EARTH DAY 2023

Public opinion on climate change
Great Britain and the world

April 2023
Ipsos Global Advisor

Divided opinions on plans to act and leadership to change

More British people disagree (41%) than agree (27%) that the government has **a clear plan for how government, businesses and people are going to work together to tackle climate change.**

And the belief that the government has a plan has **dropped back** notably since last year (27% 2023 vs. 39% 2022).

Furthermore, Britons are divided on **whether now is the right time** (35%)**, or not** (36%)**, to be investing in climate change.**

When it comes to whose responsibility it is to act, there is still an acknowledgement that it is a **shared responsibility** between government, business, and citizens. And this acknowledgment of the need for each of these parties to act is stronger in Britain than for the global average.

Although, this recognition of the need to act has also **slipped back slightly when looking at the perceived role of business** by British citizens (63% in 2023 vs. 67% in 2022).

Opinion is divided across British citizens with regard to whether they **see Britain as being a leader** in tackling climate change. But a consensus that as a nation we should do more.

However, British citizens are less forthcoming when it comes to the role of developed nations like Britain to take more **financial responsibility for solving the damage.**

But there is strong agreement across British citizens that **developed countries must do more** to tackle climate change and that it will take **all countries to work together (78%)**.

Divided opinions on plans to act and leadership to change

There is a belief amongst Brits that the **economic cost of climate change itself will be larger than the cost of measures to reduce it (44%).** Although this is not a consensus with **22%** thinking **the measures needed to reduce climate change will be greater than the impact itself.**

However, opinion is divided on whether they themselves as citizens would be willing to **pay more in taxes to help prevent climate change** (32% agree vs. 39% disagree). Although compared to the global average Brits are more supportive of financial incentives or tax cuts to encourage more environmentally friendly purchases (43% Brits vs. 28% global).

There is an acknowledgment about the importance of **individual action** in tacking climate change (57%) and that if **everyone made small changes this could have a big impact (72%).**

There is also general optimism about the future with **57% of Britons disagreeing that climate change is beyond our control** and it is too late to do anything about it versus one in five (20%) who think it is too late.

And there is an **acknowledgement that action is needed now** with more than half (54%) disagreeing that t**he negative impacts of climate change are too far off in the future to worry about** (versus 19% who agree with this statement).

There has been an increase in understanding amongst British citizens surrounding the behaviours that **households could take to reduce their carbon footprint.**

Notably, an increasing awareness of the **positive impact of switching to purchasing renewable energy.** So, possibly the start of a narrowing of the 'believe-true' gap (i.e. the difference between belief and reality).

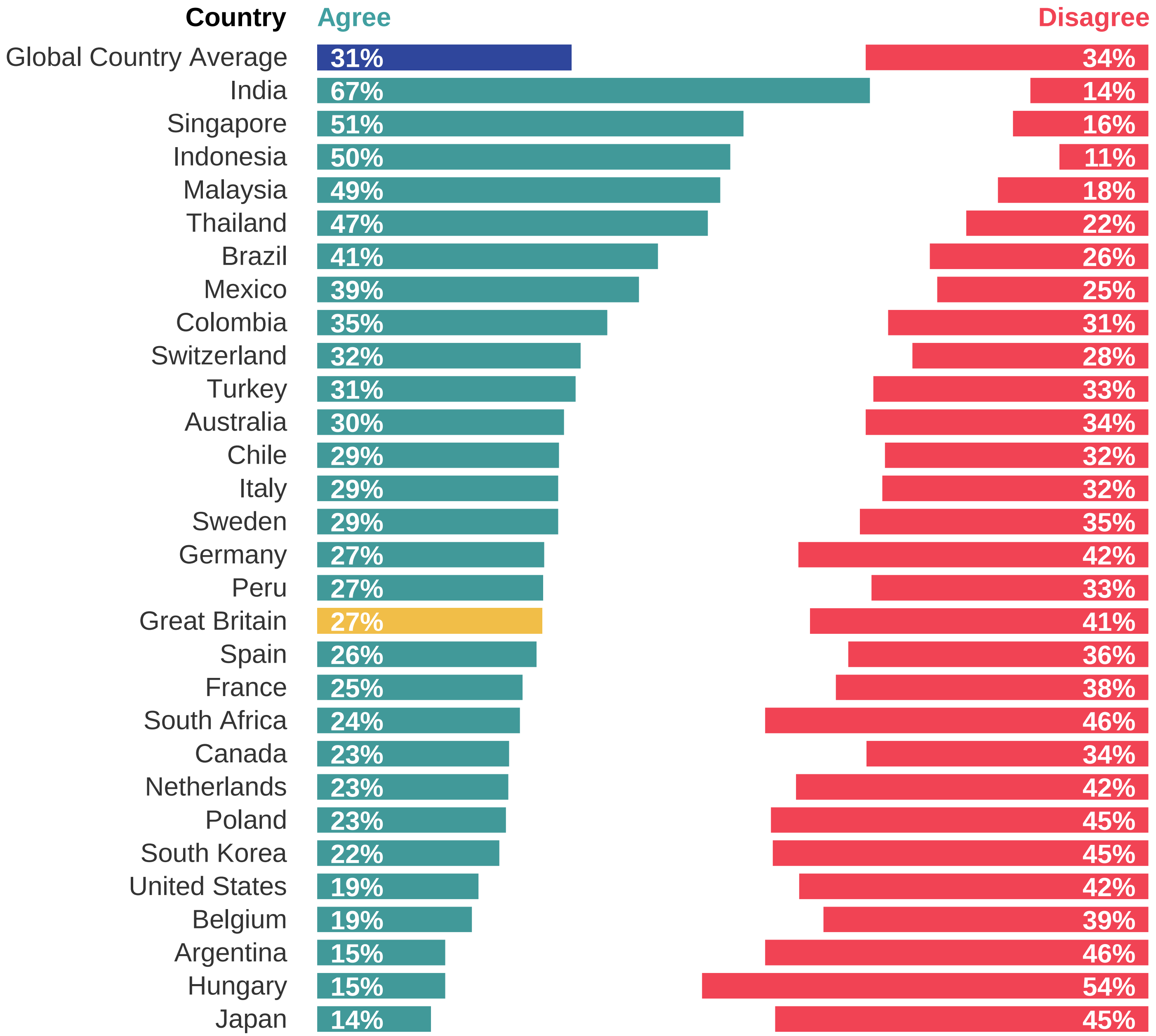
With this understanding comes an opportunity to drive behaviour change and to fill the significant void that is observed with **only 16% of Britons saying they are already doing everything they can to help fight climate change.**

What is the plan?

Who should act to combat climate change?

Only just **over a quarter of British citizens** (27%) agree the government **has a clear plan in place** for how government, businesses and people are going to work together to tackle climate change. This is down considerably from **39%** last year.

Four in ten Britons disagree that the government has a clear plan to tackle climate change



Country data

Q. To what extent do you agree or disagree with the following:

[COUNTRY]'s government has a clear plan in place for how government, businesses and people themselves are going to work together to tackle climate change

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The public perceive combatting climate change as a shared responsibility

In Great Britain, the public believe that government, businesses and individuals need to play their part, or risk failing others.

