

VIEWS ABOUT SUSTAINABLE ENERGY

A 30-country Global Advisor survey for the World Economic Forum
March 2022

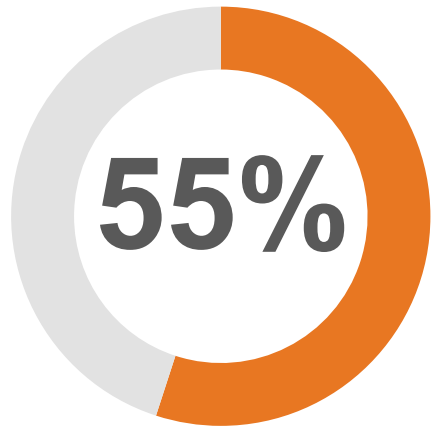
For more information: <https://www.ipsos.com/en/views-about-sustainable-energy>

GAME CHANGERS



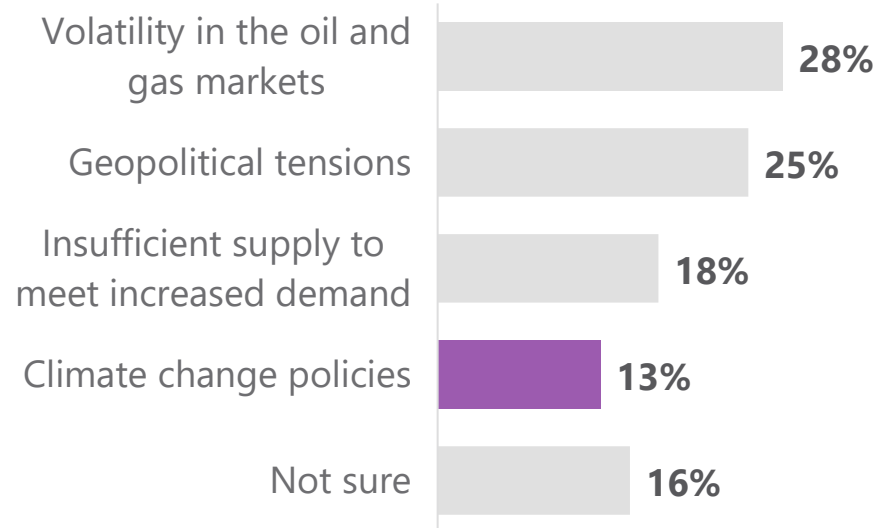
SUMMARY OF FINDINGS

On average, across 30 countries:

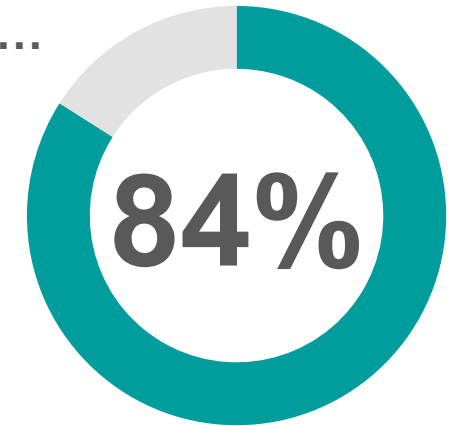


say that if energy prices continue to increase, it will significantly affect their overall spending power...

...but only 13% say climate change policies are the main reason why energy prices are increasing



and...



