

BNP PARIBAS 'JUST TRANSITION'

GLOBAL REPORT
APRIL 2023

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BNP PARIBAS



GLOSSARY

CONCERN & COMMITMENT TO CLIMATE CHANGE

P.5



CHALLENGES OF JUST TRANSITION

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**ENERGY TRANSITION:
CONCEPT PERCEPTIONS,
ACTORS AND ACTIONS**

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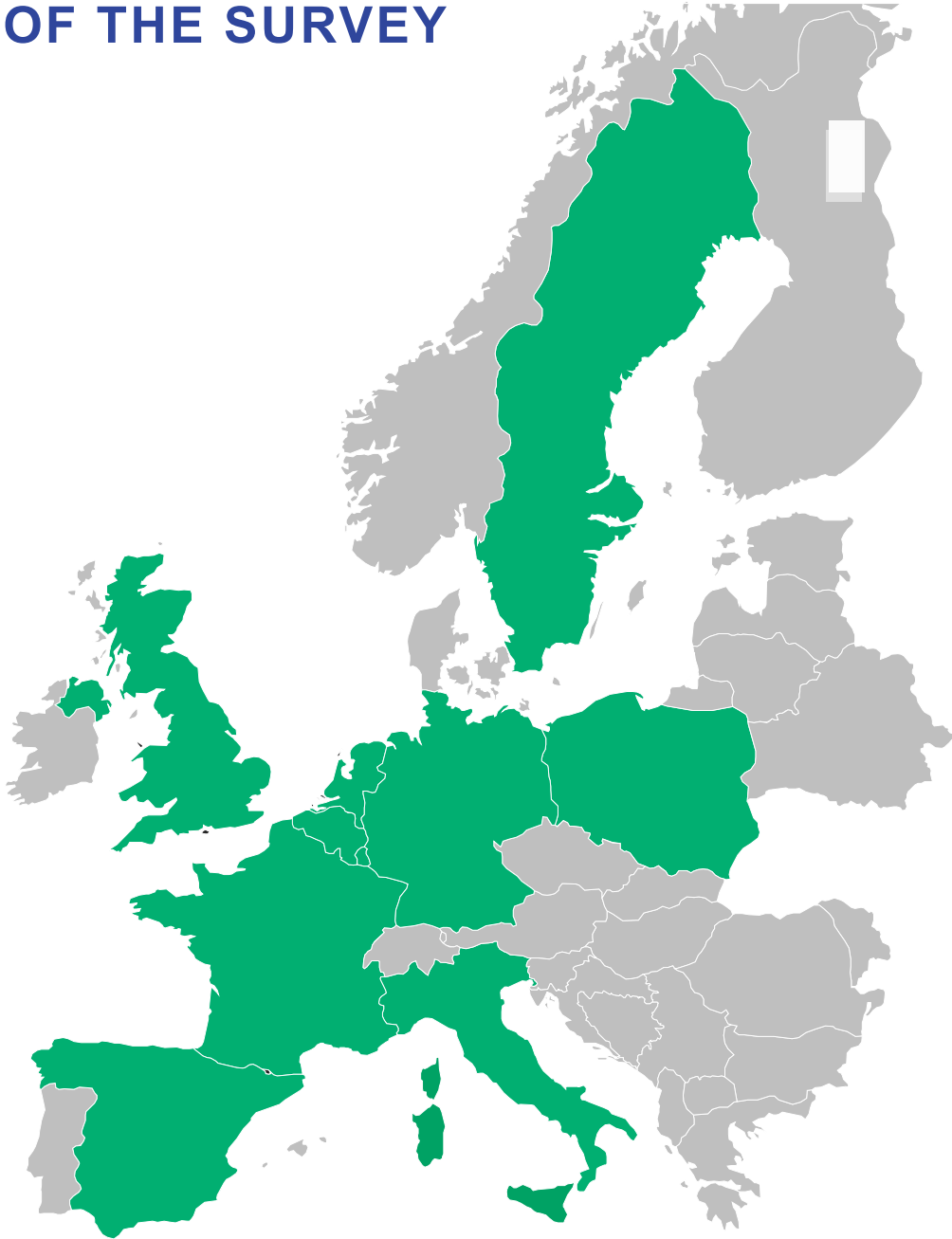


APPENDICES

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SCOPE OF THE SURVEY



Number of interviews conducted per country

	BELGIUM	1000
	FRANCE	1000
	GERMANY	1000
	ITALY	1000
	LUXEMBOURG	445
	NETHERLANDS	1000
	POLAND	1000
	SPAIN	1000
	SWEDEN	1000
	UNITED-KINGDOM	1000

METHODOLOGY



SAMPLE

- Sample of **9445 individuals**
- **Representative of the population** aged 18 and over in each of the **10 countries covered by the study**



REPRESENTATIVENESS

- Representativeness was ensured according to the **quota method** / INSEE data
- Quotas : gender, age, occupation and market size
- The results were weighted to be perfectly representative on these variables



METHODE OF DATA COLLECTION

- Respondents were interviewed **by Internet** (self-administered questionnaire) via the Ipsos online panel
- Fieldwork conducted from **17 February to 16 March 2023**
- The average length of the questionnaire is **18 minutes**

READING NOTE

In the comparative country results, **significant differences** from the overall average are indicated as follows:

XX the result is significantly **higher** than the overall average

XX the result is significantly **lower** than the overall average



CONCERN & COMMITMENT TO CLIMATE CHANGE











1

MAIN CONCERNS

Q0 : Which two of the following issues are of most concern to you personally? – Two answers possible

Base : All (9445)

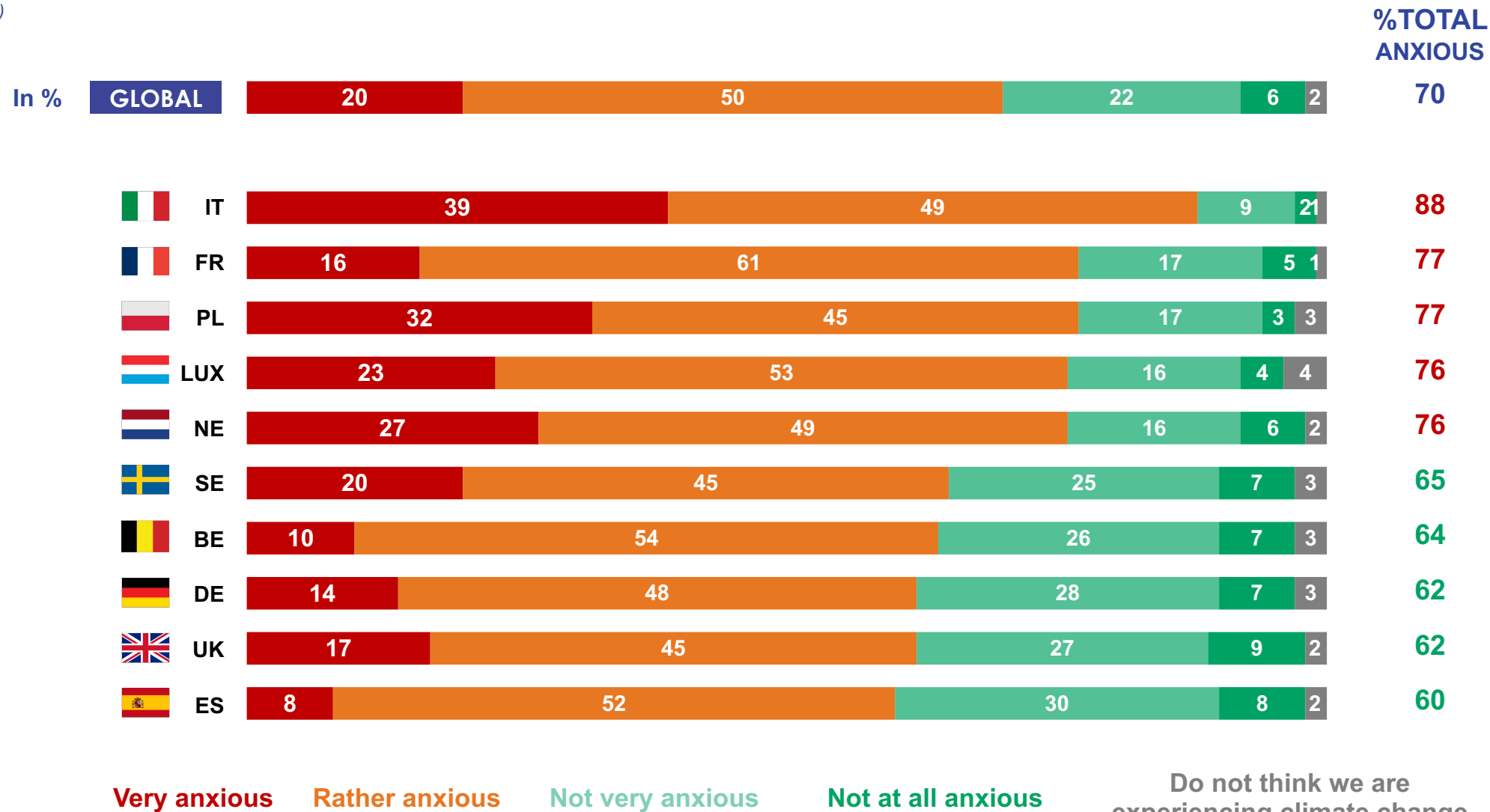
#TOP 3 – MAIN CONCERNS

GLOBAL		 BE	 FR	 DE	 IT	 LUX	 NE	 PL	 ES	 SE	 UK
#1	Purchasing power	Purchasing power	Purchasing power	International situation	Purchasing power	Purchasing power	Purchasing power	International situation	Purchasing power	Insecurity	Future of public services
#2	Effects of global warming & International situation	Effects of global warming	Effects of global warming	Effects of global warming	Effects of global warming	Effects of global warming	Effects of global warming	Purchasing power	Future of public services	International situation	Purchasing power
#3	Future of public services	International situation	International situation & Insecurity	Purchasing power	International situation	International situation	International situation	Future of public services	Effects of global warming	Purchasing power	Effects of global warming
								#4	Effects of global warming	Effects of global warming	

LEVEL OF ANXIETY REGARDING CLIMATE CHANGE

Q1 : With regard to climate change and its consequences (heat waves, drought, rising water levels, etc.), would you say that you are:

Base : All (9445)



Very anxious

Rather anxious

Not very anxious

Not at all anxious

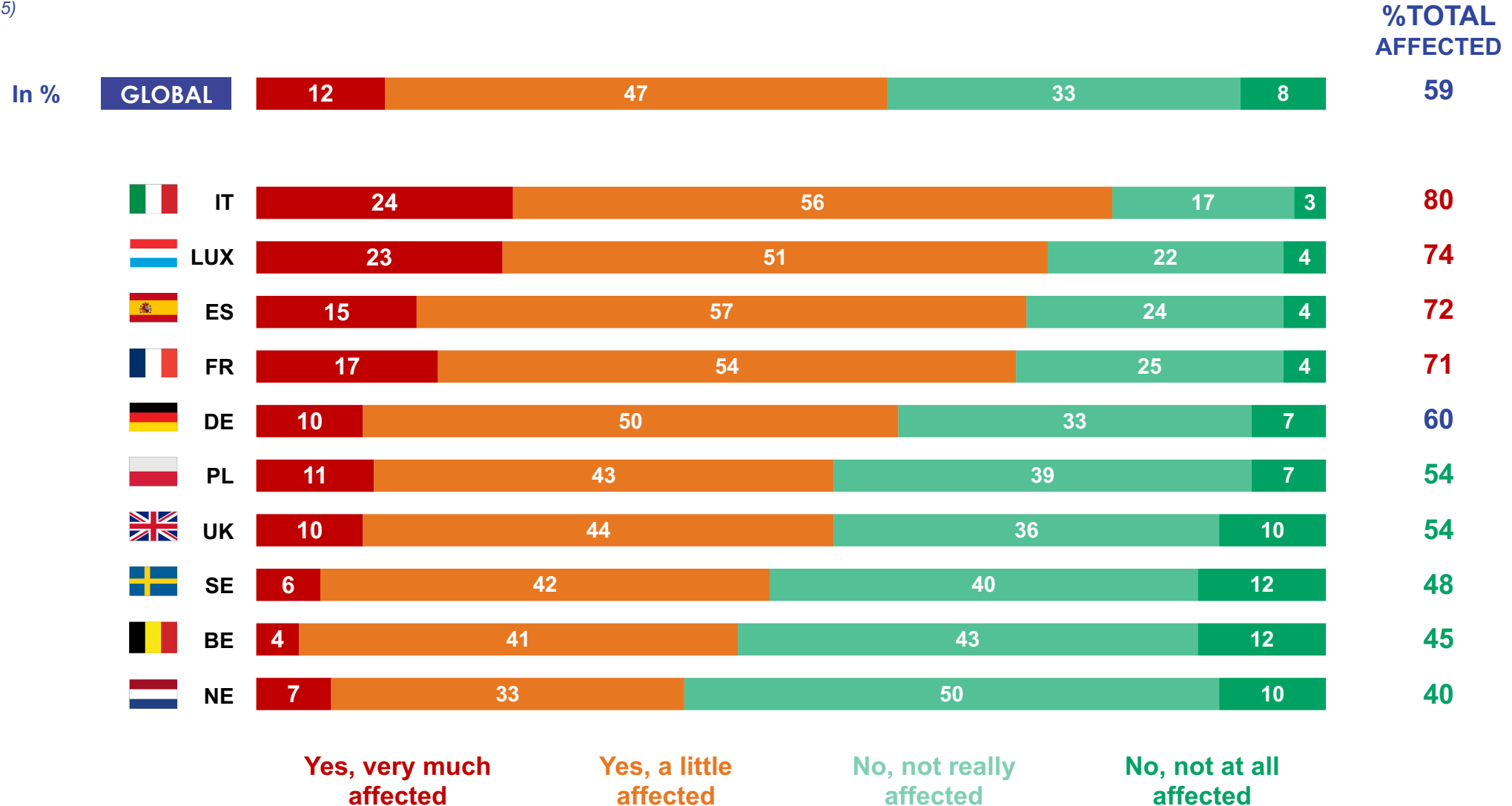
Do not think we are experiencing climate change



PERCEIVED NEGATIVE IMPACT OF CLIMATE CHANGE

Q2 : In your region, do you personally feel affected by the consequences of climate change?