66% agree that if individuals do not act now to combat climate change they will be failing future generations.

63% say that if businesses do not act now to combat climate change then they are failing their employees and customers.

66% say that if the Government does not act now to combat climate change then it is failing British citizens.

The British public believe there is a shared responsibility to act now to combat climate change and this opinion is stronger than the global average

Global Country Average vs GB

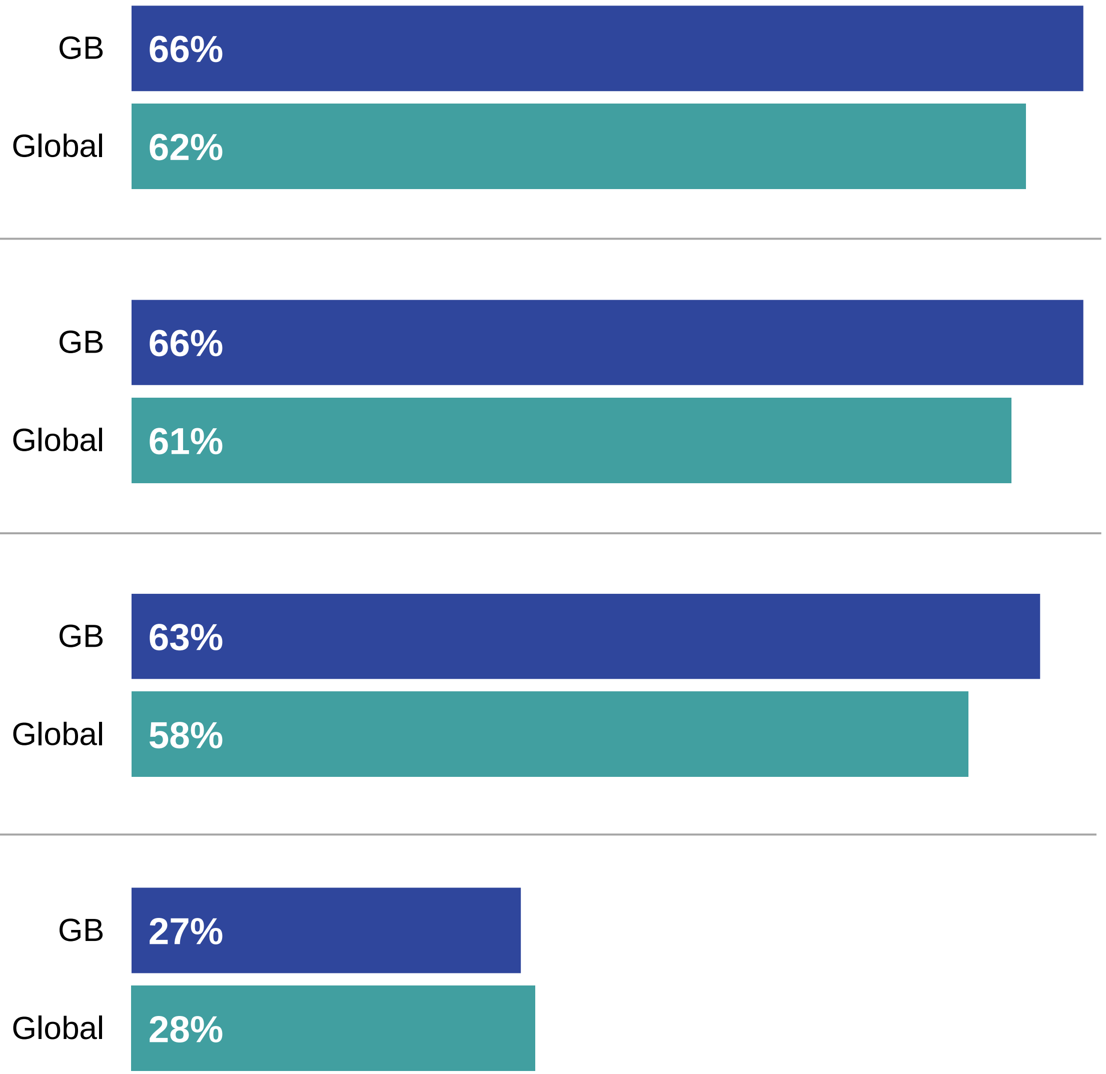
Q. To what extent do you agree or disagree with the following…

If individuals like me do not act now to combat climate change, we will be failing future generations

If ...'s government does not act now to combat climate change, it will be failing the people of …

If businesses in ... do not act now to combat climate change, they will be failing their employees and customers

...'s government has a clear plan in place for how government, businesses and people themselves are going to work together to tackle climate change



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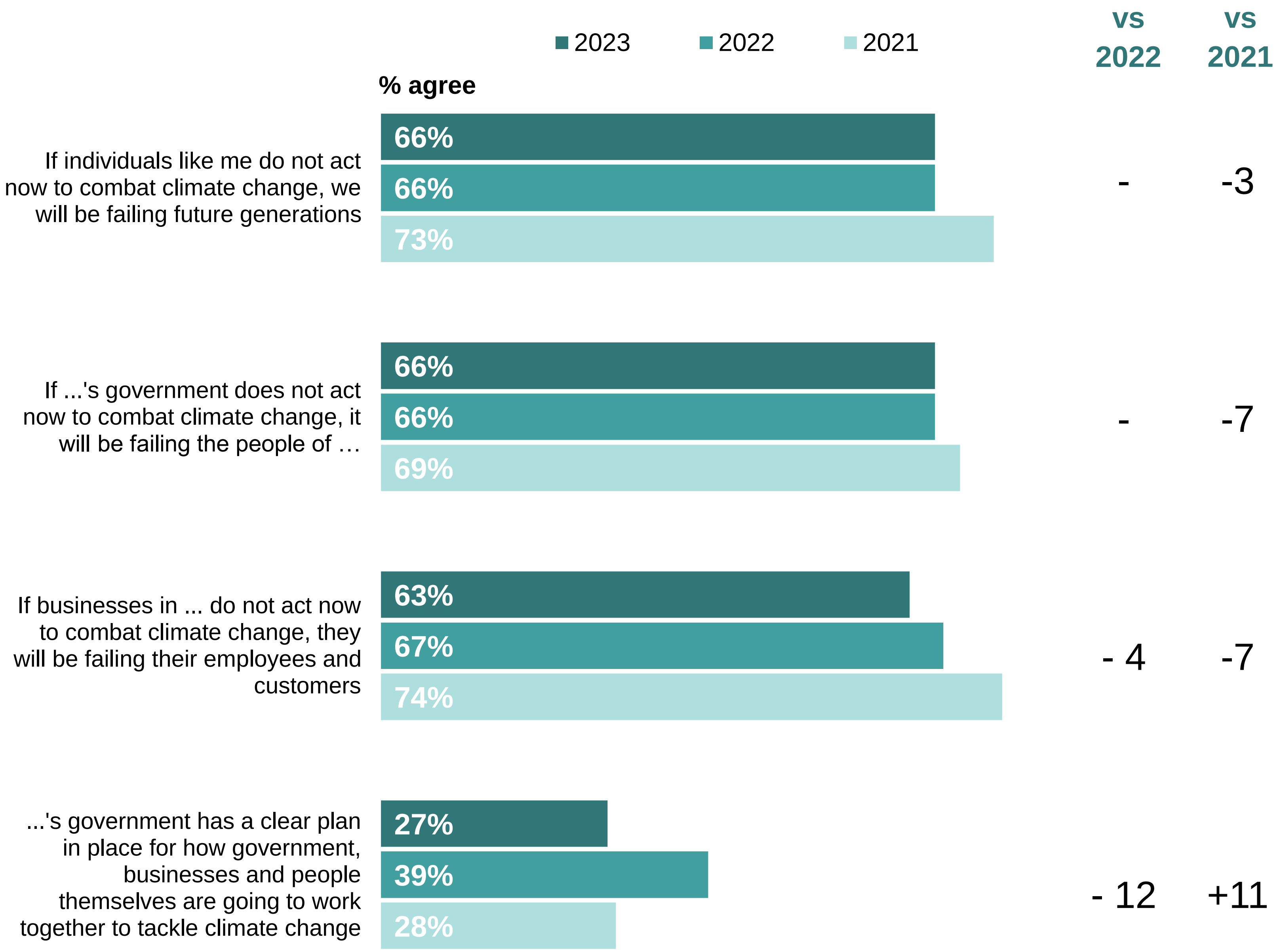
Confidence that the UK Government has a clear plan in place to tackle climate change has declined in 2023

