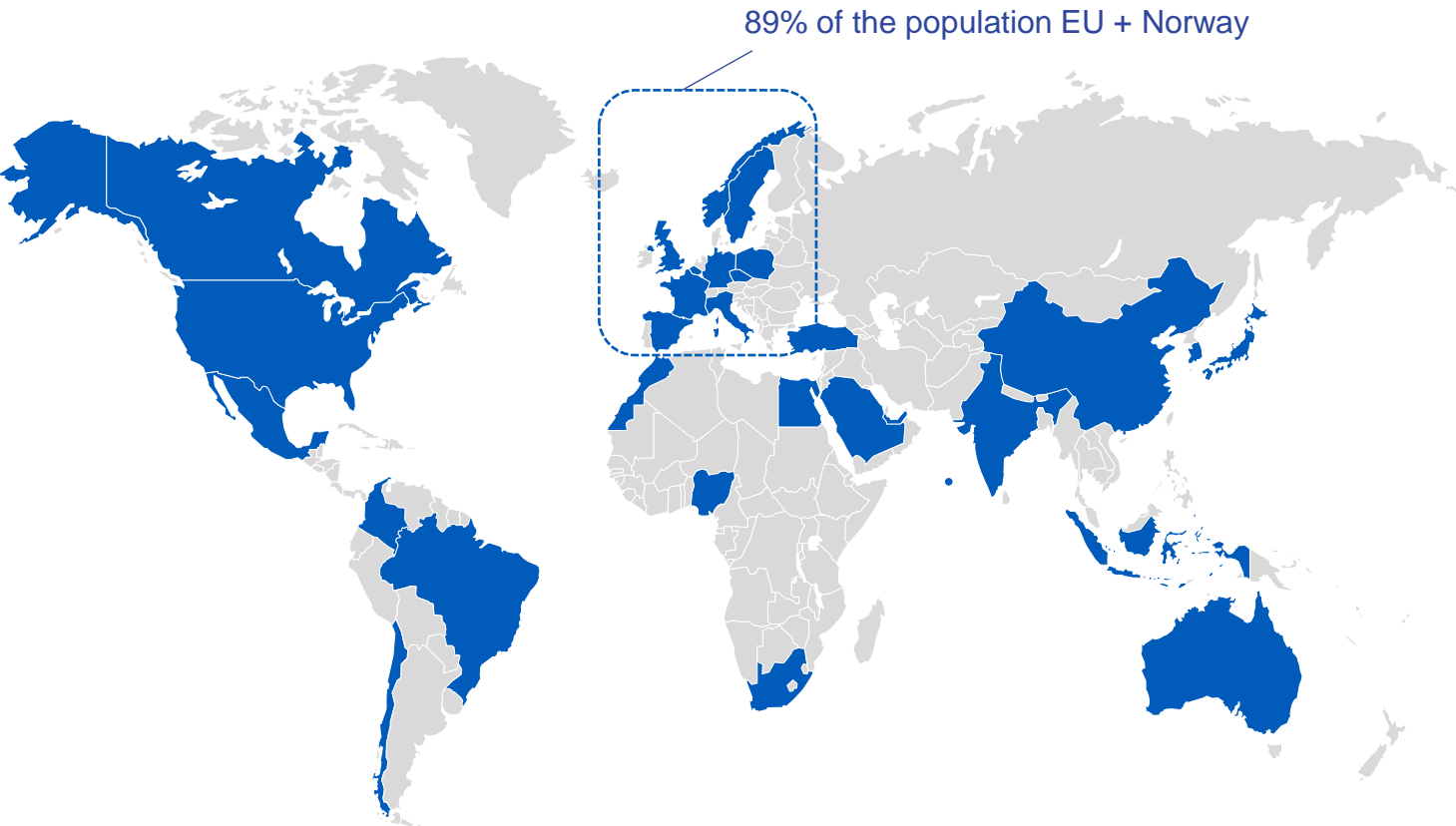
The quota method is used to ensure sample representativeness



Research fieldwork conducted **from August 18 to September 29** 2025



Online data collection from a panel conducted by Ipsos bva



Research summary

EDF, a global energy player committed to achieving carbon neutrality by 2050, presents the findings of Obs'COP 2025. Conducted by Ipsos BVA for the 7th year running, this extensive and unparalleled opinion study covers 30 countries representing two-thirds of the world's population, including the main CO₂ emitters.

The climate emergency is clashing with other emergencies

The climate is losing ground in the face of economic, social and geopolitical priorities

Prioritization of the climate clearly fell across the globe between 2024 and 2025, going from 2nd to 4th place. This drop in ranking is relatively limited in percentage terms (from 45% to 43%), a sign that the actual share of the population mobilized by the issue has not diminished that much. **It is not so much that the climate is losing importance, and more that other themes have moved ahead in the order of priorities**, notably poverty and inequality, moving up from 3rd to 2nd place, behind the cost of living, which continues to top the list.

Over a longer period (from 2019 to the present), one question that puts prioritizing the environment up against the need for economic growth shows the environment dropping back quite sharply worldwide (-7 pts). Populations are now split into two equal camps, those prioritizing the environment versus those prioritizing economic growth and jobs.

However, with the impact of rising temperatures, climate change has established itself as a reality

It is clearly the competition from other issues that is eclipsing concerns about the climate since **respondents are almost unanimous about the reality of climate change**: 90% of the world's population recognize the existence of climate change, and 61% are even "certain" of it.

This reality is making itself felt across the planet, not through climate disasters (flooding, storms), but through the unstoppable rise in temperatures and more frequent episodes of extreme heat. **For populations, climate change is primarily about climate warming.**

Living with climate change

Climate skepticism is no longer spreading...

The debate around the causes of climate change or its consequences seems to have stabilized. **Skeptics have not capitalized on a trend in public opinion that is less favorable to the environment:** they still represent around a third of the world's population and remain concentrated in the same countries: Gulf States, Eastern Europe, Australia, Norway, USA... But even in the USA, the election of Donald Trump did not boost the number of skeptics (+1 pt).

...but concern isn't growing either

Nevertheless, awareness of climate change among a majority of people, accentuated by the rise in temperatures, **has not generated an increase in concern.** The level of great concern worldwide remains stable (40%).

Adaptation strategies are already in place

Concern is not growing, whereas **a large share of the world's population** (32%, but more than half of the population in Colombia, Nigeria, Turkey, Indonesia, the Emirates and 63% in India) **expect to be forced to leave their home in the next 10 years, as a result of climate change.** The reasons cited are, in 7 out of 10 cases, extreme heat or water shortages. The prospect of change is not being taken lightly: those who are certain of having to leave their current place of residence are very concerned about climate change.

Much is expected of the authorities and of the corporate world, whereas consumer behaviors have scarcely evolved

High expectations of governments in terms of climate action

To fight climate change, governments are the players most generally expected to take action by 70% of the world's population. The other players, such as private companies, local politicians or consumers, were mentioned by fewer than 43%.

Across the world, and particularly in Europe, **a sense of decreased commitment** has dominated for the past year, on the part of all players.

Among the economic players, **farmers, carmakers and electricity providers seem to be the most credible**: between 57% and 56% of our global sample recognize their involvement in the ecological transition. Other sectors such as digital technology, banks etc. receive less recognition for their efforts.

Consumers lack commitment

Not all consumers show signs of paying attention to the impact their consumption has on the climate. Take three symbolic habits: daily car use, daily meat consumption and taking a plane more than once a year. Only meat consumption dropped (slightly) worldwide between 2021 and 2025 (from 38% to 36%). Meanwhile, use of cars and planes has not decreased, regardless of geographic area.

When it comes to the other pro-climate habits tested, and especially the ones that really count in relation to the climate, around one quarter of consumers systematically engage in them, and those are the more mobilized individuals.

Research summary

Acceptance of climate policies is dropping

Within a context of great concern about purchasing power, there is increasing resistance to restrictive climate policies. This is particularly true when it comes to measures concerning transport, for example the ecological penalty, which receives no more than 57% support on a global scale (-6 points vs. 2021). The ban on internal-combustion-engine vehicles by 2035 generates even less support: only 37% of Europeans are in favor (-9 points vs. 2021).

Electrification: a popular lever hampered by cost

A majority support electrification

The world's population supports electrification. This is one of the survey's key findings: 68% of our sample in 30 countries are in favor of replacing fossil fuels with electricity in transport, heating or industry. Europeans are no exception to the rule: 62% are in favor.

The climate value of the transition to electricity is obvious for 64% of Europeans, but even more so on a global scale (72%), notably because the southern countries doubtless see it as a means to fight air pollution at the same time.

To support the electricity production required for this transition, people choose solar panels (84% globally), hydroelectric dams (73%), and onshore (72%) or offshore (73%) wind farms. **In Europe, nuclear power has become popular again**, notably in Poland and the Czech Republic where 70% of citizens are in favor (+24 points in Poland since 2021). The return to grace of this energy source, albeit relative, is spectacular in Germany (+15 pts) and especially in Italy (+21 pts) and Norway (+23 pts).

Attitudes to the electric car differ according to geographic areas

Most of the world's citizens react positively to the development of the electric car (68%), which is in line with their desire to see increased electrification. The enthusiasm evident in the Southern countries contrasts with a chillier response among Europeans, only 55% of whom view the EV boom favorably (vs. 62% for electrification in general). In Germany and Belgium, the level of support is at 51%, and dips beneath the 50% bar in France, Poland and the Czech Republic.

Research summary

Cost, the main barrier to electric vehicles

European reluctance about the policy of promoting electric vehicles stems from three obstacles:

- **Financial:** electric vehicles still suffer from an image of expensiveness, with price being the main obstacle to purchase (53% in Europe – source: Obs’COP 2024), whereas there is an increasingly diverse range of offers under 25,000€. Moreover, there is a lack of awareness of the fact that Total Cost of Ownership for EVs is lower than for internal-combustion-engine vehicles.
- **Psychological:** fears around loss of autonomy linger among drivers. A lack of autonomy (40%) and a lack of charging stations (25%) feature among the key obstacles to purchase, just behind the price (source: Obs’COP 2024). This phenomenon is especially observed among older people. However, the rate of installation of public charging stations is accelerating.
- **Ideological:** the environmental impact of EVs is questioned given that only 57% of Europeans believe that the electric car is an asset in fighting climate change, as opposed to 72% worldwide. However, the environmental and climate benefits of EVs are undeniable (CO2, noise, pollution, comfort).

Within this context, the electric vehicle has even less appeal this year: only 11% of Europeans would consider purchasing a 100% electric vehicle, i.e. a 2-point drop vs. 2024. In contrast, internal-combustion-engine vehicles are regaining popularity: 42% of Europeans would prioritize an internal-combustion-engine vehicle, i.e. an 8-point increase compared to 2024. This trend can also be observed on a global scale.

Research summary

The heat pump, the preferred heating method for Europeans

Unlike the electric vehicle, the heat pump has attracted a lot of interest, a sign of potential success. This other lever of decarbonization is well-known in Europe (91%), and in North America (75%).

Among its prospective customers — homeowners thinking of changing their individual heating system in the next three years — **the heat pump is the system most widely considered**: 39% of Europeans would opt for the heat pump from among six other options. The heat pump has even more appeal among individuals who are very sensitive to environmental and climate issues.

In Europe, the prospect of energy savings (67%) and financial incentives (56%) are the two most convincing levers by far. Within a context of heatwaves and temperatures rises, the dual heating/air-conditioning function also appeals to 33% of Europeans.

But once again, the purchase cost continues to be an obstacle: 44% of Europeans not considering this system view it as too expensive, and 22% think that the financial aid available is insufficient. The setting up of financial incentives and the guarantee of a stable regulatory framework therefore appear to be vital factors in encouraging its adoption. Moreover, doubts about its efficiency during cold weather (25%) were also pointed out, but neither negative word-of-mouth nor the lack of qualified installers seem to be dissuasive, showing that the heat pump has overcome its past negative feedback.



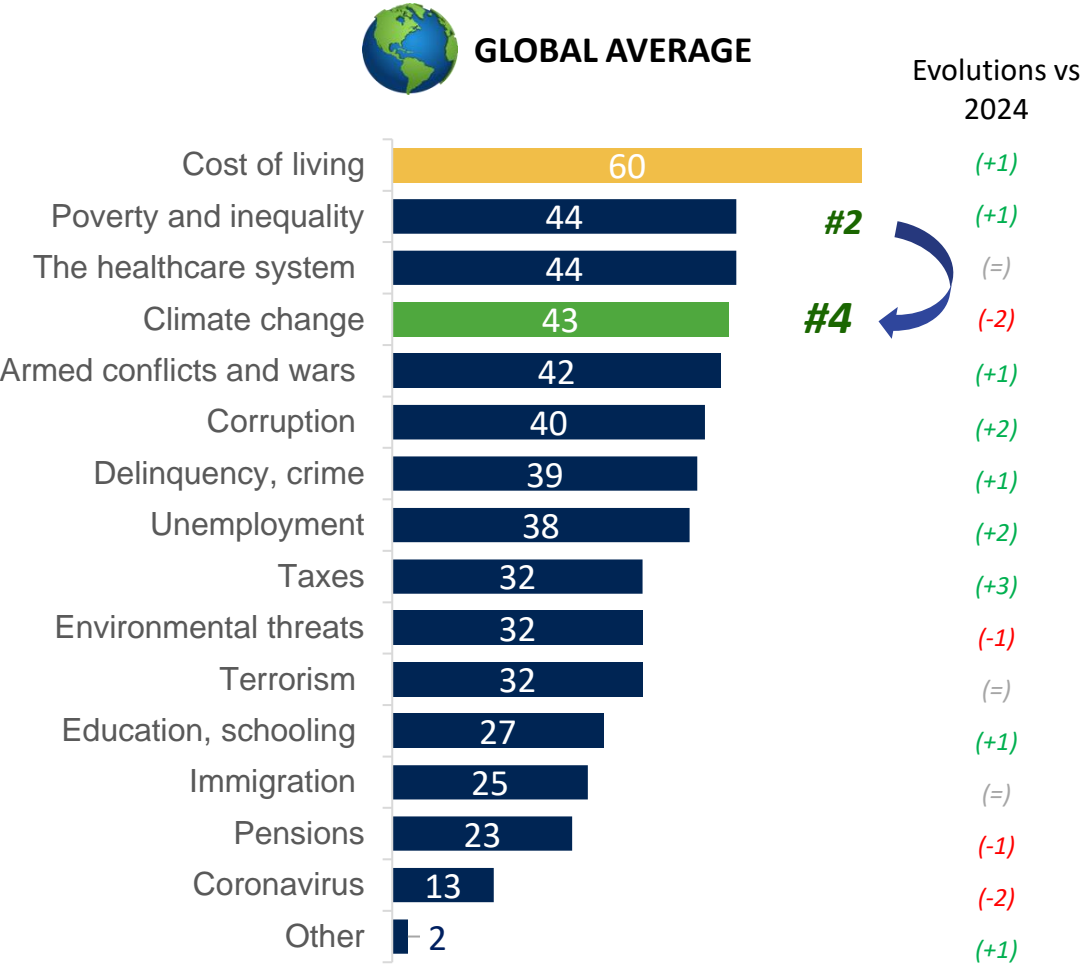
1.

Public opinion is less favorable to the environment

The climate continues to be a major priority on a global scale

Although it dropped down the list between 2024 and 2025 as other issues rose to prominence

What worries the global population the most?

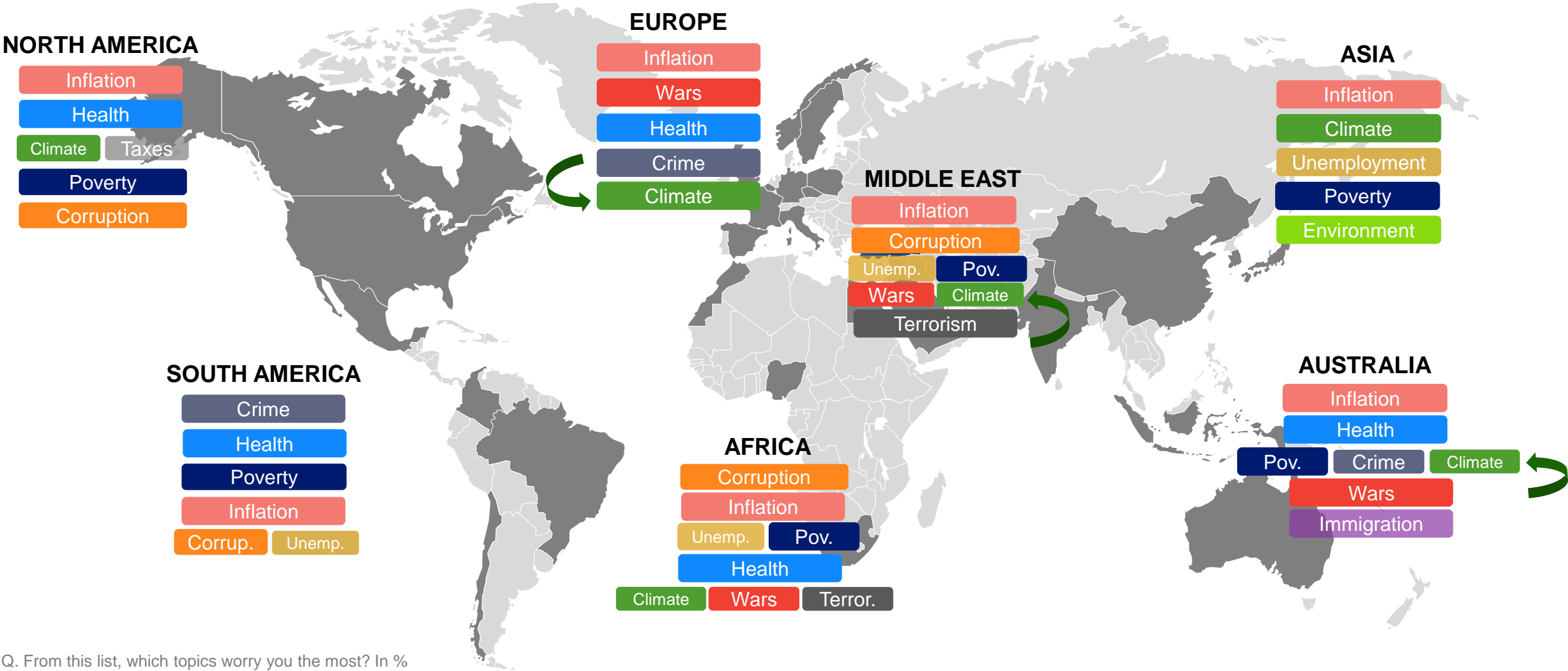


Q. From this list, which topics worry you the most? In %

Asia is the region in the world most sensitive to the climate issue

What worries the global population the most?

Climate change: evolution of ranking 2024-2025



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

Concern about the environment is particularly high in Indonesia and India

What worries the global population the most?

	Cost of living		Poverty and inequality		The healthcare system		Climate change		Armed conflicts and wars		Corruption		Delinquency, crime		Unemployment		Taxes		Environmental threats		Terrorism		Education, schooling		Immigration		Pensions		Coronavirus	
GLOBAL	60	+1	44	+1	44	=	43	-2	42	+1	40	+2	39	+1	38	+2	32	+3	32	-1	32	=	27	+1	25	=	23	-1	13	-2
Germany	59	-1	42	-4	46	+2	40	-6	56	+2	22	+3	44	-3	16	=	26	+4	31	-4	36	-6	25	-2	45	-6	42	+1	5	=
Belgium	57	+2	41	+4	36	+5	43	-3	54	+3	24	-2	50	=	17	+2	44	+1	29	-3	31	-8	25	+2	37	-2	36	+5	4	-4
Spain	62	=	49	-2	48	=	46	=	50	+6	52	+7	40	-3	42	-4	34	-5	30	-2	24	-2	27	=	36	-2	36	-3	7	-4
France	67	+2	42	+1	55	+1	48	=	50	+6	26	+9	56	+4	21	+4	46	+5	31	=	33	-4	36	+2	39	=	37	+1	4	-2
Italy	53	+1	38	+1	47	=	44	-5	51	+3	20	=	42	+1	31	+1	35	+5	24	-3	19	-1	16	=	23	-1	24	+3	4	-2
Norway	46	-2	42	+15	37	+4	39	-3	59	+10	27	+2	53	+27	18	+4	34	+7	30	+4	42	+1	17	+3	33	+9	21	=	6	+2
Poland	57	-7	32	-4	54	=	42	-3	69	+5	28	-4	31	+3	25	+5	33	+3	33	+1	27	-3	20	+2	36	+5	29	-7	10	-5
UK	72	+5	39	-2	59	-1	45	-1	44	+4	30	+2	29	-4	22	+2	31	=	34	=	31	-1	20	-1	45	+11	23	-4	8	-1
Czech Republic	55	-4	39	+2	39	+4	25	-5	65	+5	34	+3	37	-1	21	=	24	-3	24	-1	32	-5	24	+6	42	-1	36	-5	7	-1
Sweden	45	+4	39	+5	47	-3	46	+6	61	+9	33	+5	56	-4	33	+9	22	+1	34	+3	43	=	29	+4	34	+1	29	+2	7	+1
Canada	77	+2	42	+4	57	-4	42	-1	33	-2	30	-1	28	-3	27	+6	43	-1	28	-2	19	-5	22	=	33	+6	22	-3	6	-4
USA	70	=	36	+2	50	+7	41	-1	31	-7	41	-1	26	-6	26	+2	42	+2	33	+3	32	-5	25	=	26	-8	10	-2	9	-10
Australia	81	+3	38	=	46	+2	38	+1	35	=	27	-4	38	+5	26	+2	26	+2	28	=	23	-2	22	+2	29	+4	18	-2	10	=
China	40	-7	28	=	28	-8	50	+5	18	-5	19	-5	18	+1	31	-4	9	+1	38	-2	16	-2	20	-4	7	+1	22	+1	22	+1
South Korea	60	+6	35	+1	21	-16	53	-4	25	=	27	+2	24	-2	32	+3	26	+3	35	-5	12	=	13	+2	3	=	16	-2	13	-6
India	49	+4	42	-2	39	-1	55	-2	27	+1	57	+5	25	-1	54	+1	38	+4	44	-1	49	+8	35	+2	20	+3	11	=	19	-2
Indonesia	67	+7	63	+5	33	+4	56	+1	45	=	69	+16	31	-1	56	+8	42	+20	48	+6	37	-1	26	=	7	=	7	-1	27	=
Japan	69	+4	25	-2	28	=	55	+1	34	-2	10	-3	23	-4	10	-1	41	=	25	+1	12	-2	8	=	21	+7	42	-3	16	-3
Singapore	80	+5	29	-1	42	+2	42	-7	32	-1	20	+2	21	=	46	+12	20	+1	25	-7	33	=	14	-1	16	+3	9	+2	17	-2
Brazil	60	+5	65	+7	56	+2	42	-12	39	+6	54	+2	50	+4	51	-2	42	+1	39	-6	29	+3	39	+1	6	=	22	=	21	+1
Chile	58	-1	48	-6	54	-5	31	-6	25	=	51	=	78	+1	54	+4	24	+1	21	-4	26	=	33	-4	50	+4	38	-4	6	-2
Colombia	51	-5	60	+6	67	+6	41	-12	51	+3	57	-2	64	+2	57	-2	34	-2	34	-8	48	+11	34	+2	17	-5	21	+1	8	-3
México	51	+3	51	+5	53	=	44	-4	35	+1	53	+5	71	+5	54	+5	32	+7	31	+1	22	+2	39	+3	13	+1	17	=	14	-6
South Africa	67	-2	67	-3	48	-2	45	-7	34	-2	75	+2	46	+4	80	=	37	+2	34	-6	27	+1	40	=	28	+4	15	-1	19	-2
Saudi Arabia	46	+7	35	+4	20	+2	29	+7	32	+5	41	+2	19	+3	43	+6	32	+4	22	+5	35	+10	24	+3	13	=	12	+1	23	+2
Egypt	58	-2	47	+3	33	-5	39	-3	45	+3	48	+2	21	+1	38	-1	25	+2	31	+3	36	+3	36	-3	15	-1	16	+1	21	-5
United Arab Emirates	50	+1	38	+1	24	-2	40	+5	43	+8	42	+4	25	-1	44	=	25	+5	33	+4	39	+3	26	+6	15	+2	10	+2	21	+1
Morocco	51	-4	48	-7	44	+5	33	-14	36	-5	51	-3	30	-4	46	-5	23	+2	32	-5	28	-7	45	+6	15	-7	18	+1	16	-2
Nigeria	62	-3	67	=	48	+3	41	+3	42	-3	72	+3	32	+1	61	-4	20	+2	40	-3	63	-3	30	=	12	+2	13	+3	20	-2
Turkey	68	-3	64	-1	46	-2	55	+4	51	=	57	+4	48	+6	50	-3	47	-1	40	+3	43	-8	45	-4	39	-15	43	-1	19	-1

Prioritize growth or the environment: the world's population is increasingly split

Priority to the environment or economic growth?