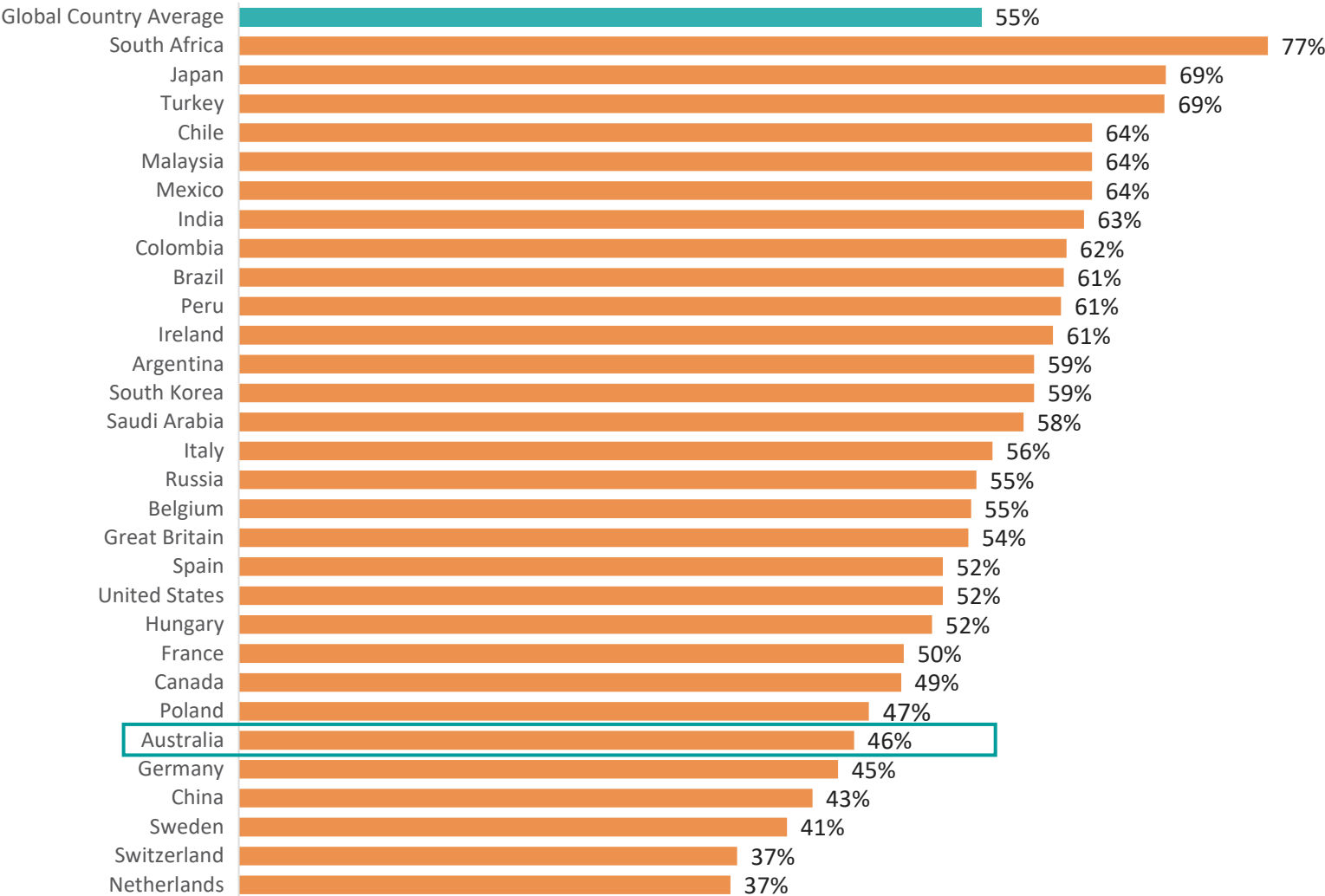
say it is important to them that their country shifts away from fossil fuels to more climate-friendly and sustainable energy sources

EXPECTATION ENERGY PRICE INCREASES WILL AFFECT ONE'S SPENDING POWER BY COUNTRY

% “A great deal or a fair amount”

Q. Think of all the energy you use daily for transportation, heating or cooling your home, cooking, powering your appliances, etc., and how much you pay for it. If energy prices continue to increase, to what extent will it affect your overall spending power?

- More than half of consumers on average across 30 countries expect their overall spending power to be significantly impacted by further energy price increases.
- Countries where energy price hikes are most widely expected to affect consumers are South Africa, Japan, and Turkey