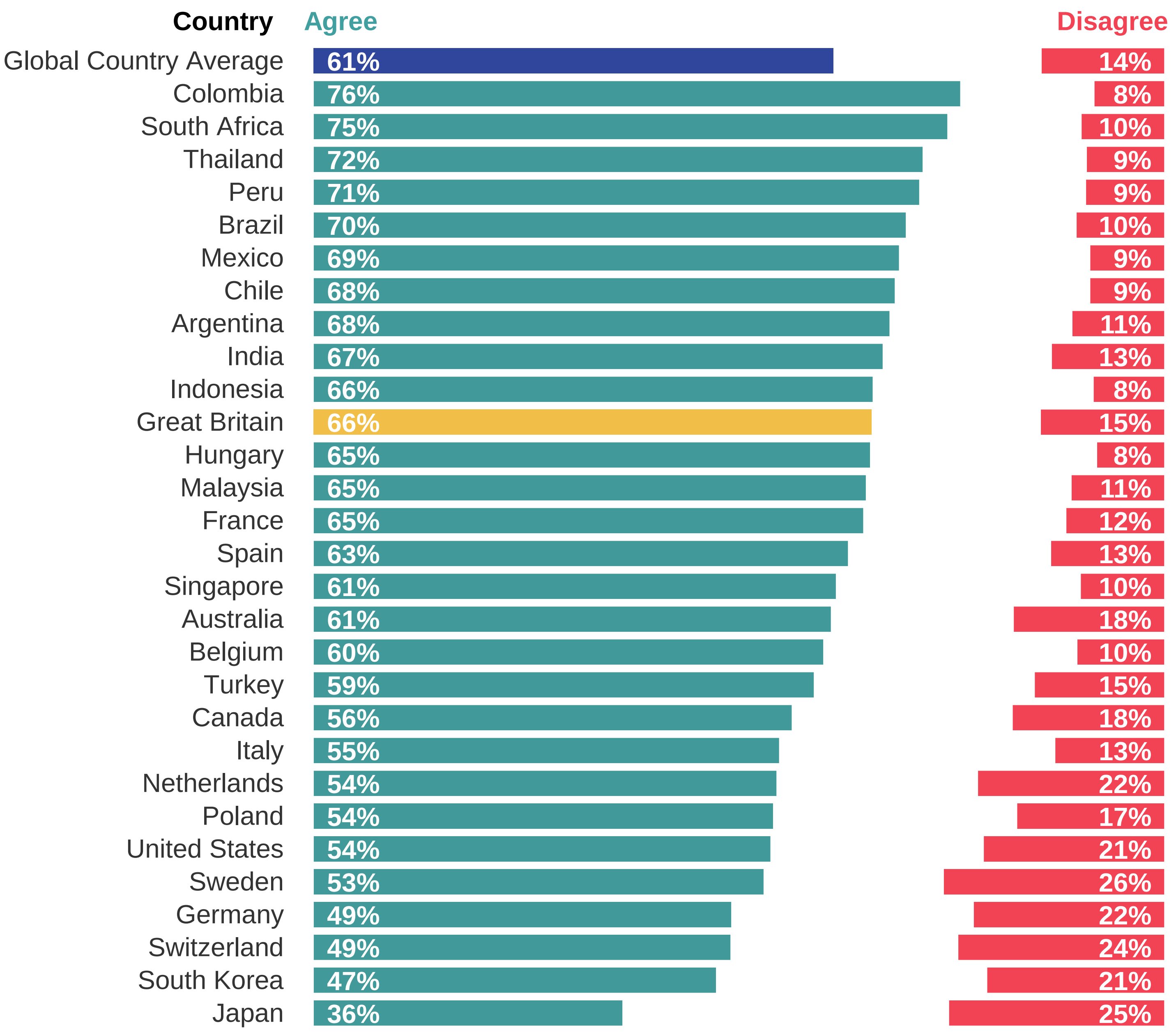
GB trended

Q. To what extent do you agree or disagree with the following…



Base: 2023: 1,001 GB Online adults aged 16-74; 2022: 1,001 GB online adults aged 16-74; 2021: 1,000 GB online adults aged 16-74. Fieldwork dates: 20 Jan – 3 Feb 2023; 18 Feb – 4 Mar 2022; 19 Feb – 5 Mar 2021.

The agreement on the need for government to combat climate change is still strong



Country data

Q. To what extent do you agree or disagree with the following:

If [COUNTRY]'s government does not act now to combat climate change, it will be failing the people of [COUNTRY]