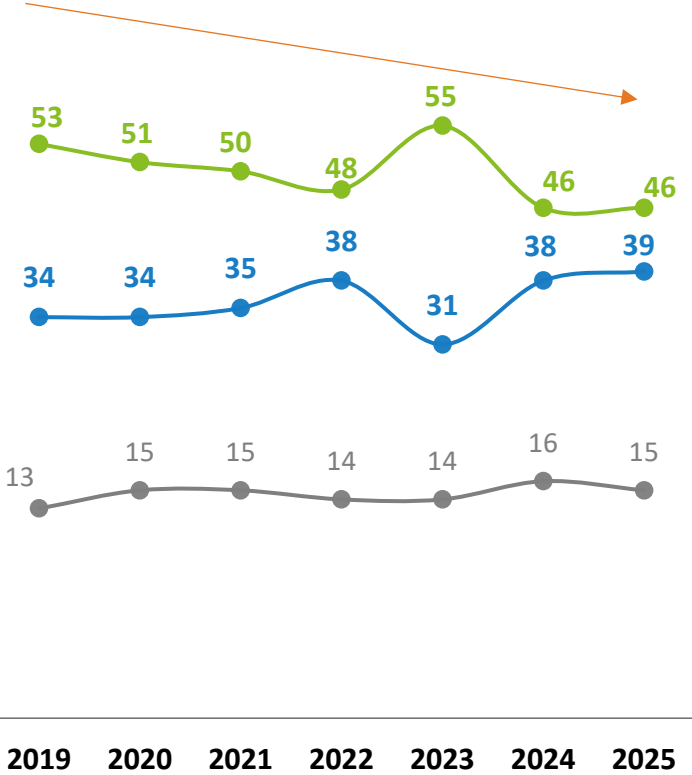


GLOBAL AVERAGE

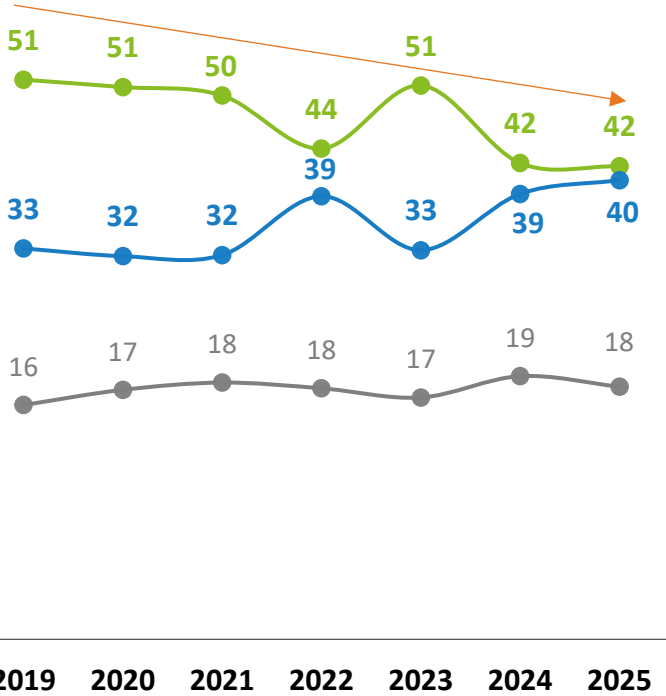
Priority should be given to the environment

Priority should be given to economic growth and jobs

Don't know



EUROPE



Q. Which of the following two statements do you agree with most?
1 - We should prioritize the environment even if it may slow your country's economic growth and lead to job losses
2 - We should prioritize economic growth and jobs even if it may have harmful consequences for the environment

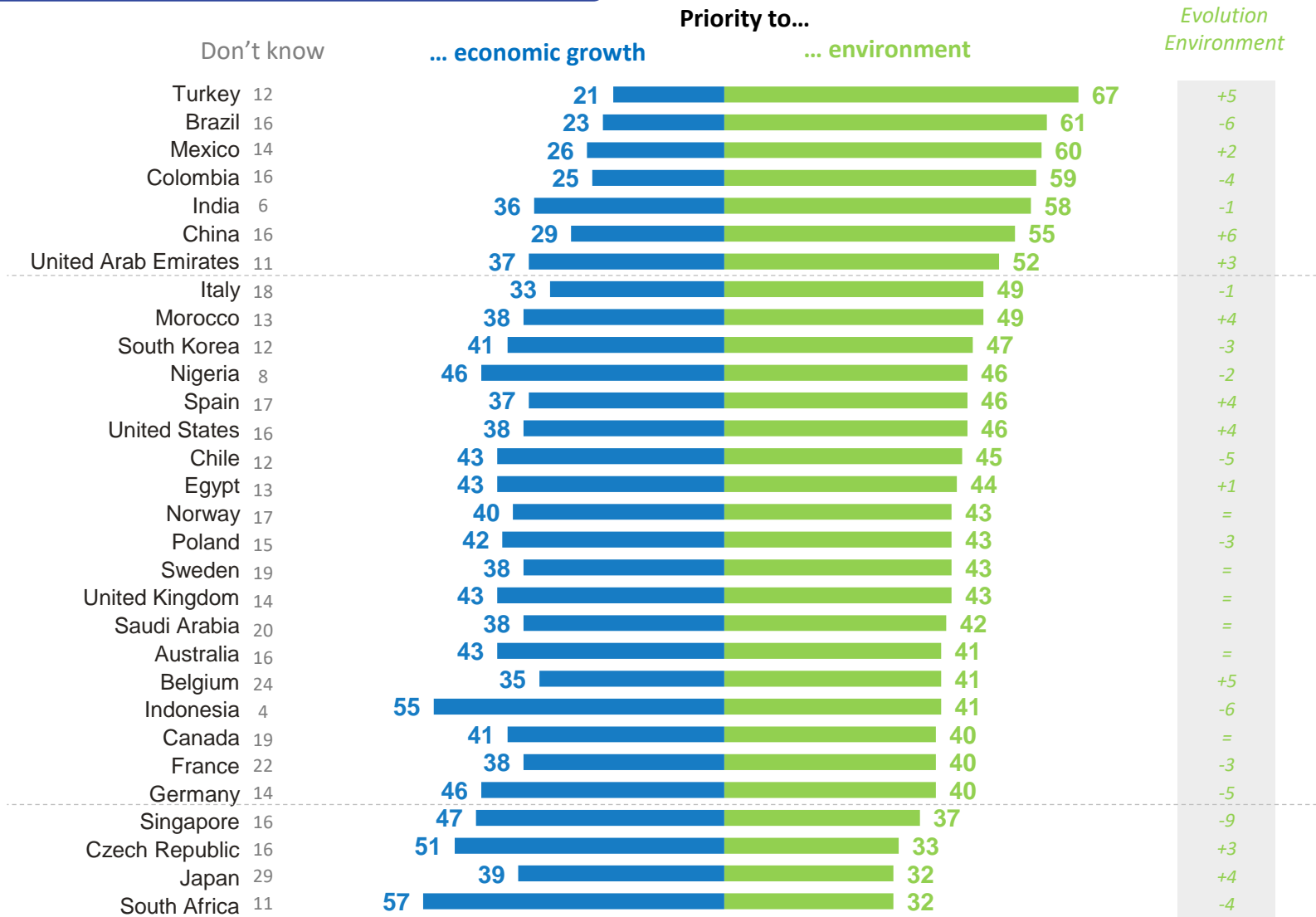
South Africa and Indonesia prioritize economic growth the most

(countries hit hard by unemployment, the cost of living and unemployment)

Priority to the environment or economic growth?

We should prioritize economic growth and jobs even if it may have harmful consequences for the environment

We should prioritize the environment even if it may slow down your country's economic growth and cause job losses



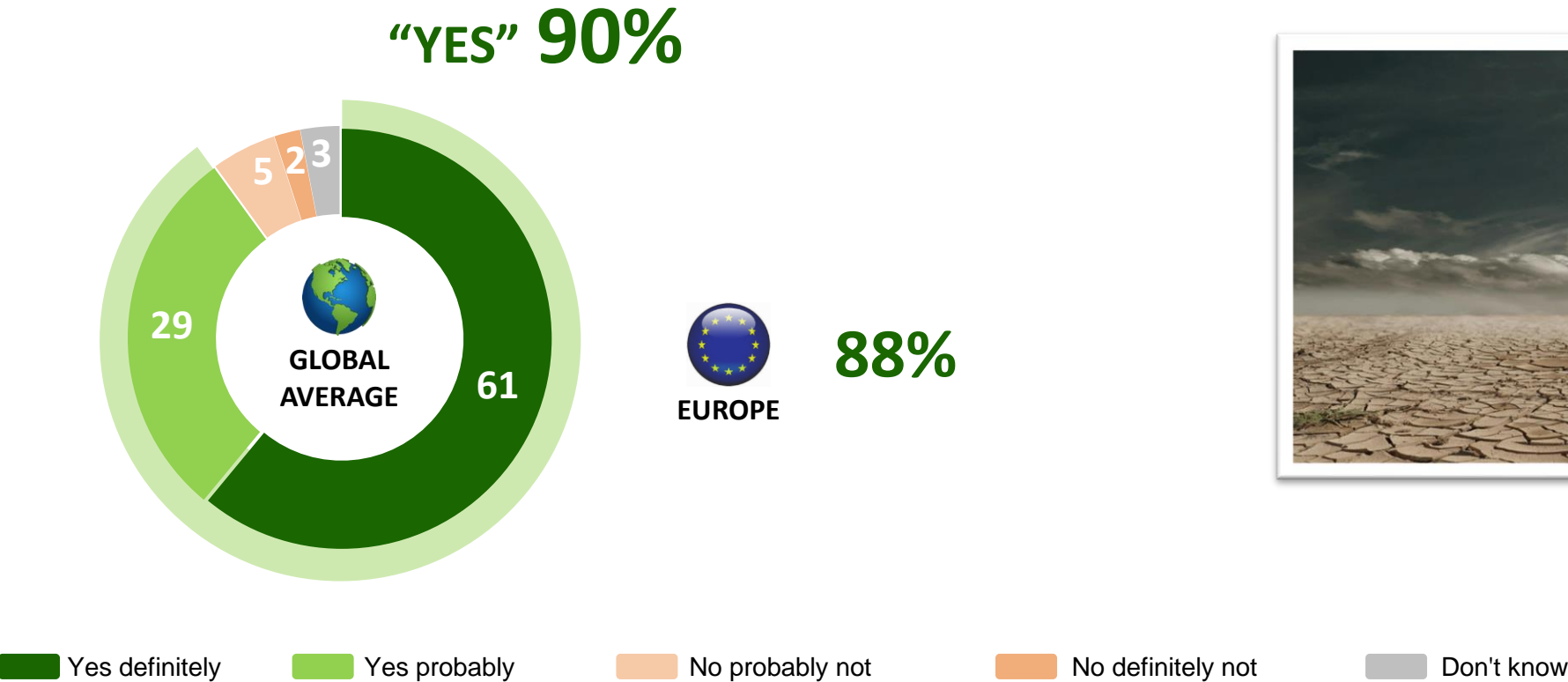


2.

**Is there still a debate
around climate change?**

The question of whether or not climate change exists is no longer up for debate

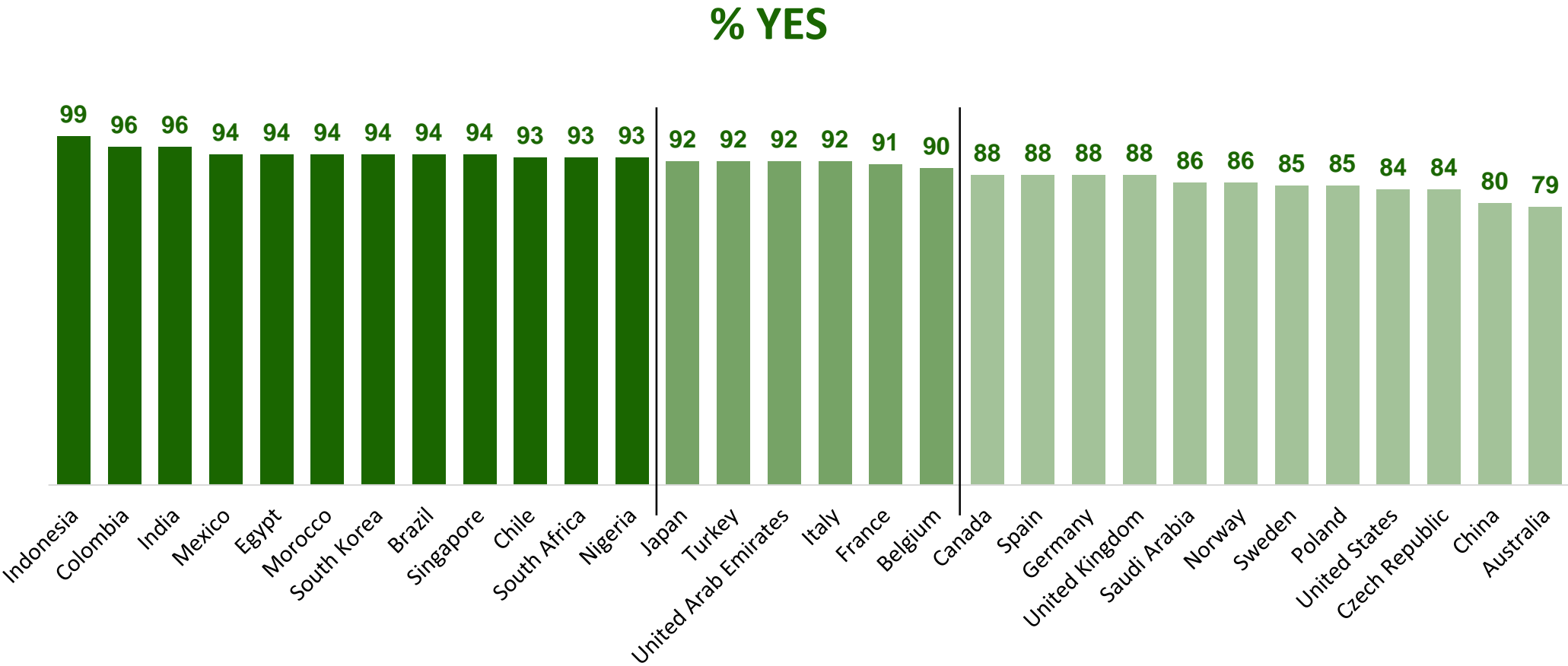
Are we experiencing a change in climate?



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

The southern countries are particularly convinced as to the existence of climate change

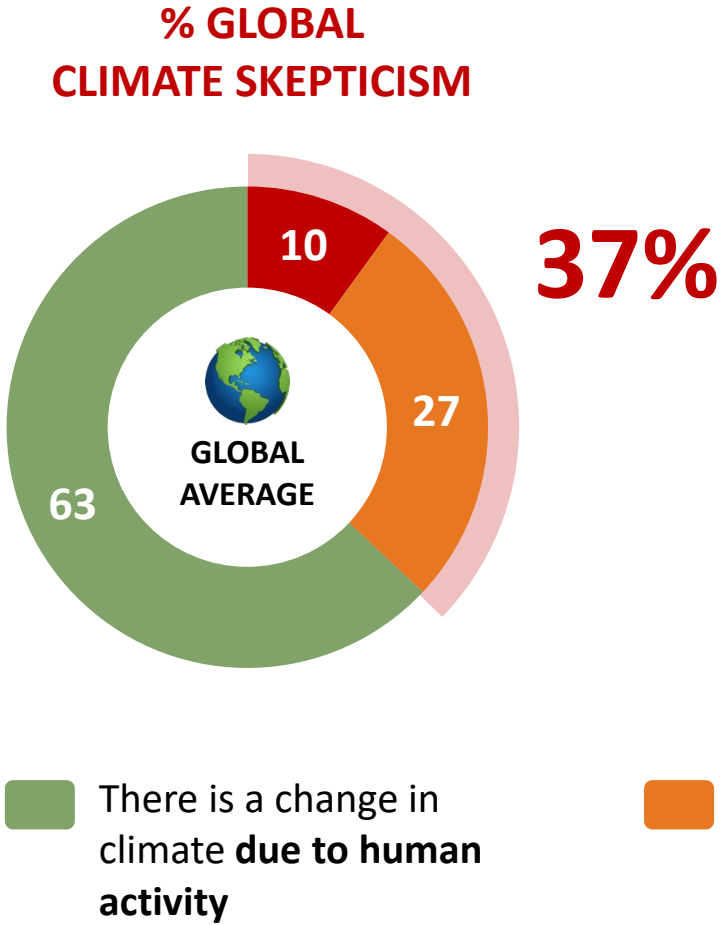
Are we experiencing a change in climate?



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

More than a third of the population still doubt its human causes or deny its existence

Rate of climate-skepticism

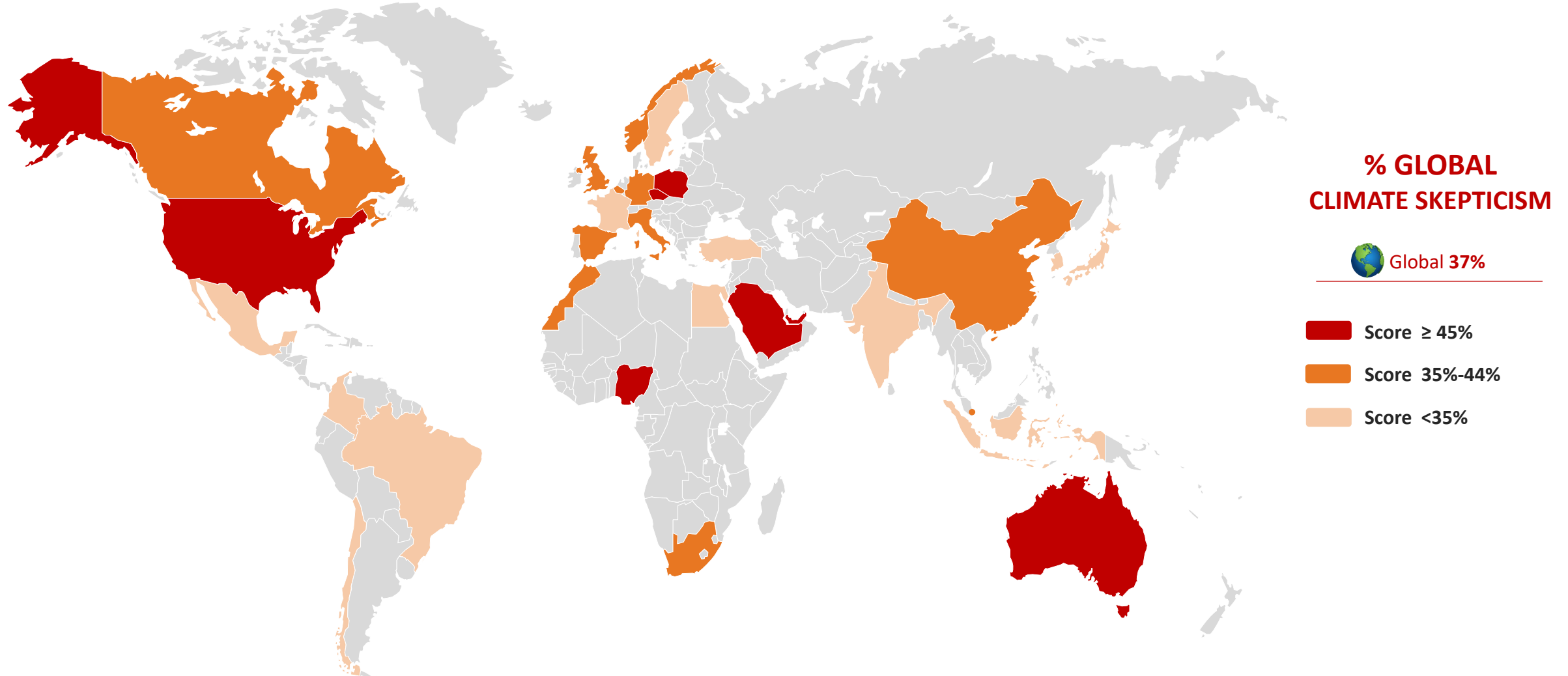


CHARLES CHUCK O'REAR/DOCUMERICA PUBLIC DOMAIN

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 (like the ones the Earth has experienced throughout its history) or there is no way to know ? In %

Some countries still show a high rate of climate-skepticism

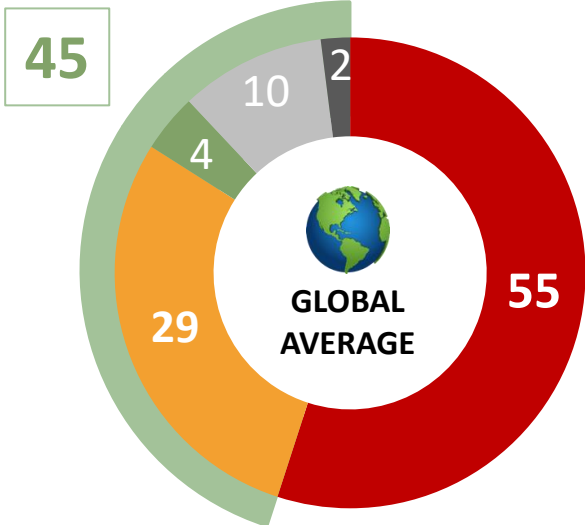
Rate of climate-skepticism



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 (like the ones the Earth has experienced throughout its history) or there is no way to know ? In %

The future consequences of climate change are not always considered negative

What will be the consequences of climate change?

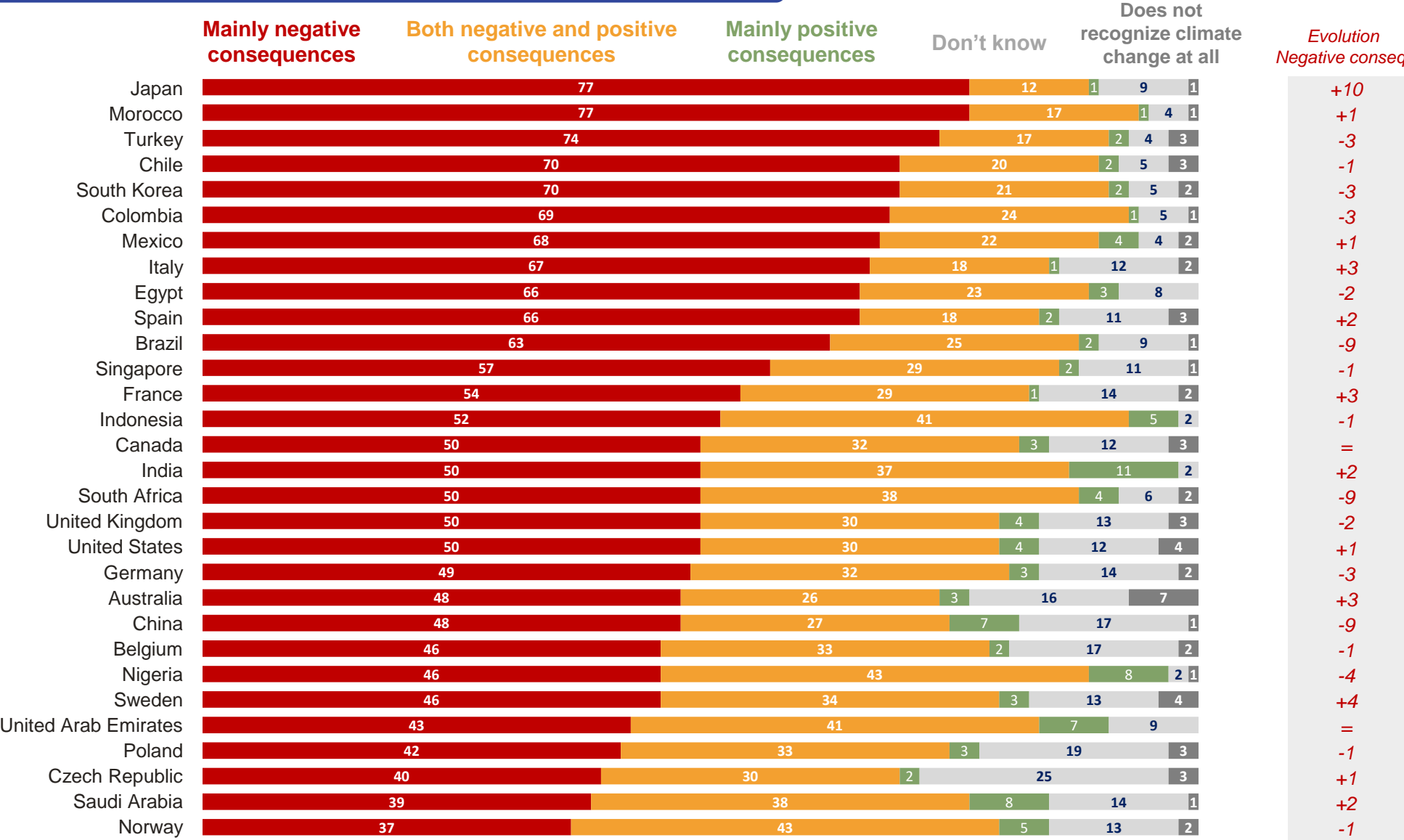


- Mainly **negative** consequences
- Both **negative** and **positive** consequences
- Mainly **positive** consequences
- Don't know
- Does not recognize climate change at all

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

The Gulf States and Northern Europe are the least pessimistic

What will be the consequences of climate change?



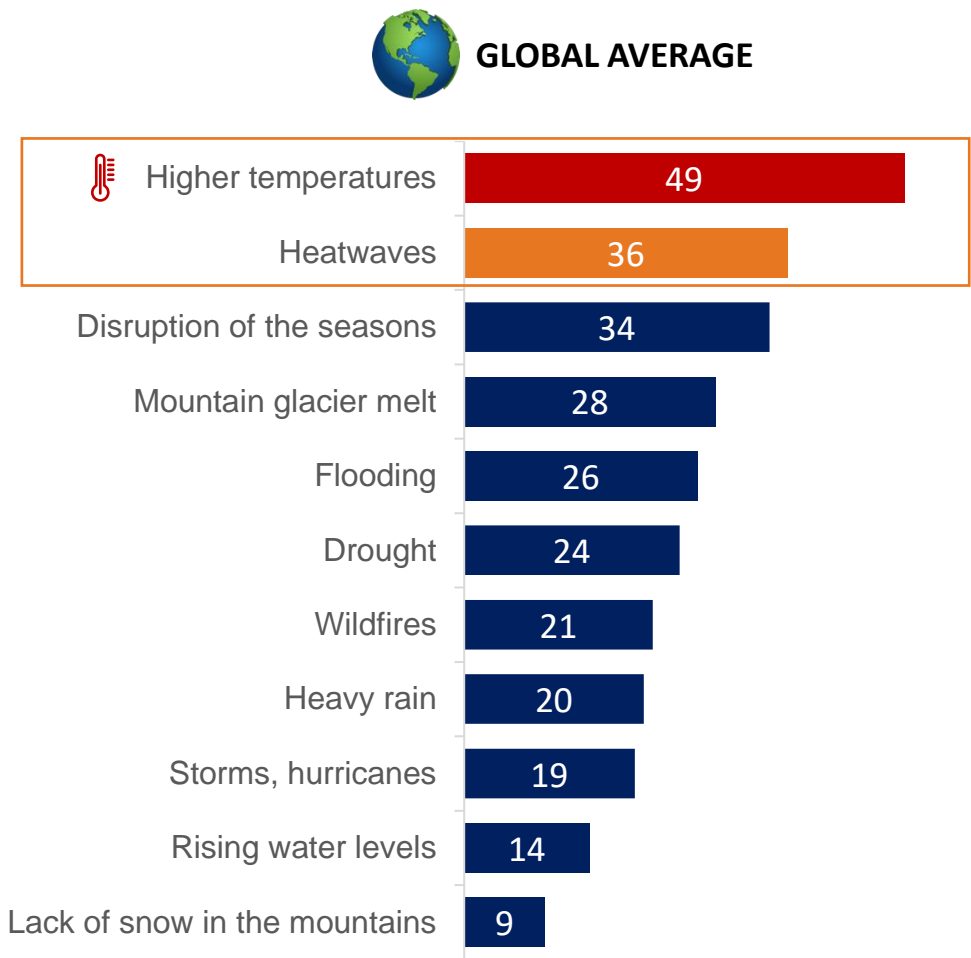


3.