Base : All (9445)



PERCEIVED IMPACT OF DIFFERENT POPULATIONS ON GLOBAL WARMING

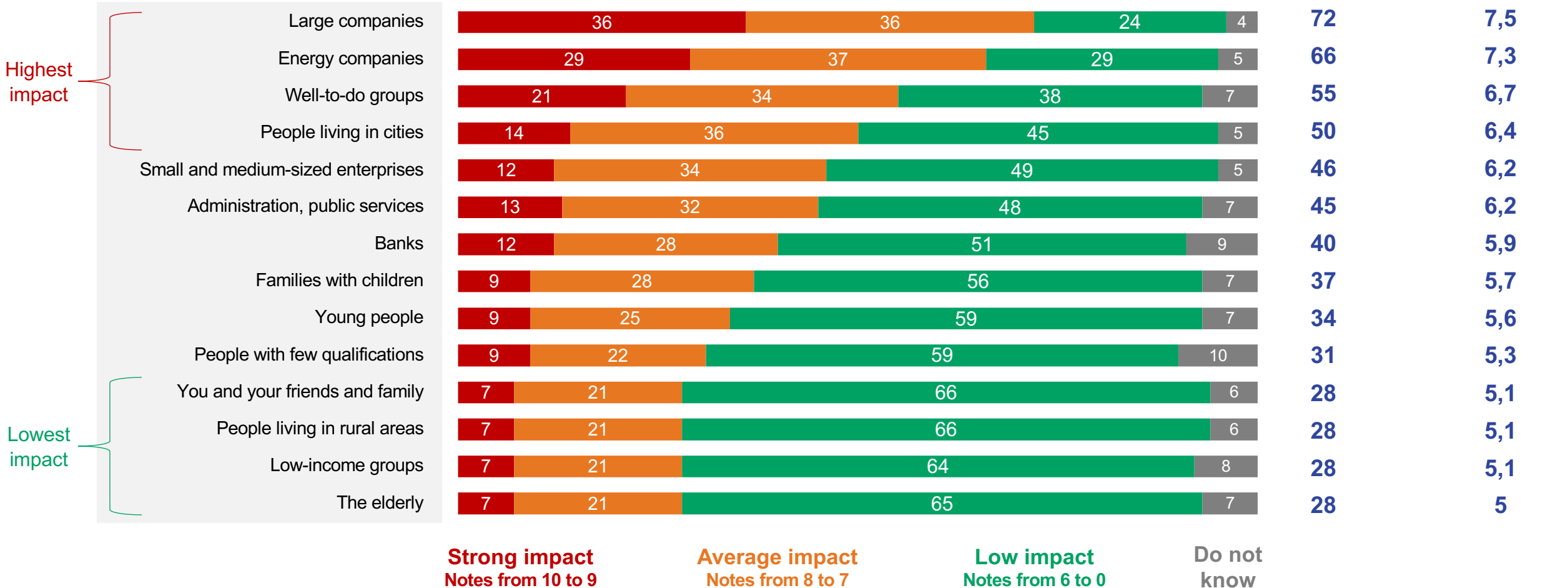
Q4 : And would you say that the following groups have an impact on global warming? 0 means that their lifestyle has no impact on global warming, while 10 means it has an extremely large negative impact.

Base : All (9445)

In % **GLOBAL**

% TOTAL
Notes from 7 to 10

Average/10



Strong impact
Notes from 10 to 9

Average impact
Notes from 8 to 7

Low impact
Notes from 6 to 5

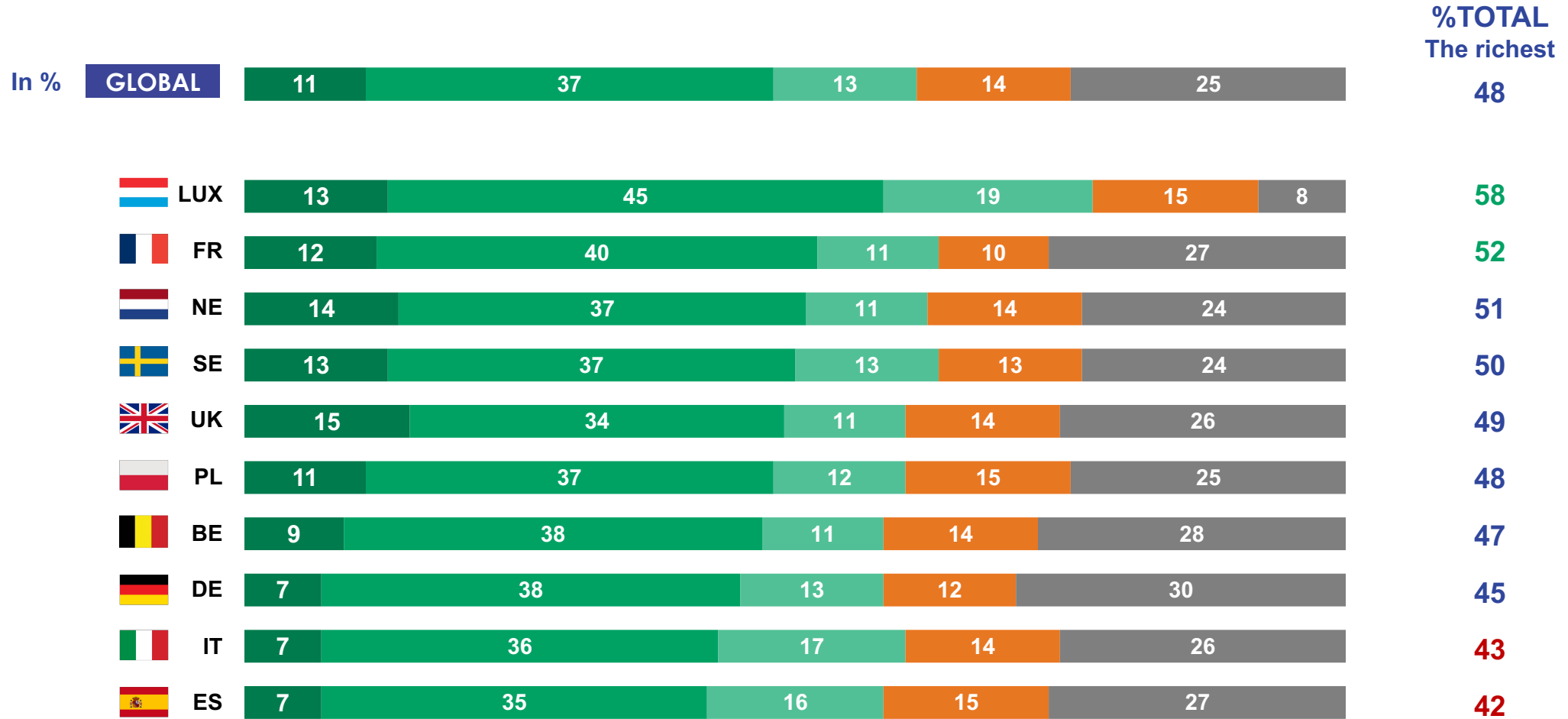
Do not know



PERCEPTION OF CATEGORIES CONTRIBUTING MOST TO GLOBAL WARMING

Q32 : Who do you think contributes most to global warming in terms of greenhouse gas?

Base : All (9445)



The richest 1%

The richest 10%

The poorest 50%

The remaining 40%

Do not know





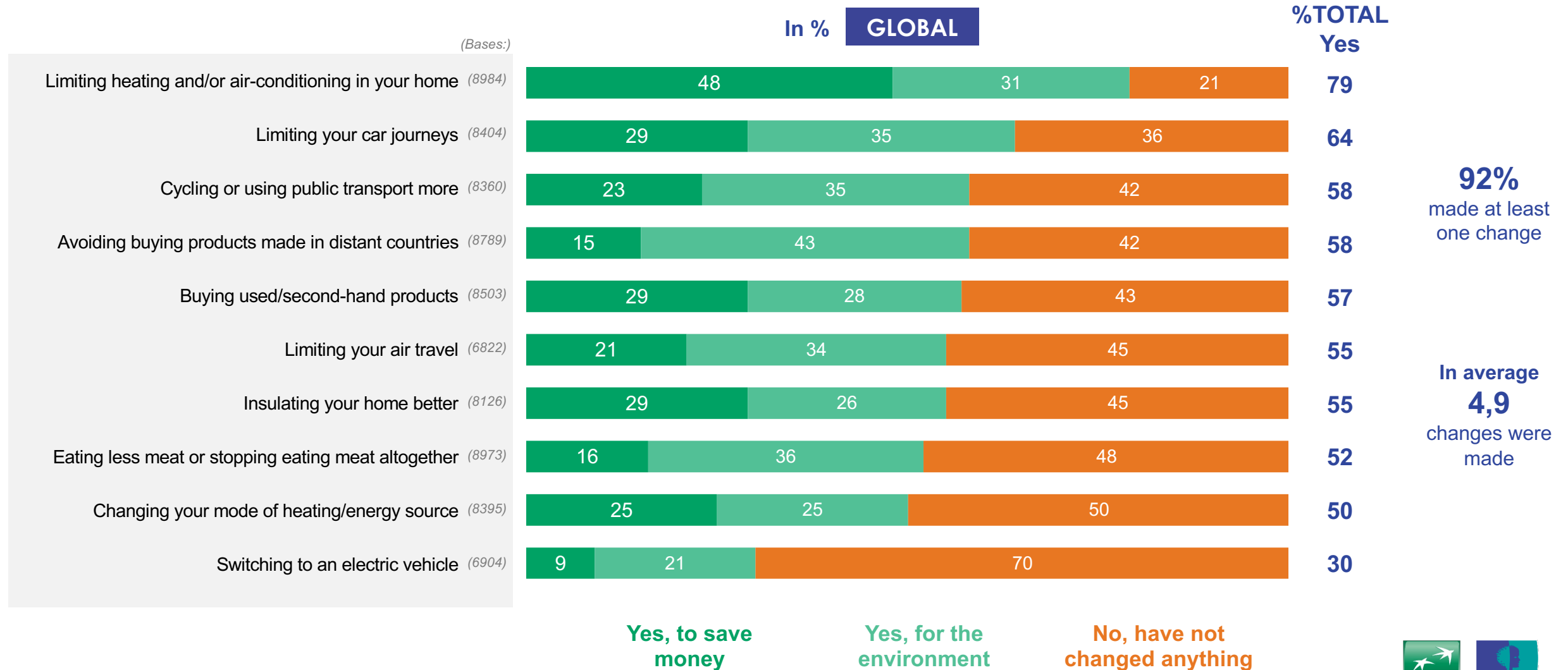
ENERGY TRANSITION: CONCEPT PERCEPTIONS, ACTORS AND ACTIONS

2

COMMITMENT TO THE FIGHT AGAINST CLIMATE CHANGE INDIVIDUAL ACTIONS – CONCERNED BASE

Q6 : In recent years, have you significantly changed your behaviour in the following areas?

Base : Concerned



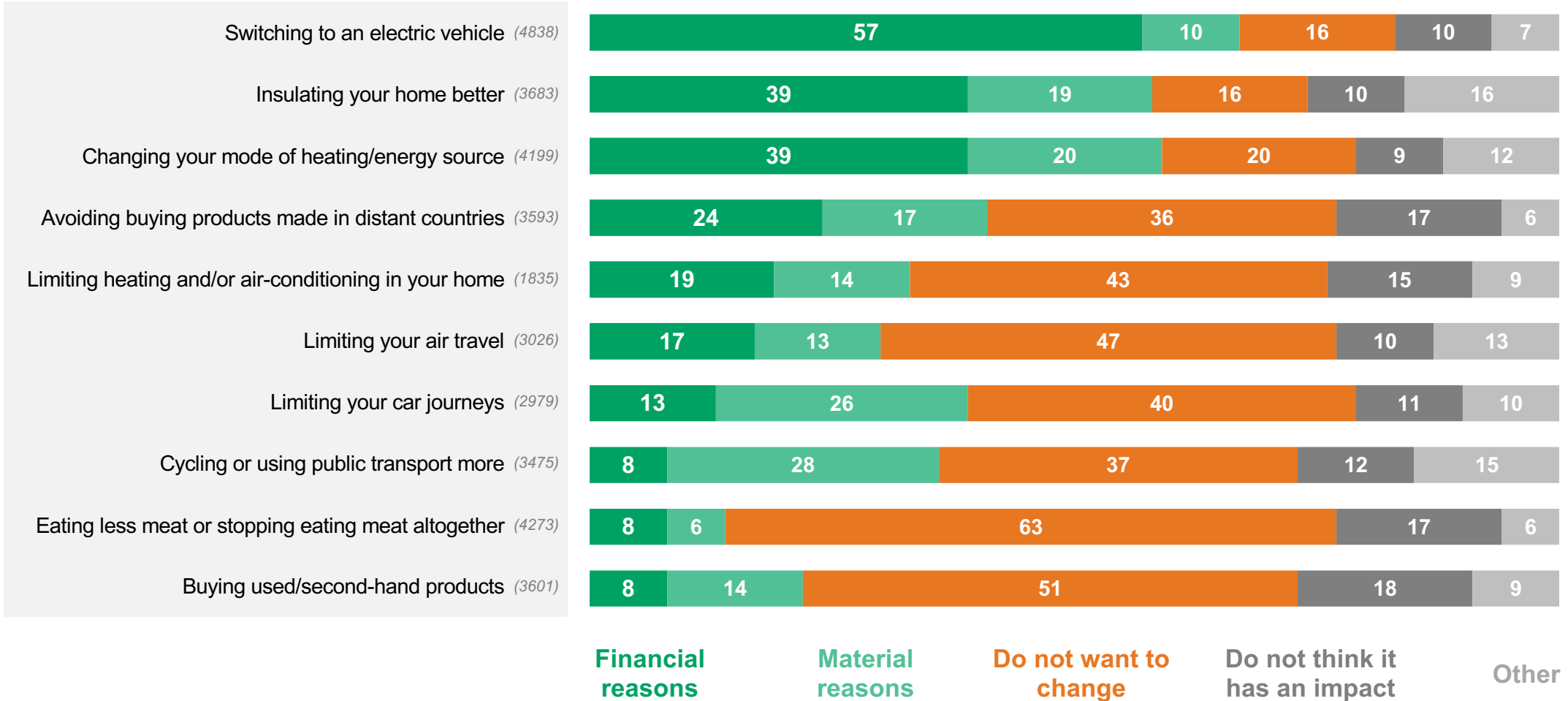
REASONS FOR NOT CHANGING BEHAVIOUR

Q6B : What is the main reason why you have not changed your behaviour in each of these areas?