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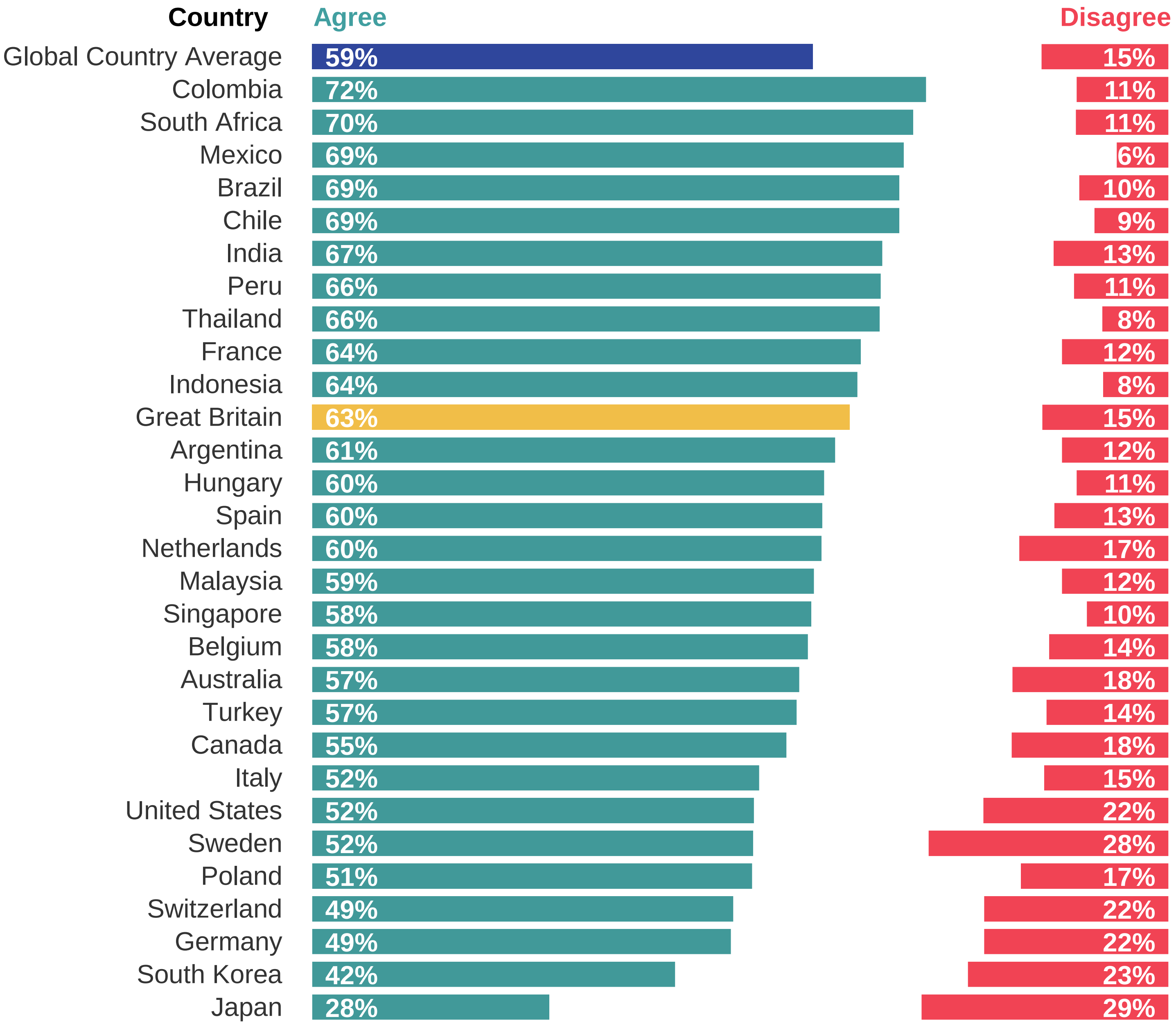
The agreement on the need for corporate action to combat climate change is still strong but has reduced slightly in Britain



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Country data

Q. To what extent do you agree or disagree with the following:

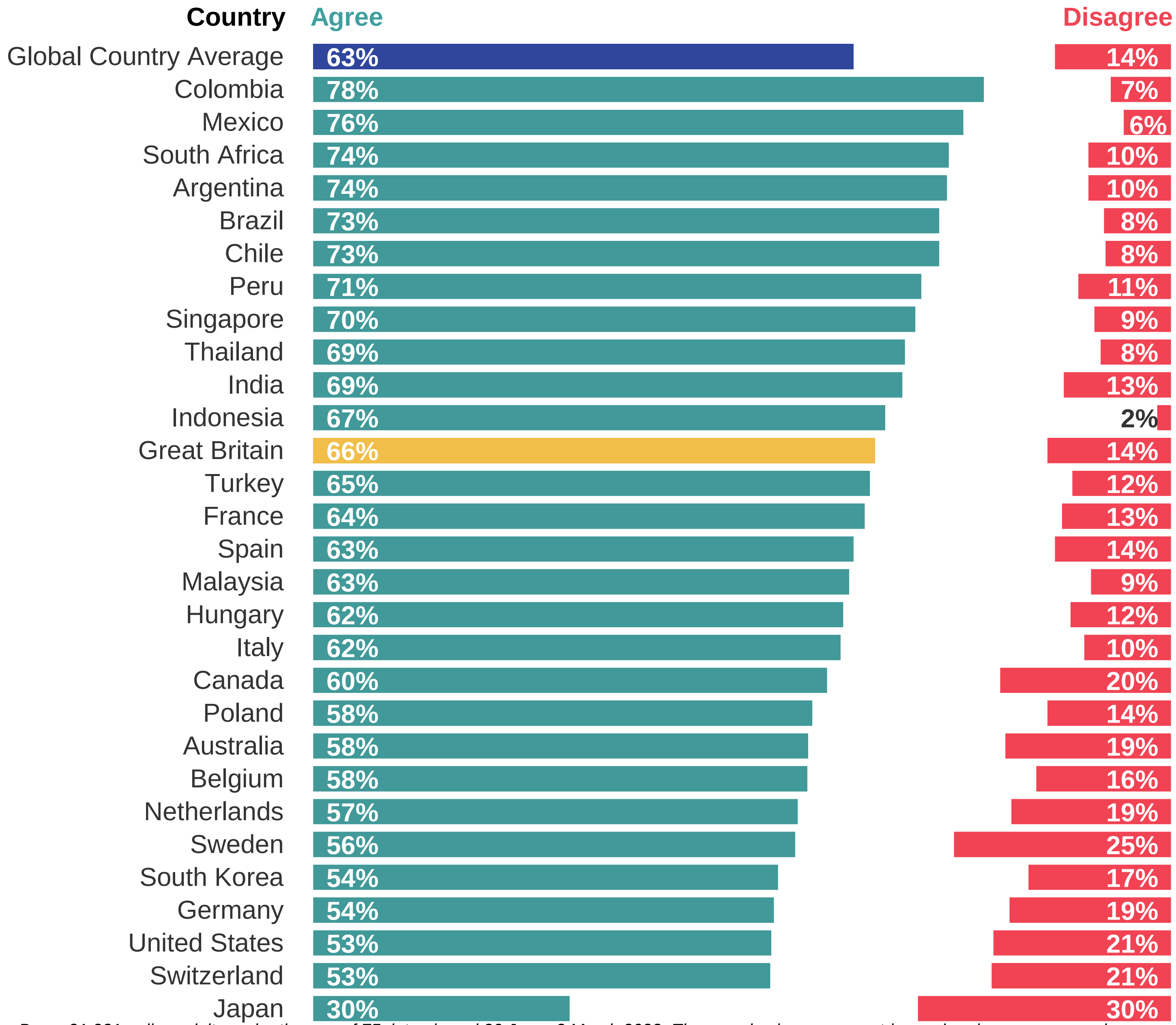
If businesses in [COUNTRY] do not act now to combat climate change, they will be failing their employees and customers

Individuals in Briton also see they too need to act to combat climate change

Country data

Q. To what extent do you agree or disagree with the following:

If individuals like me do not act now to combat climate change, we will be failing future generations