**Temperature rise,
universal sign of climate
change**

The most convincing sign of the reality of climate change: heat

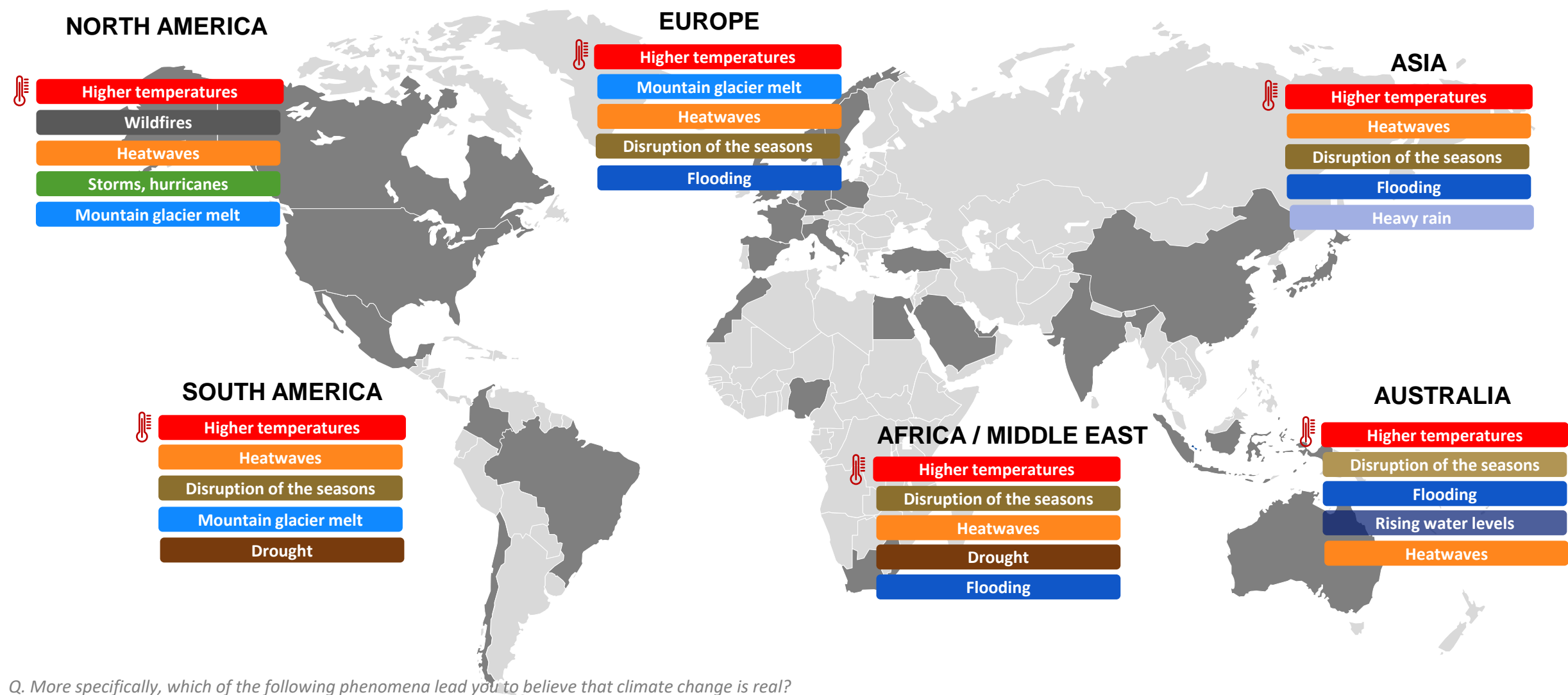
The signs that give credibility to the existence of climate change



Q. More specifically, which of the following phenomena lead you to believe that climate change is real?

Climate change is primarily about global warming

The signs that give credibility to the existence of climate change



Q. More specifically, which of the following phenomena lead you to believe that climate change is real?

Warming is particularly striking in Asia and South America (but also in certain European countries)

The signs that give credibility to the existence of climate change

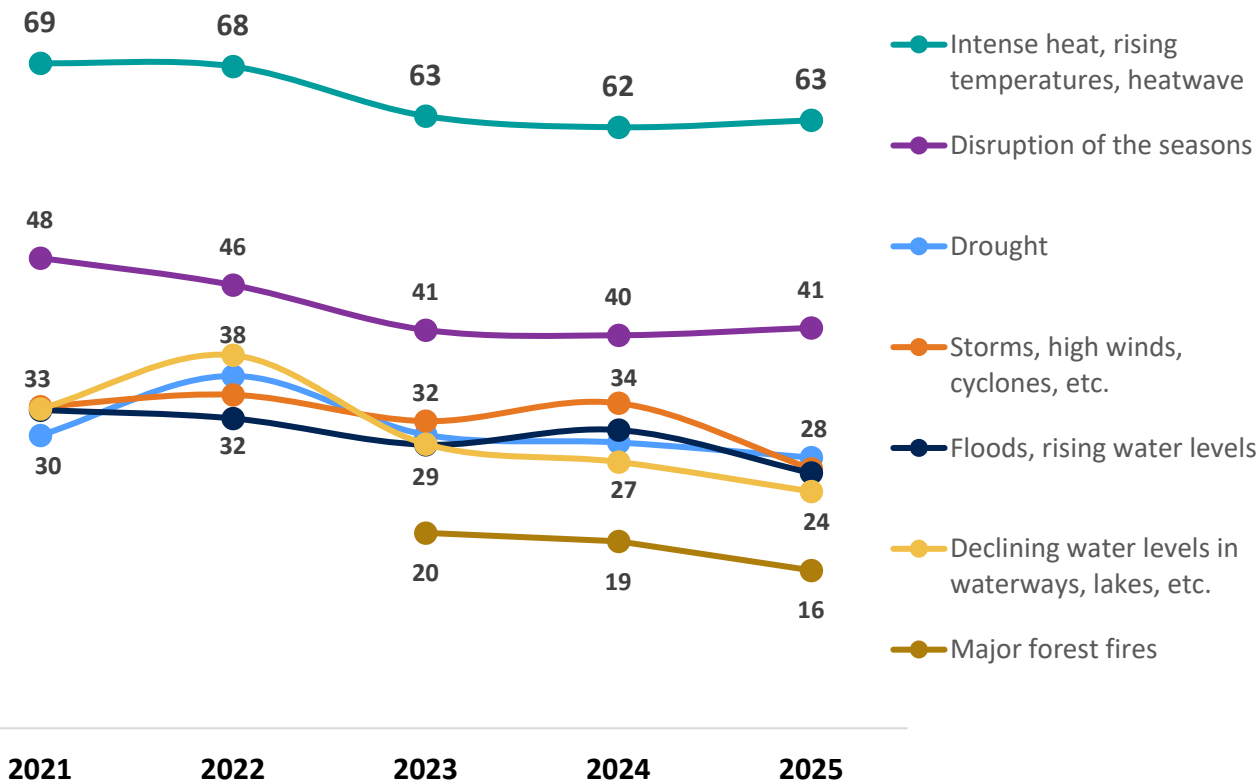
	Higher temperatures	Heatwaves	Disruption of the seasons	Mountain glacier melt	Flooding	Drought	Wildfires	Heavy rain	Storms, hurricanes	Rising water levels	Lack of snow in the mountains
GLOBAL	49	36	34	28	26	24	21	20	19	14	9
Germany	37	36	29	42	29	16	17	24	16	10	18
Belgium	35	35	34	37	30	22	28	17	19	14	11
Spain	47	46	30	28	25	22	25	21	16	10	8
France	39	40	36	39	27	23	19	16	24	15	12
Italy	45	28	33	45	35	22	7	16	31	6	16
Norway	50	36	21	52	14	13	20	22	22	12	16
Poland	32	34	48	35	24	39	13	12	25	5	13
United Kingdom	52	44	36	26	28	16	26	10	21	16	8
Czech Republic	35	29	43	46	21	34	9	4	21	9	23
Sweden	47	30	30	44	26	17	24	19	16	10	12
Canada	47	35	25	26	21	19	53	8	24	11	9
United States	52	26	27	28	24	16	28	11	34	20	13
Australia	48	25	36	21	29	23	24	15	22	27	6
China	57	20	31	33	21	20	8	27	20	16	19
South Korea	37	73	32	12	27	35	23	17	9	17	2
India	50	32	32	29	39	12	14	35	14	21	9
Indonesia	50	40	36	21	41	26	16	15	13	24	12
Japan	84	17	38	12	14	21	8	51	8	20	3
Singapore	69	39	24	18	24	11	12	20	18	40	4
Brazil	44	41	34	23	22	26	32	27	21	12	3
Chile	40	40	45	41	16	35	17	18	17	11	8
Colombia	52	47	21	31	22	26	26	24	18	10	8
Mexico	49	39	37	26	23	30	16	28	24	6	5
South Africa	44	41	38	8	42	23	14	35	24	12	3
Saudi Arabia	51	36	21	19	20	27	22	22	16	12	7
Egypt	62	48	37	21	9	16	22	14	18	17	6
United Arab Emirates	50	35	24	21	28	16	24	23	19	15	9
Morocco	52	36	46	17	21	49	24	4	15	5	10
Nigeria	52	29	35	7	53	18	12	34	13	20	4
Turkey	43	21	55	28	11	57	34	8	10	6	11

A global population seriously impacted by extreme heat

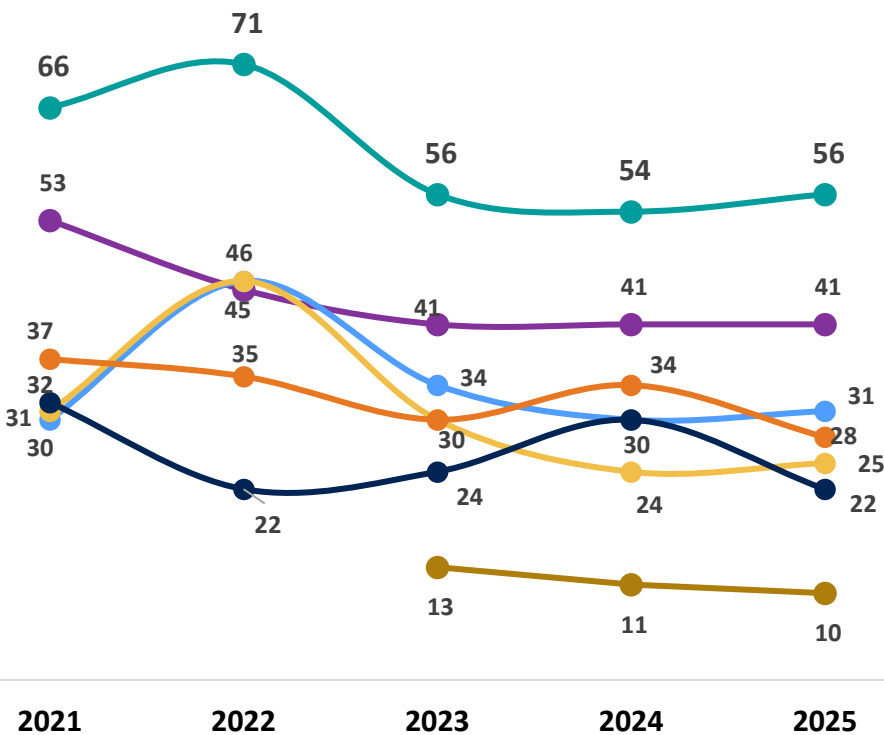
What phenomena have you experienced in recent years?



GLOBAL AVERAGE



EUROPE

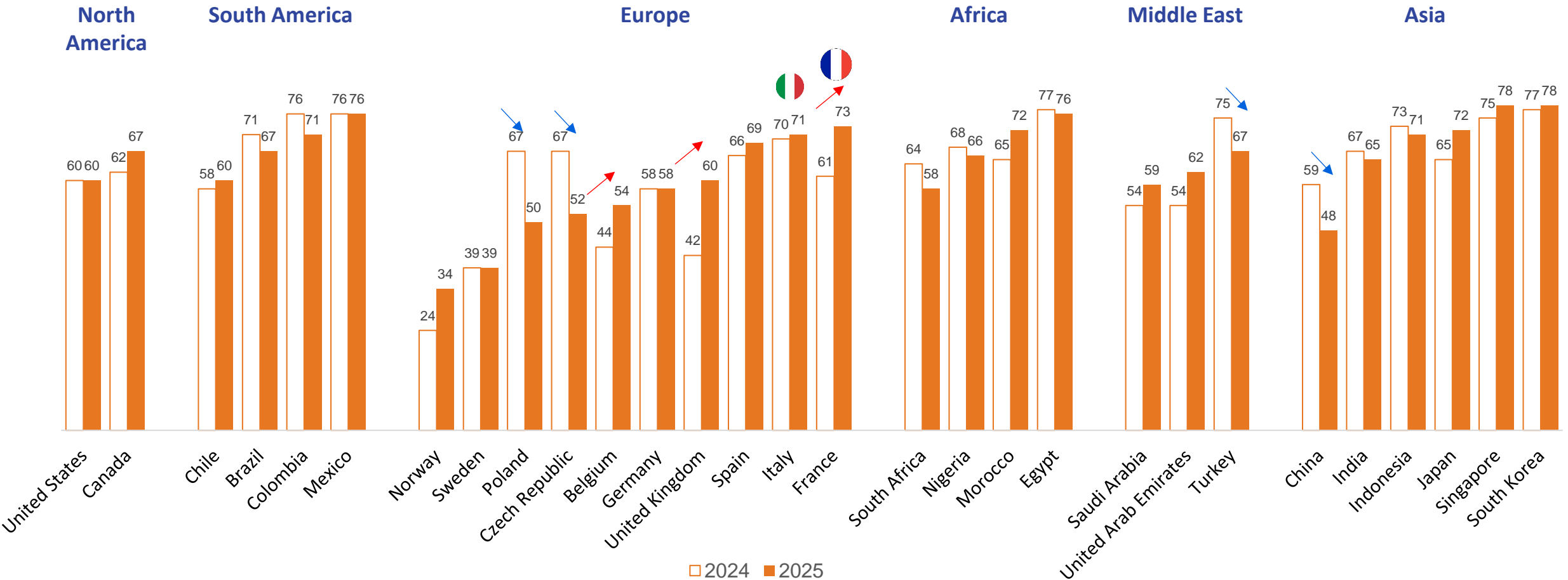


Q. Where you live, have you been impacted by any of the following phenomena in recent years? % YES

In 2025, extreme heat impacted the French and Italians as much as the Egyptians and Mexicans

Has experienced intense heat and heatwaves in recent years

% YES



Q. Where you live, have you been impacted by any of the following phenomena in recent years? % Intense heat, rising temperatures, heatwave

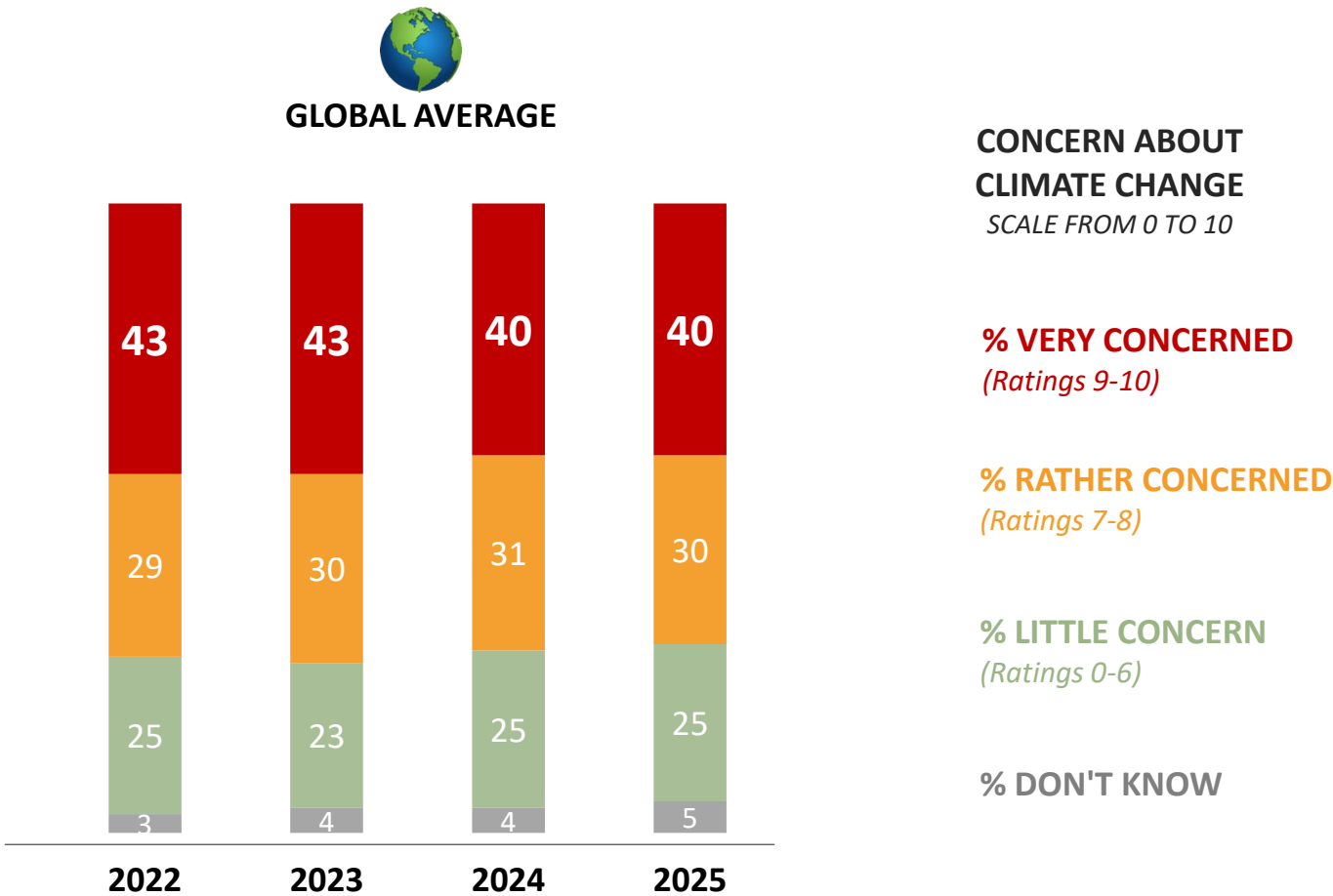


4.

Living with climate change

Concern about climate change is not growing

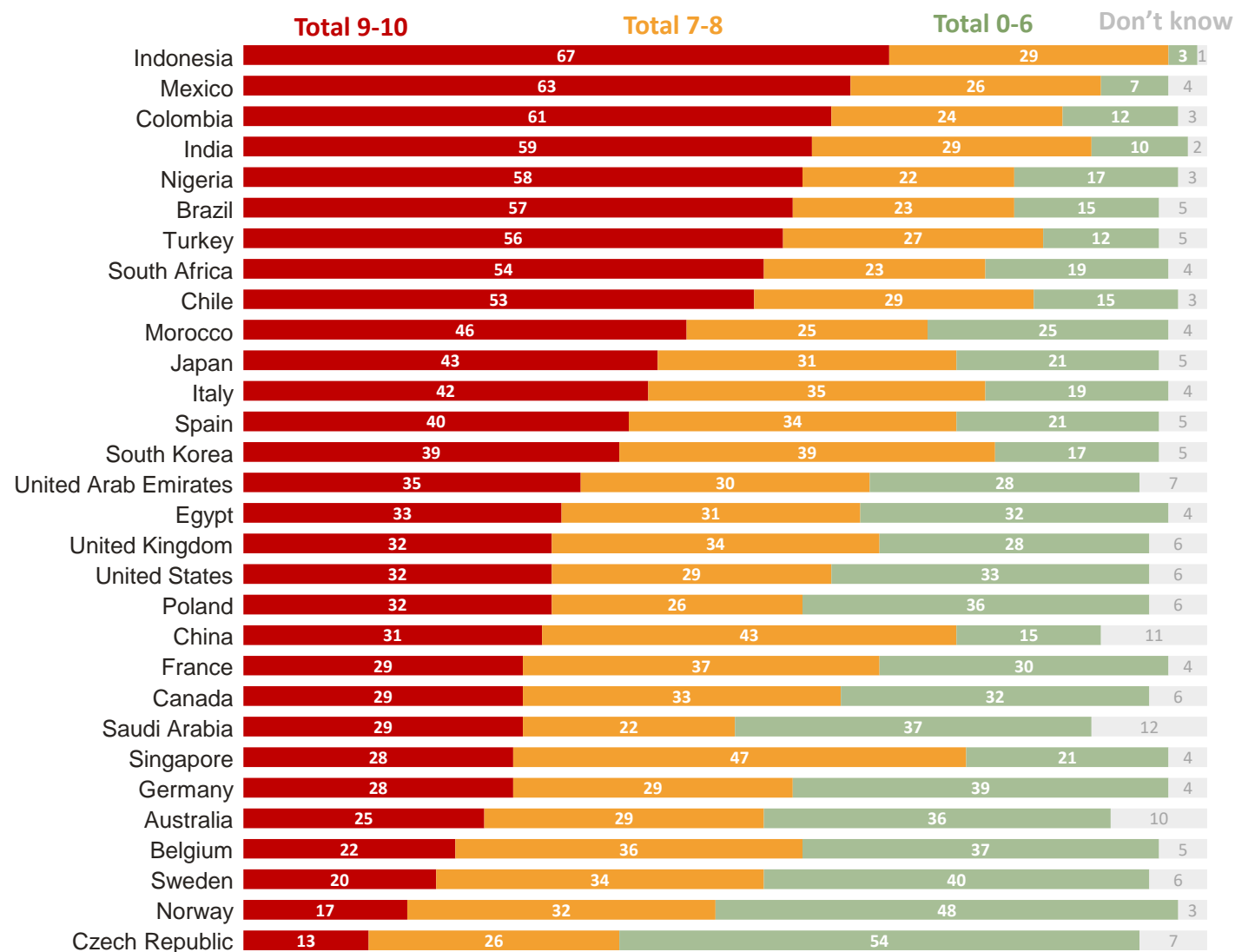
Are you concerned about climate change?



Q. To what extent are you concerned about climate change? A score of 10 means that you are very concerned about climate change, while a score of 0 means that you are not concerned at all. The intermediate scores allow you to nuance your judgment.

The Northern European countries and Australia are still the least concerned

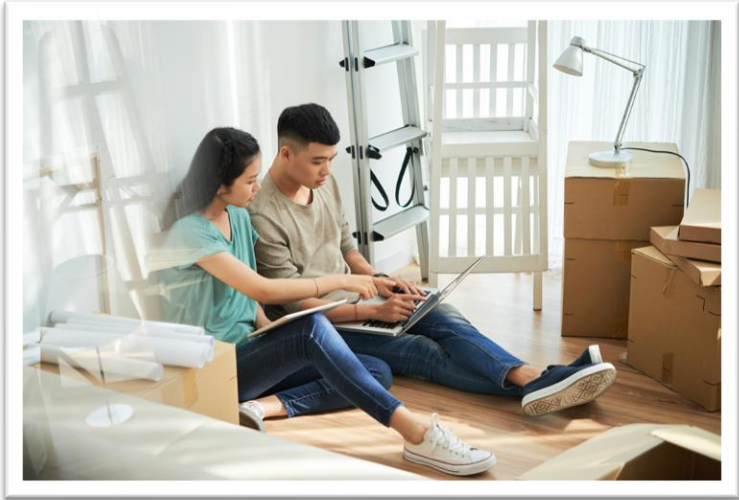
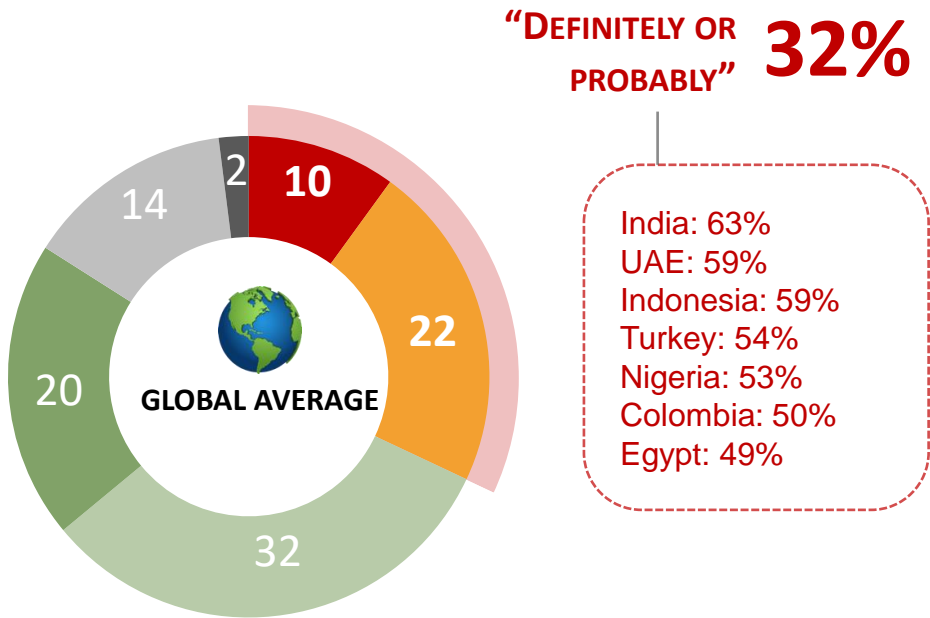
Are you concerned about climate change?



Average	Evolution
8,9	+0,1
8,8	+0,1
8,6	-0,4
8,6	+0,1
8,4	+0,3
8,5	-0,3
8,4	+0,1
8,2	+0,1
8,3	=
7,9	-0,2
7,9	=
7,8	-0,1
7,7	=
7,9	-0,2
7,4	+0,2
7,2	-0,1
7,2	+0,1
6,9	=
7,0	-0,2
7,7	+0,1
7,2	=
7,0	=
6,8	+0,3
7,5	=
6,7	-0,2
6,7	-0,1
6,8	=
6,4	+0,2
6,1	-0,1
5,9	-0,6

However, 32% of citizens across the world expect to have to leave their home in the next 10 years

Moving because of climate change?



Yes, definitely **Yes, probably** **No, probably not** **No, definitely not** **Don't know** **Does not acknowledge climate change**

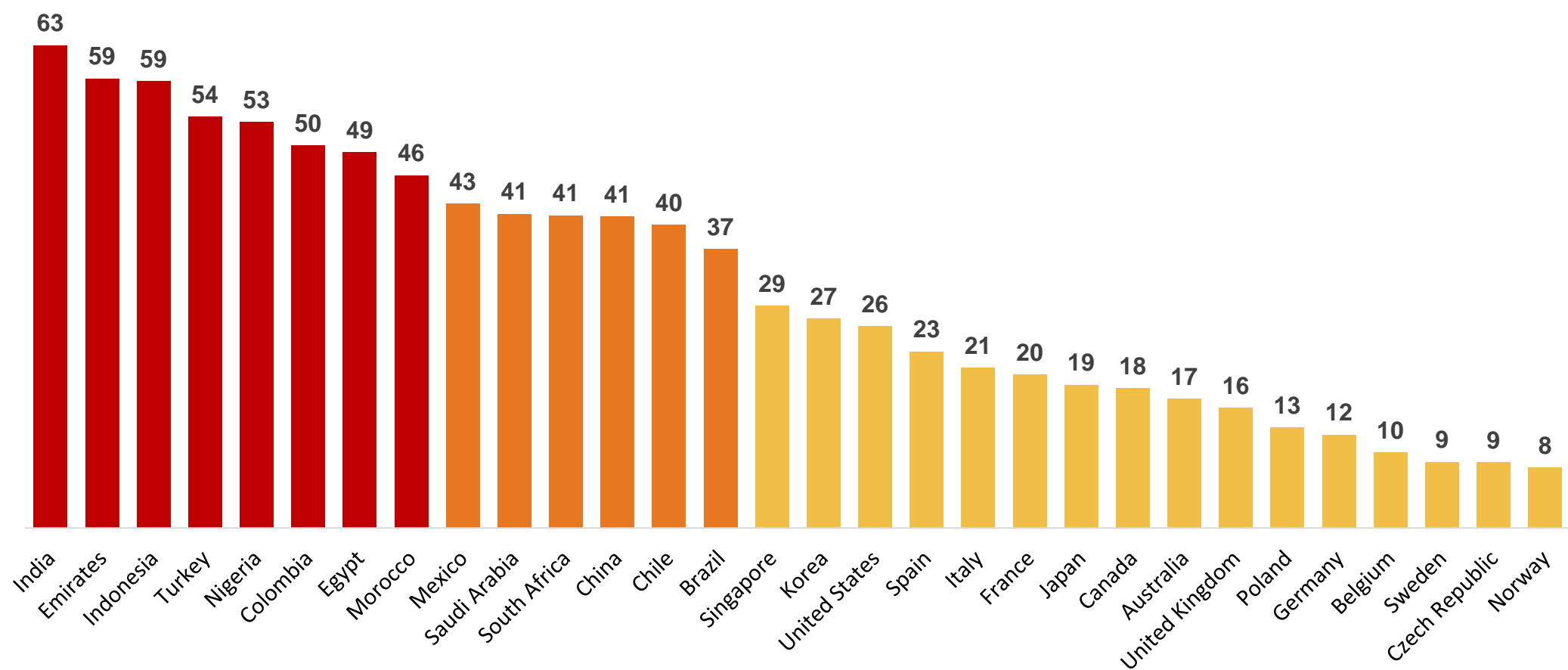
Q. Do you think that climate change will force you to move to another location within the next 10 years? In %

A prospect broadly shared in the Southern countries

And the Southern European countries

Moving because of climate change?