Base : Did not change his behaviour

In % **GLOBAL**

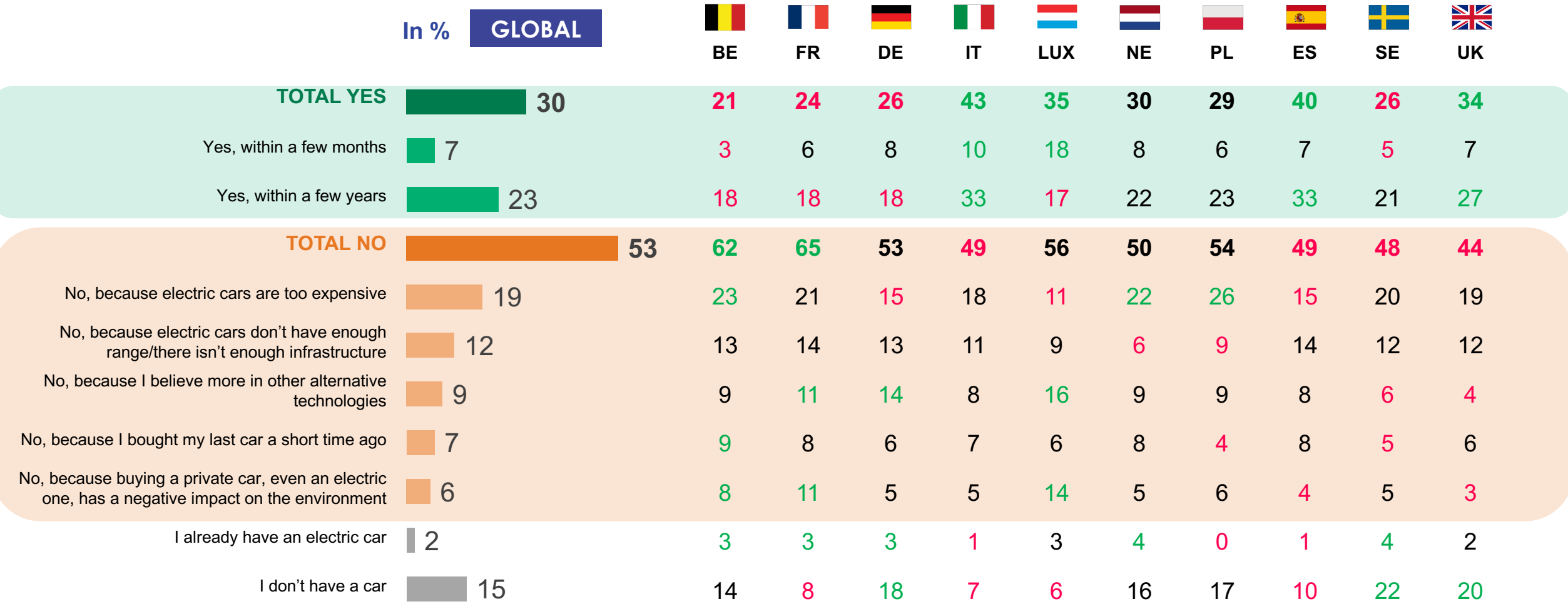
(Bases:)



INTENTION TO SWITCH TO AN ELECTRIC CAR

Q7 : Would you be willing to replace your car with an electric vehicle?

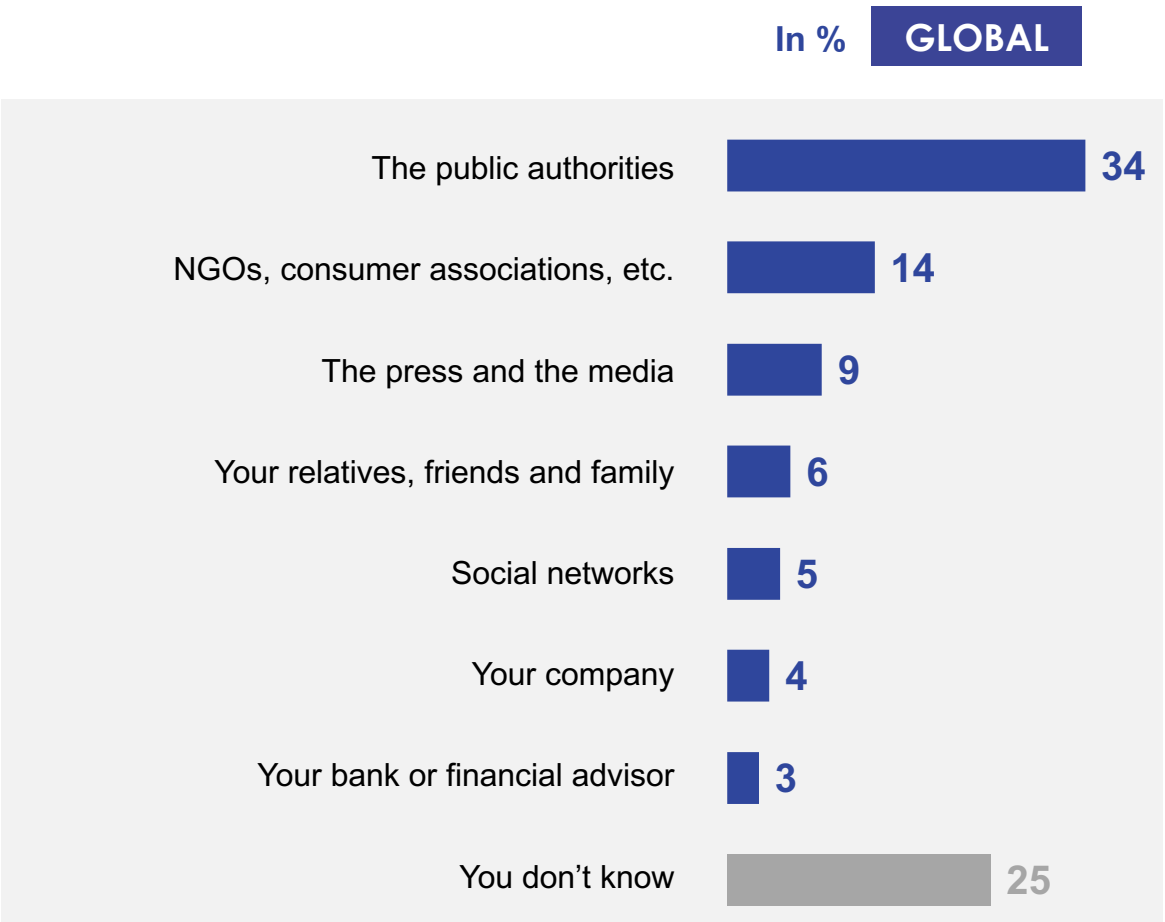
Base : All (9445)



ACTORS TO ADVISE AND ACCOMPANY IN THE ENERGY TRANSITION

Q33 : Who could best advise and support you in the energy transition?

Base : All (9445)

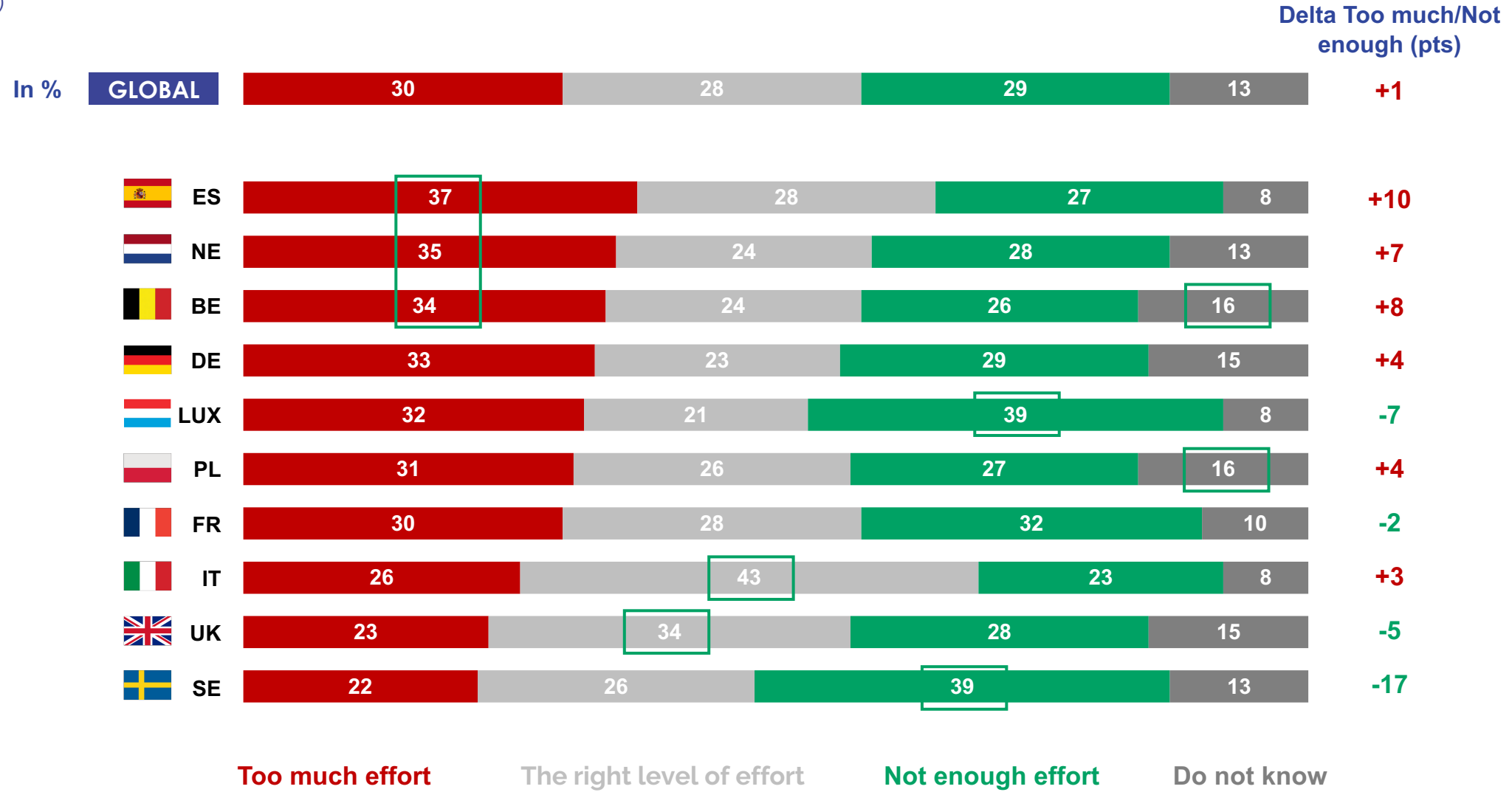


	BE	FR	DE	IT	LUX	NE	PL	ES	SE	UK
The public authorities	44	38	21	37	23	41	22	34	40	35
NGOs, consumer associations, etc.	9	15	17	10	20	12	24	14	12	13
The press and the media	8	8	9	12	12	6	12	11	7	10
Your relatives, friends and family	6	6	8	5	9	6	7	7	6	5
Social networks	3	4	5	5	11	5	6	5	5	5
Your company	2	3	5	4	6	3	2	4	3	4
Your bank or financial advisor	2	2	2	5	7	3	4	3	2	2
You don't know	26	24	33	22	12	24	23	22	25	26



PERCEPTION OF LEVEL OF EFFORT REQUIRED IN THE ENERGY TRANSITION

Q8 : The energy transition requires efforts from citizens to change their habits and behaviour. In your opinion, are citizens being asked for:
 Base : All (9445)



 the result is significantly higher than the overall average

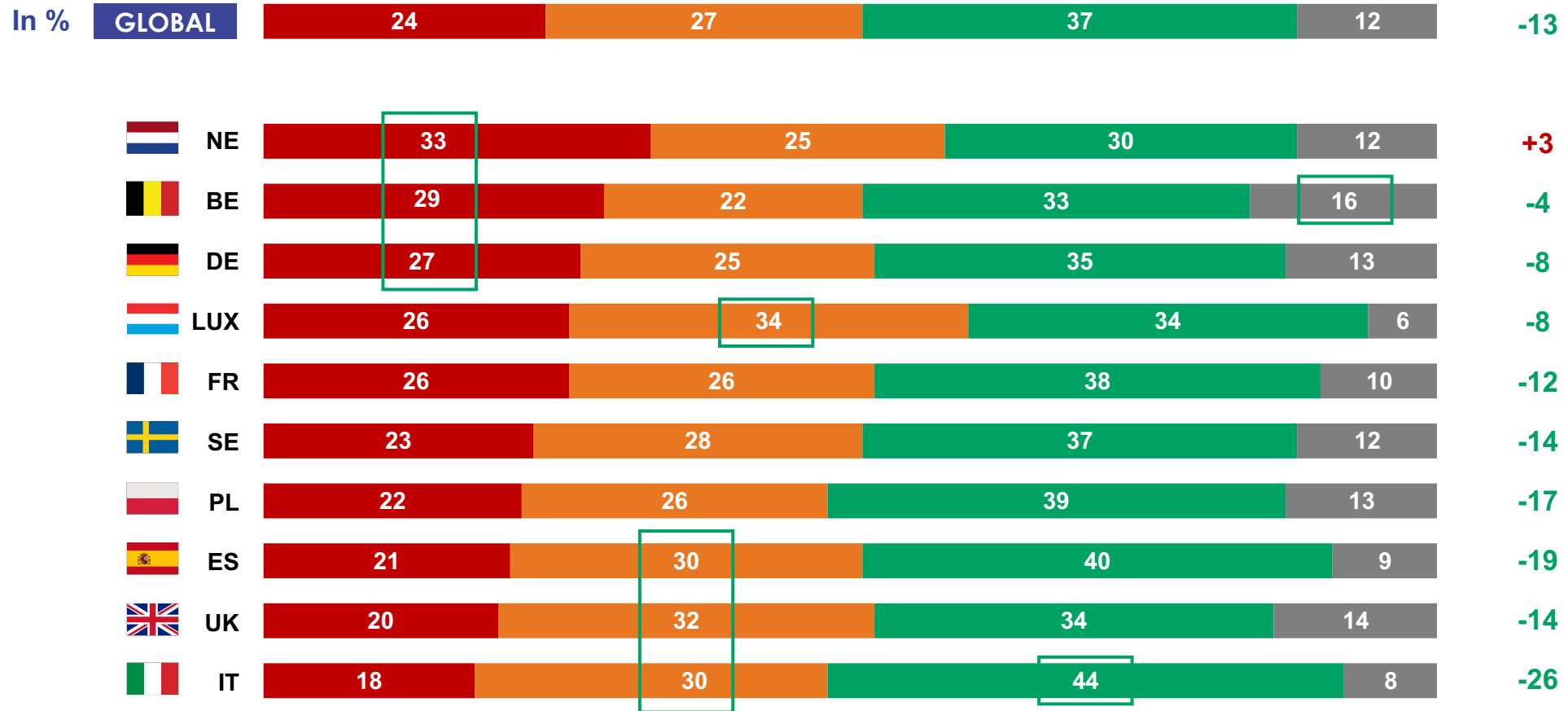


PERCEPTION OF THE ENERGY TRANSITION PACE

Q9 : In your opinion, is the energy transition moving:

Base : All (9445)

Delta Too quickly/Too slowly (pts)



Too quickly,
without giving people time to
organise themselves and without
taking their constraints
into account

At the right pace,
taking into account the state of
urgency but also people's
daily lives

Too slowly,
people should be prompted to
change their habits more quickly
in view of the urgency
of the problem

**Do not
know**

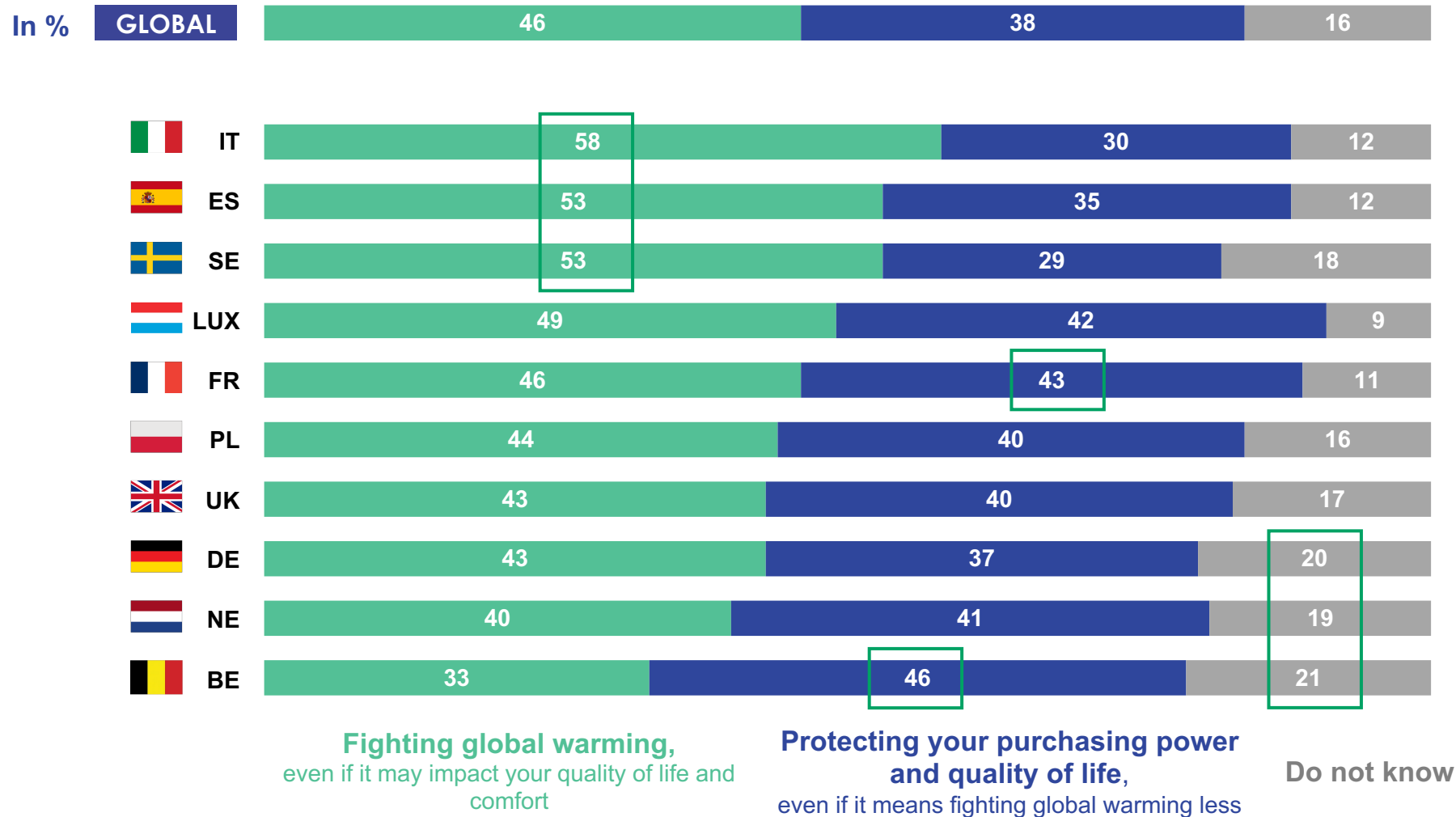
 the result is significantly **higher** than the overall average



GLOBAL WARMING VS. PURCHASING POWER: WHICH PRIORITY?

Q10 : For you, of the following two proposals, the most important is:

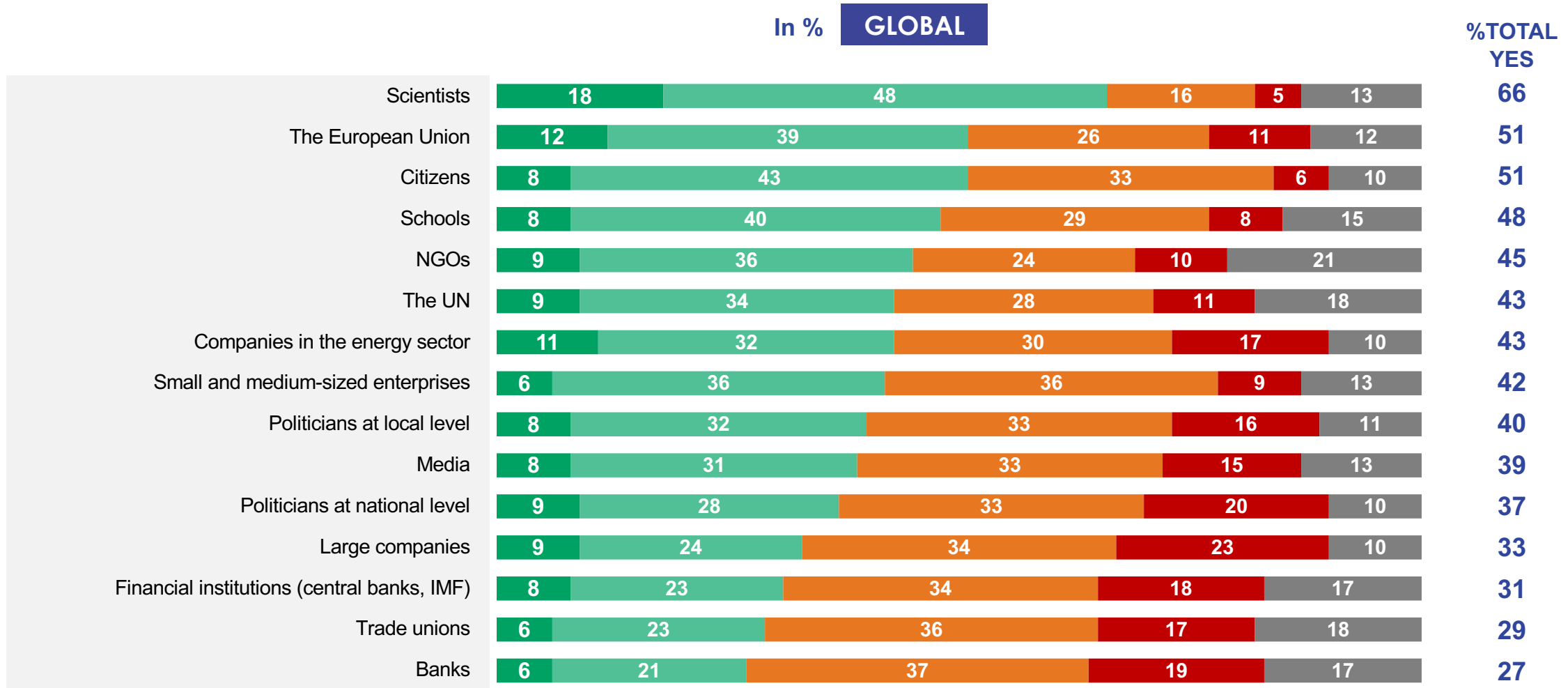
Base : All (9445)



PERCEIVED ACTION OF DIFFERENT ACTORS IN THE ENERGY TRANSITION

Q11 : Would you say that each of the following stakeholders is acting in the context of the energy transition and the fight against global warming?

Base : All (9445)



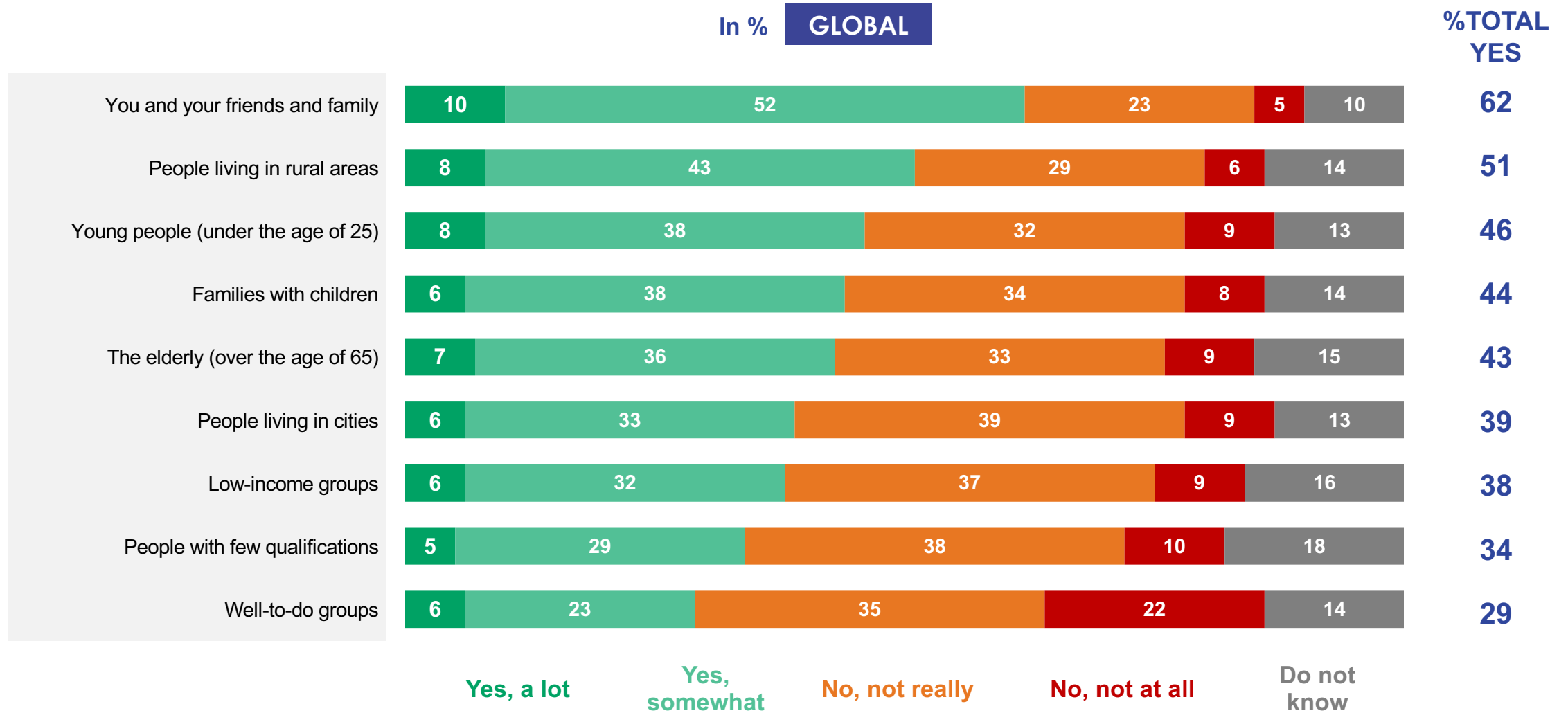
Yes, a lot Yes, somewhat No, not really No, not at all Do not know



PERCEIVED ACTION OF DIFFERENT POPULATIONS IN THE ENERGY TRANSITION

Q13 : In your opinion, is each of the following groups acting at its level in the context of the energy transition and the fight against global warming?