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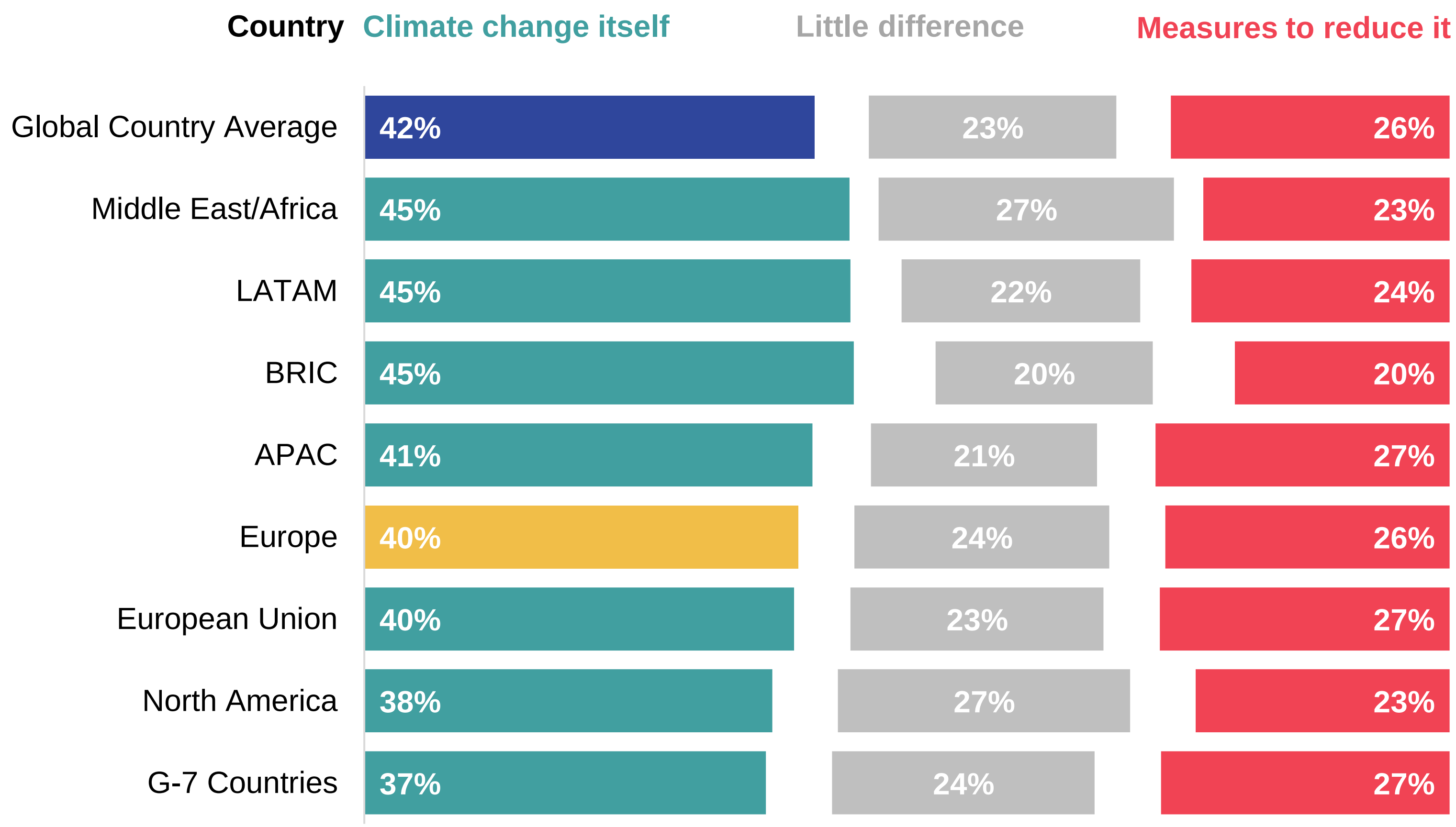
Generally, more British citizens say that the **economic cost of climate change itself will be larger than the cost of measures to reduce it.**

But this was **not a consensus or a majority**: one in four (44%) said this in Britain, but more than one in five (22%) said the costs of mitigating climate change would be greater.

Across the regions more citizens believe that the economic cost of climate change itself will be larger than the cost of measures to reduce it



Q. What do you think will be greater, the economic costs of measures to reduce climate change, or the economic costs of climate change itself, or do you think there will be little difference?

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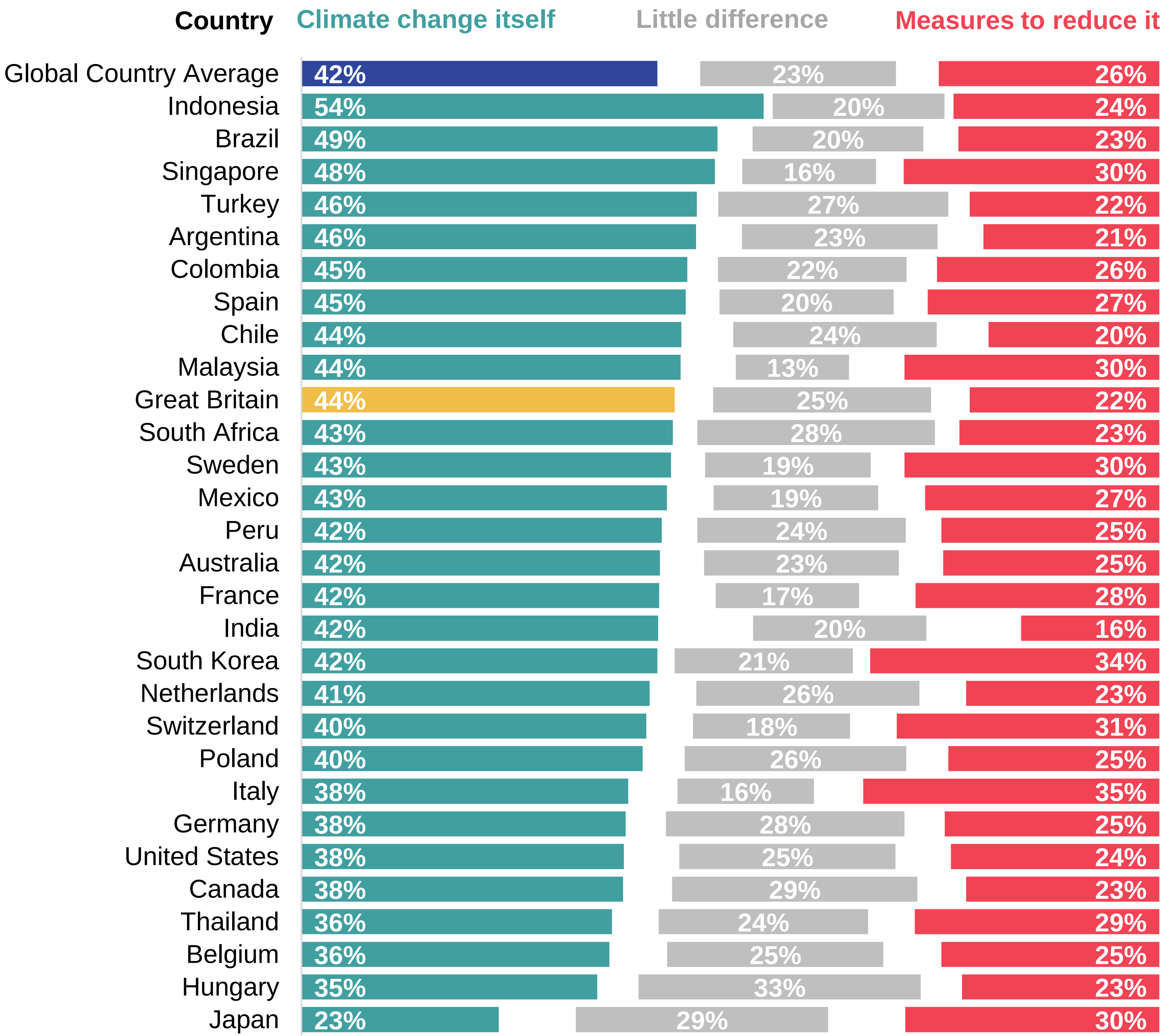
In Britain, there is a stronger belief that the economic cost of climate change itself will be larger than the cost of measures to reduce it

Country data

Q. What do you think will be greater, the economic costs of measures to reduce climate change, or the economic costs of climate change itself, or do you think there will be little difference?