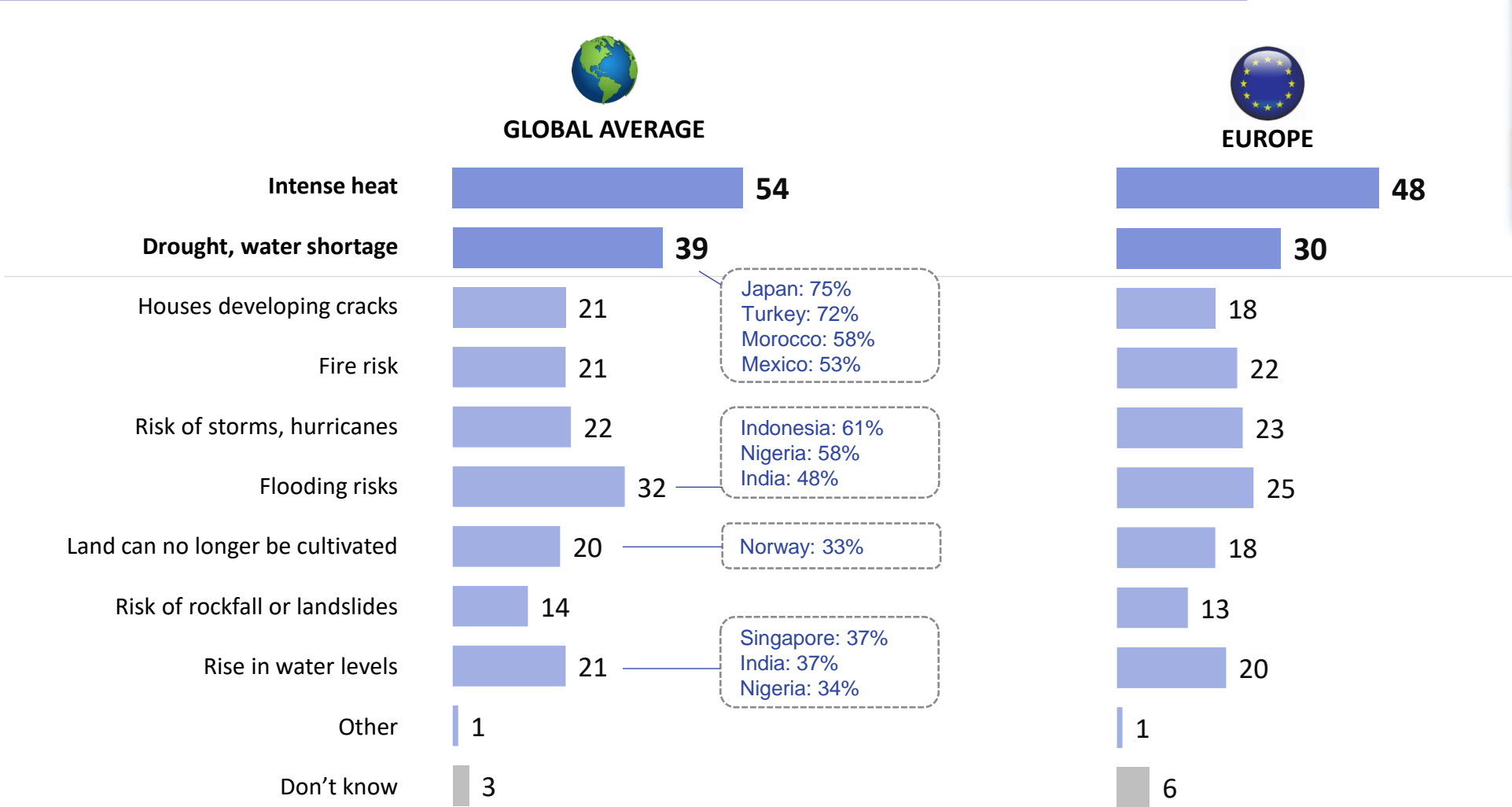
% Definitely or probably



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

Extreme heat and water shortages are among the reasons pushing people to move in the next 10 years

Reasons for moving in the next 10 years

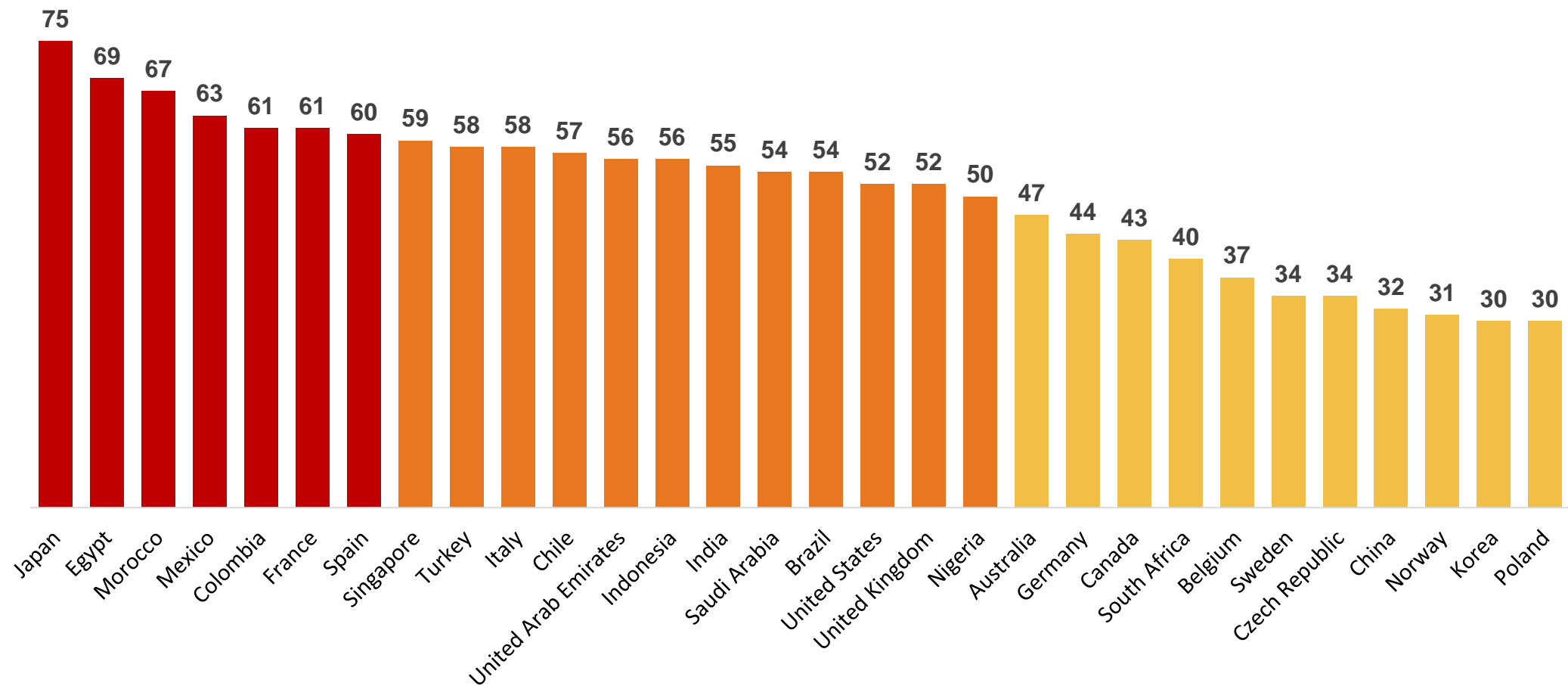


Q. What makes you think that you will be forced to move? Base: Those who think they will be forced to change their place of residence in 10 years

Even in certain European countries (France, Spain), heat is the main cause of forced moves

Moving because of extreme heat

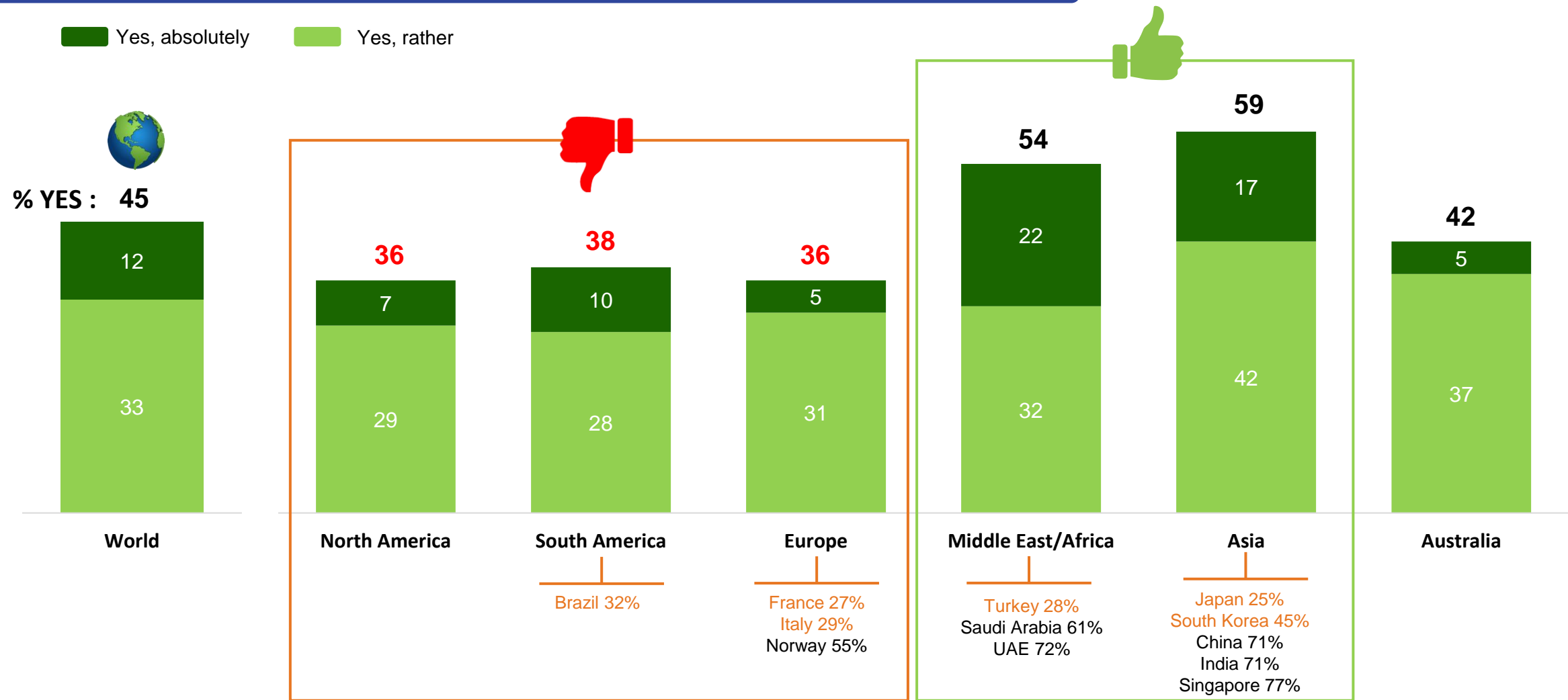
Among those who are considering leaving their home



Q. What makes you think that you will be forced to move? **Intense heat** In %

Very different perceptions of the country's level of preparation for the consequences of climate change

Is the country prepared for the consequences of climate change?



Q. Would you say that the government or local authorities in your country are putting in place measures to prepare the country for the consequences of climate change?

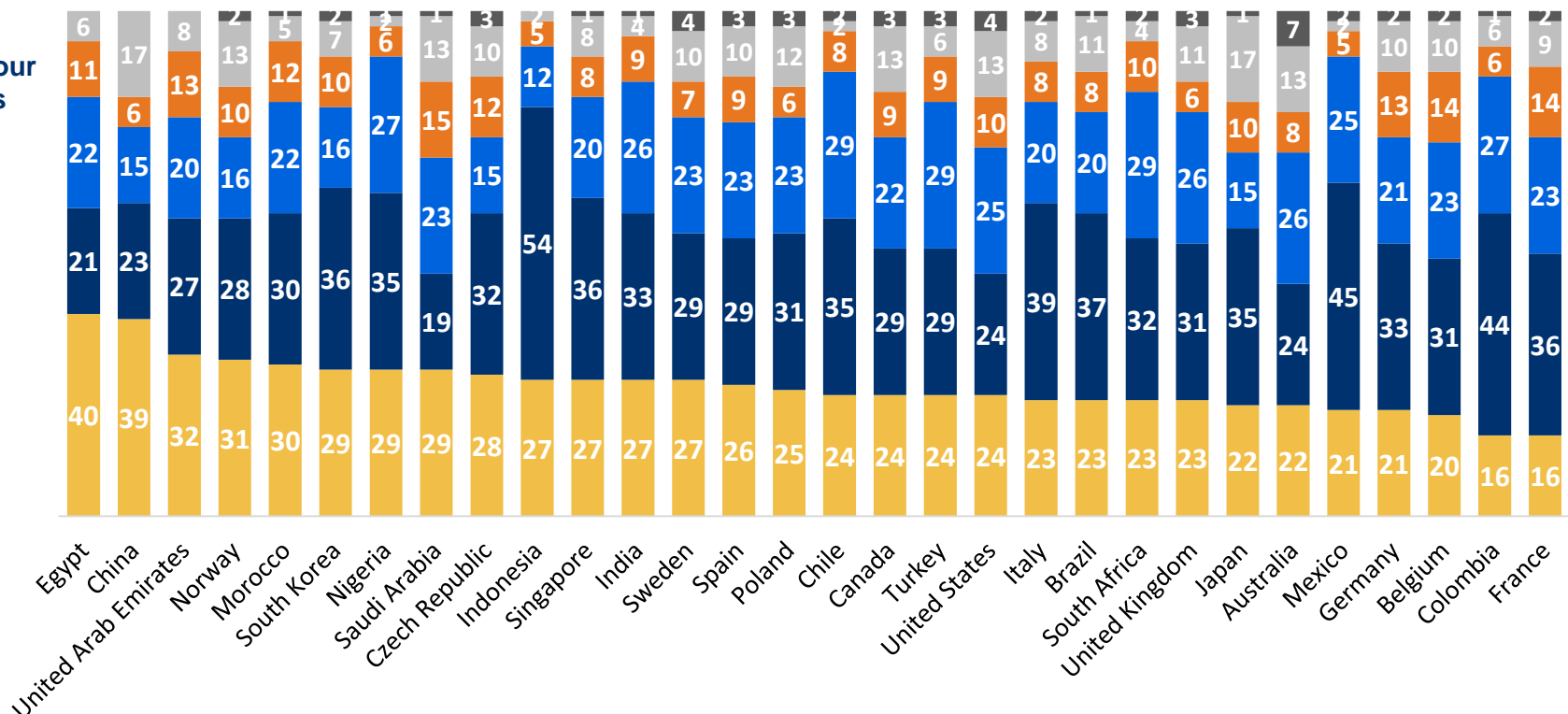
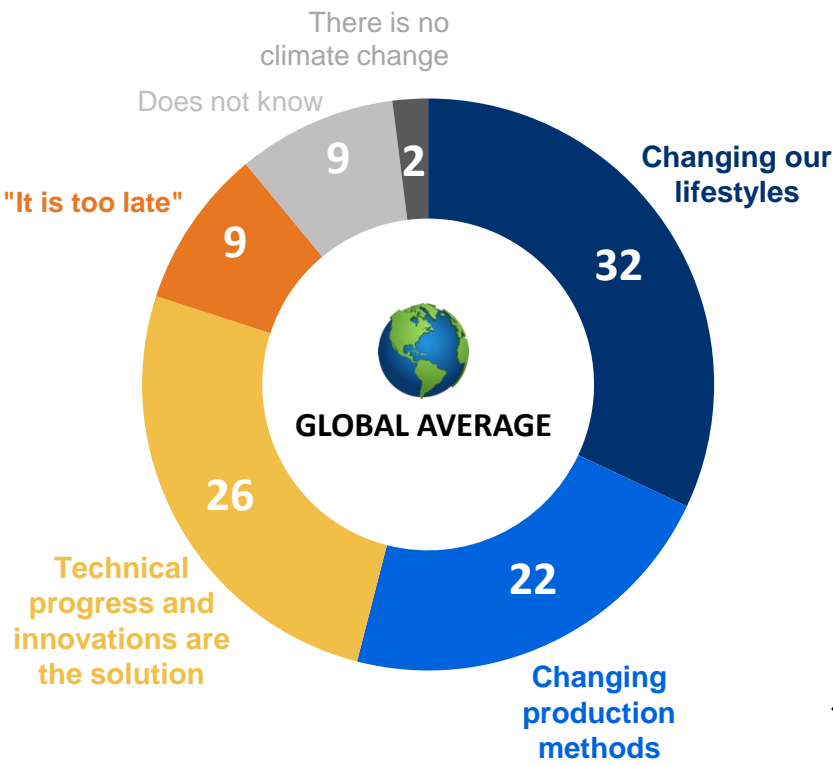


5.

In tackling climate change: who should be taking action? And who is taking action?

On a global scale, public opinion is very split over the types of action to be prioritized

Production methods, ways of life, or techno-solutionism?



Q. Which of these four opinions is closest to your own? In %

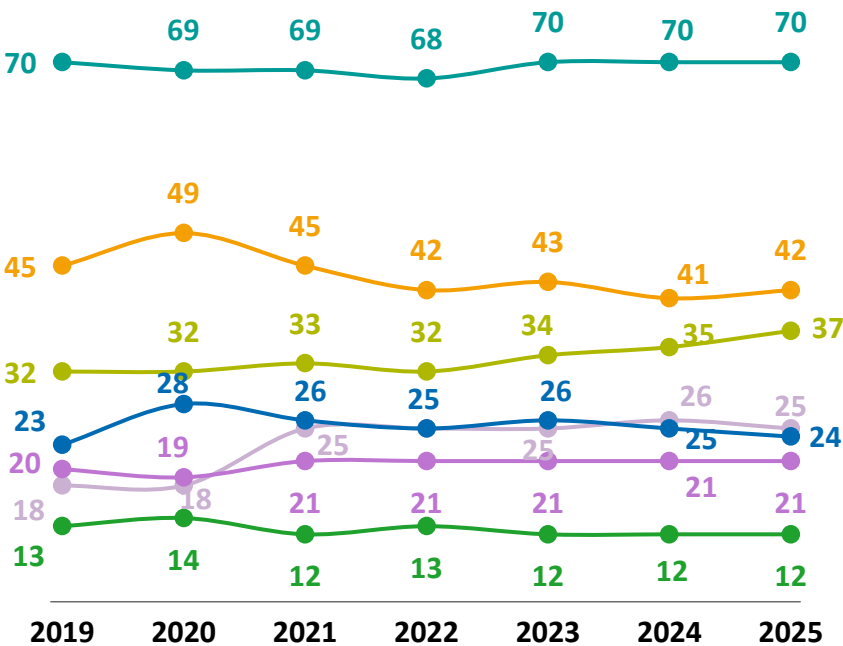
- It is mainly through technological advancement and scientific innovation that we will find solutions to climate change
- It is mainly through changes in the production methods companies use that climate change will be limited
- It is mainly through major changes in our lifestyles that climate change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

Governments have natural authority when it comes to climate issues

Who should take action to fight climate change?

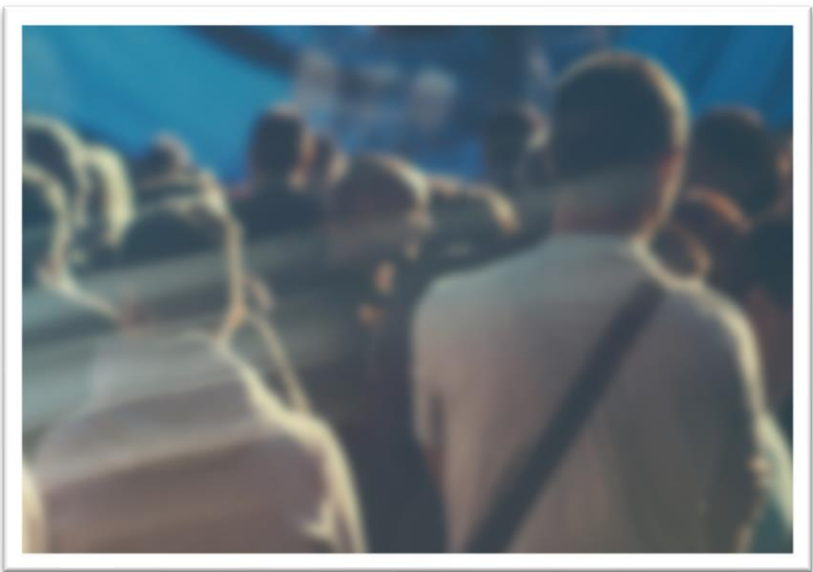


GLOBAL AVERAGE



% SHOULD ACT...

- The government
- Citizens /consumers
- Private companies
- Political leaders
- Scientists
- Local authorities
- NGOs and non-profits



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 %

In France, more is expected of consumers and private companies

Political leaders have lost responsibility (credibility?) in the Southern countries

Who should take action to fight climate change?

	The government		Citizens /consumers		Private companies		Political leaders		Scientists		Local authorities		NGOs and non-profits	
GLOBAL	70	=	42	+1	37	+2	25	-1	24	-1	21	=	12	=
Germany	61	-7	44	-3	34	=	39	-3	20	=	18	+5	7	+1
Belgium	69	+3	39	+4	40	+4	40	+3	23	-2	17	=	8	=
Spain	74	-1	40	-1	43	=	28	-1	22	+1	19	+2	8	+1
France	63	-6	54	+3	60	+2	35	+1	18	-2	18	+6	9	=
Italy	75	=	39	-2	37	+2	25	+3	28	+1	24	+1	10	=
Norway	68	+2	46	+12	28	+1	39	-4	24	+7	17	+1	8	+4
Poland	68	-4	38	+1	27	+8	31	-1	25	-1	28	-4	13	=
United Kingdom	77	=	39	+2	45	-3	28	-2	21	=	19	+1	8	+1
Czech Republic	58	-4	33	-2	20	+2	28	-4	41	+6	15	-1	6	=
Sweden	70	+3	39	-6	38	+5	40	+4	21	+2	19	+1	7	+2
Canada	70	+1	45	=	48	-4	27	-1	21	-2	10	+1	6	=
United States	63	+4	41	-3	44	+1	28	=	26	-1	14	+1	7	=
Australia	71	+3	36	+3	44	+6	31	=	18	-8	13	-2	5	-1
China	58	+1	34	=	33	+1	29	-3	32	+3	43	-3	12	=
South Korea	81	+2	35	-3	25	-2	29	+1	21	+3	22	-1	12	-5
India	69	+1	50	-1	37	+3	24	+2	22	+1	27	+2	19	-1
Indonesia	80	+2	56	+4	39	=	14	=	18	-7	24	-4	8	=
Japan	78	+1	33	=	51	+3	23	-2	21	+2	25	+4	6	=
Singapore	77	+3	44	-2	42	+1	22	+4	16	+1	27	+1	10	-1
Brazil	70	-5	43	+4	37	+3	28	-6	17	+1	18	=	12	+3
Chile	74	-3	43	+1	51	+2	14	-2	25	-3	17	+2	18	+1
Colombia	71	-2	56	+2	44	+1	17	+3	19	-3	21	-3	21	=
Mexico	74	+4	52	=	43	-3	17	+4	19	-2	18	+2	21	+2
South Africa	73	-4	44	-2	34	+3	18	-3	36	-1	18	+1	13	+2
Saudi Arabia	48	+1	40	+7	26	+1	12	-3	29	+5	21	=	15	-4
Egypt	70	+1	39	-4	27	+6	18	-6	33	-2	26	-1	21	+1
United Arab Emirates	61	+1	38	+2	28	+6	16	-4	22	-2	29	+6	15	+2
Morocco	68	-7	48	+5	31	+5	17	-5	28	-4	25	-2	21	+4
Nigeria	79	=	44	+3	28	=	17	=	32	-2	22	+5	15	-1
Turkey	74	+2	35	-2	24	+5	25	+1	34	-6	28	-1	17	=

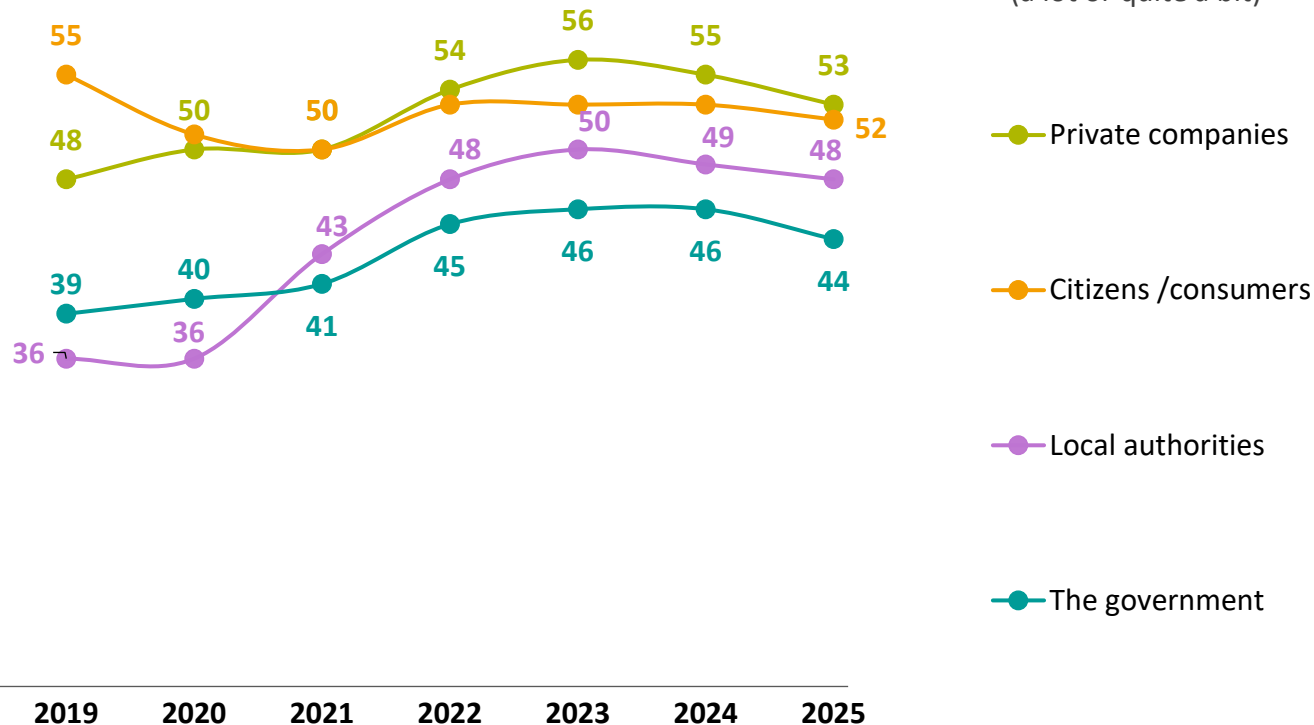
Since 2023, a sense of a drop in commitment on the part of the various players

Particularly in Europe

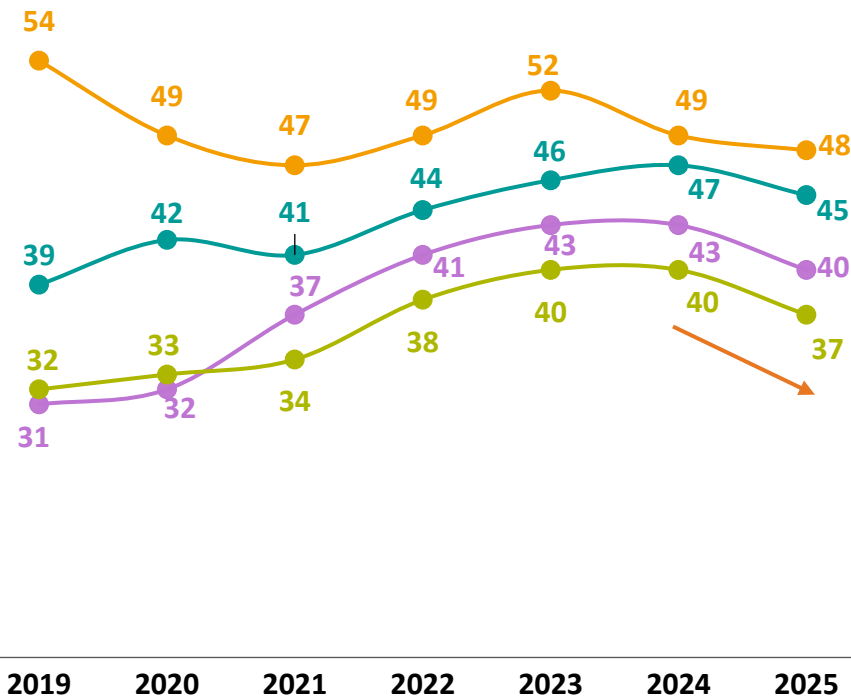
And do you think that these same actors are taking action?