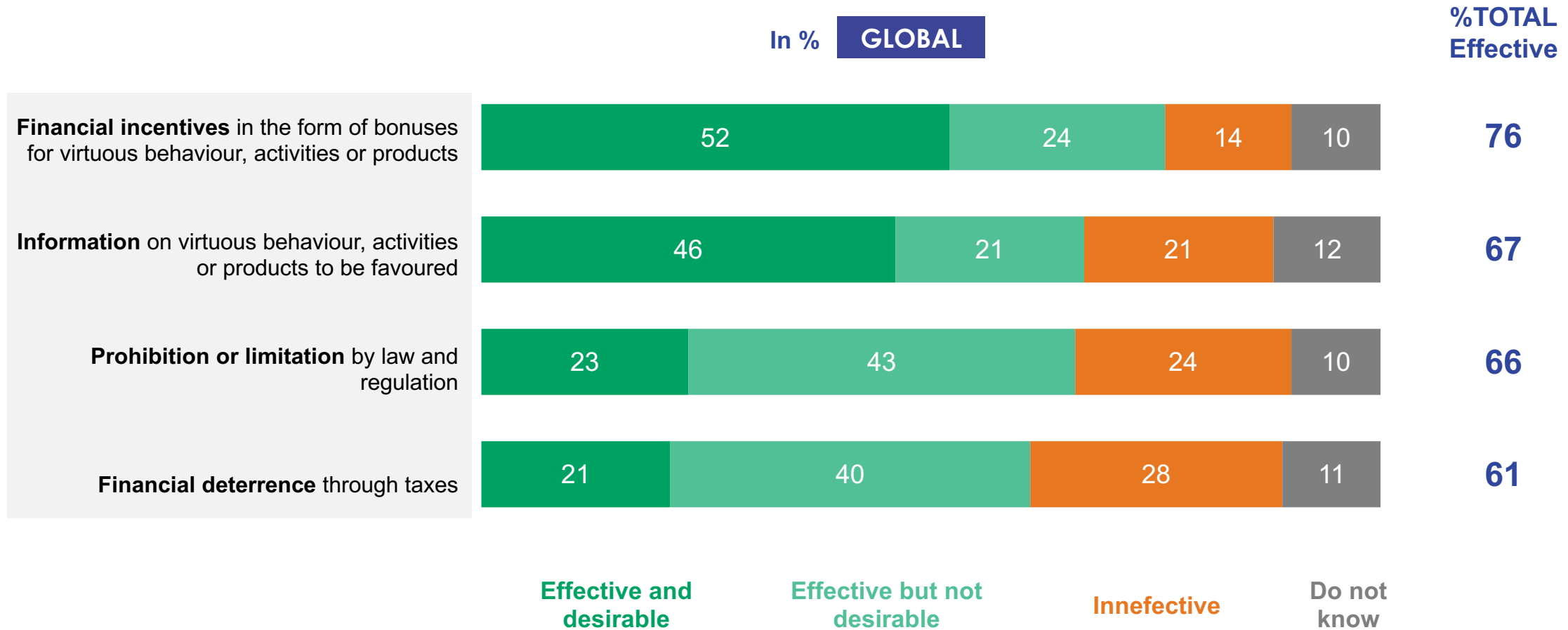
Base : All (9445)



EFFECTIVENESS OF MEANS TO FIGHT GLOBAL WARMING

Q14 : There are various means of reducing the behaviours, activities and products that contribute to global warming. For each of the following means, would you say that it is:

Base : All (9445)



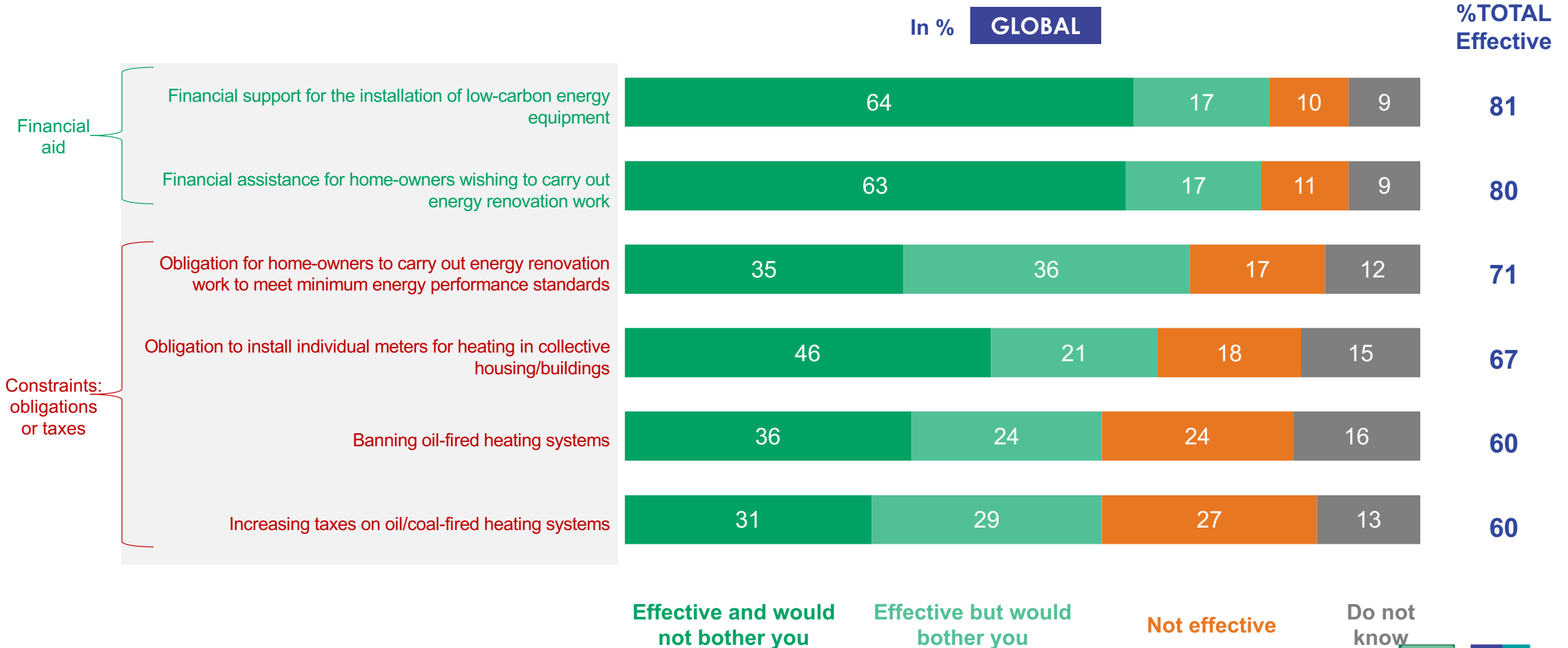
POTENTIAL MEASURES EFFECTIVENESS



HOUSING – ENERGY

Q15 : Here is a list of measures that could be adopted as part of the energy transition. For each one, would you say that in the fight against climate change:

Base : Sample A (4725)



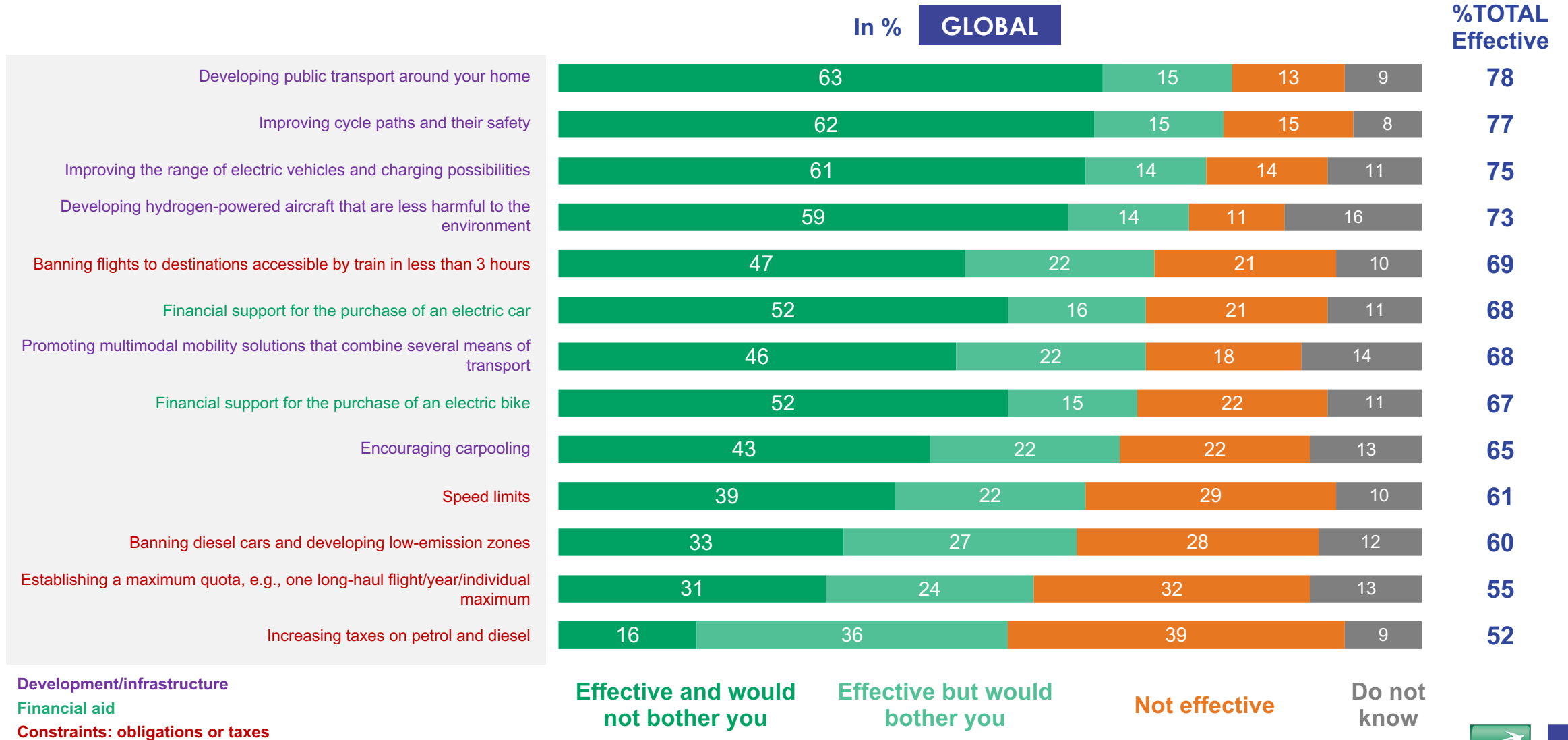
POTENTIAL MEASURES EFFECTIVENESS



TRANSPORT - MOBILITY

Q15 : Here is a list of measures that could be adopted as part of the energy transition. For each one, would you say that in the fight against climate change:

Base : Sample B (4720)



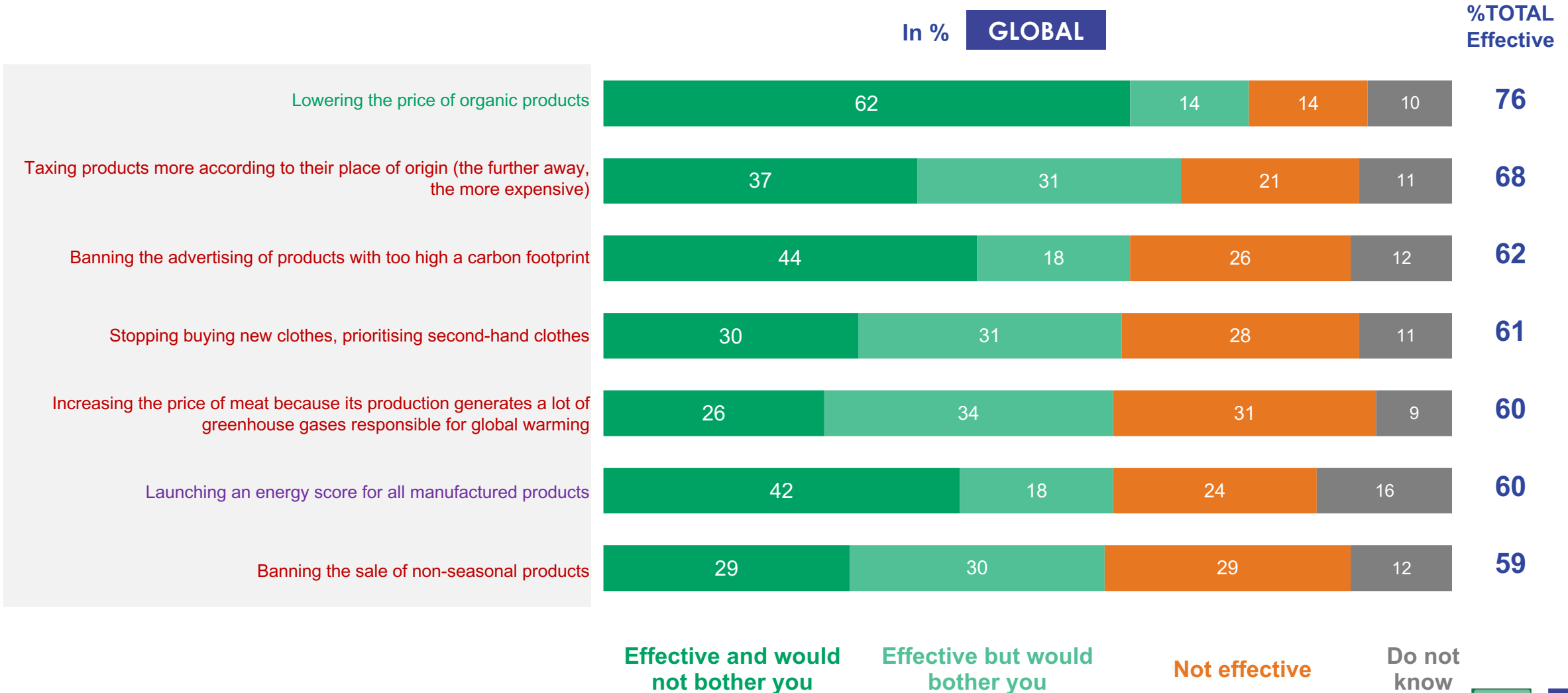
POTENTIAL MEASURES EFFECTIVENESS



DAILY CONSUMPTION

Q15 : Here is a list of measures that could be adopted as part of the energy transition. For each one, would you say that in the fight against climate change:

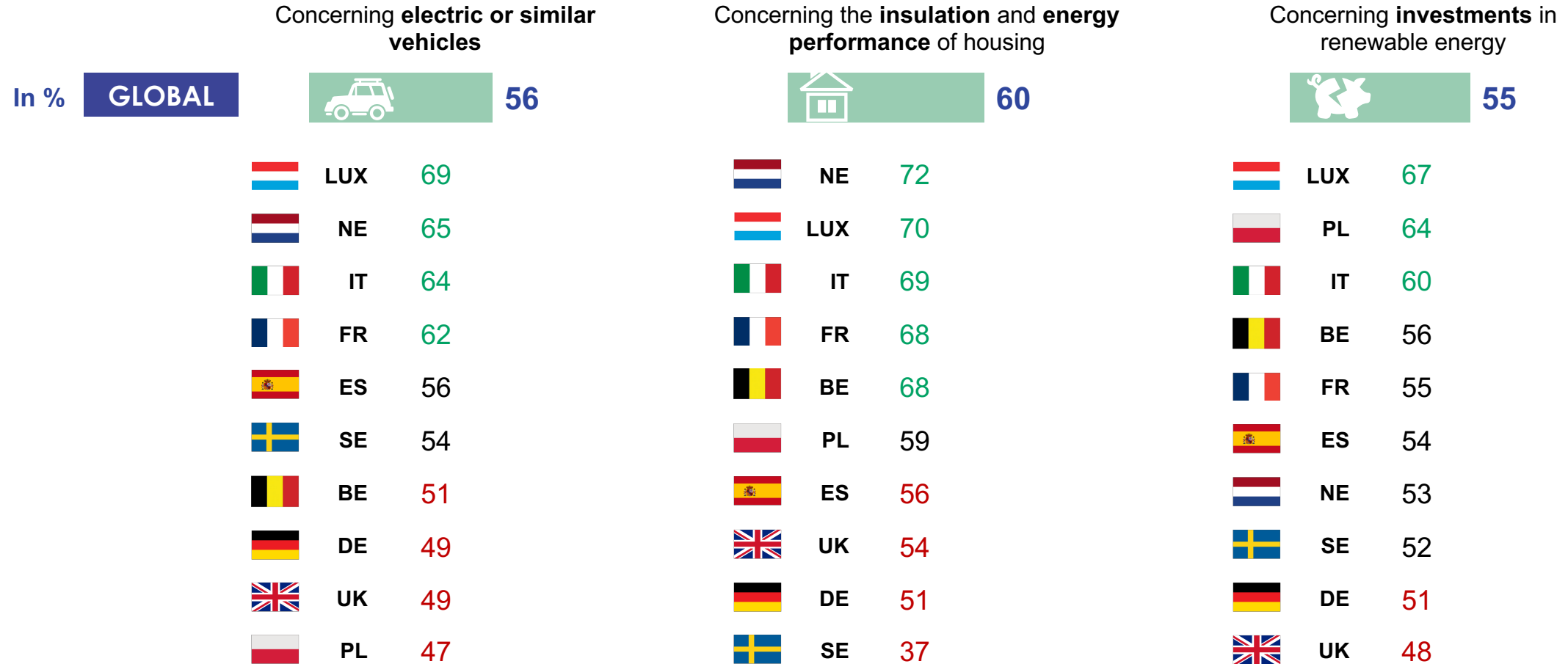
Base : Sample A (4725)



KNOWLEDGE OF INITIATIVES DEVELOPED BY AUTHORITIES

Q16 : Which of the following* do you think should be done as a priority regarding these initiatives?