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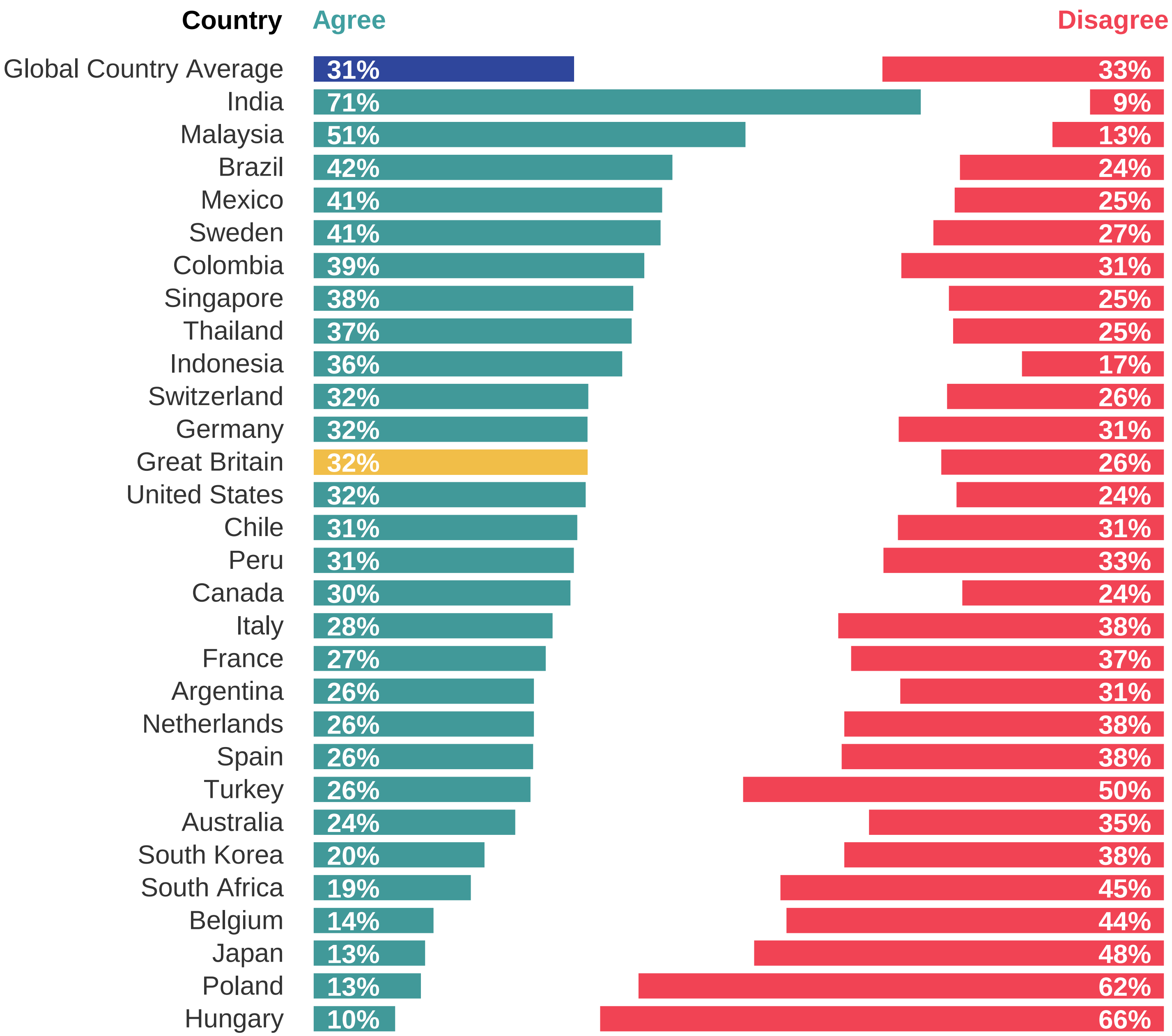
Who is leading the pack?

There is some polarisation of opinion across British citizens with regard to whether they **see their country as being a leader** in tackling climate change. But a clear consensus that **Britain should do more to combat climate change**.

However, when it comes to **taking financial responsibility for solving the damage** that has been created by developed countries like Britain, agreement amongst British citizens is less than for many other developed countries.

However, Britons are in strong agreement that **developed countries must do more** to tackle climate change and that it will take **all countries to work together**.

Only a third of British citizens see their own country as a world leader against climate change