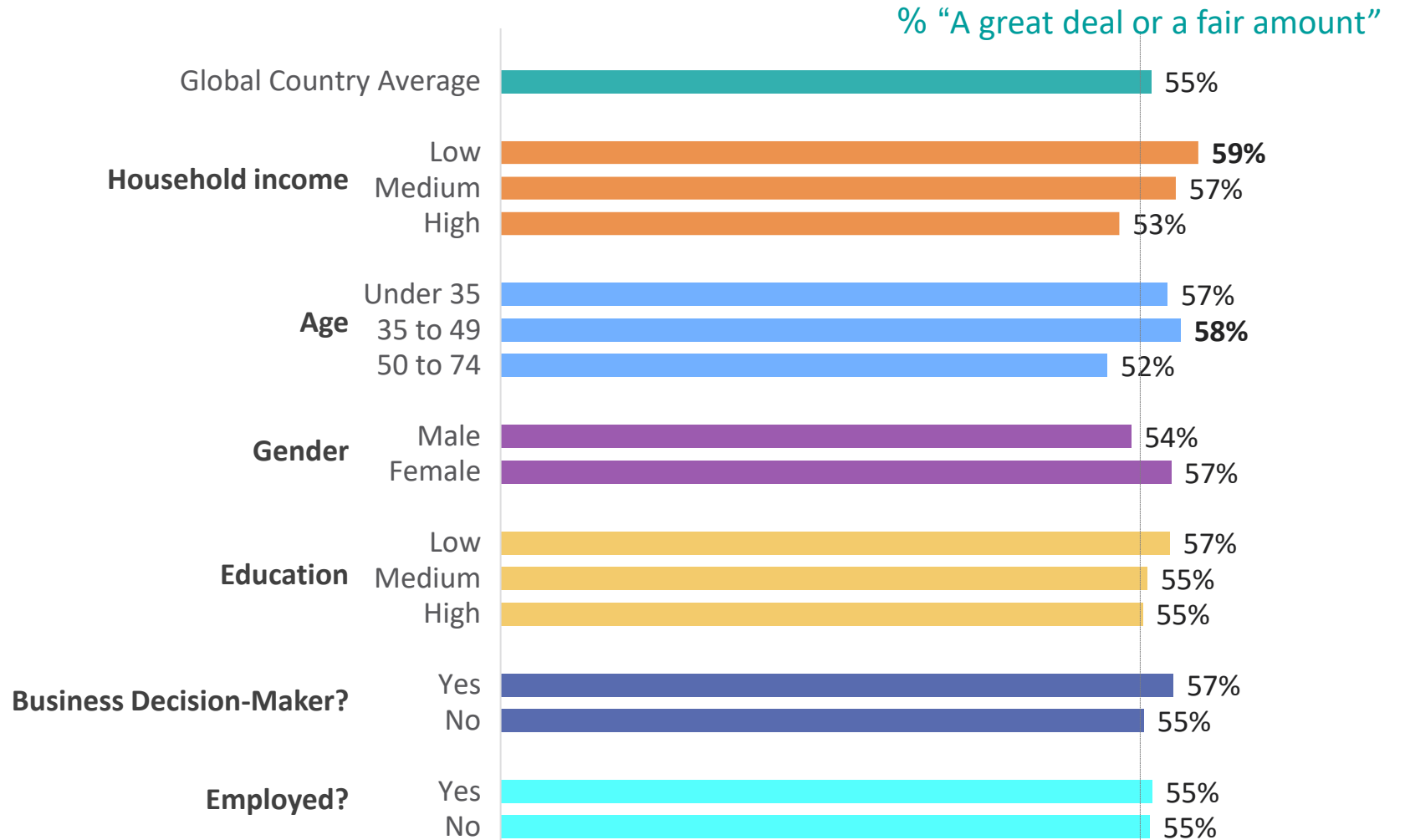


Base: 22,534 online adults aged 16-74 or 18-74 across 30 countries
The “Global Country Average” reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.
The samples in Brazil, Chile, China (mainland), Colombia, India, Malaysia, Mexico, Peru, Russia, Saudi Arabia, South Africa, and Turkey are more urban, more educated, and/or more affluent than the general population.

HOW MUCH DEMOGRAPHIC GROUPS EXPECT ENERGY PRICE INCREASES TO AFFECT THEIR SPENDING POWER

Q. Think of all the energy you use daily for transportation, heating or cooling your home, cooking, powering your appliances, etc., and how much you pay for it. If energy prices continue to increase, to what extent will it affect your overall spending power?

- Globally, the survey finds few differences across demographic groups when it comes to the expectation that one's overall spending power will be impacted by continued energy price increases
- Concern is slightly higher among those with a lower income and those in the 35-49 age group.