Base : All (9445)



*Public authorities (governments, regions, cities) are taking initiatives to accelerate the energy transition:

At the same time by requiring greater transparency, for example with energy audits for housing; by sanctioning, for example, the most polluting cars, which are no longer welcome in cities; and by offering subsidies or tax incentives, for example for roof, window and wall insulation, with bonuses linked to the purchase of electric vehicles or by facilitating individual renewable energy equipment (solar panels, etc.)

PRIORITY INITIATIVES TO BE DEVELOPED

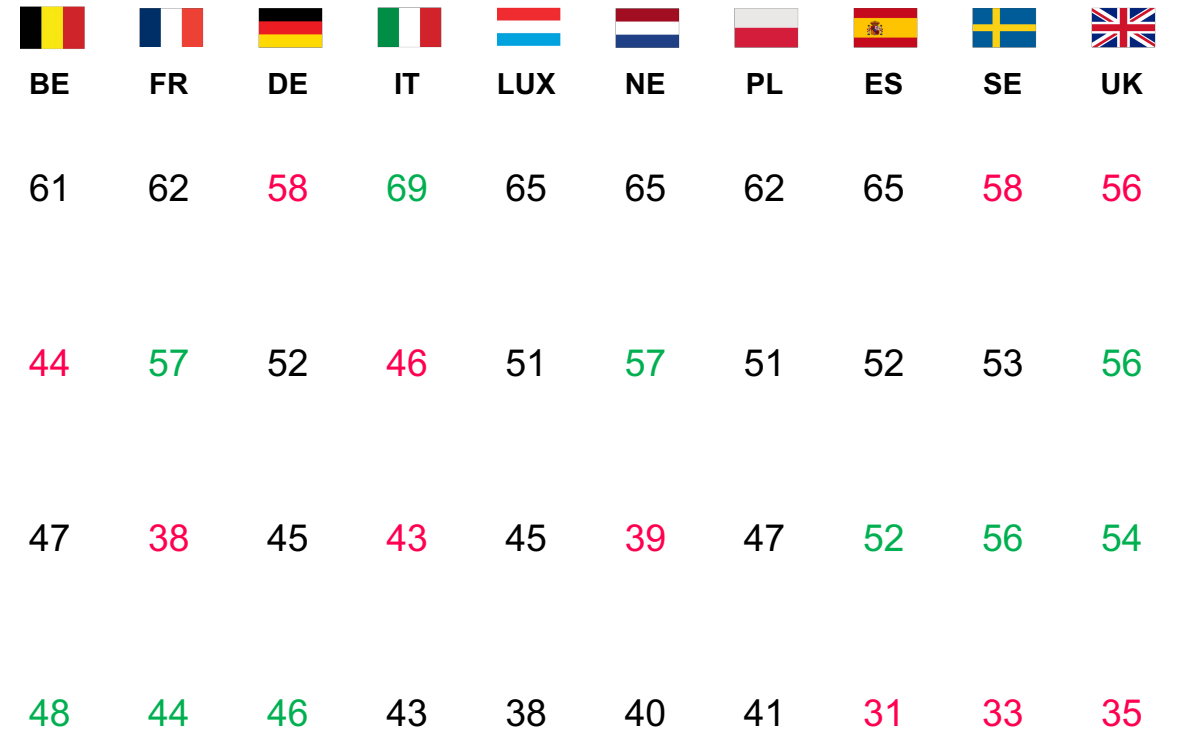
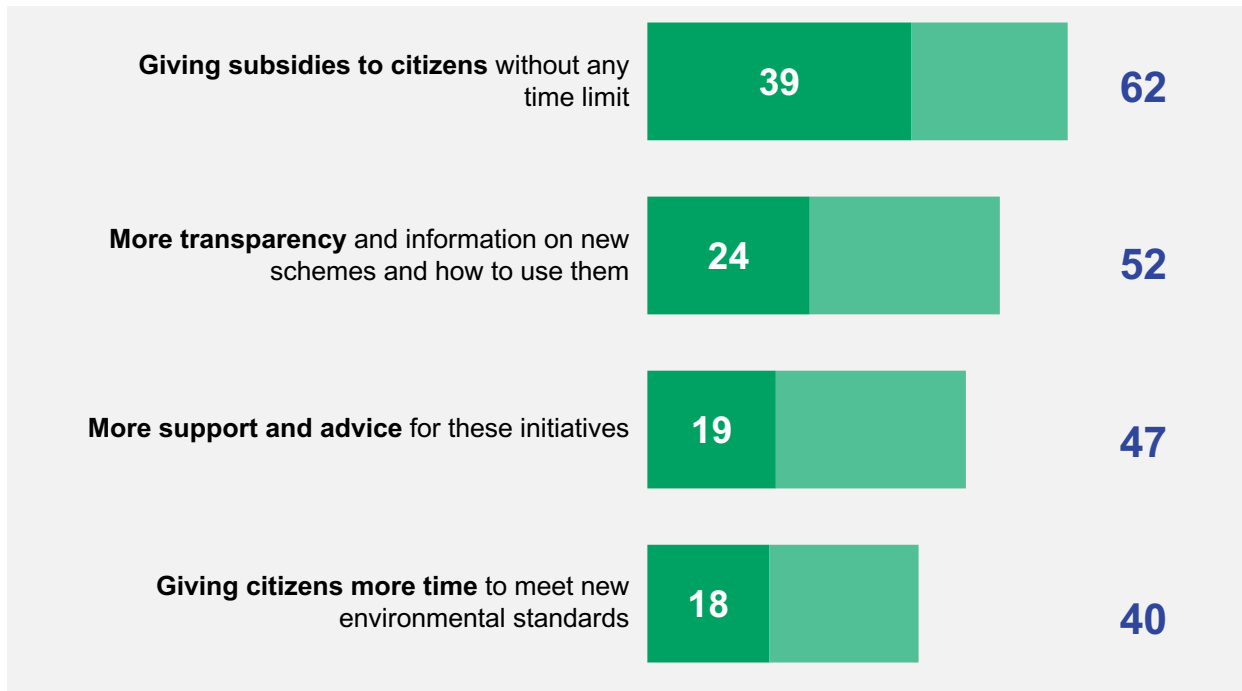
Q17 : Which of the following do you think should be done as a priority regarding these initiatives?

Base : All (9445)

GLOBAL

In first

% TOTAL



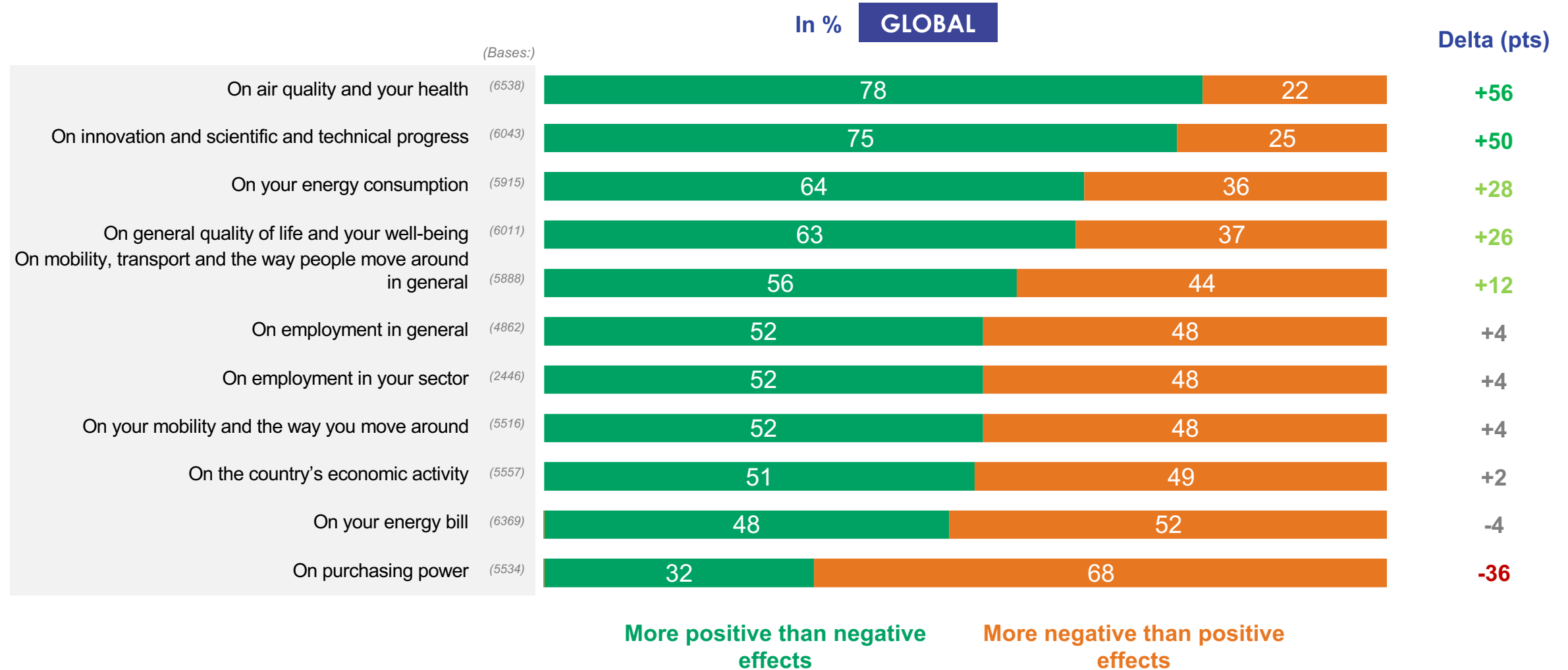
CHALLENGES OF JUST TRANSITION

3

POSITIVE AND NEGATIVE EFFECTS OF ENERGY TRANSITION

Q19 : In your opinion, in each of the following areas, will the energy transition have:

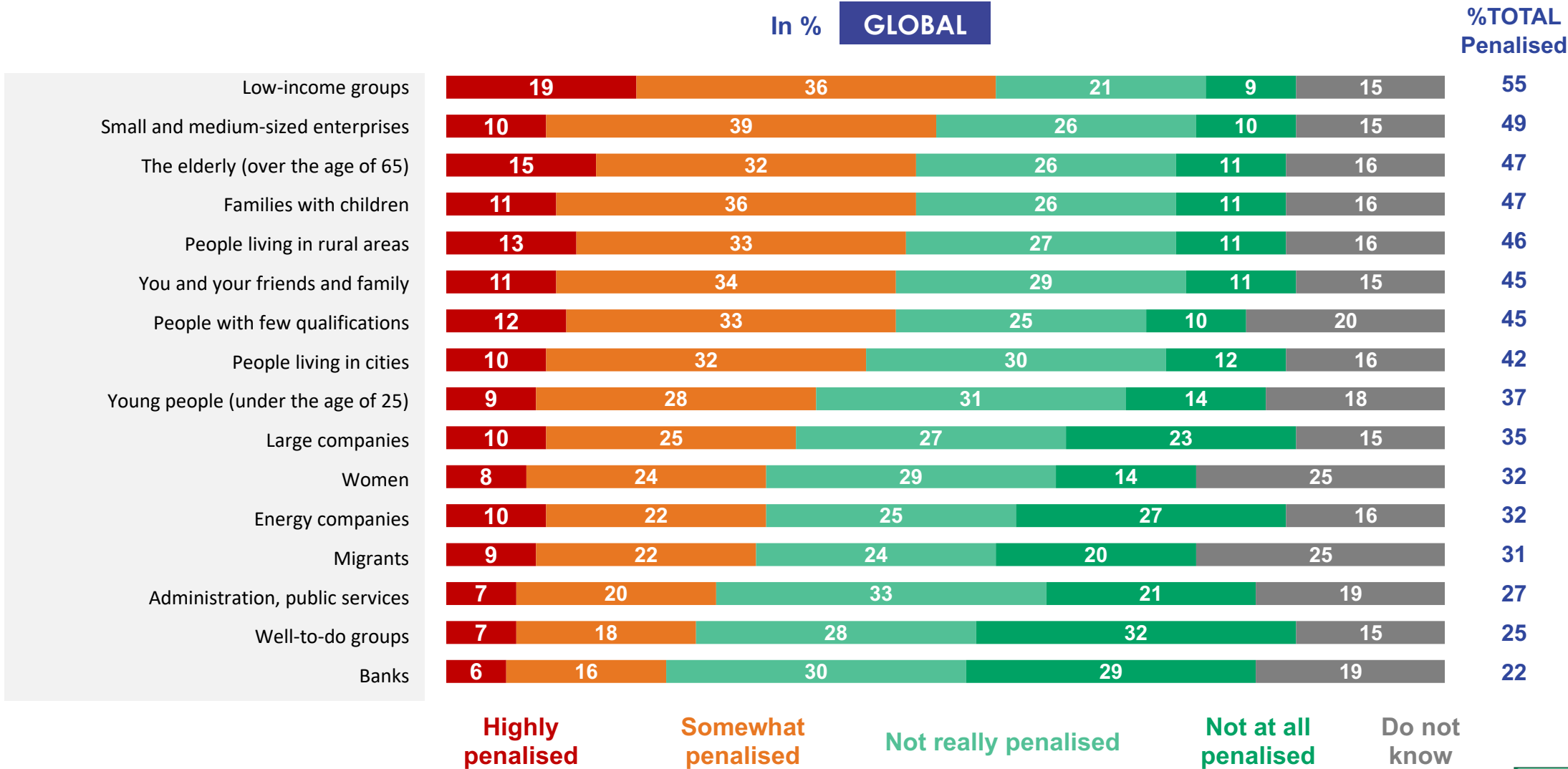
Base : « Takes a position on the item in positive or negative terms »



CATEGORIES OF POPULATION MOST PENALISED BY THE ENERGY TRANSITION

Q20 : For each of the following groups, would you say that it will be penalised under the energy transition?