Country data

Q. To what extent do you agree or disagree that your country is a world leader in the fight against climate change?

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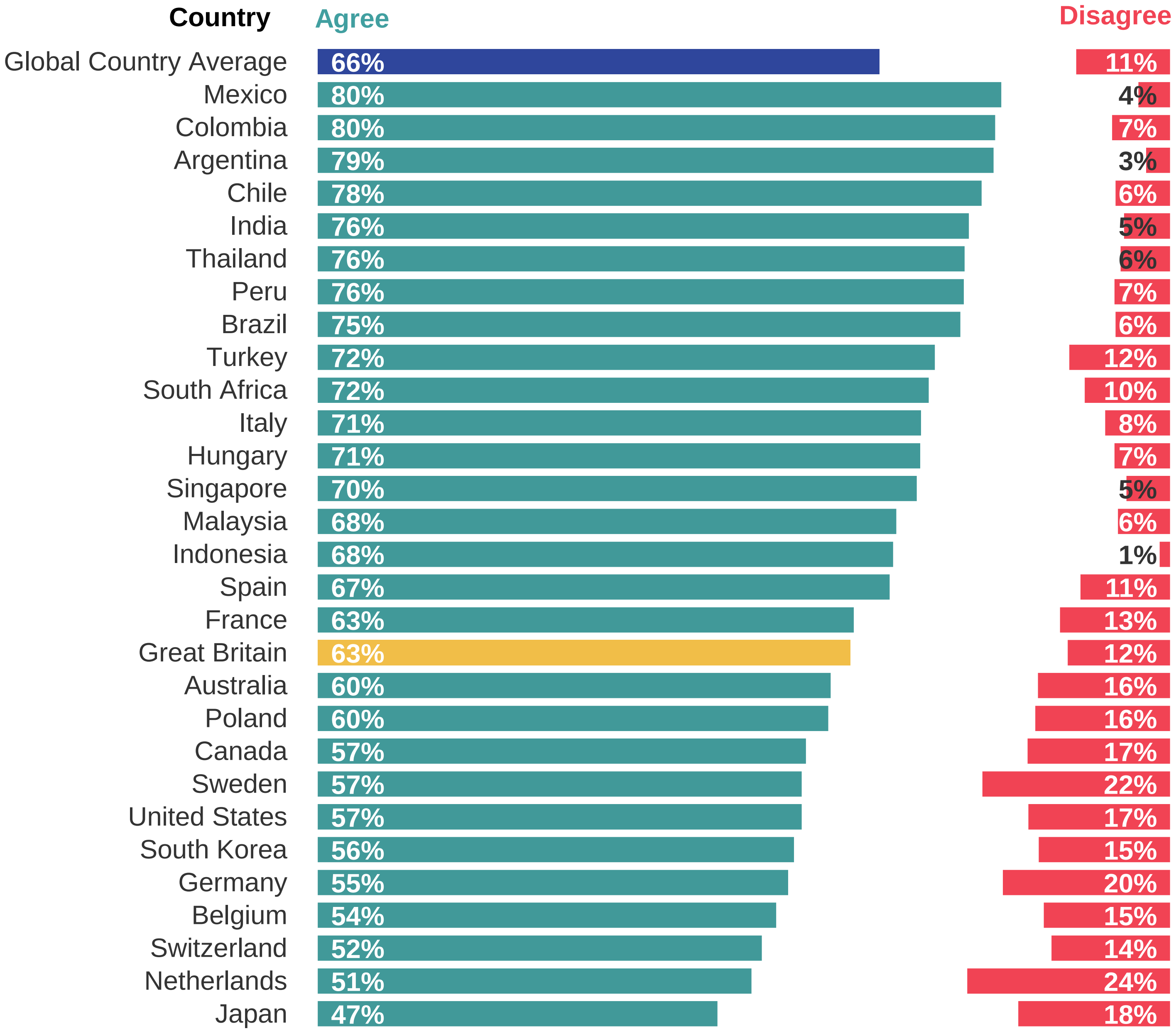
A majority of British citizens agree that their country should do more in the fight against climate change

Country data

Q. To what extent do you agree or disagree that your country should do more in the fight against climate change?



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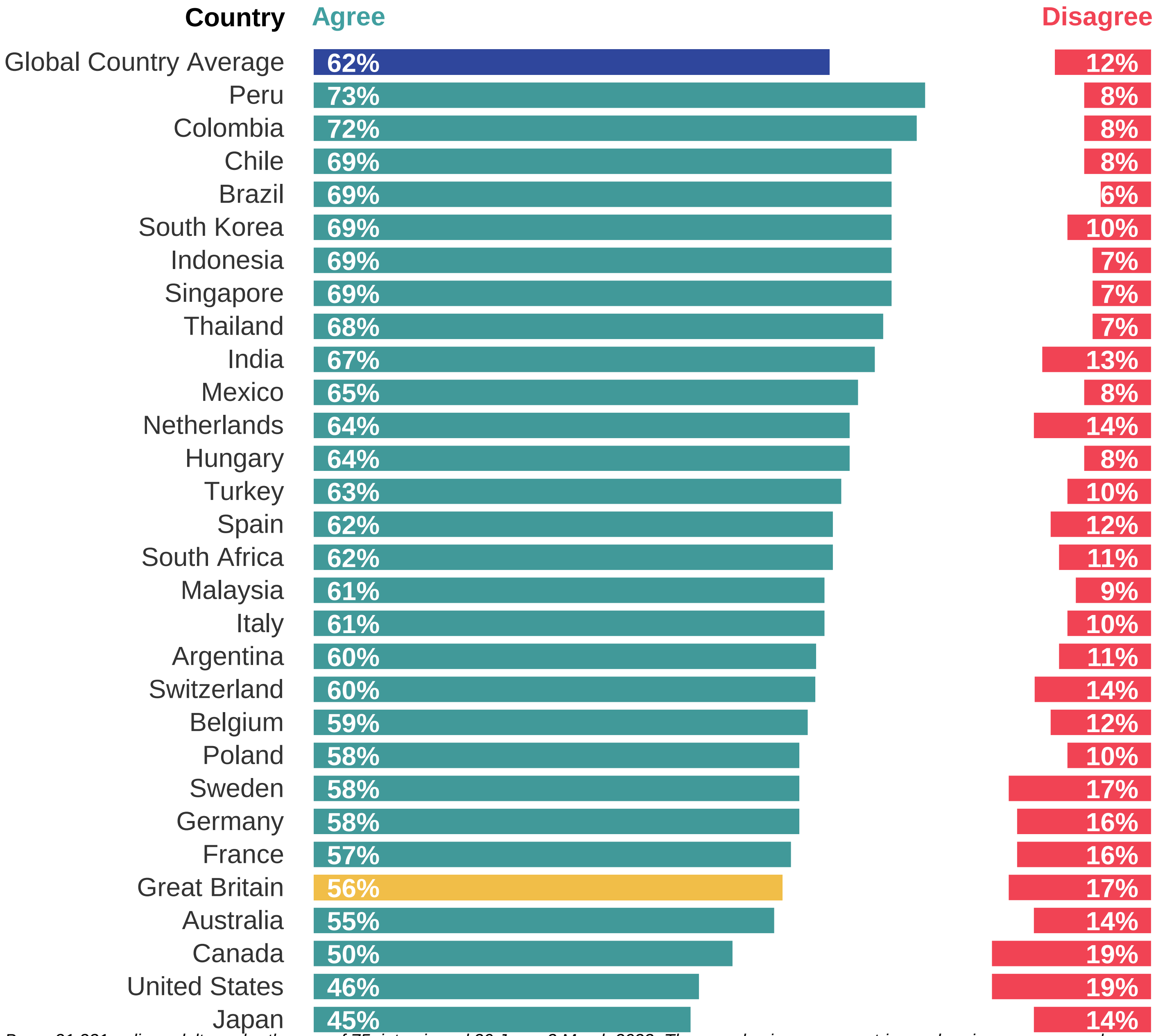
Although Britons are less convinced than many other developed nations that they should pay more to solve the problem

Country data

Q. To what extent do you agree or disagree with the following:

It is right that developed countries (such as the United States, United Kingdom, Canada, Germany, and France) who have contributed most to the climate emergency, by producing the most carbon emissions, should pay more to solve the problem