GLOBAL AVERAGE



EUROPE



Q. For each of the following players, do you think that they are taking action to fight climate change in your country?
% TOTAL Taking action a lot or quite a bit

Since 2023, a sense of a drop in commitment on the part of the various players

Particularly in Europe

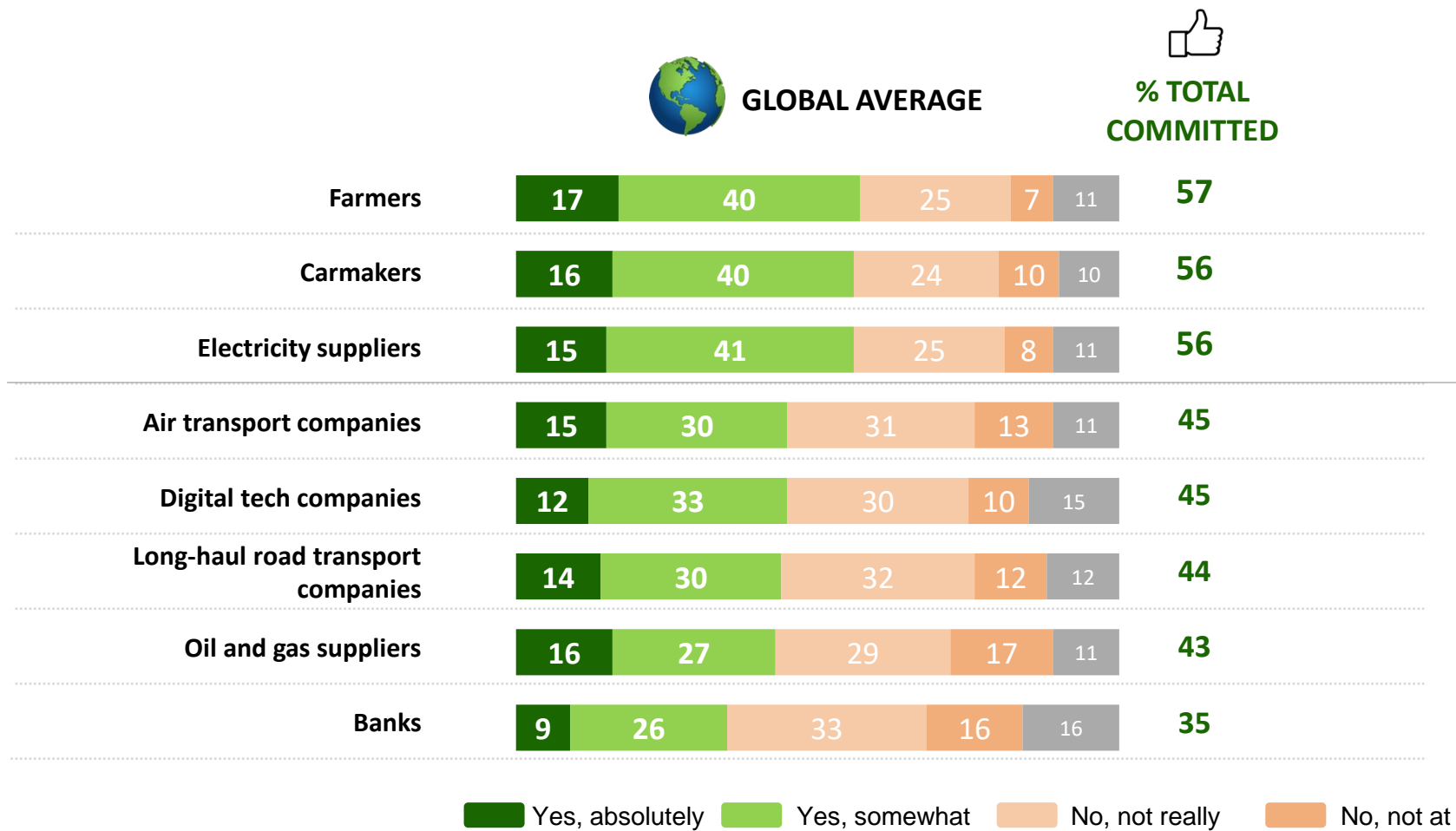
And do you think that these same actors are taking action?

% TOTAL TAKING ACTION	The government		Citizens /consumers		Local authorities		Private companies	
GLOBAL	53	-2	52	-1	48	-1	44	-2
Allemagne	49	-6	57	-1	49	=	48	=
Belgique	42	-5	47	=	39	-5	36	-4
Espagne	43	-1	53	+4	37	-3	35	-4
France	27	-6	43	-1	34	-4	29	-4
Italie	32	-4	39	-3	30	-5	34	-5
Norvège	65	+7	58	+4	47	-1	46	+1
Pologne	56	+3	51	+1	50	-4	38	-1
Royaume-Uni	51	-1	56	=	44	=	37	-2
République Tchèque	42	=	42	-2	35	-5	36	-3
Suède	44	-5	39	-7	39	-1	33	-4
Canada	52	+4	54	+2	41	+1	36	+1
Etats-Unis	44	-8	59	+1	43	+1	45	-1
Australie	53	-3	54	-4	43	-5	40	-1
Chine	77	-3	57	=	72	-4	58	+6
Corée du sud	51	+4	48	-3	41	+1	33	-2
Inde	72	-3	70	-1	66	-1	62	-2
Indonésie	69	-5	70	-1	70	-1	59	-5
Japon	28	=	29	-1	30	+1	44	+2
Singapour	80	-2	56	-2	73	-2	43	-12
Brésil	46	+5	41	-1	39	=	44	=
Chili	59	+2	59	-2	54	+6	50	+5
Colombie	54	-10	56	-2	53	-3	51	-6
Mexique	53	-4	56	-9	46	-5	53	-5
Afrique du Sud	45	-6	54	+4	42	-1	52	+3
Arabie Saoudite	67	+3	56	+2	61	+1	52	-1
Egypte	63	-1	43	-7	55	+3	47	+2
Emirats Arabes Unis	74	-2	61	-2	70	-1	53	-3
Maroc	50	-7	44	=	45	-3	38	-2
Nigeria	70	+5	55	+1	56	+1	52	-1
Turquie	42	+1	43	-1	44	-1	35	-3

Companies are struggling to convince as to their commitment

Farmers, carmakers and electricity suppliers are the most credible

Commitment to the ecological transition

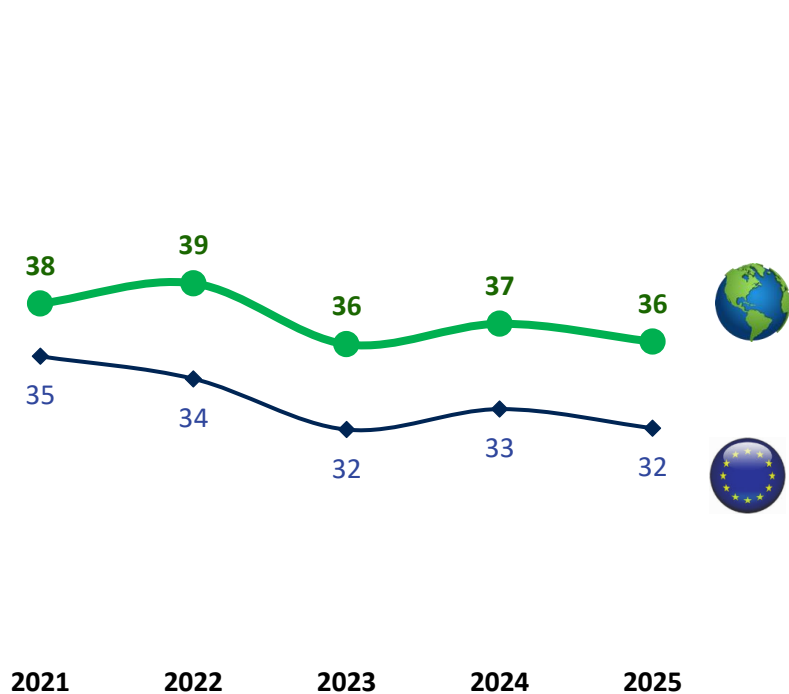


Q. Would you say that the following sectors are committed to ecological transition or not?

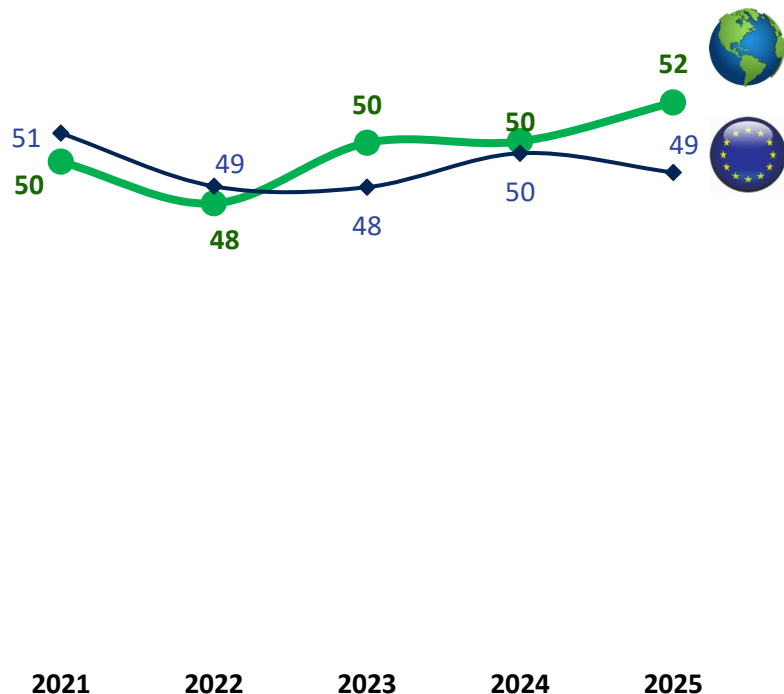
On the consumer side, there has been little change in behaviors

Annual trends: meat, car, airplane In %

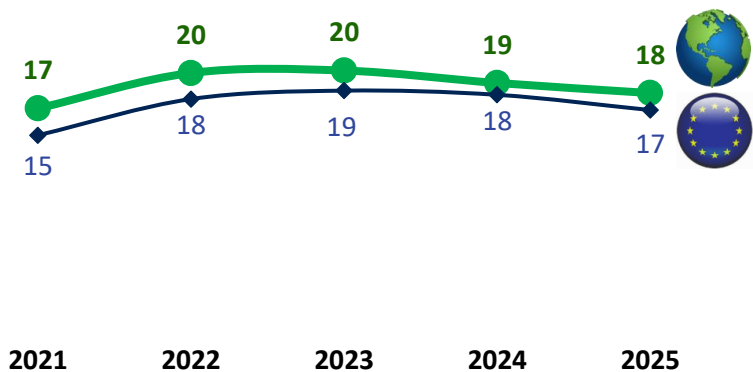
Declared daily **meat** consumption



Declared daily **car** use



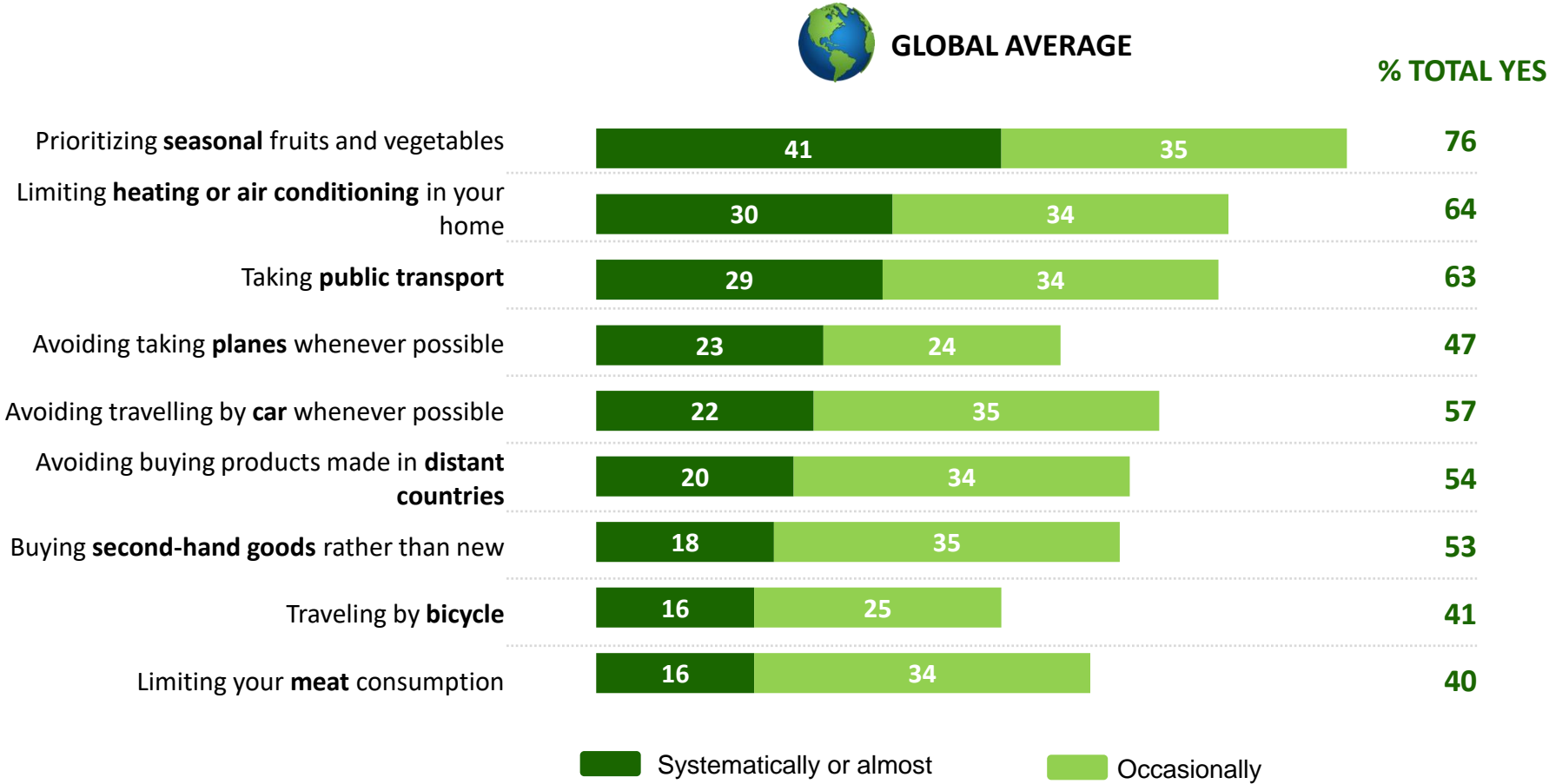
Air travel at least twice a year



Q. On average, how often do you eat meat or meals based on meat ?
Q. On average, how often do you use your car ?
Q. Generally speaking, how often have you travelled by plane in recent years ?

Responsible consumption: a minority systematically make an effort

Regular and occasional practices

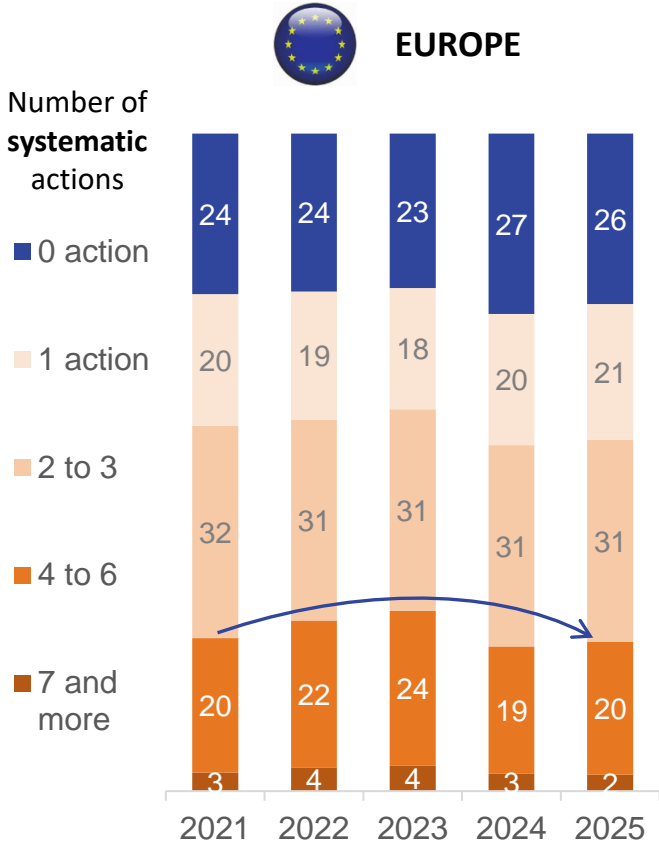


Q. Here are some individual actions that can help fight climate change. For each of them, tell me whether you do it systematically or almost always, you do it occasionally, you do not do it yet but plan to, you do not want or cannot do it, or you do not know or are not concerned.

In Europe, the efforts prompted by the 2022-23 energy crisis have subsided

Number of systematic actions

- Prioritizing seasonal **fruits** and **vegetables**
- Limiting **heating or air conditioning** in your home
- Avoiding taking **planes** whenever possible
- Avoiding travelling by **car** whenever possible
- Limiting your **meat** consumption
- Avoiding buying products made in **distant countries**
- Taking public **transport**
- Buying **second-hand goods** rather than new
- Traveling by **bicycle**

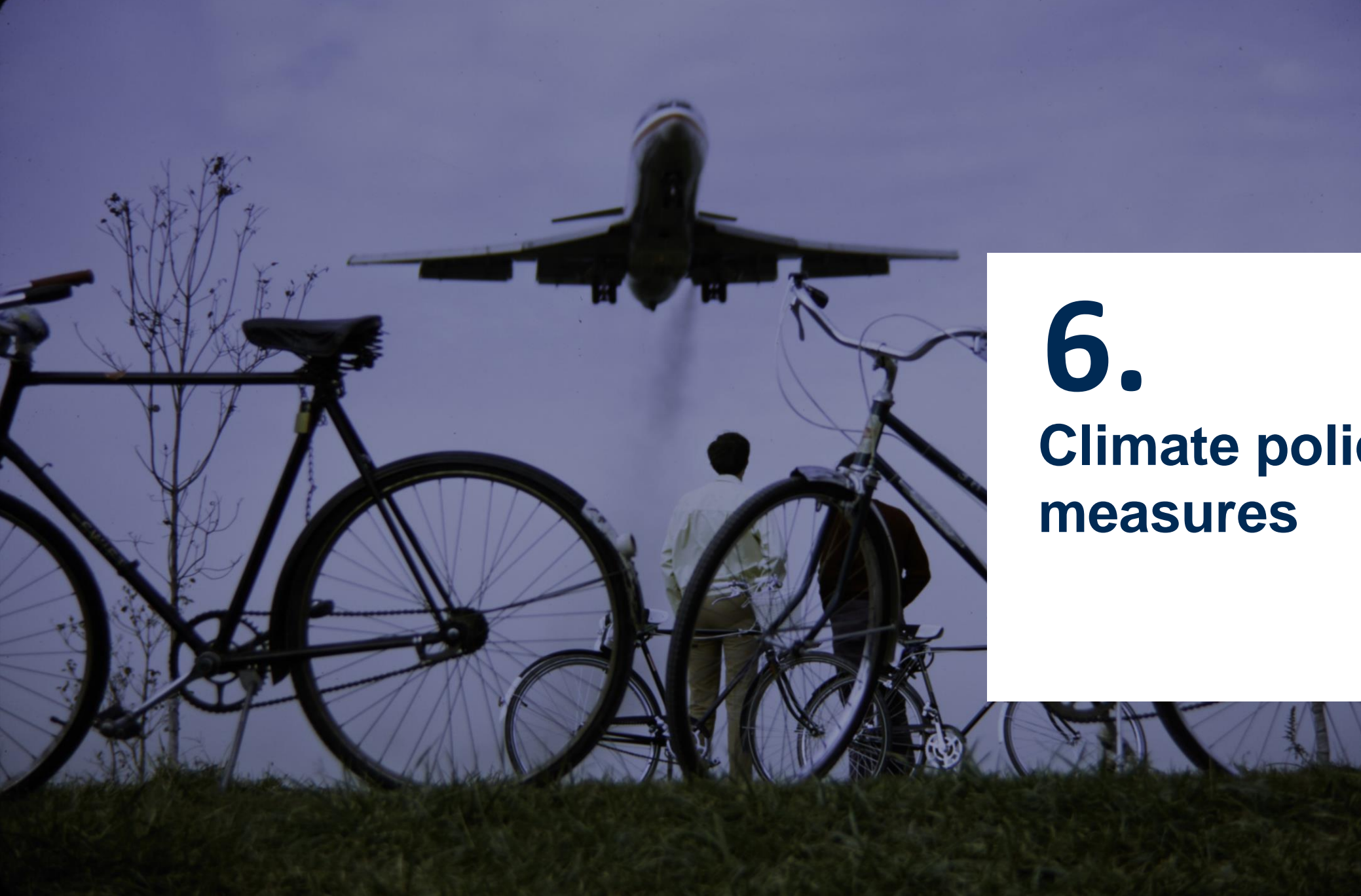


Q. Here are some individual actions that can help fight climate change. For each of them, tell me whether you do it systematically or almost always, you do it occasionally, you do not do it yet but plan to, you do not want or cannot do it, or you do not know or are not concerned.

Practices vary according to country

Regular and occasional practices

% SYSTEMATICALLY OR ALMOST		Prioritizing seasonal fruits and vegetables		Limiting heating or air conditioning in your home		Taking public transport		Avoiding taking planes whenever possible		Avoiding travelling by car whenever possible		Avoiding buying products made in distant countries		Buying second-hand goods rather than new		Limiting your meat consumption		Traveling by bicycle	
GLOBAL		41	=	30	-1	29	+1	23	-1	22	=	20	+1	18	-1	16	-1	16	=
Germany	Germany	38	+1	34	=	25	-1	33	-2	21	+1	22	+4	16	=	23	-1	24	=
	Belgium	45	+1	41	+2	25	+2	31	+1	26	+1	17	+1	17	-1	17	-1	19	+3
	Spain	46	-2	38	-2	30	=	26	-2	25	-2	21	+1	13	-3	16	-1	8	-1
	France	60	+4	52	-1	22	-1	33	+1	35	+4	26	+1	20	=	27	-3	11	-1
	Italy	58	-1	42	-1	21	-1	31	-2	32	=	24	-3	16	-2	27	-4	17	-4
	Norway	27	+7	26	+5	26	+5	17	+2	16	=	16	+4	15	-2	11	-1	12	+2
	Poland	55	-1	25	-1	26	-2	22	-2	21	-2	19	-5	23	+1	14	-1	23	-3
	United Kingdom	26	-3	33	+2	25	+1	24	+1	21	+1	13	-4	20	+1	18	=	9	+1
	Czech Republic	45	+6	25	+1	34	+2	24	+3	24	+7	15	+6	16	-1	12	+2	16	+4
	Sweden	28	-2	25	=	30	+3	28	-1	23	-1	22	+3	24	+4	15	-3	20	-1
Canada	Canada	33	-2	29	+2	16	+1	21	+1	16	-2	18	+3	19	-2	13	-2	7	-1
	United States	29	+2	21	-1	11	+1	25	=	14	+2	15	+1	20	-1	14	+1	7	-1
Australia		37	+2	30	+2	18	-1	15	-2	13	-1	15	-1	16	-1	12	-4	5	-2
China	China	34	+4	19	+4	27	+4	19	+5	18	+3	23	+7	20	+9	15	+6	21	+5
	South Korea	24	-3	13	-3	35	=	13	+1	9	-2	12	-1	10	=	6	-2	8	=
	India	48	+2	39	=	33	-2	32	=	34	-1	31	-2	29	=	29	-6	27	-3
	Indonesia	41	+1	33	+6	30	+4	23	-2	23	+3	26	=	21	=	20	-1	23	+1
	Japan	24	-4	15	-3	27	=	24	-3	20	+3	8	+1	5	=	5	-1	18	-1
	Singapore	22	+4	29	+3	51	+3	9	-4	24	+3	8	-1	11	+1	10	-1	10	=
Brazil	Brazil	38	-3	35	-8	37	=	27	-5	27	-6	22	-3	19	-3	16	-1	20	-5
	Chile	56	=	32	=	39	+2	21	=	24	-1	16	-1	24	-1	14	-3	17	=
	Colombia	50	-2	34	-9	34	-1	19	=	20	-4	21	-2	18	+1	13	-6	26	-1
	Mexico	56	+1	43	+3	41	-5	31	+1	30	=	21	-3	22	-2	18	-1	22	=
South Africa	South Africa	42	+1	32	-1	29	=	19	-3	21	+2	23	+1	19	+2	19	+2	15	+2
	Saudi Arabia	37	+3	23	-2	21	+1	18	-3	14	-5	23	+4	22	=	14	-4	13	-1
	Egypt	47	-7	23	-10	21	-7	15	-6	19	+1	22	-6	11	-7	14	-4	8	-7
	United Arab Emirates	38	-4	25	-1	23	-2	22	+2	24	+1	23	+2	23	-3	16	-2	20	+3
	Morocco	49	+4	36	+3	32	+3	20	=	19	-3	20	+3	20	+1	21	-4	15	-2
	Nigeria	46	+4	33	+7	32	+5	24	+4	24	+2	24	+3	25	+2	25	+5	20	=
	Turkey	51	-4	24	-3	35	-1	20	-2	22	=	24	-3	18	=	13	-2	15	-2

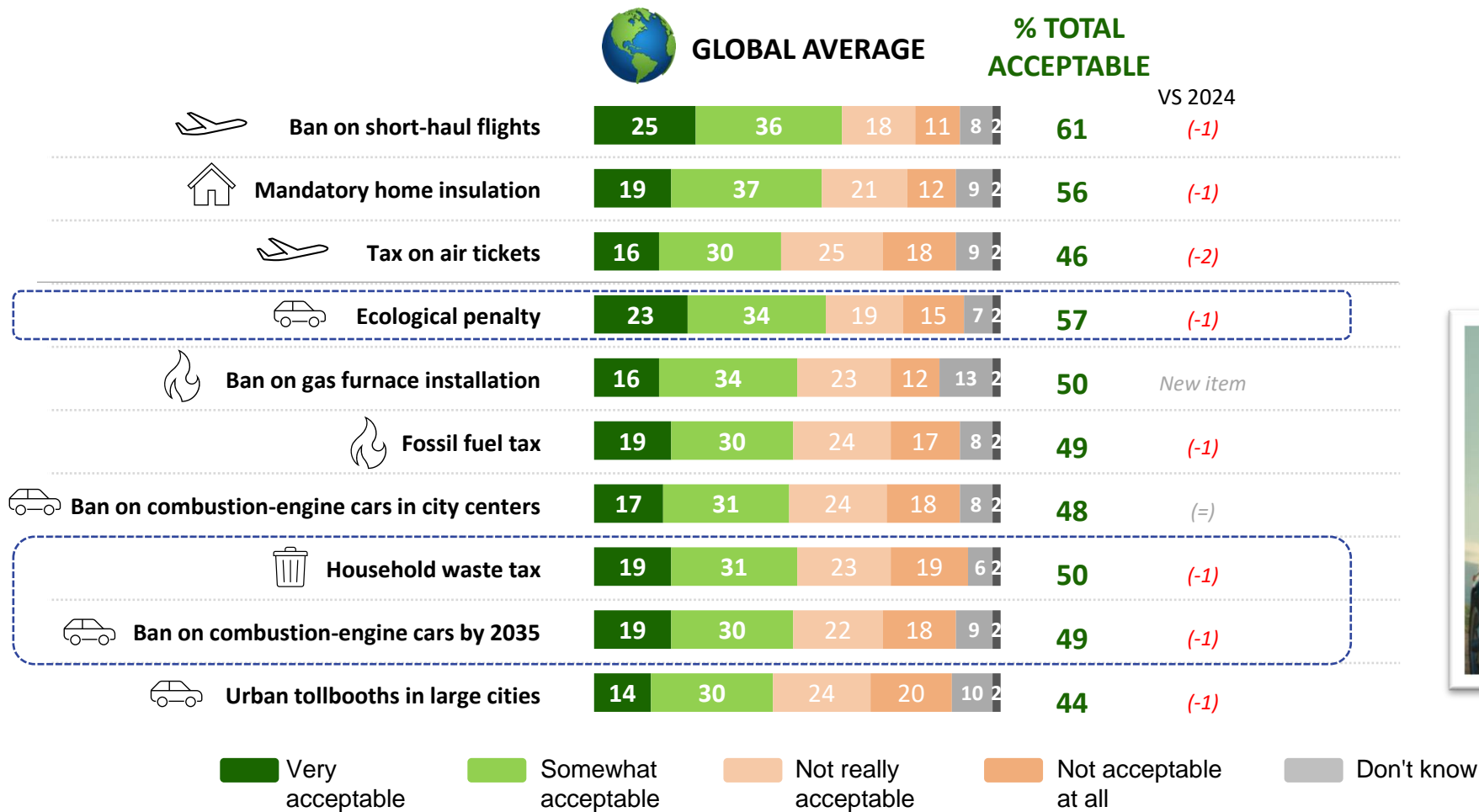


6.