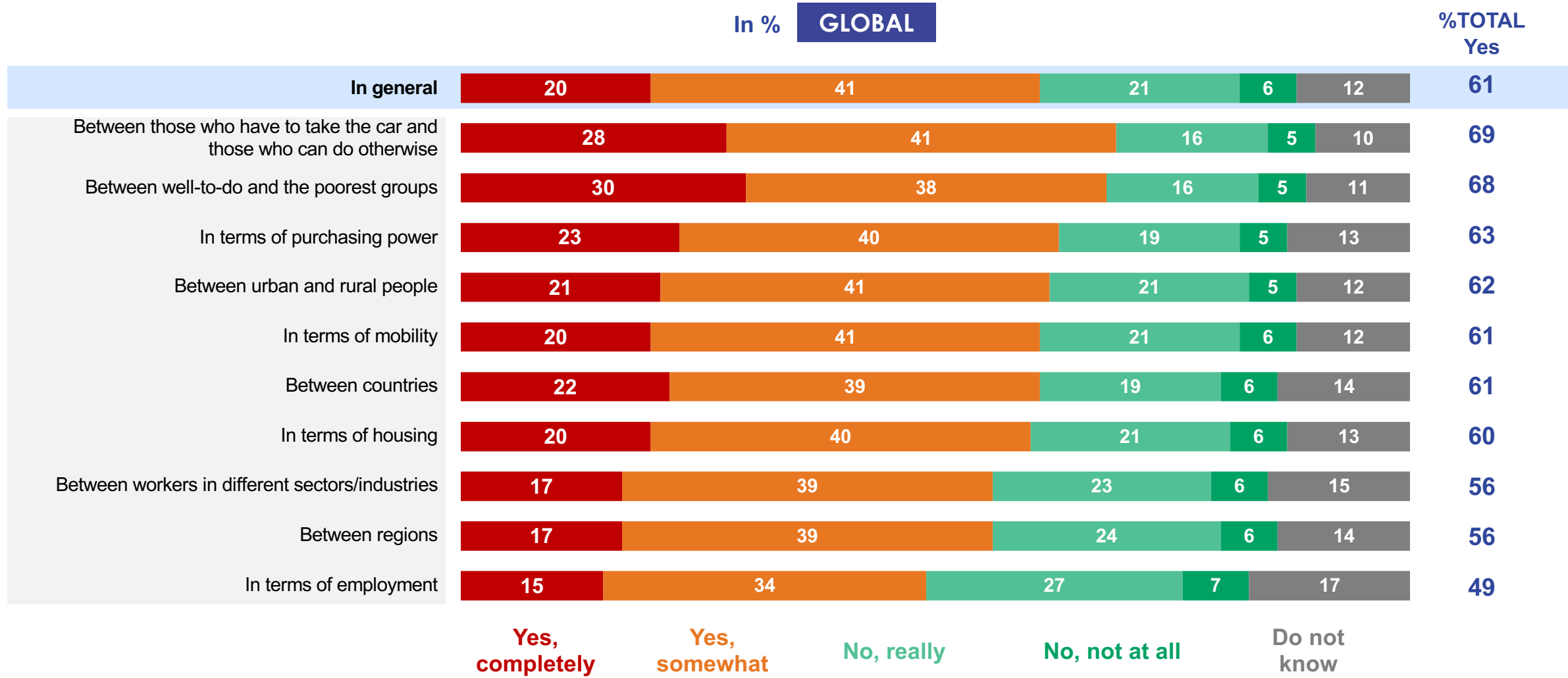
Base : All (9445)



SOCIAL INJUSTICE AND INEQUALITIES GENERATED BY THE FIGHT AGAINST GLOBAL WARMING

Q21 : In your opinion, will efforts to combat global warming generate social inequalities?

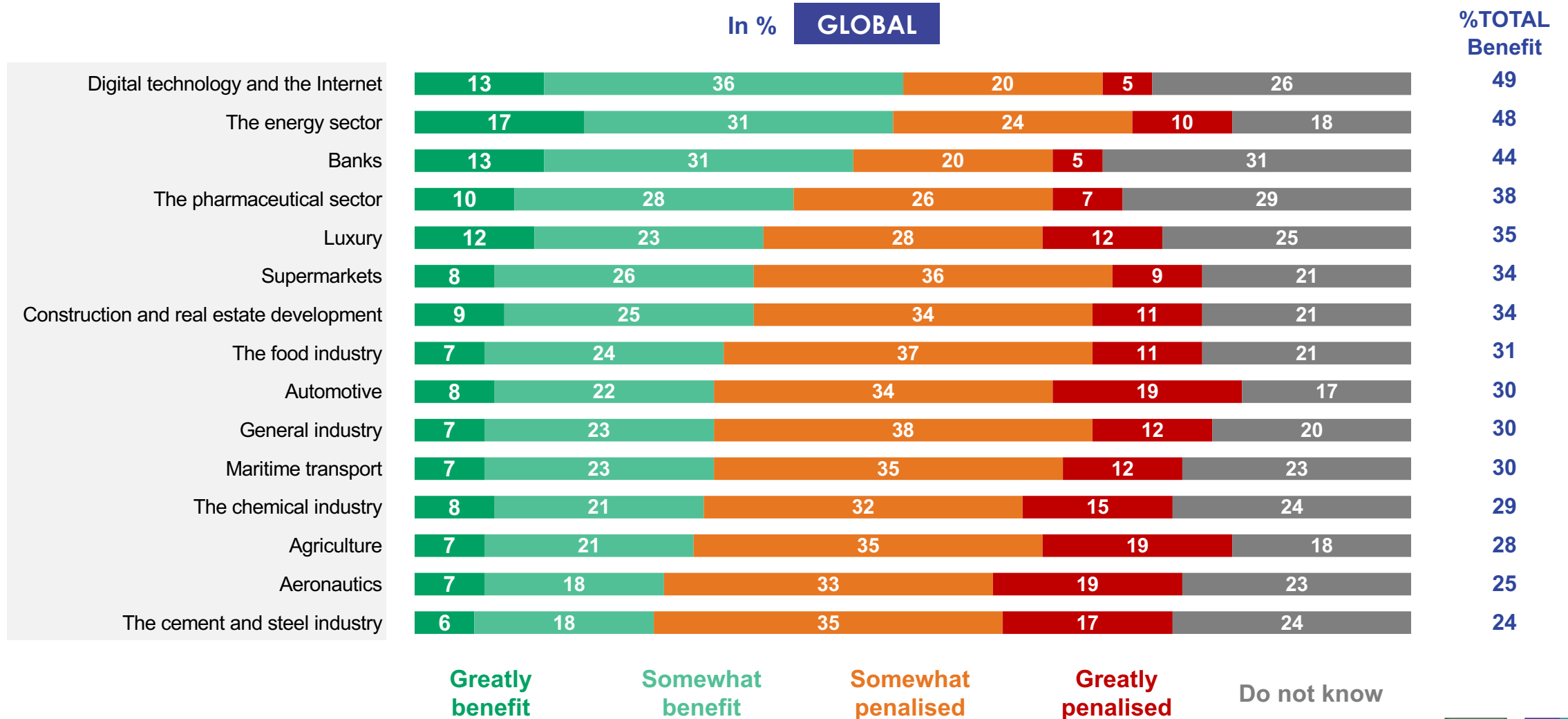
Base : All (9445)



SECTORS OF ACTIVITY ADVANTAGED AND PENALISED BY THE ENERGY TRANSITION

Q22 : In your opinion, which business sectors are the most threatened by/benefit most from the energy transition (loss of income, jobs, etc.)?

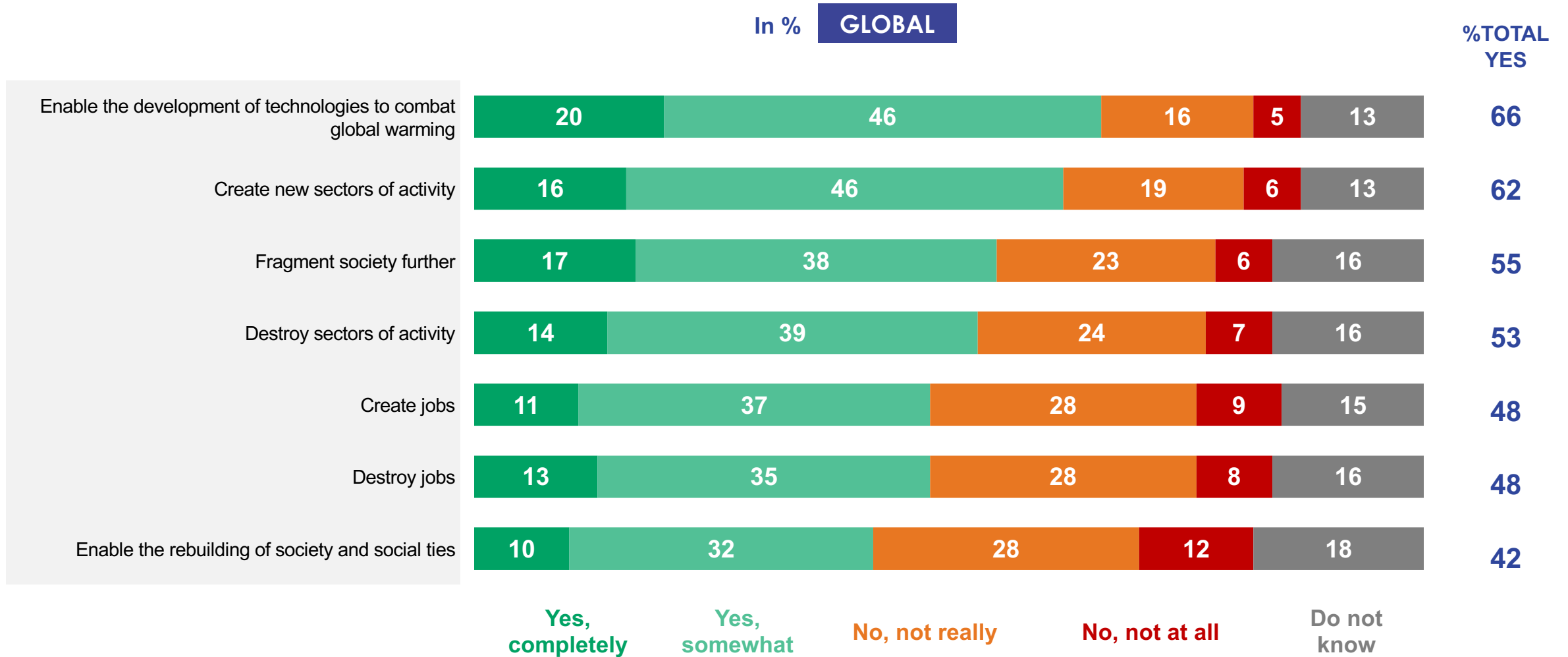
Base : All (9445)



ECONOMIC IMPACTS OF THE ENERGY TRANSITION

Q25 : In economic terms, do you think the energy transition will:

Base : All (9445)



MEASURES TO BE PUT IN PLACE TO ACHIEVE A JUST ENERGY TRANSITION

Q24 : What do you think it would take to achieve a just energy transition that leaves no one behind? – Multiple answers possible, up to three

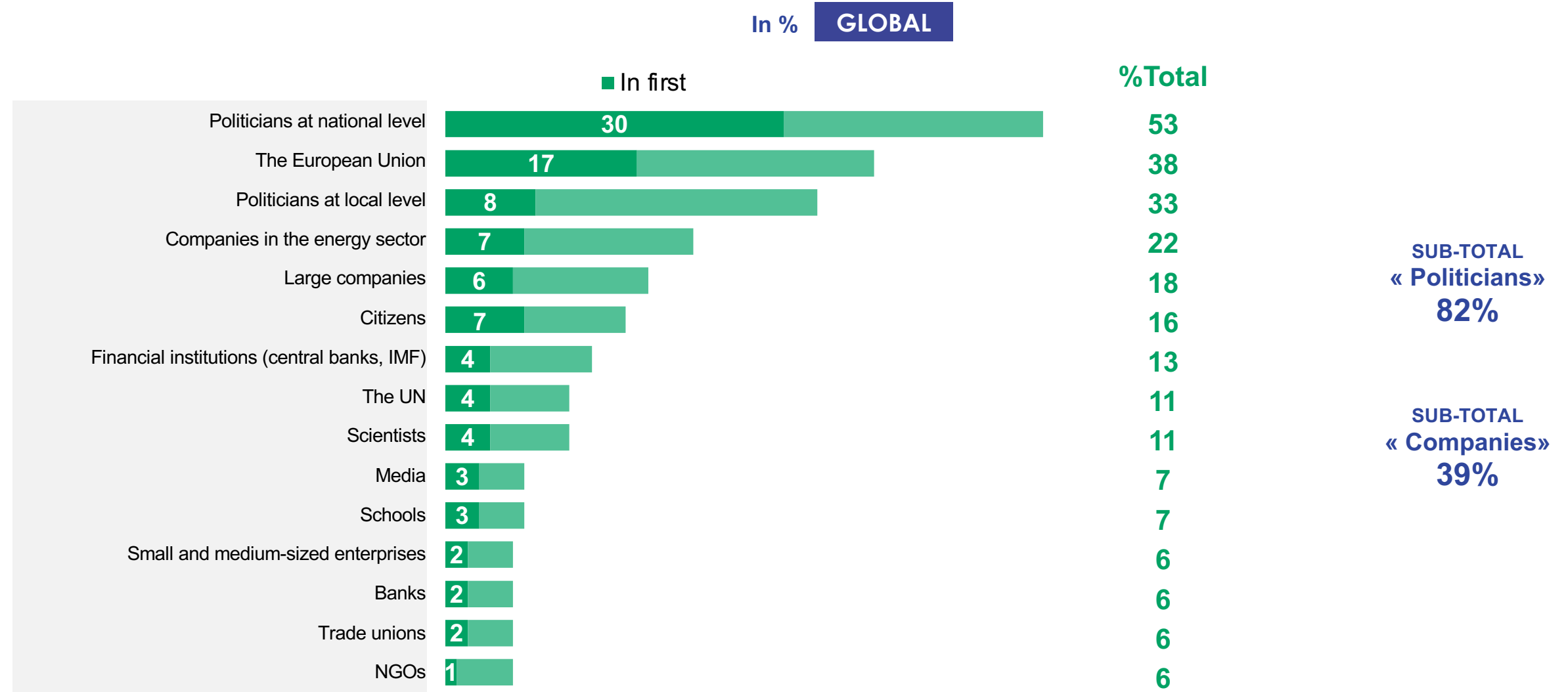
Base : All (9445)



PRIORITY ACTORS IN CHARGE OF MAINTAINING SOCIAL JUSTICE TO ACHIEVE A JUST TRANSITION

Q12 : And in your opinion, what are the main stakeholders that should be in charge of maintaining social justice in the context of the energy transition, i.e., to achieve a “just” transition, involving everyone?