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PERCEIVED MAIN REASON WHY ENERGY PRICES ARE INCREASING

Q. Many people have seen the prices for various forms of energy (electricity, natural gas, oil/gasoline, etc.) rise recently. Which of these do you think is the main reason why energy prices are increasing:

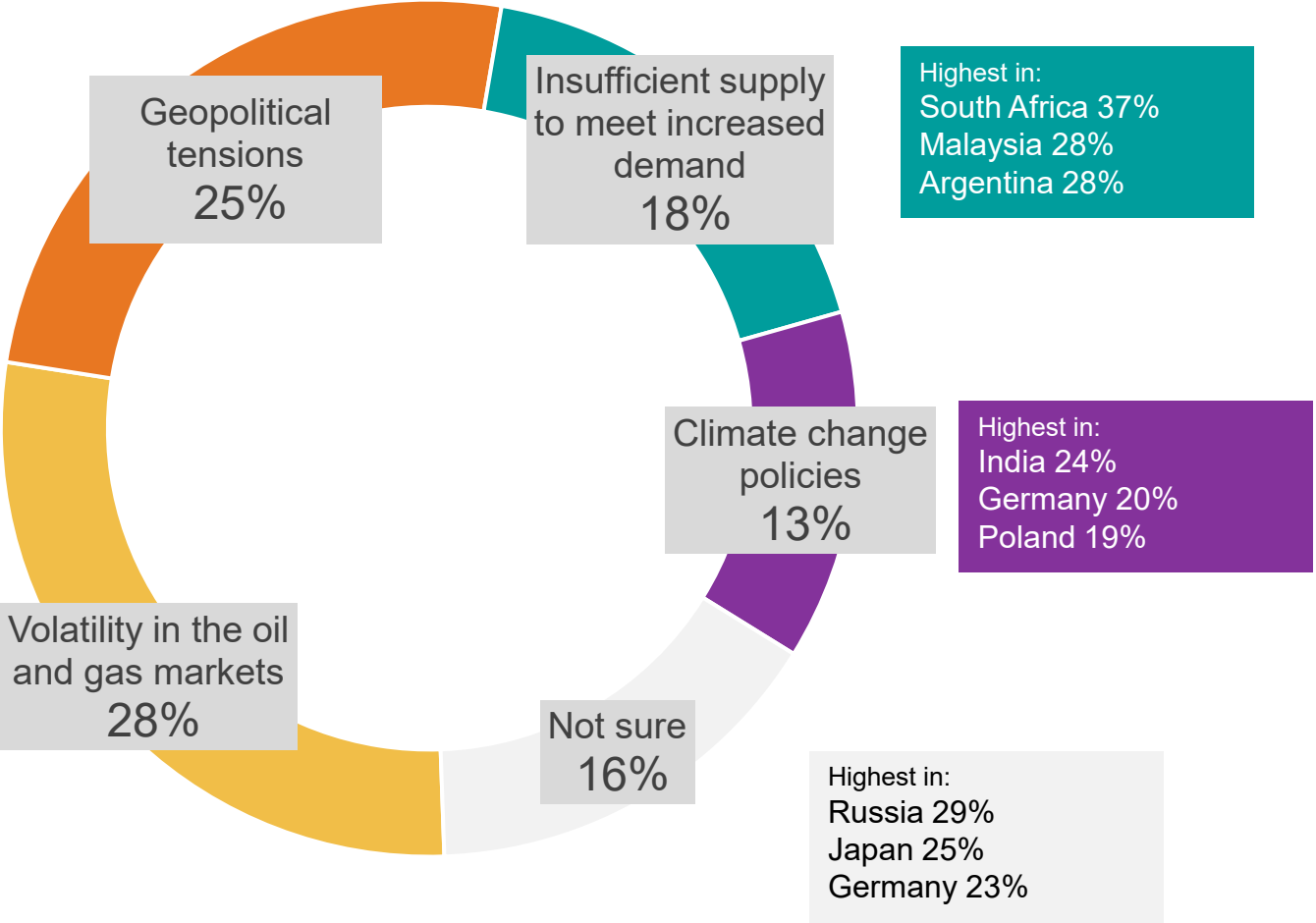
- Consumers throughout the world show a diversity of views on the main reason for energy price hikes
- Each of volatility in the oil and gas markets and geopolitical tensions are cited by about 1 in 4; insufficient supply to meet increased demand by about 1 in 6 and climate change policies by only about 1 in 7
- With only one exception, no single reason is cited by a majority in any country

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Highest in:
Netherlands 54%
Belgium 46%
Italy 42%

Highest in:
Mexico 40%
South Korea 38%
Peru 36%
Saudi Arabia 36%



MAIN REASON WHY ENERGY PRICES ARE INCREASING BY COUNTRY

Q. Many people have seen the prices for various forms of energy (electricity, natural gas, oil/gasoline, etc.) rise recently. Which of these do you think is the main reason why energy prices are increasing:

	Volatility in the oil and gas markets	Geopolitical tensions	Climate change policies	Insufficient supply to meet increased demand	Not sure
Global Country Average	28%	25%	13%	18%	16%
Argentina	21%	22%	8%	28%	21%
Australia	32%	19%	17%	15%	18%
Belgium	20%	46%	10%	10%	14%
Brazil	30%	19%	15%	17%	18%
Canada	24%	23%	16%	15%	22%
Chile	35%	24%	8%	18%	15%
China	26%	36%	15%	18%	5%
Colombia	31%	21%	13%	23%	13%
France	25%	34%	11%	14%	16%
Germany	19%	27%	20%	11%	23%
Great Britain	34%	19%	11%	18%	20%
Hungary	33%	28%	9%	15%	16%
India	24%	16%	24%	27%	9%
Ireland	34%	21%	17%	18%	10%
Italy	20%	42%	7%	16%	15%
Japan	31%	14%	9%	21%	25%
Malaysia	33%	19%	13%	28%	6%
Mexico	40%	14%	11%	20%	15%
Netherlands	13%	54%	8%	15%	11%
Peru	36%	23%	10%	16%	14%
Poland	35%	21%	19%	8%	16%
Russia	20%	36%	8%	8%	29%
Saudi Arabia	36%	18%	16%	15%	15%
South Africa	26%	14%	15%	37%	9%
South Korea	38%	22%	18%	18%	5%
Spain	32%	25%	12%	13%	18%
Sweden	20%	25%	13%	26%	16%
Switzerland	17%	39%	16%	13%	15%
Turkey	29%	20%	14%	18%	19%
United States	28%	20%	13%	20%	20%

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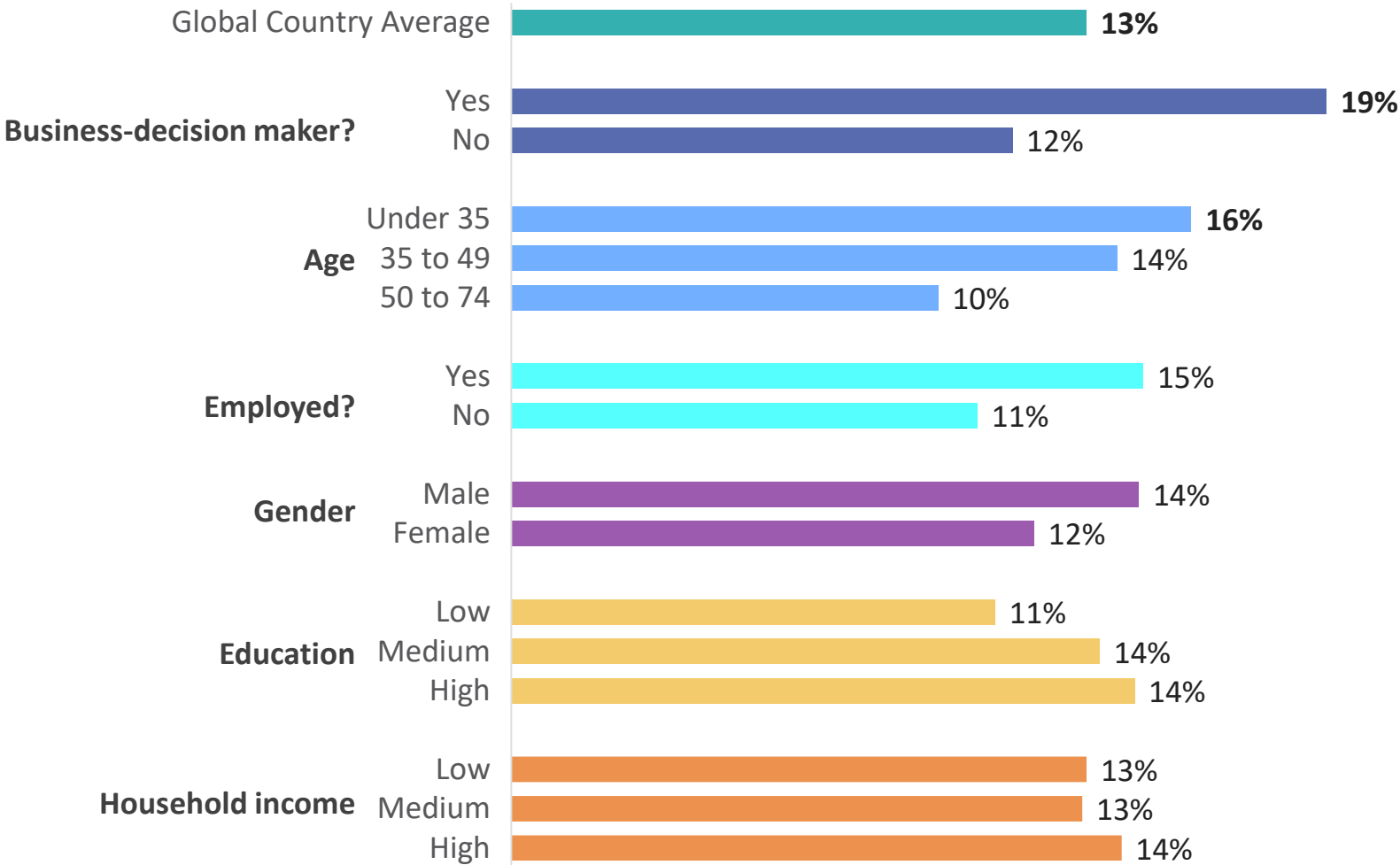
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TO WHAT EXTENT ARE CLIMATE CHANGE POLICIES VIEWED AS THE MAIN REASON FOR INCREASING ENERGY PRICES