Climate policy measures

Increasing resistance to restrictive measures, particularly those concerning internal-combustion-engine cars and household waste

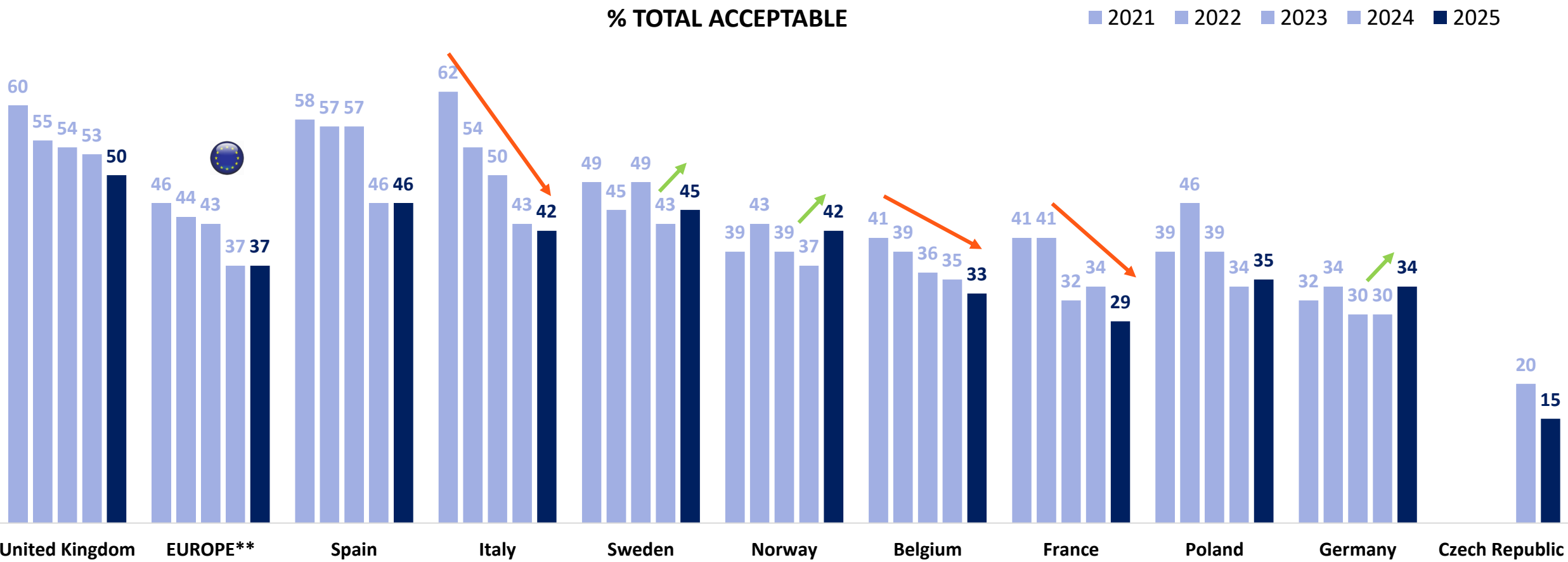
Acceptability of climate measures



Q. Here are some measures that could be adopted in your country to reduce greenhouse gas emissions.
For each of them, tell me whether it seems very acceptable, somewhat acceptable, rather unacceptable, or not acceptable at all.

Ban on the sale of new internal-combustion-engine cars by 2035*: opposition continues to grow in France and Belgium. While it is regaining support in Scandinavia.

Ban on sale of internal-combustion-engine vehicles in 2035



*The European wording of the item was previously “in the next 15years” **The Czech Republic was added to the European scope in 2024

Q. Here are some measures that could be adopted in your country to reduce greenhouse gas emissions.
For each of them, tell me whether it seems very acceptable, somewhat acceptable, rather unacceptable, or not acceptable at all.

In South America, the ban on internal-combustion-engine cars is meeting with greater resistance than in 2024, but is still accepted by a majority of the population

Acceptability of climate measures

% TOTAL ACCEPTABLE		Banning short-haul flights when it is possible to take the train		Introducing a tax when purchasing a polluting car		Obliging owners to insulate their home		Increasing the tax on household waste to encourage people to waste less		A ban on the installation or replacement of gas furnaces <i>(new item)</i>		Making energy sources that produce CO2 more expensive, like gas, gasoline, etc.		Banning the sale of new petrol or diesel cars [within 15 years/by 2035]		Limiting access to city centers to electric or hybrid cars only		Introducing a tax on plane tickets		Setting up an urban tollbooth at the entrance to big cities	
GLOBAL		61	-1	57	-1	56	-1	50	-1	50		49	-1	49	-1	48	=	46	-2	44	-1
	Germany	62	-4	43	+3	48	+2	33	-1	38		39	+4	34	+4	35	+2	53	-3	33	+2
	Belgium	71	-1	57	+2	62	+3	43	+1	44		39	+3	33	-2	33	+1	59	+2	27	=
	Spain	58	-6	50	-2	40	-3	42	-2	51		46	+2	46	=	50	=	38	-6	34	-3
	France	69	=	49	-4	62	+1	32	-6	46		33	+1	29	-5	32	-2	56	+4	23	-3
	Italy	59	-4	50	-2	34	-3	31	-2	40		41	=	42	-1	55	-3	39	-3	39	-4
	Norway	47	-2	43	-1	36	-12	35	-2	42		43	-2	42	+5	35	-6	36	-8	35	+1
	Poland	61	-4	46	+1	57	=	41	-1	42		33	-1	35	+1	41	-4	42	=	31	-1
	United Kingdom	54	-5	56	-4	62	-7	42	-5	54		48	-3	50	-3	44	+1	49	-4	37	-2
	Czech Republic	60	+5	33	+3	40	-2	31	-3	24		23	=	15	-5	34	+6	33	+1	33	=
	Sweden	57	-7	49	-2	66	+1	37	-9	46		48	=	45	+2	37	-8	51	-1	47	-1
Canada		49	=	46	+2	66	+1	42	-2	40		41	-1	38	-2	29	+2	37	=	31	+1
USA		48	+2	48	+5	61	=	44	+2	40		45	+4	44	+4	36	+5	41	+3	37	+4
Australia		41	-4	41	-1	64	+2	37	-4	44		41	-3	39	-1	29	-3	30	-3	28	-3
	China	65	=	67	=	74	-2	69	+1	57		63	=	58	-2	60	+2	64	-2	59	+6
	South Korea	55	-4	64	-2	49	-1	57	-2	43		50	-2	55	+4	39	-2	51	-4	46	=
	India	76	+1	80	+1	75	+4	75	-1	74		75	+1	72	-2	74	+1	62	-2	73	-2
	Indonesia	81	-1	77	-5	74	-2	70	-5	56		56	-8	60	-4	61	-4	60	-6	65	-1
	Japan	49	+3	57	+2	52	+3	38	=	30		34	-3	42	+4	35	+3	48	+3	28	+2
	Singapore	52	-1	69	=	51	-4	54	+2	54		63	+5	55	-3	51	-1	46	+1	50	-3
	Brazil	49	-5	47	-2	27	-1	41	-4	39		40	-6	47	-6	39	-5	30	-1	29	-4
	Chile	70	-1	64	-1	47	=	59	-1	58		54	-1	66	-1	58	+1	45	=	43	-2
	Colombia	66	-4	67	-4	38	+2	58	-4	60		54	+1	68	-5	59	=	44	-2	38	-5
	Mexico	68	-4	65	+1	45	+1	63	-2	61		55	=	66	-4	55	-1	44	-8	52	-5
	South Africa	61	-5	60	-3	64	-1	56	=	59		59	=	48	-2	55	=	46	-6	56	-1
	Saudi Arabia	56	+1	52	+1	49	+2	53	+2	51		53	=	51	+4	53	+5	45	+6	43	-4
	Egypt	63	-6	59	-3	53	-7	51	-5	58		59	-3	62	-2	62	-2	46	-8	67	+2
	United Arab Emirates	63	-2	60	-5	56	-4	59	-2	56		59	-5	56	-4	57	-1	43	-2	58	+1
	Morocco	68	+4	64	=	63	+4	61	+2	60		63	-2	59	=	60	+1	50	+4	64	+2
	Nigeria	72	-1	77	-1	77	+5	75	+1	70		64	=	57	+1	61	-2	56	-4	74	=
	Turkey	71	-4	68	-4	77	-4	57	-5	63		53	+2	59	-2	59	-4	43	-6	42	-6

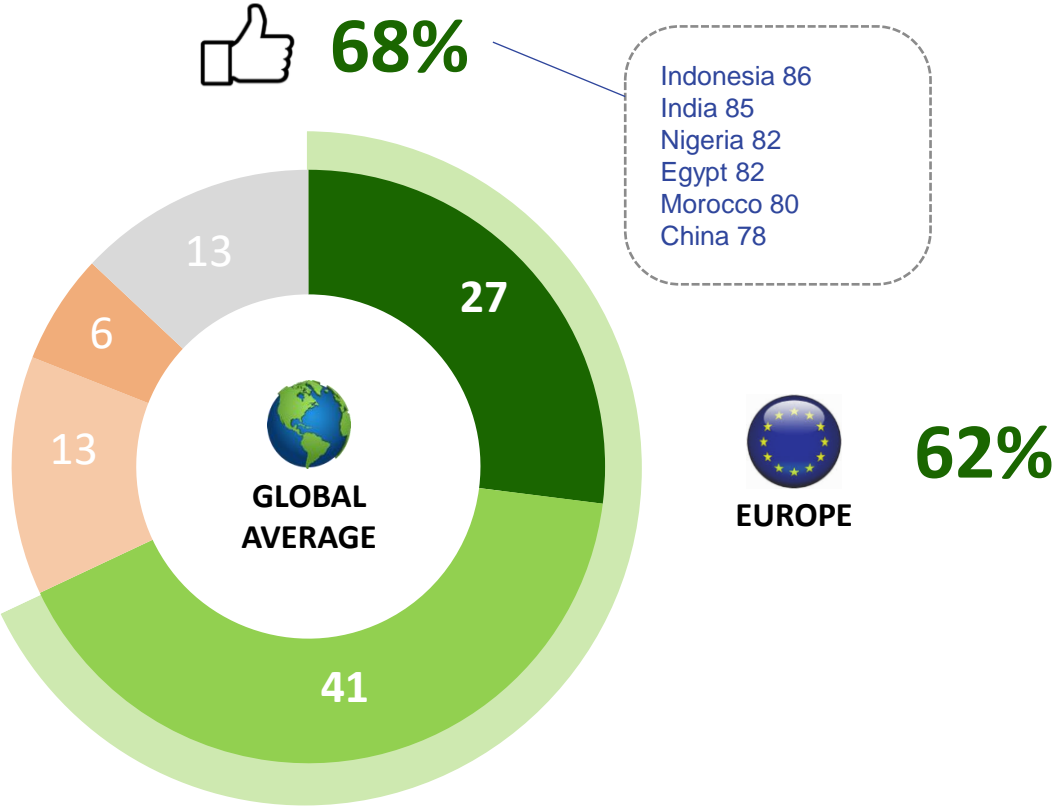


7.

Electrification: a global perspective

Strong support for replacing fossil fuels with electricity

Replacing fossil fuels with electricity in the next 10 years?

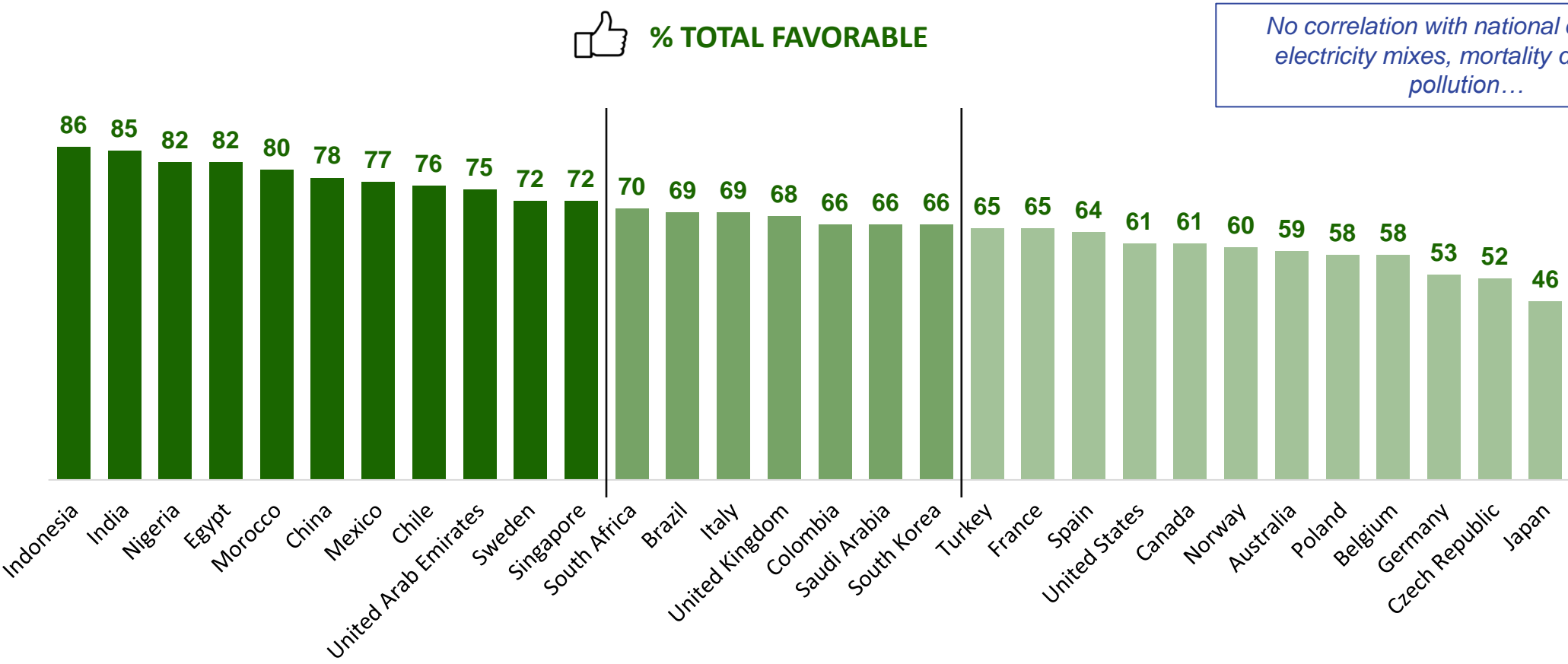


Very favorable Somewhat favorable Somewhat opposed Very opposed Don't know

Q. Are you favorable or opposed to the increasing replacement of fossil-fuel energies such as oil, coal and gas by electricity in all possible areas (heating, transport, industrial production...) in the next 10 years, in your country?

Clearer support in the Southern countries than in the West

Replacing fossil fuels with electricity in the next 10 years?



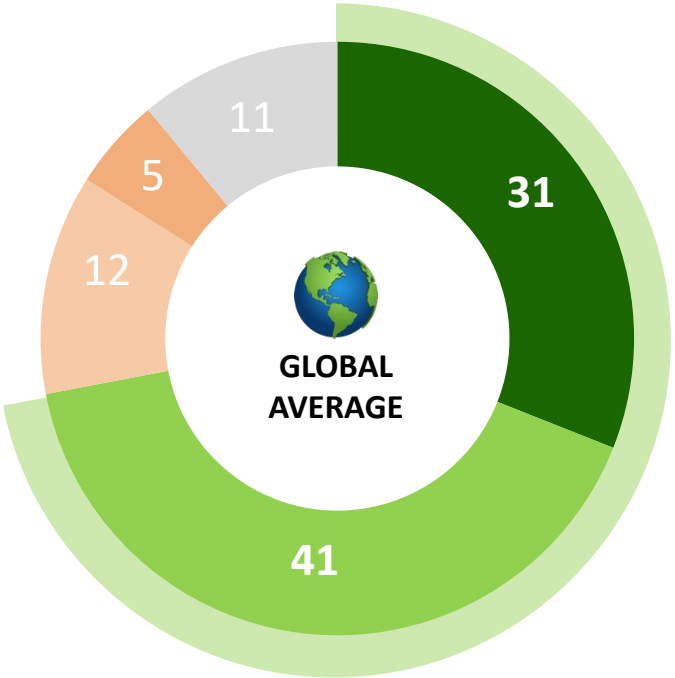
Q. Are you favorable or opposed to the increasing replacement of fossil-fuel energies such as oil, coal and gas by electricity in all possible areas (heating, transport, industrial production...) in the next 10 years, in your country?

Climate value of electrification: obvious for 72% of the world's population

Electrification to fight climate change?



👍 72%



EUROPE

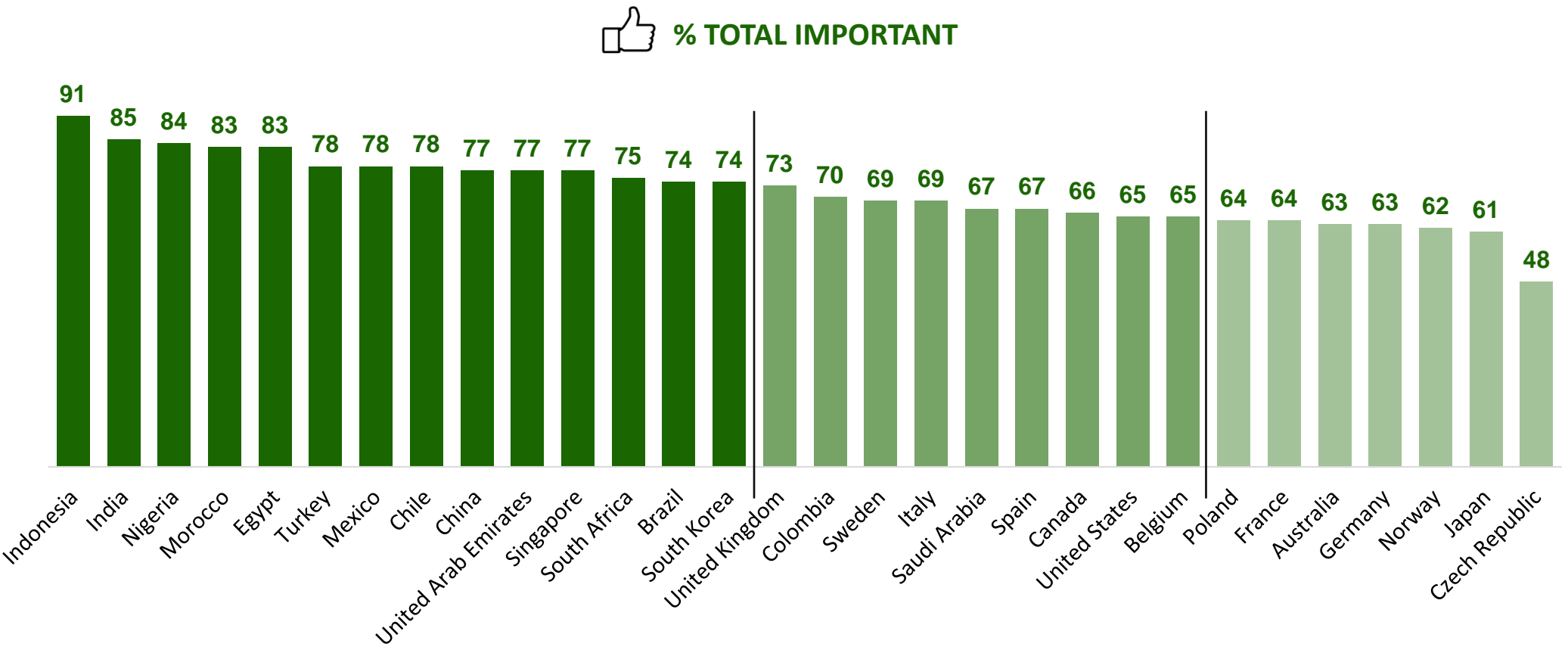
64%

Very important Somewhat important Not very important Not important at all You don't know

Q. In fighting climate change, do you think that it is very important, somewhat important, not very important, or not important at all for electricity to increasingly replace oil, coal and gas in all possible areas?

Climate value of electrification: once again the Southern countries are ahead of the game

Electrification to fight climate change?

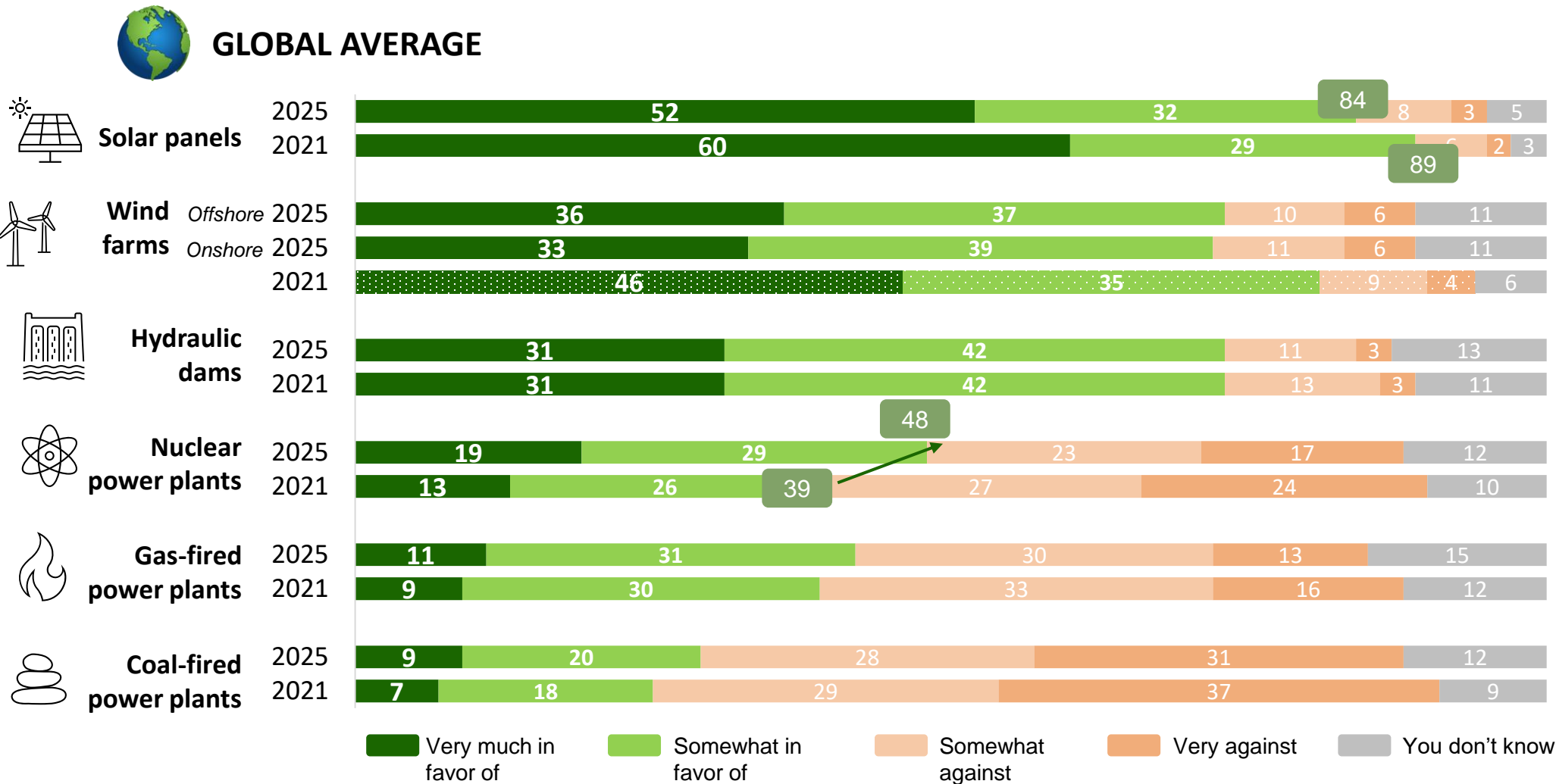


Q. In fighting climate change, do you think that it is very important, somewhat important, not very important, or not important at all for electricity to increasingly replace oil, coal and gas in all possible areas?

Solar, wind and hydroelectric power are the three most widely accepted production methods

Nuclear power has progressed the most compared to 2021

Acceptability of electricity production sources



Distinction between onshore and offshore since 2025

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?

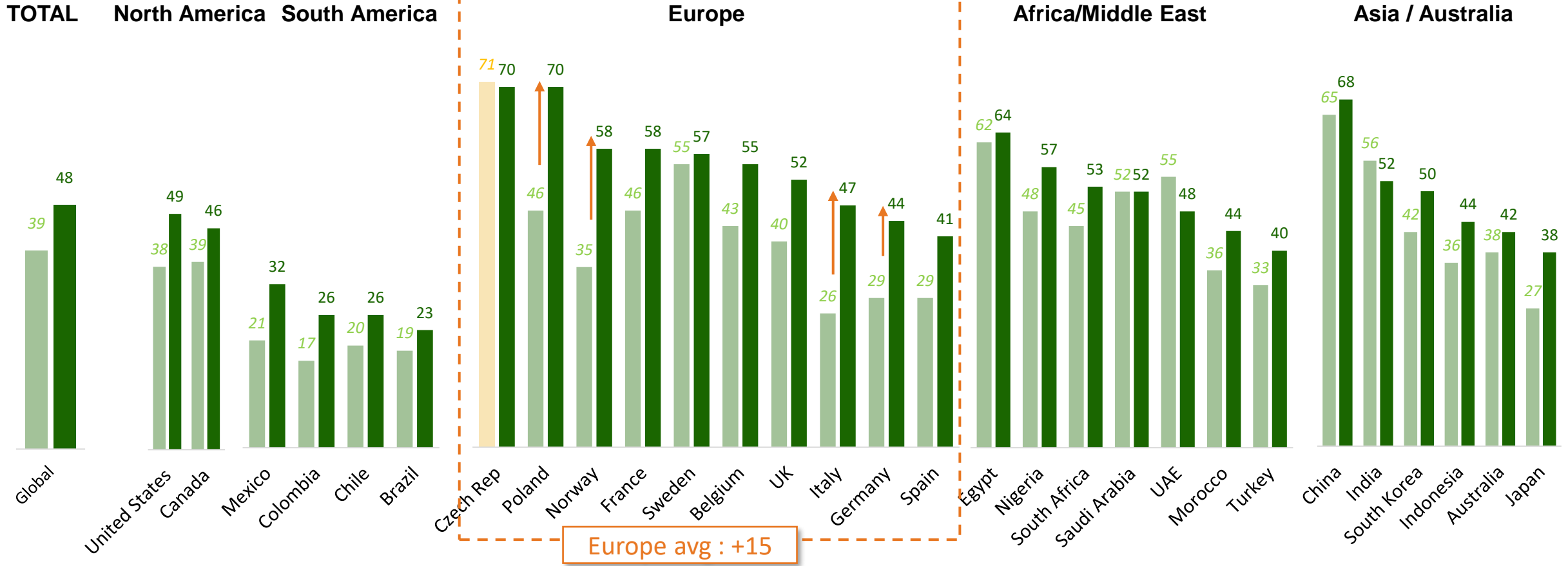
Increased support for nuclear power, particularly evident in Europe

Acceptability of nuclear power



2021 2024 2025

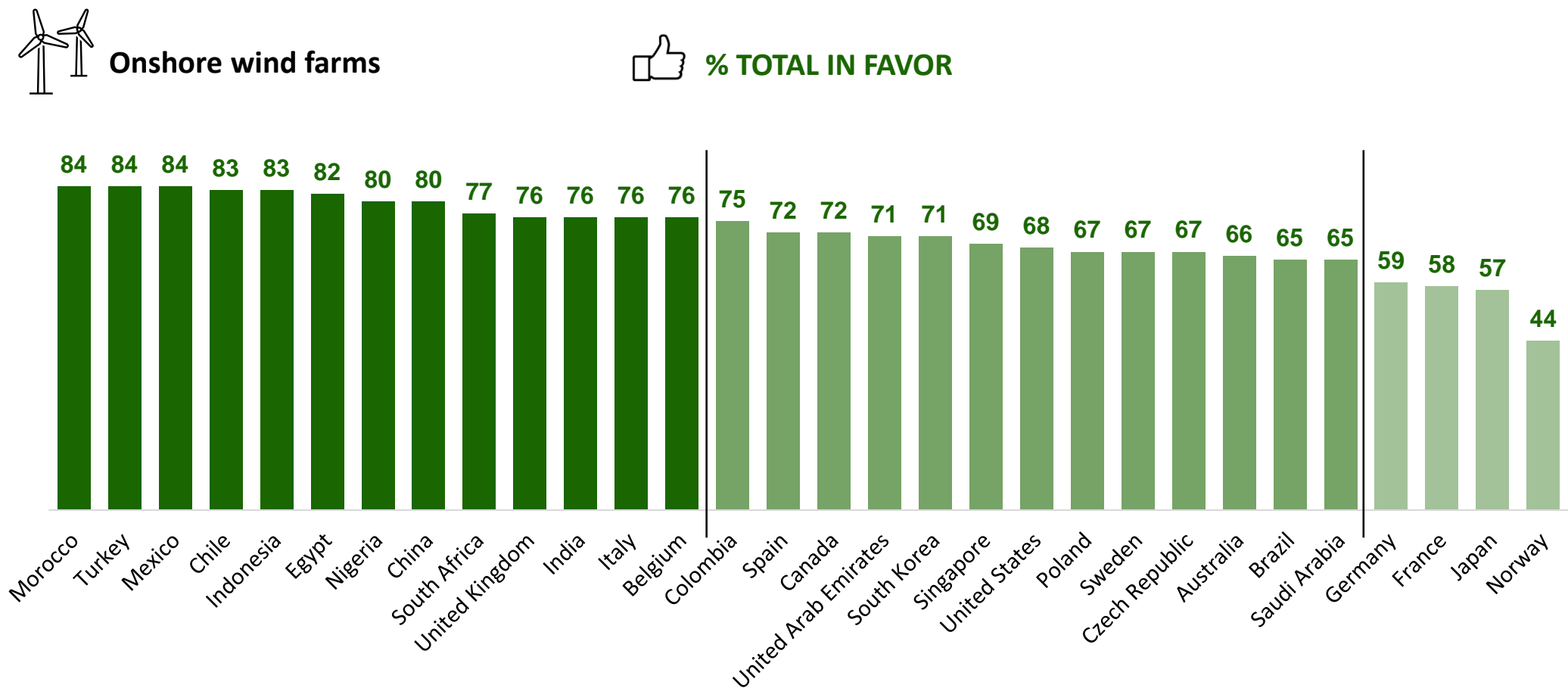
% TOTAL IN FAVOR



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?