Base : All (9445)

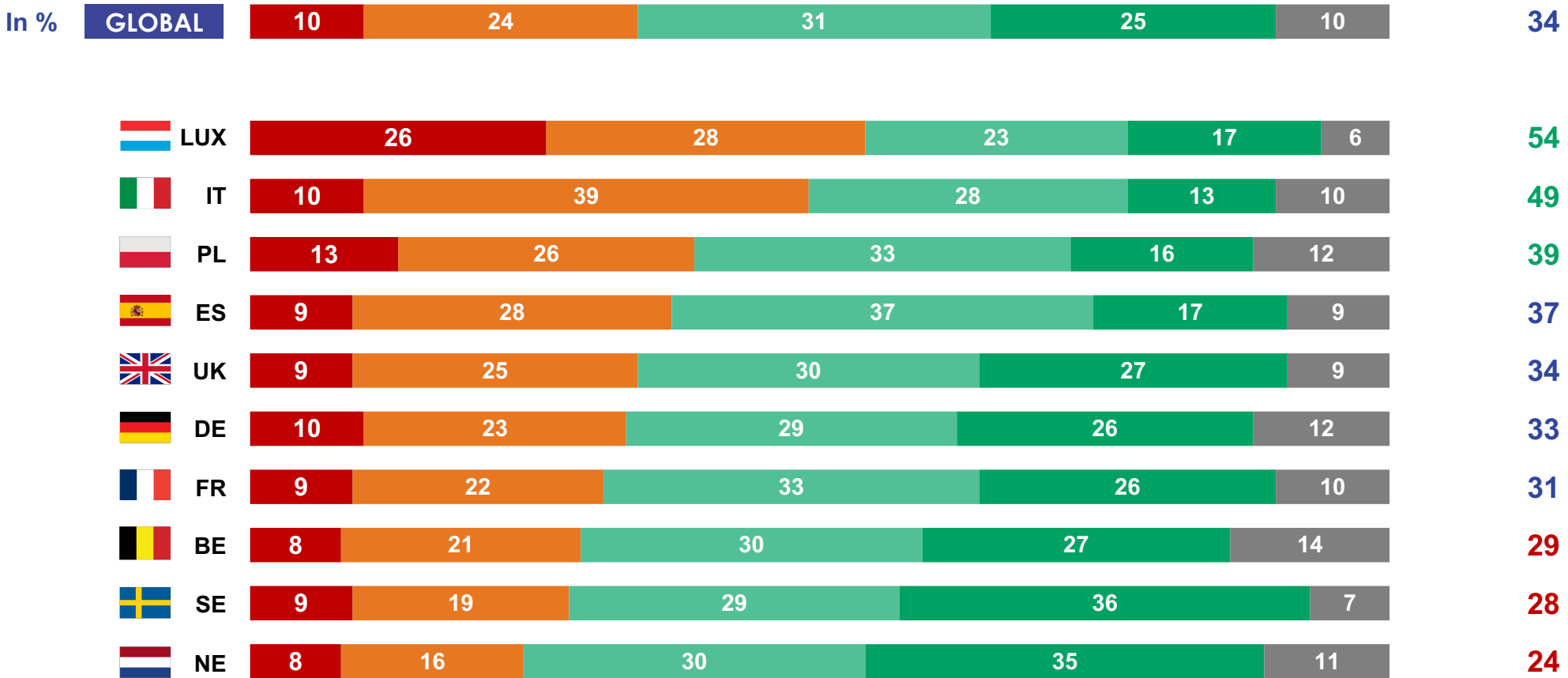


FEARS THAT JOB, BUSINESS OR SECTOR WILL BE JEOPARDISED BY ACTIONS TO BE TAKEN IN ENERGY TRANSITION

Q28 : Are you concerned that the actions to be taken to achieve the energy transition will jeopardise your job/your business/your sector of activity?

Base : To those who work (5084)

% TOTAL
Yes



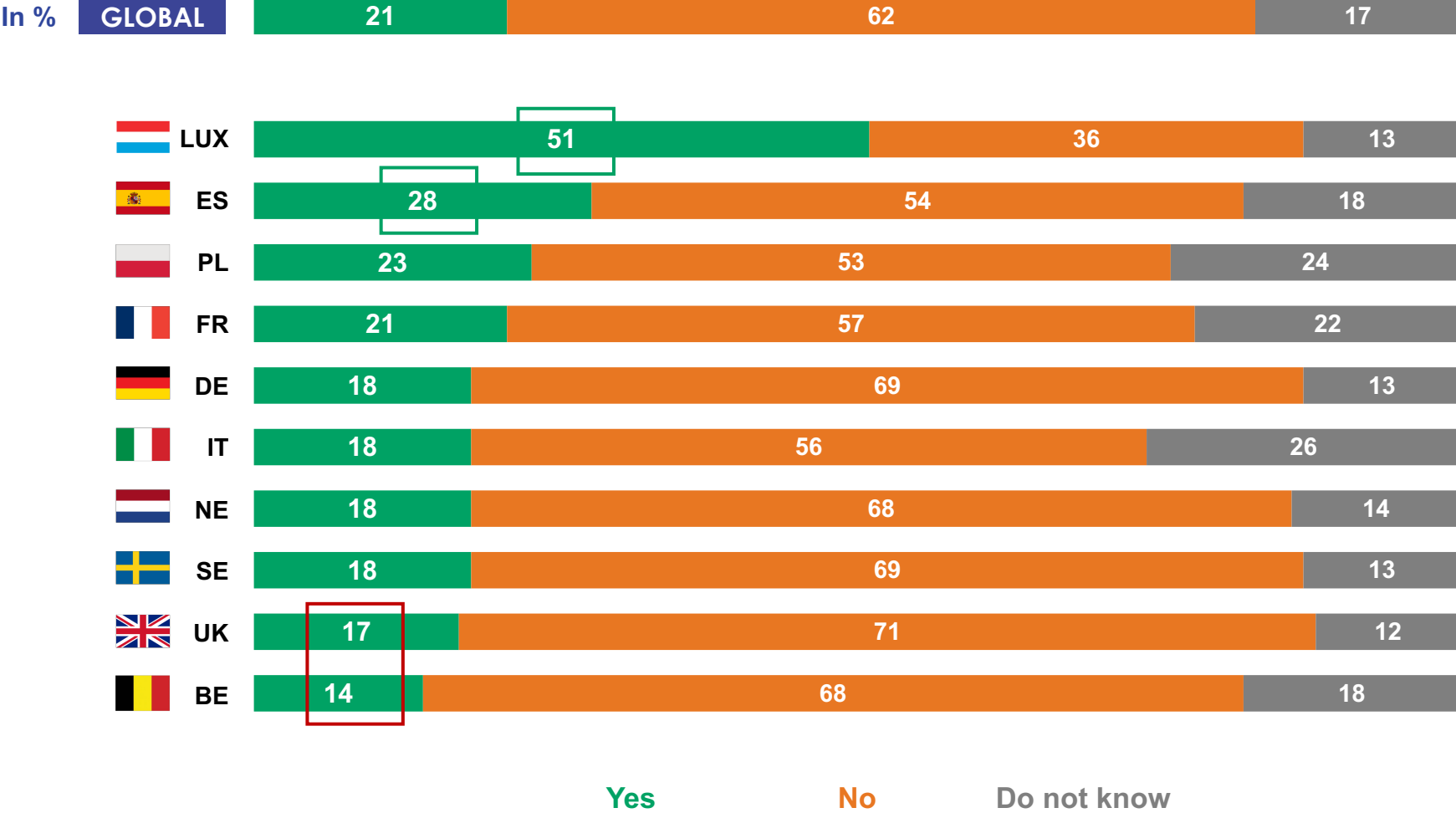
Yes, completely Yes, somewhat No, not really No, not at all Do not know



TRAINING/RETRAINING CONSIDERED IN ANTICIPATION OF POSSIBLE IMPACT OF ENERGY TRANSITION ON THEIR JOB

Q29 : Are you considering retraining or going back to school in anticipation of the possible impact on your job?

Base : To those who works (5084)



RESPONSIBILITY AND PACE OF REDUCTION OF GREENHOUSE GAS EMISSIONS

Q30 : Greenhouse gas emissions caused by human activity, like CO2, are what contributes the most to climate change. From the following pairs of statements, which statement best describes what you think?

Base : All (9945)

In % GLOBAL

 **BE**
  **FR**
  **DE**
  **IT**
  **LUX**
  **NE**
  **PL**
  **ES**
  **SE**
  **UK**

Rich countries should **help financially** poor countries to reduce their greenhouse gas emissions **74**

69 70 72 80 67 70 83 79 73 71

Poor countries should reduce their greenhouse gas emissions **with their own means** **26**

31 30 28 20 33 30 17 21 27 29

The pace of reduction of greenhouse gas emissions should **depend on the level of development of countries** **54**

45 51 47 49 56 54 62 60 57 58

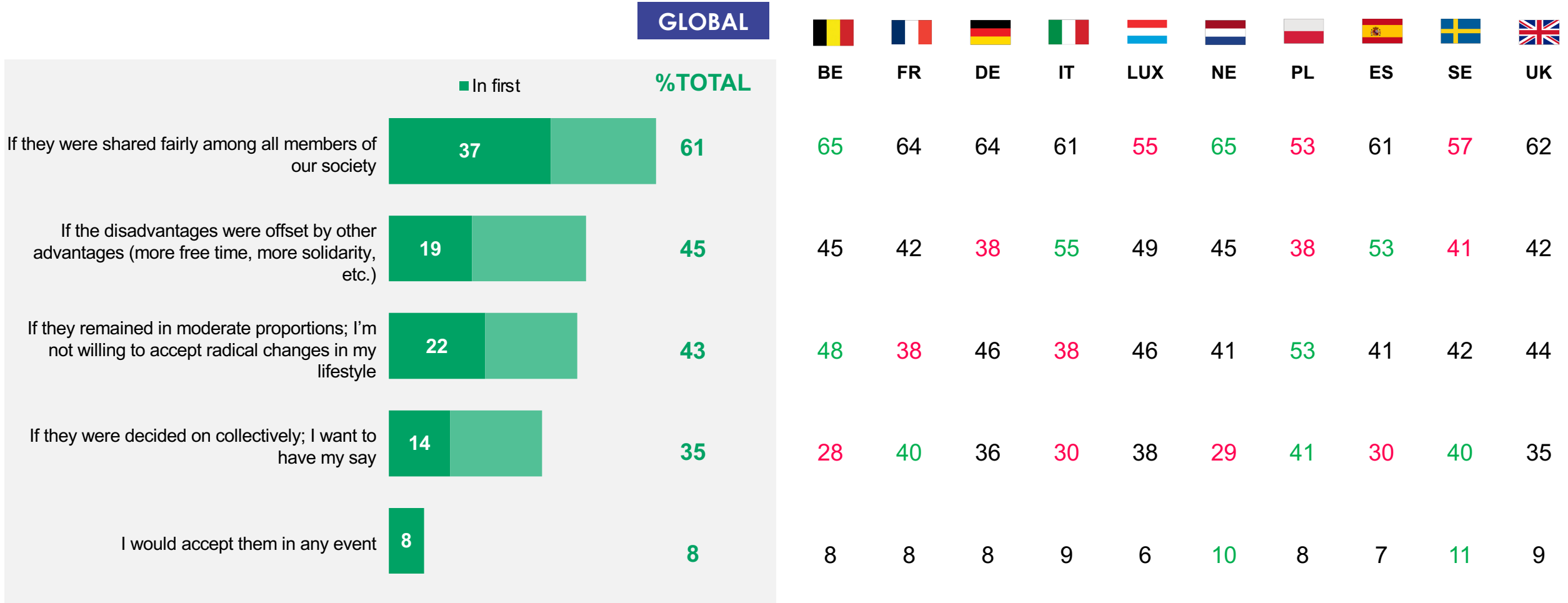
Each country should reduce its greenhouse gas emissions **at the same pace** **46**

55 49 53 51 44 46 38 40 43 42

ACCEPTABILITY OF CHANGES LINKED TO THE ENERGY TRANSITION

Q31 : As part of the energy transition, if major changes in our lifestyles were necessary, under what conditions would you accept them?

Base : All (9445)



APPENDICES





BNPP - JUST TRANSITION

VOS CONTACTS IPSOS

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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

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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 aged 18+
- **Selection of the respondent** : participant selection using a quota or random method (Kish method, other random method), etc.
- **Sample representativeness** : criteria and sources : gender, age, socio-professional category and municipality category



DATA COLLECTION

- **Fieldwork dates** : 17 February to 16 March 2023
- **Sample achieved** : 9945 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: age, gender, region, occupation

Organisation (Online panel study)



ACTIVITIES CARRIED OUT OR COORDINATED BY IPSOS TEAMS IN FRANCE

- Design and methodology
- Questionnaire design / scripting validation
- Coordination and validation of translations
- Coordination of data collection
- Data processing
- Validation of statistical analyses
- Drafting of the study report
- Designing the presentation of the results
- Formatting the results
- Oral presentation
- Analysis and synthesis



ACTIVITIES CARRIED OUT BY LOCAL IPSOS TEAMS WITH EXPERTISE IN THE ACTIVITY

- Translation
- Scripting
- Sampling
- Data collection
- Data processing
- Formatting of results

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.

ABOUT IPSOS

Ipsos is one of the largest market research and polling companies globally, operating in 90 markets and employing nearly 20,000 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.

Our 75 business solutions are based on primary data from our surveys, social media monitoring, and qualitative or observational techniques.

“Game Changers” – our tagline – summarizes our ambition to help our 5,000 clients navigate with confidence our rapidly changing world.

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

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GAME CHANGERS

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

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

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

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

So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth:

You act better when you are sure.