Q. Many people have seen the prices for various forms of energy (electricity, natural gas, oil/gasoline, etc.) rise recently. Which of these do you think is the main reason why energy prices are increasing:

■ Business decision-makers and, to a lesser extent, younger adults are the only demographic groups that are significantly more likely to blame climate changed policies for energy price increases.

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PERCEIVED IMPORTANCE OF OWN COUNTRY'S SHIFT AWAY FROM FOSSIL FUELS

% “A great deal or a fair amount”

Q. How important is it to you that [YOUR COUNTRY] shifts away from fossil fuels to more climate-friendly and sustainable energy sources over the next 5 years?

- On average, more than 8 in 10 globally say it's important to them that their country shift s away from fossil fuels in the next five years.
- Citizens of emerging countries are especially adamant about it.

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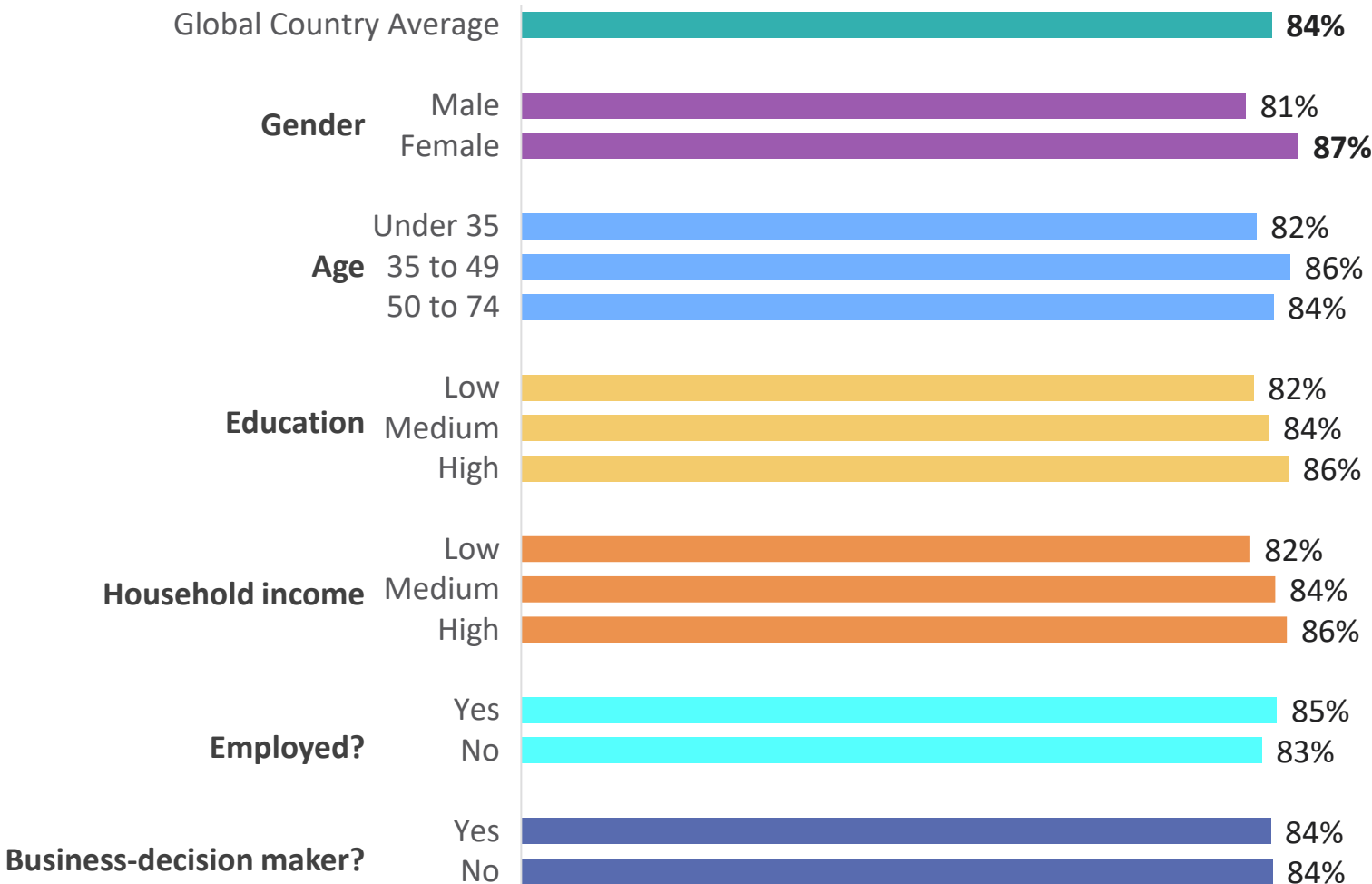
HOW MUCH DEMOGRAPHIC GROUPS PERCEIVE SHIFT AWAY FROM FOSSIL FUELS AS IMPORTANT