Diverging opinions of onshore wind farms in Germany, France, Japan and Norway

Acceptability of onshore wind farms



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?



8.

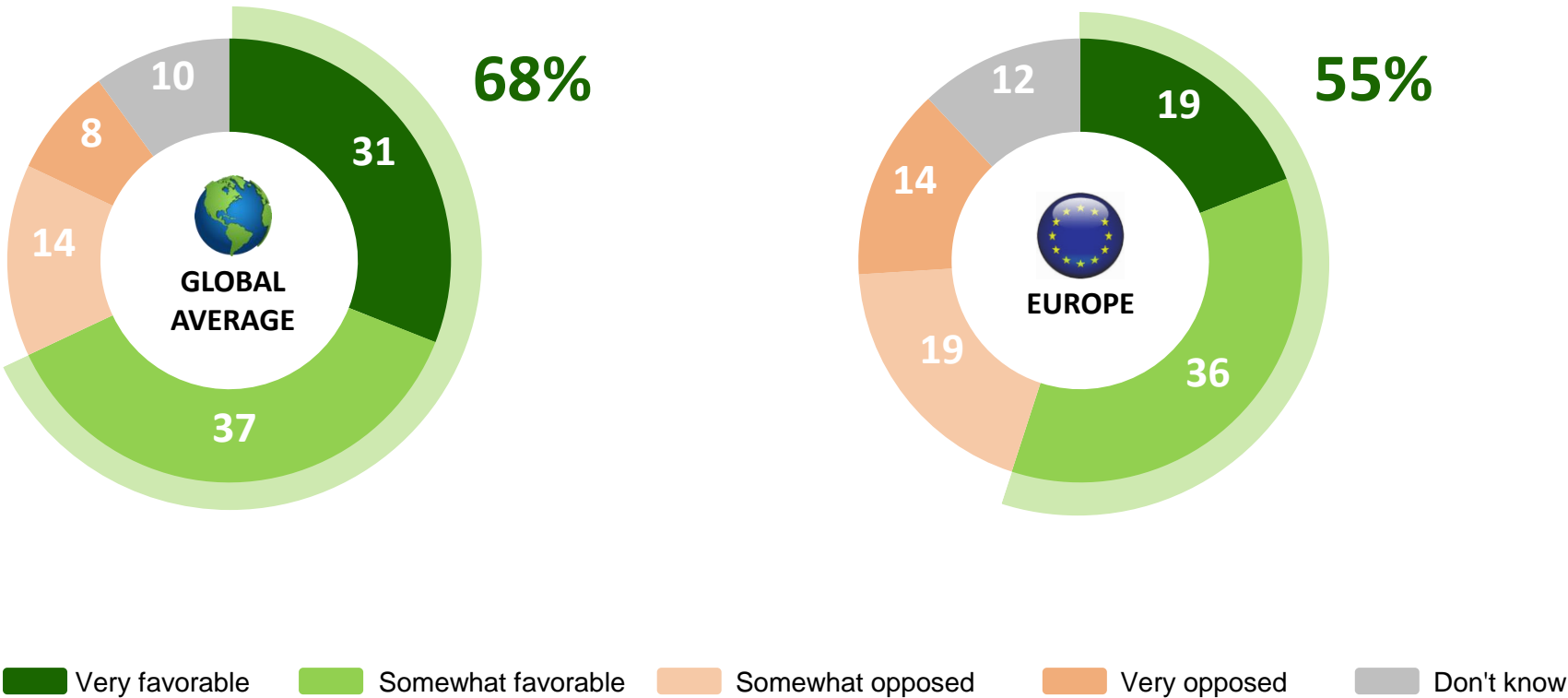
The electric vehicle: European reluctance

The vast majority of people across the world support EVs

But reactions are more mixed in Europe

Support for the development of electric vehicles

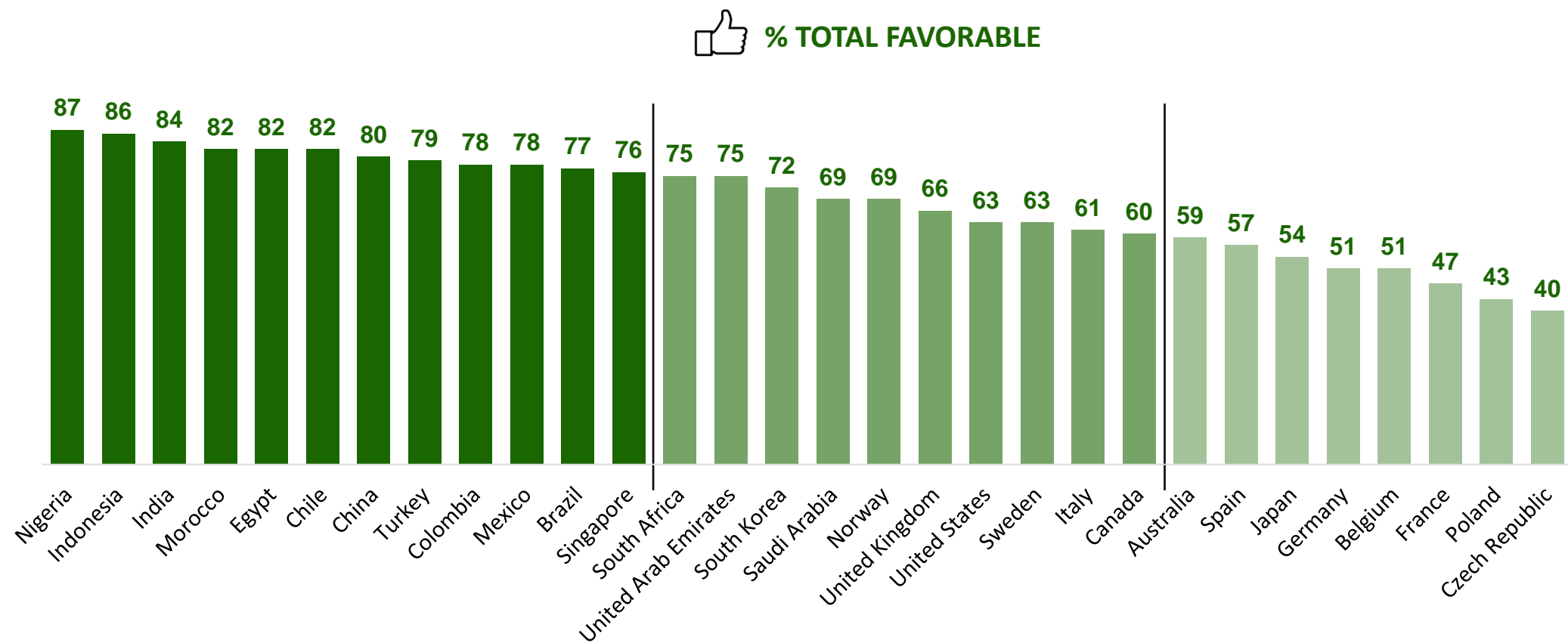
👍 % TOTAL FAVORABLE



Q. Are you personally favorable or opposed to the development of electric vehicles in your country?

European countries lack enthusiasm

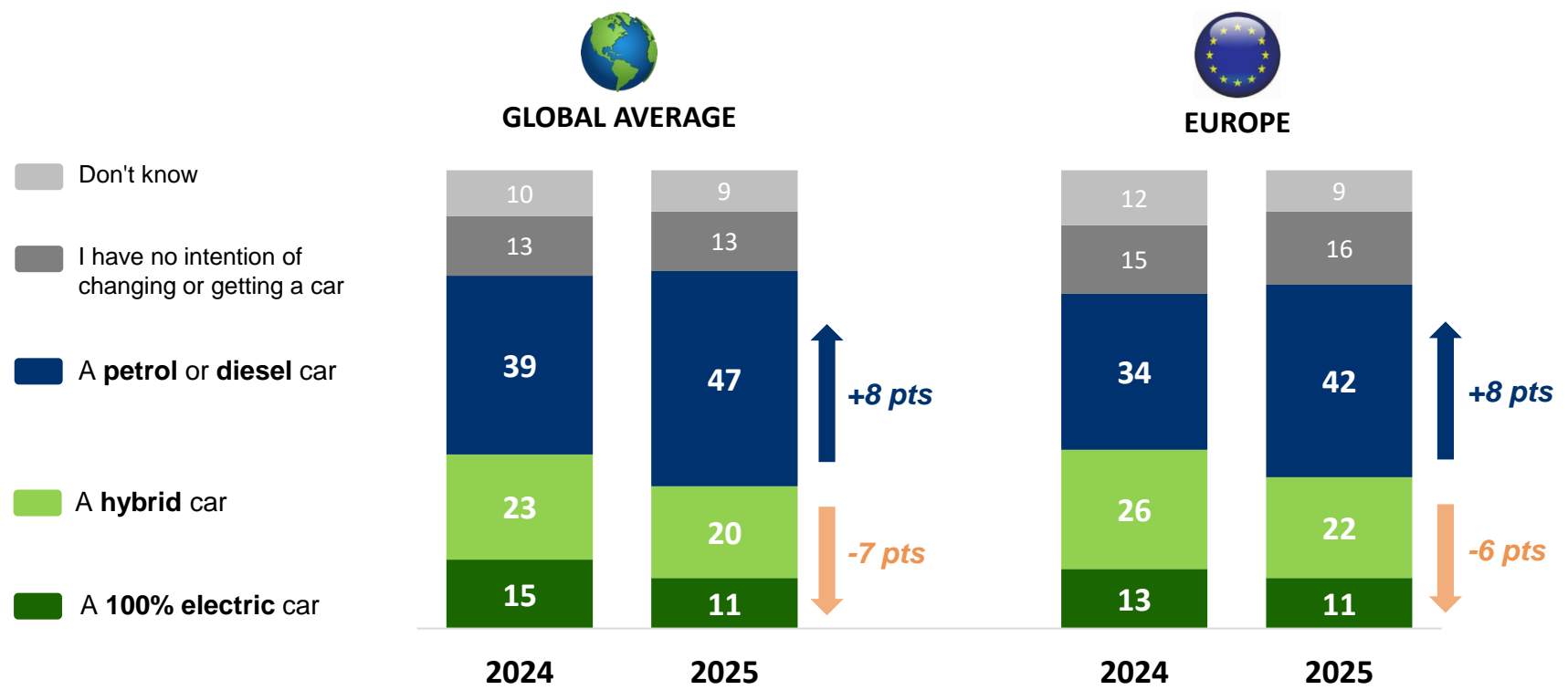
Support for the development of electric vehicles



Q. Are you personally favorable or opposed to the development of electric vehicles in your country?

Potential for EV adoption: dropping everywhere

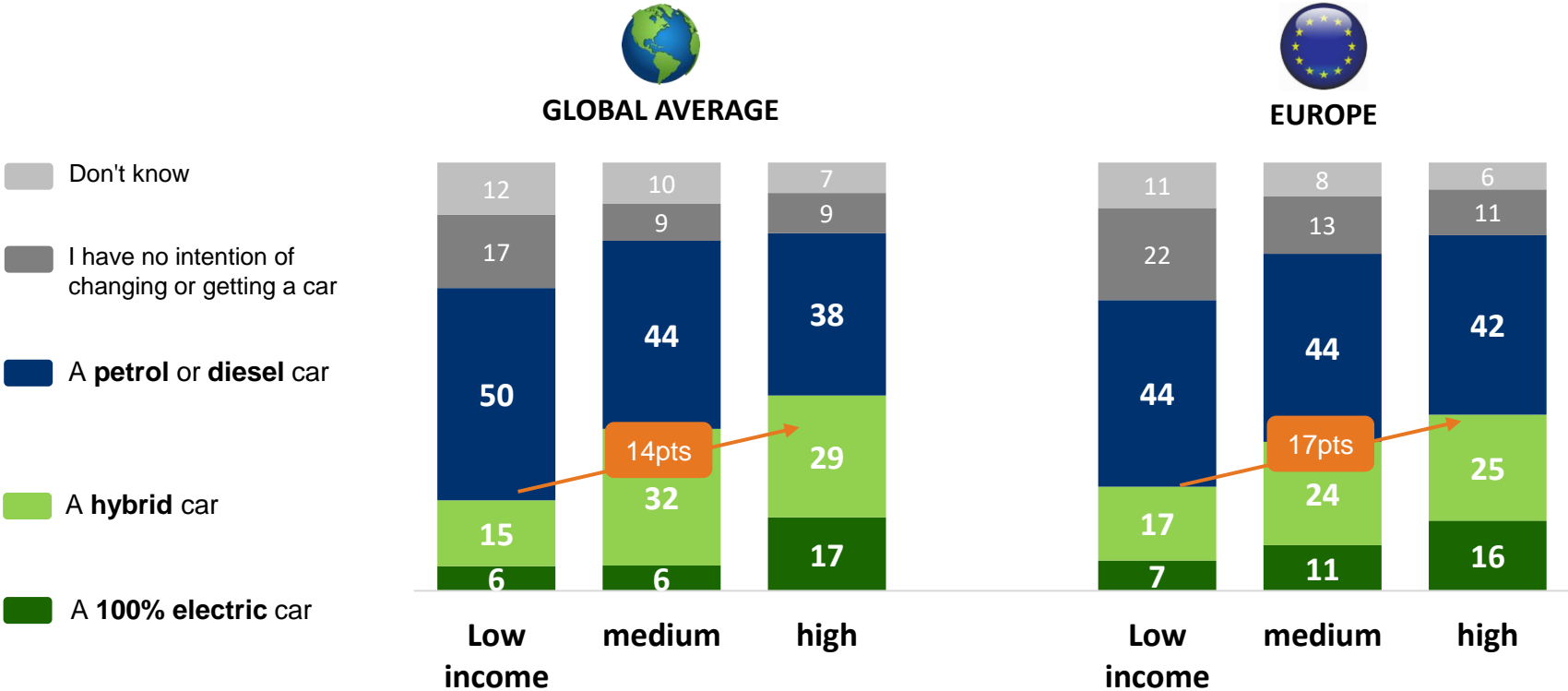
Plans to adopt an EV



Q. For your next car, or if you decided to get a car (whether leasing or buying, new or used), what would be your most likely choice?

A fairly general income-based rationale

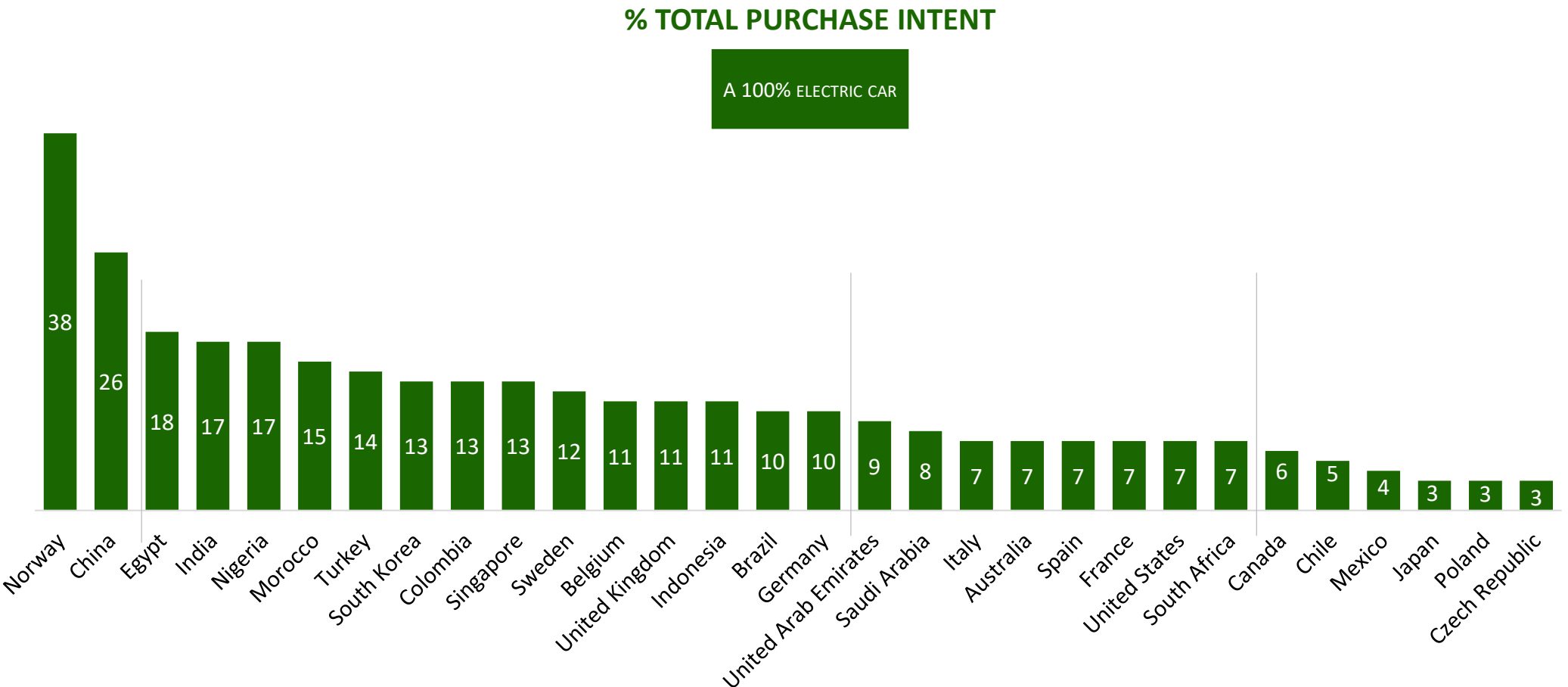
Plans to adopt an EV



Q. For your next car, or if you decided to get a car (whether leasing or buying, new or used), what would be your most likely choice?

Ahead of the game: Norway and China

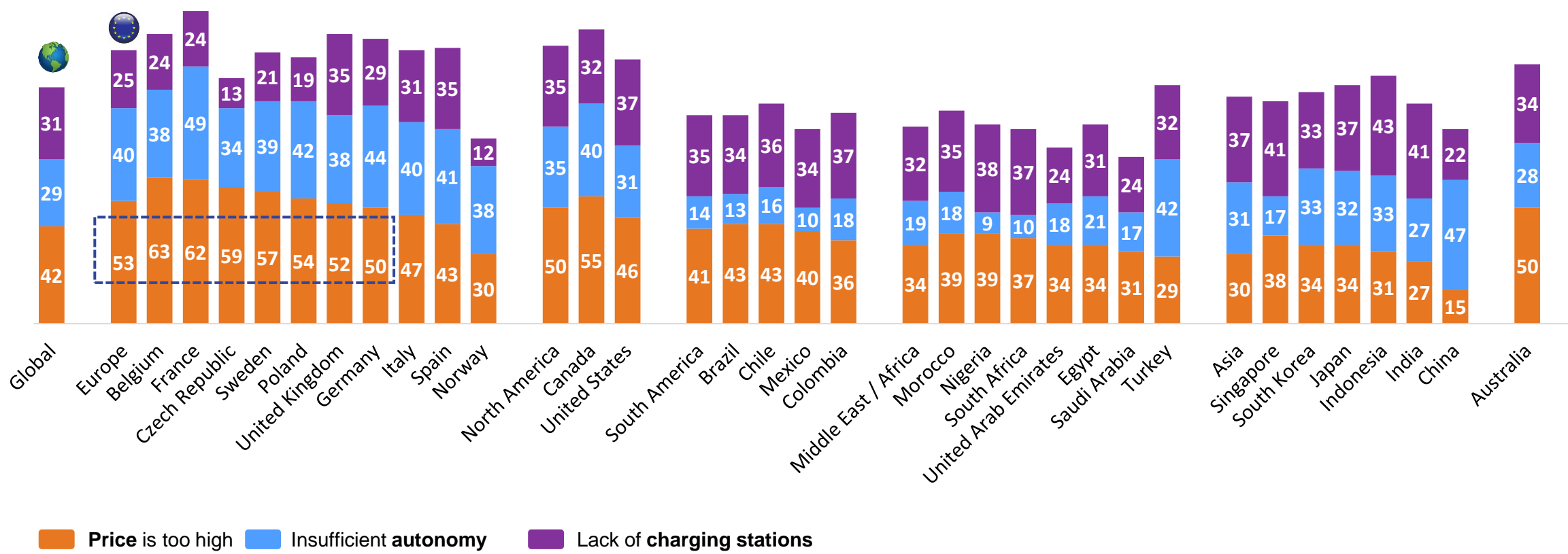
Plans to adopt an EV



Q. For your next car, or if you decided to get a car (whether leasing or buying, new or used), what would be your most likely choice?

In Europe, high prices and a lack of autonomy are the key obstacles

Key obstacles to EV purchase Obs'COP 2024



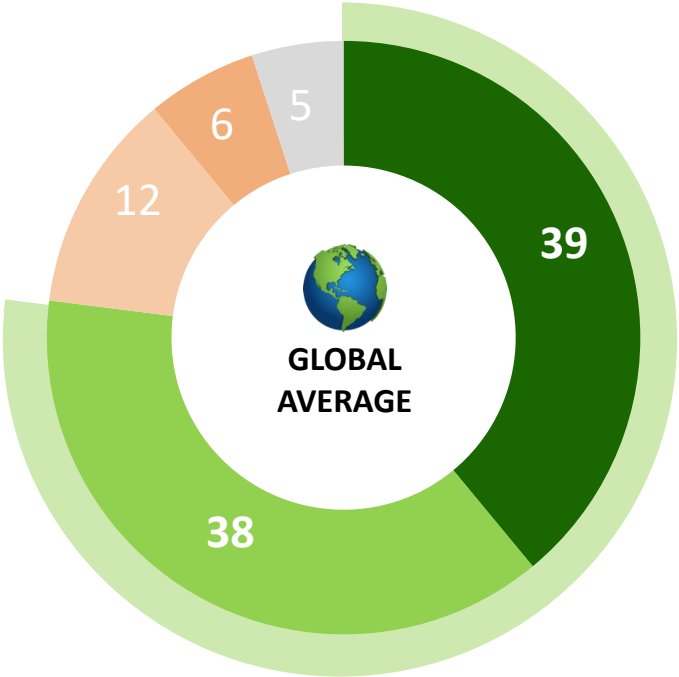
Q. What are the main reasons why you don't intend to get a 100% electric car?

The EV is persuasive when it comes to air pollution, but its impact on climate change is up for debate in Europe

Ecological value of EVs

To fight air pollution:

👍 77%

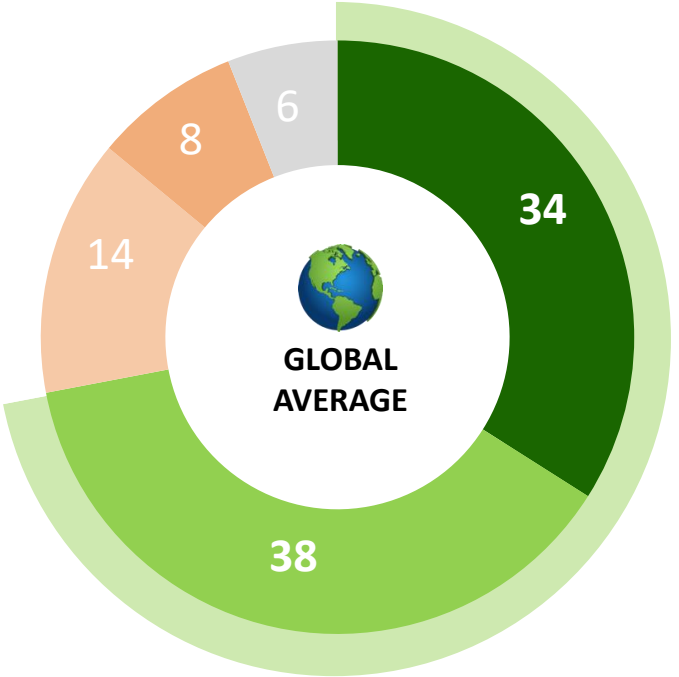


EUROPE

66%

To fight climate change:

👍 72%



EUROPE

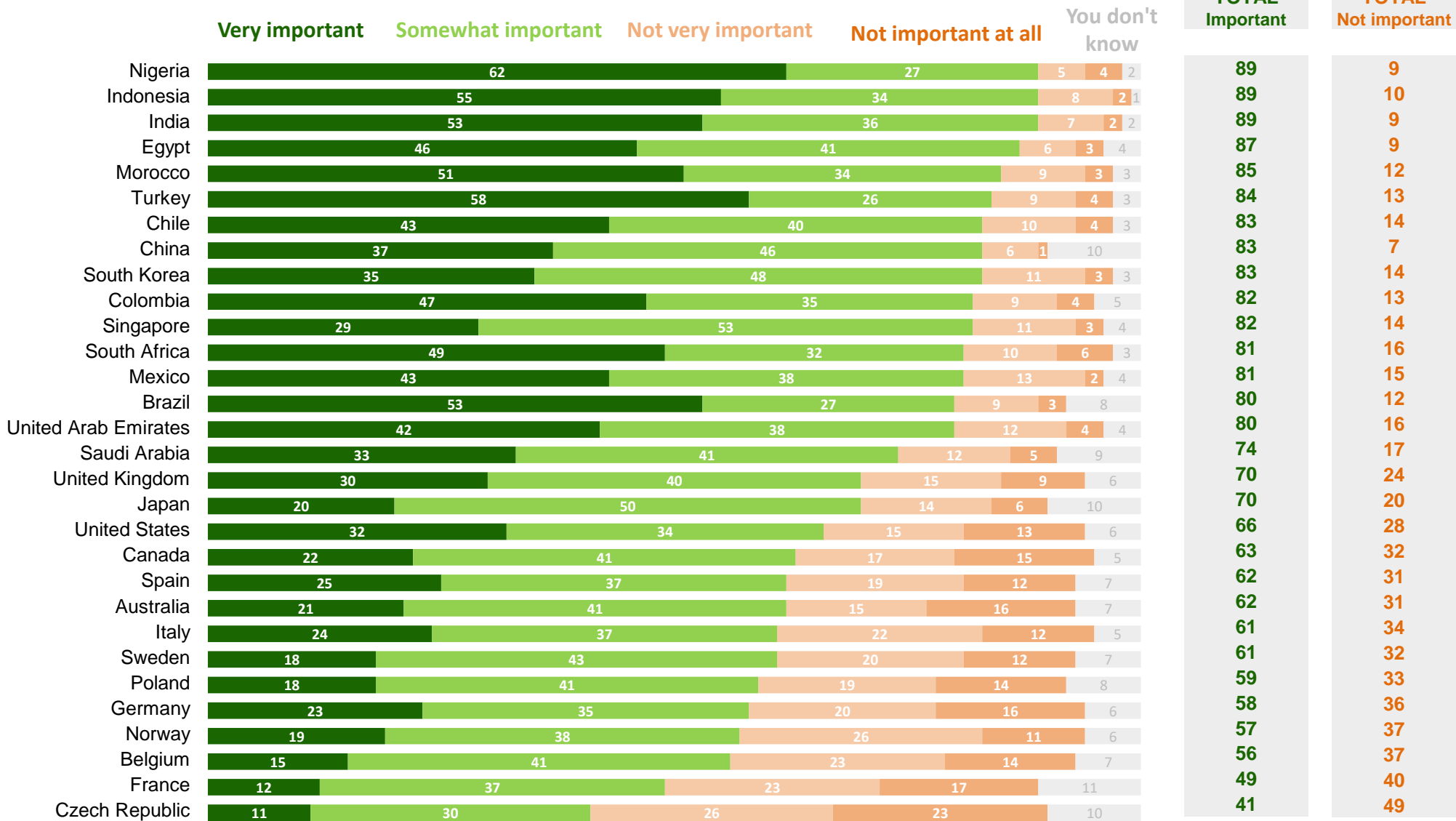
57%

Very important Somewhat important Not very important Not important at all You don't know

Q. Do you think that the electric car is very important, somewhat important, not very important, or not important at all in fighting:

Its environmental impact is particularly disputed in France and the Czech Republic

Value of EVs in fighting climate change



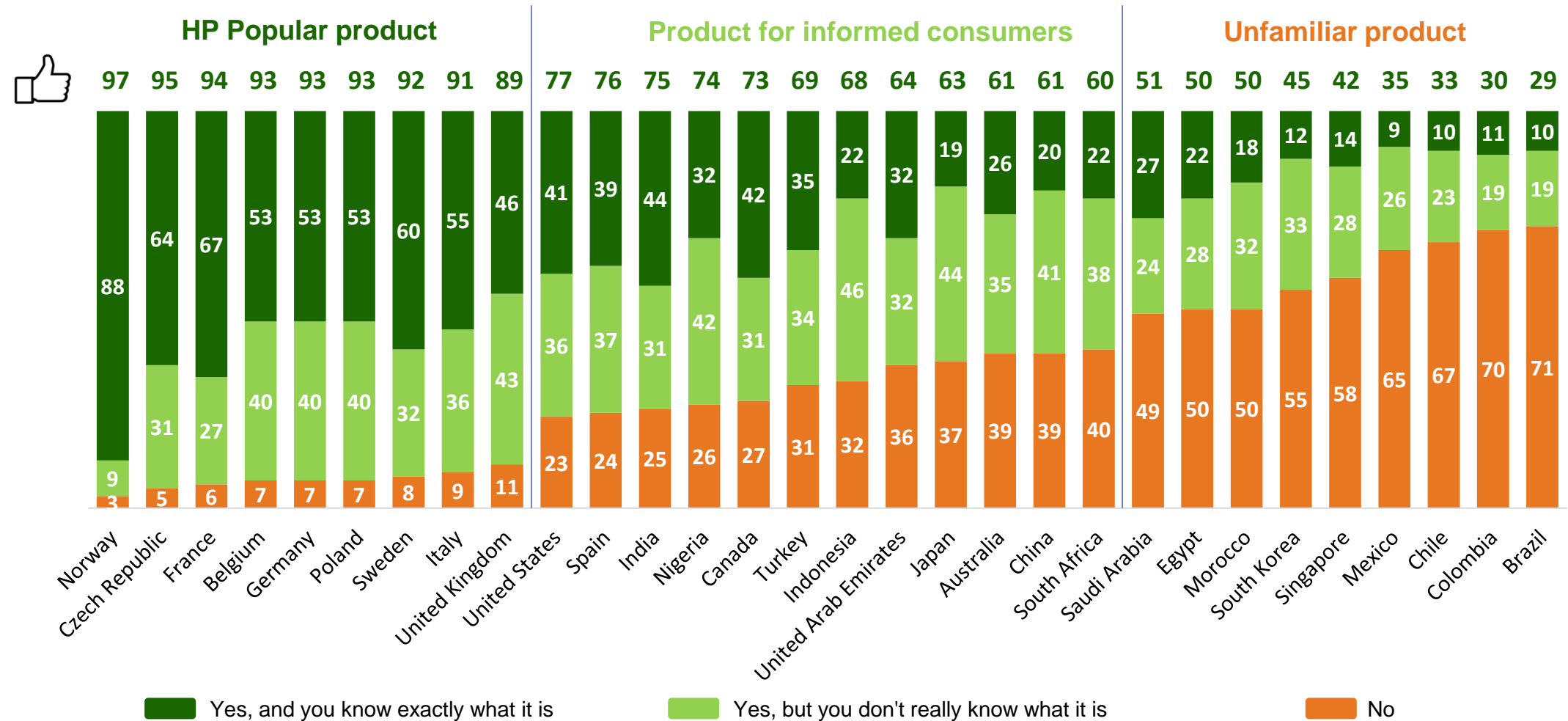


9.