% “A great deal or a fair amount”

Q. How important is it to you that [YOUR COUNTRY] shifts away from fossil fuels to more climate-friendly and sustainable energy sources over the next 5 years?

- Globally, the level of importance granted to shifting away from fossil fuels is very high across all demographic groups
- The only difference of note (6 points) is between the percentages of women (87%) and of men (81%) saying it is important

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Methodology

These are the findings of a 30-country Ipsos survey conducted February 18 – March 4, 2022, among 22,534 adults aged 18-74 in the United States, Canada, Ireland (Republic), Malaysia, South Africa, and Turkey, and 16-74 in 24 other countries, via Ipsos's Global Advisor online survey platform.

Each country's sample consists of ca. 2000 individuals in Japan and the United States, ca. 1000 individuals in Australia, Brazil, Canada, China (mainland), France, Germany, Great Britain, Italy, and Spain, and ca. 500 individuals in Argentina, Belgium, Chile, Colombia, Hungary, India, Ireland, Malaysia, Mexico, the Netherlands, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Sweden, Switzerland, and Turkey.

The samples in Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Ireland, Italy, Japan, the Netherlands, Poland, South Korea, Spain, Sweden, Switzerland, and the United States can be taken as representative of these countries' general adult population under the age of 75.

The samples in Brazil, Chile, China (mainland), Colombia, India, Malaysia, Mexico, Peru, Russia, Saudi Arabia, South Africa, and Turkey are more urban, more educated, and/or more affluent than the general population. The survey results for these markets should be viewed as reflecting the views of the more "connected" segment of their population.

The data is weighted so that each market's sample composition best reflects the demographic profile of the adult population according to the most recent census data.

The Global average reflects the average result of all the countries and markets where the survey was conducted that year. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.

Where results do not sum to 100 or the 'difference' appears to be +/-1 more/less than the actual, this may be due to rounding, multiple responses or the exclusion of don't knows or not stated responses.

The precision of Ipsos online polls is calculated using a credibility interval with a poll of 1,000 accurate to +/- 3.5 percentage points and of 500 accurate to +/- 4.8 percentage points. For more information on Ipsos's use of credibility intervals, please visit the Ipsos website.

The publication of these findings abides by local rules and regulations.

ABOUT IPSOS

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Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques.

“Game Changers” – our tagline – summarises our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

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

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GAME CHANGERS

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

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

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

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

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

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