The heat pump: how much appeal in 2025?

The heat pump: a very European (and North American) product

Awareness of heat pumps

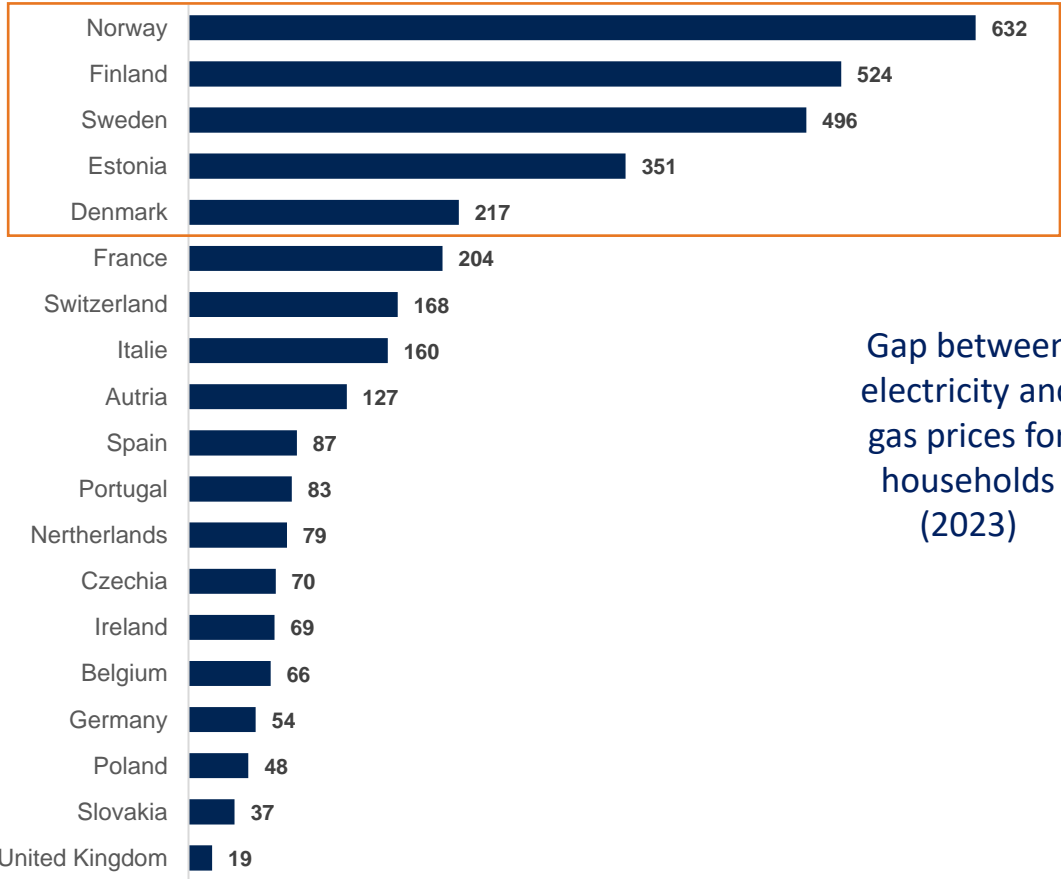


Q. Have you ever heard of the heating system known as a heat pump?

The Nordic countries are the heat pump champions in Europe

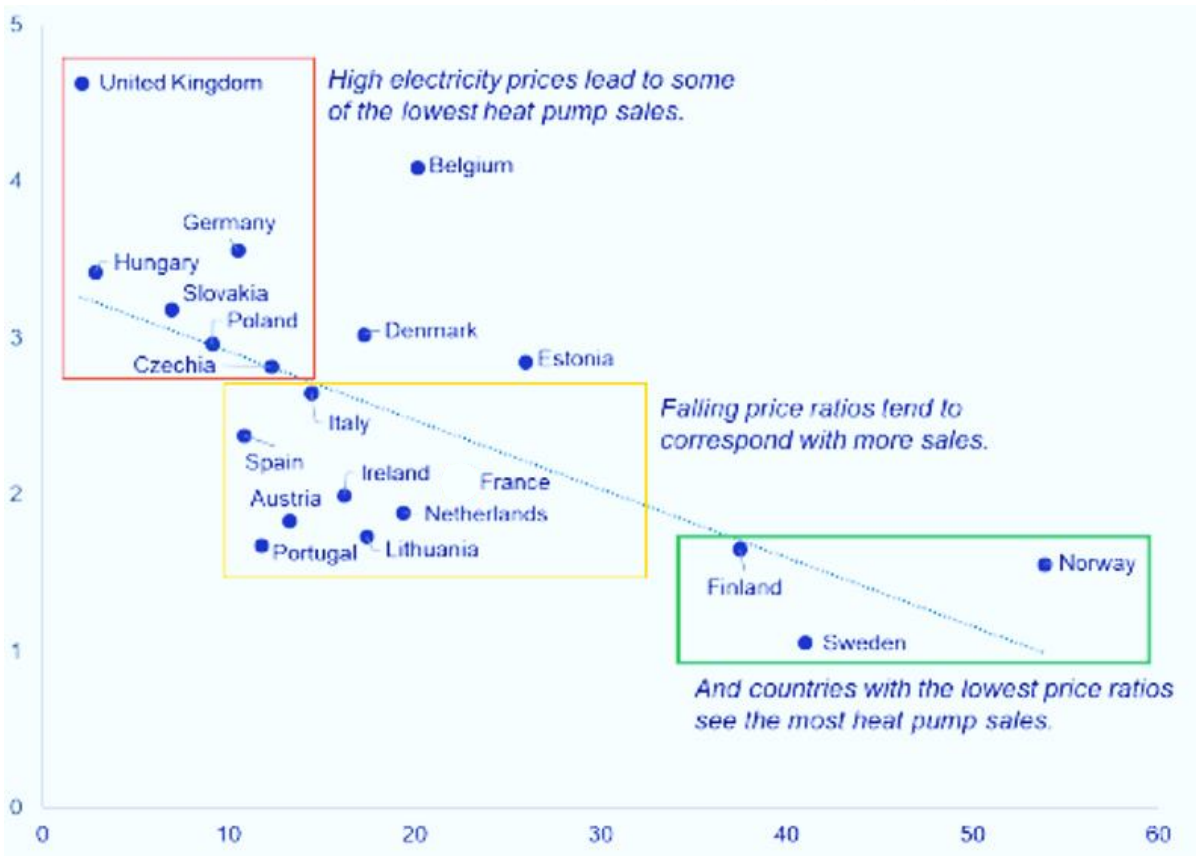
The price gap between electricity/gas is decisive

Number of heat pumps installed per 1000 inhabitants



Gap between electricity and gas prices for households (2023)

HP sales based on electricity/gas price gap



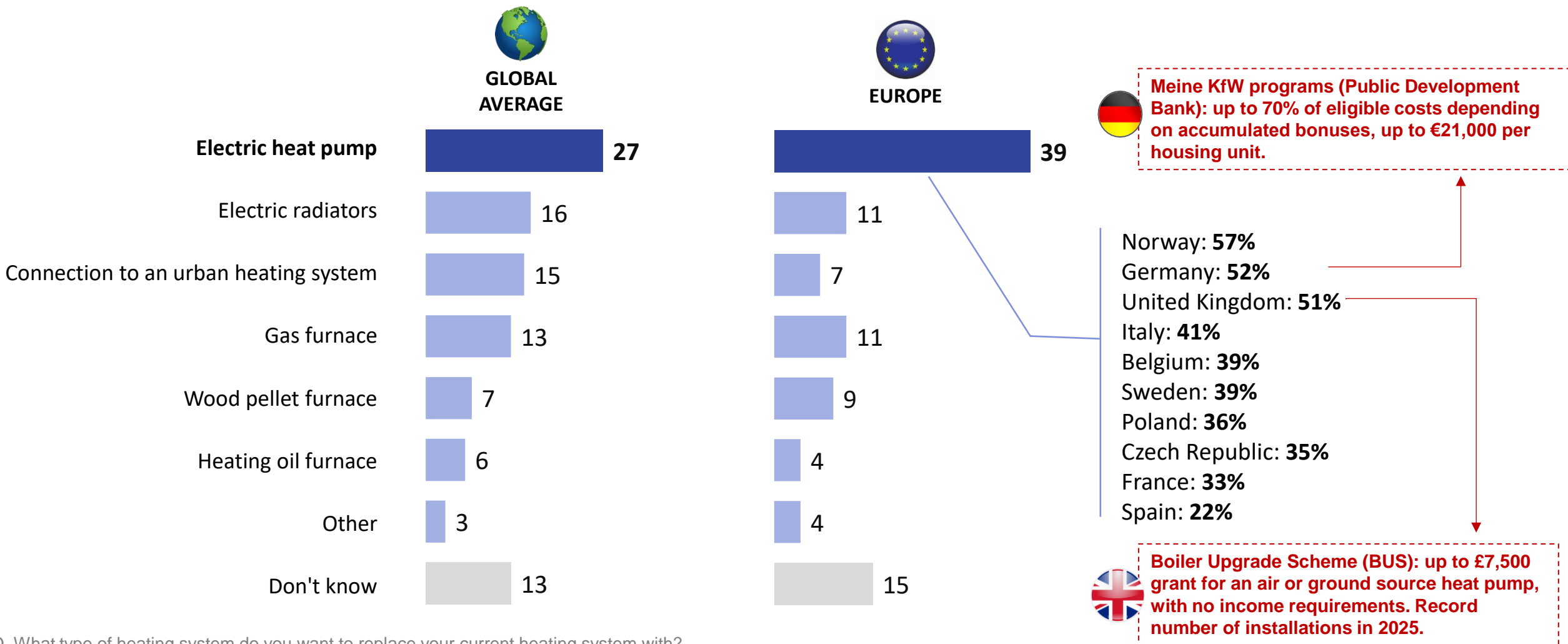
Heat pump sales per 1000 inhabitants (2023)

Source: EHPA Market Report 2025

The heat pump, the leading heating choice when updating systems

A particularly attractive system in Norway, Germany and now in the United Kingdom

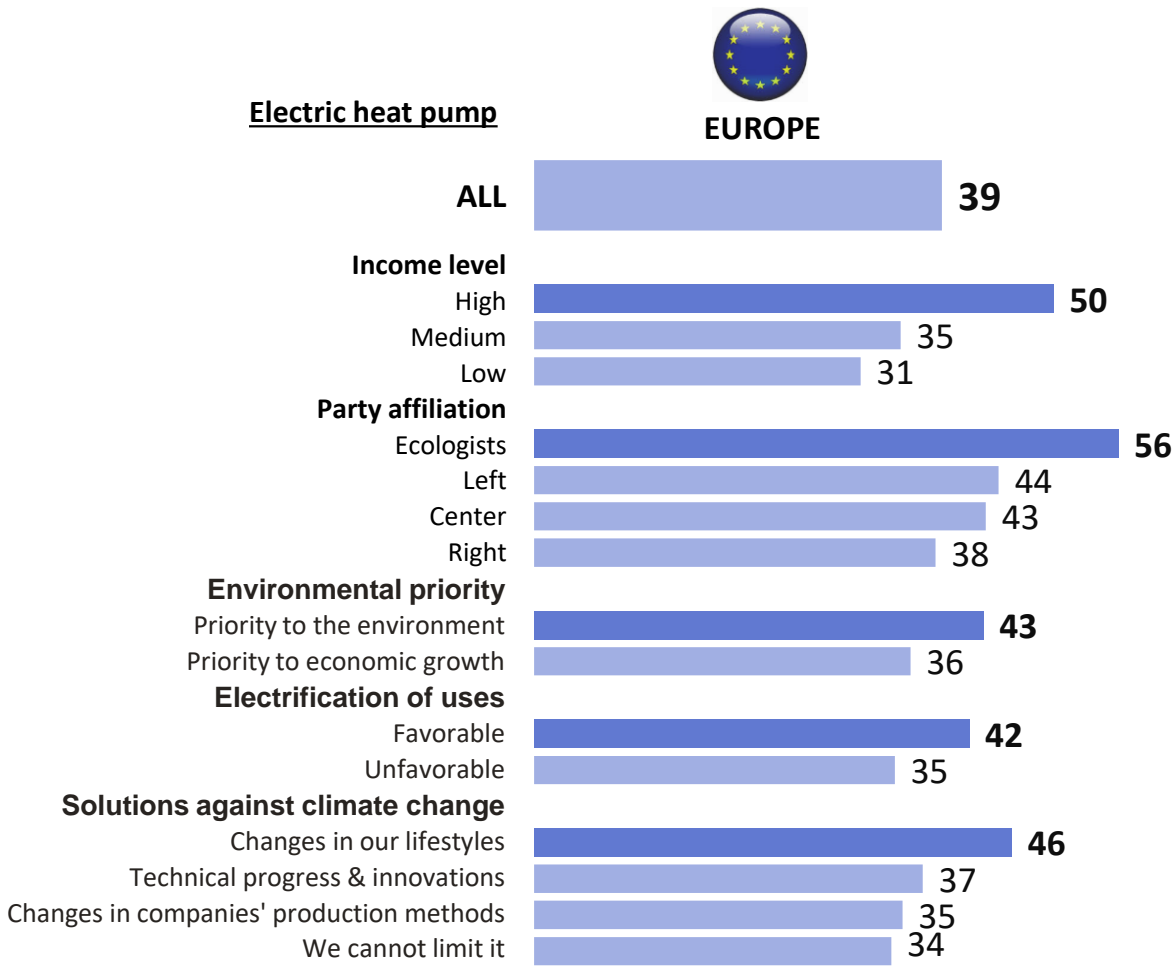
Type of heating system considered when planning a replacement



Q. What type of heating system do you want to replace your current heating system with?
Base: Owners with an individual main heating system who are considering changing it within the next 3 years

In Europe, the preferred solution for high incomes and anyone with environmental concerns: the HP seems to have a good environmental image

Plans to adopt a heat pump



Q. What type of heating system do you want to replace your current heating system with?
Base: Owners with an individual main heating system who are considering changing it within the next 3 years

Outside Europe, heat pumps have a certain appeal in the USA and Australia...

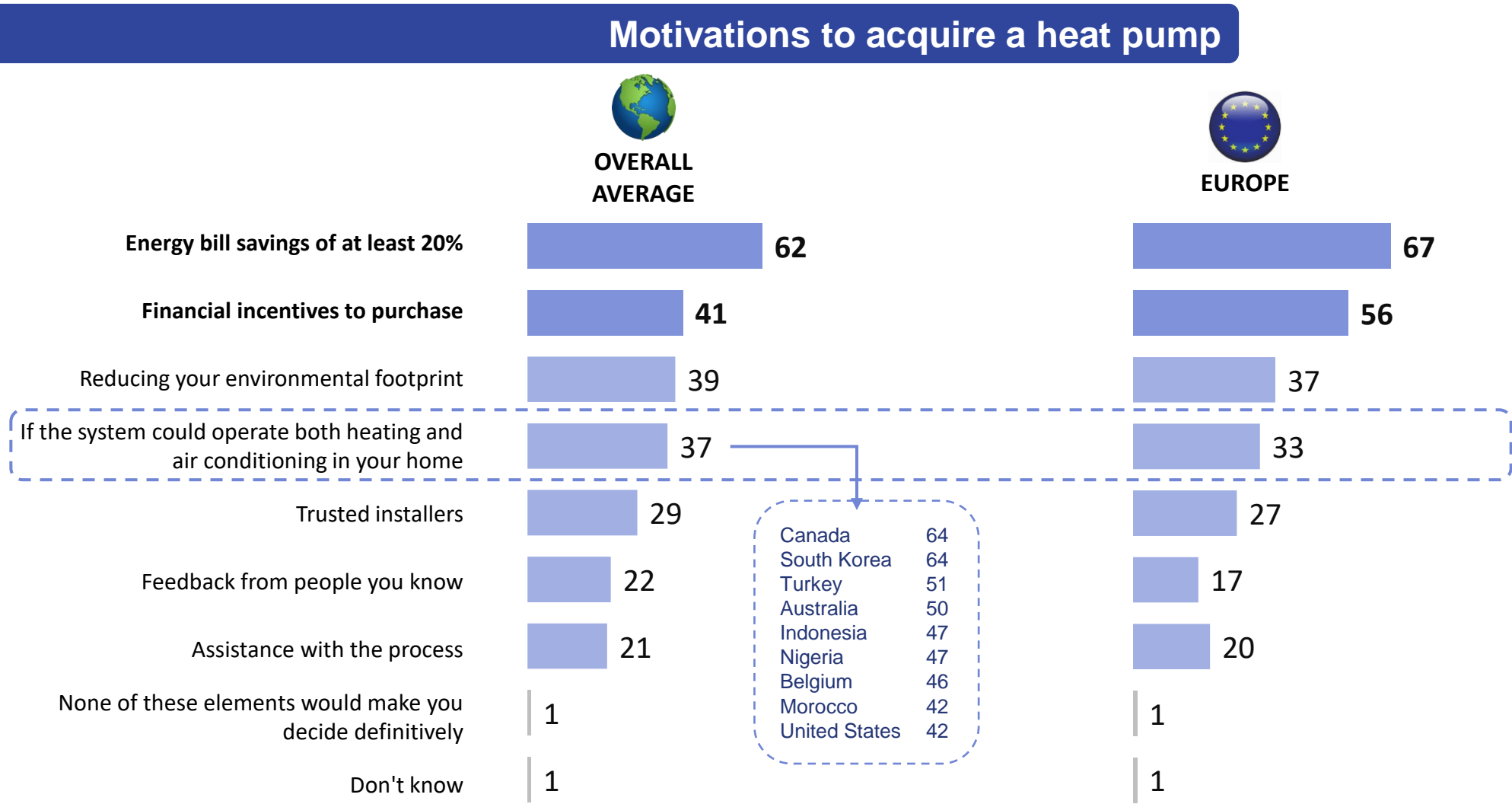
Type of heating system considered when planning a replacement

Base: Owner with an individual heating source who is thinking of replacing their heating system in the next 3 years

		Electric heat pump	Electric radiators	Connection to an urban heating system	Gas furnace	Wood pellet furnace	Heating oil furnace
GLOBAL		27	16	15	13	7	6
Europe	Germany	52	7	5	6	11	9
	Belgium	39	12	3	15	2	7
	Spain	22	22	11	7	4	3
	France	33	15	2	13	16	3
	Italy	41	9	6	10	8	2
	Norway	57	17	8	12	0	0
	Poland	36	6	7	14	17	7
	United Kingdom	51	13	10	7	2	1
	Czech Republic	35	7	5	11	20	3
	Sweden	39	0	21	11	0	6
North America	Canada	26	9	3	34	2	8
	United States	37	18	12	13	2	7
Oceania	Australia	37	10	10	12	3	3

Financial savings are still the main driver of HP adoption

Within a context marked by heatwaves and temperature rises, the dual heating/air-conditioning function also has appeal

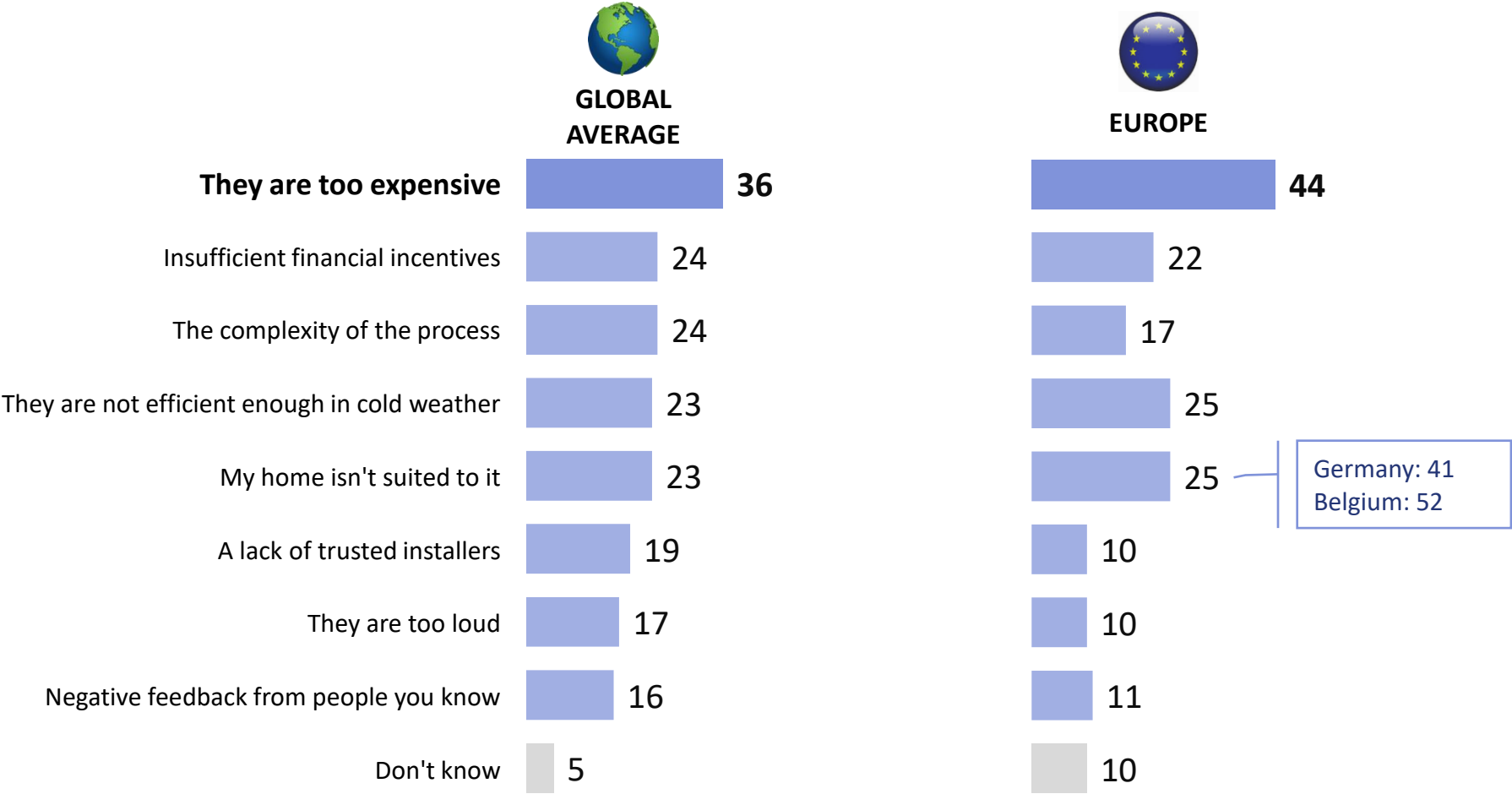


Q. From the following list, select all the elements that would motivate you to switch your heating system to an electric heat pump :
Base : Owner with an individual heating source who think replacing the heating system in the next 3 years for an electric heat pump

The price of heat pumps is the main obstacle to acquiring one

A few doubts persist as to its efficiency in cold weather

Why not consider a heat pump?



Q. What are the main reasons why you don't plan to install a heat pump for heating your main residence in the near future?
Base : Owner with an individual heating source who think replacing the heating system in the next 3 years but not for an electric heat pump

The price of heat pumps presents a particular problem in the United Kingdom, France and Belgium

Why not consider a heat pump?

Base: Do not plan to install a heat pump

	They are too expensive	Insufficient financial incentives	The complexity of the process	They are not efficient enough in cold weather	My home isn't suited to it	A lack of trusted installers	They are too loud	Negative feedback from people you know
GLOBAL	36	24	24	23	23	19	17	16
Germany	30	20	29	15	41	19	23	10
Belgium	58	24	8	19	52	6	21	5
Spain	34	19	18	23	17	8	7	16
France	60	31	9	29	13	13	21	13
Italy	41	27	13	22	18	5	9	7
Norway	36	38	25	12	21	14	6	6
Poland	46	18	15	23	27	20	4	9
United Kingdom	64	19	33	36	34	6	11	11
Czech Republic	37	11	16	35	37	4	0	22
Sweden	15	10	25	51	0	0	13	10
Canada	24	31	17	17	9	19	12	6
United States	26	16	38	34	22	13	20	15
Australia	34	15	20	33	32	14	22	8

Contacts



Estelle CHANDEZE
Director, Corporate Reputation
estelle.chandeze@ipsos.com

Margaux SCHMITT
Group Leader, Corporate Reputation
margaux.schmitt@ipsos.com



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

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