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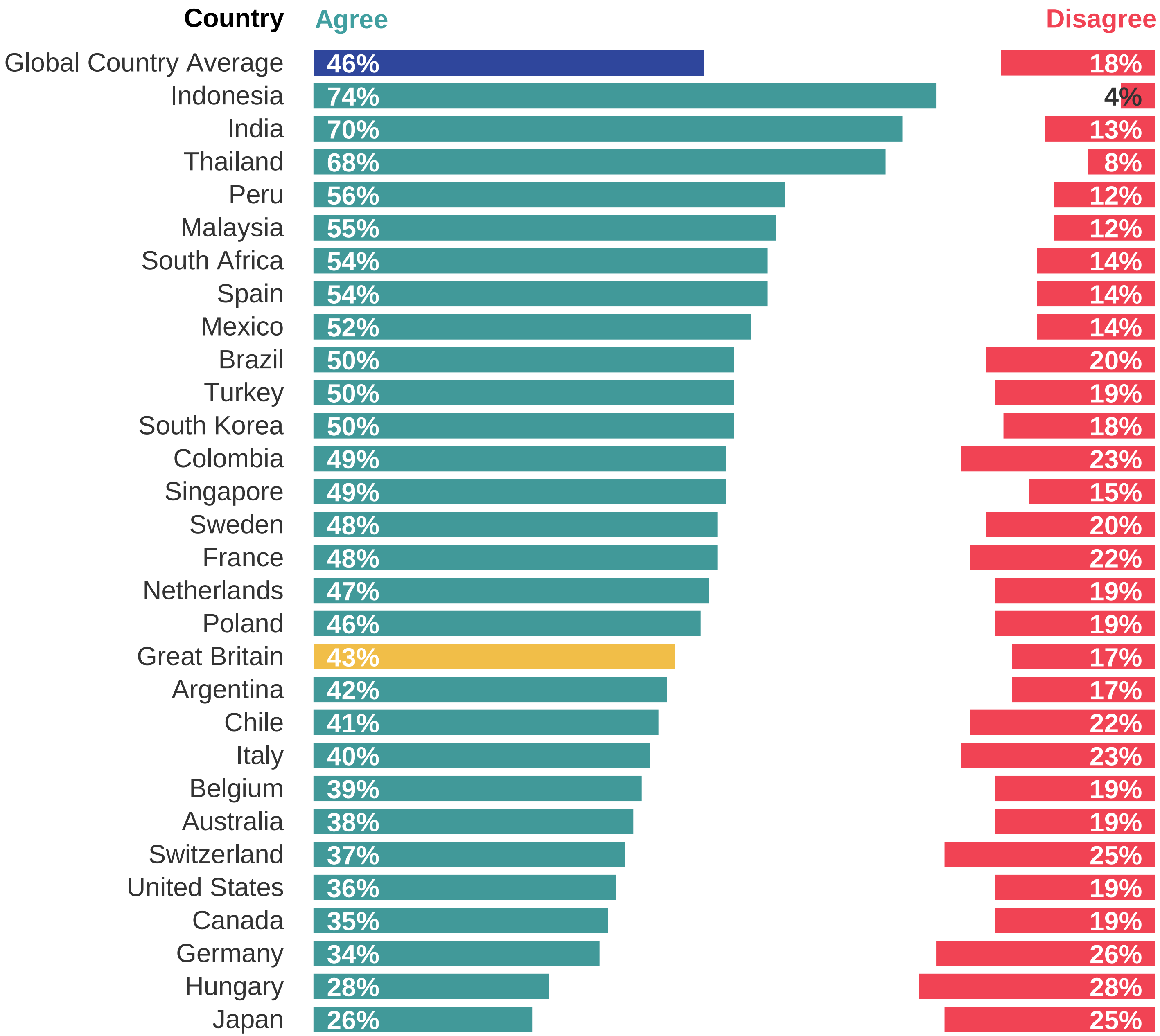
There is moderate agreement amongst Britons that developed countries are leading in the fight against climate change

Country data

Q. To what extent do you agree or disagree with the following:

Developed countries are leading in the fight against climate change



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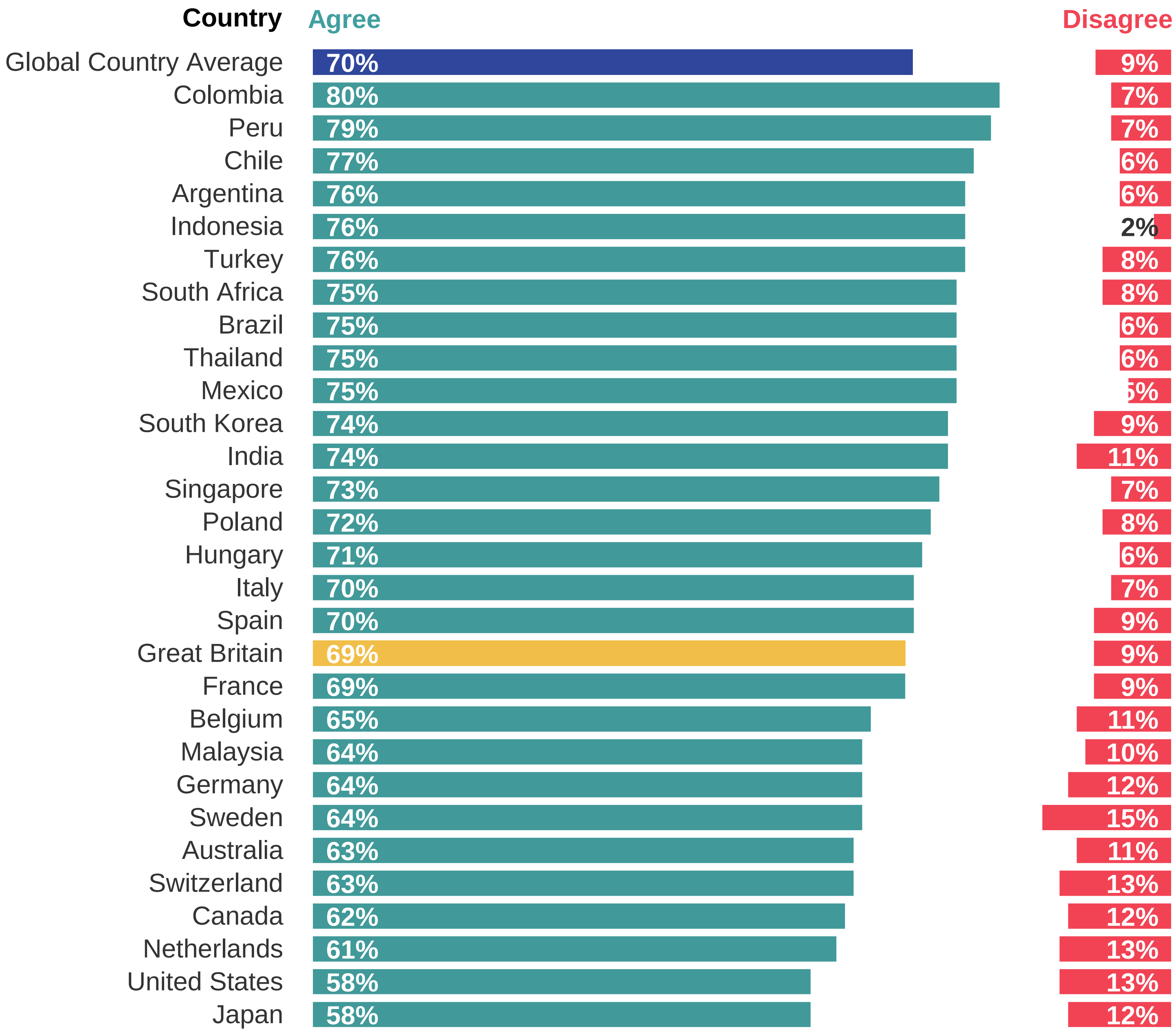
But, much stronger consensus in Britain that developed countries should do more to combat climate change

Country data

Q. To what extent do you agree or disagree with the following:

Developed countries should do more to combat climate change



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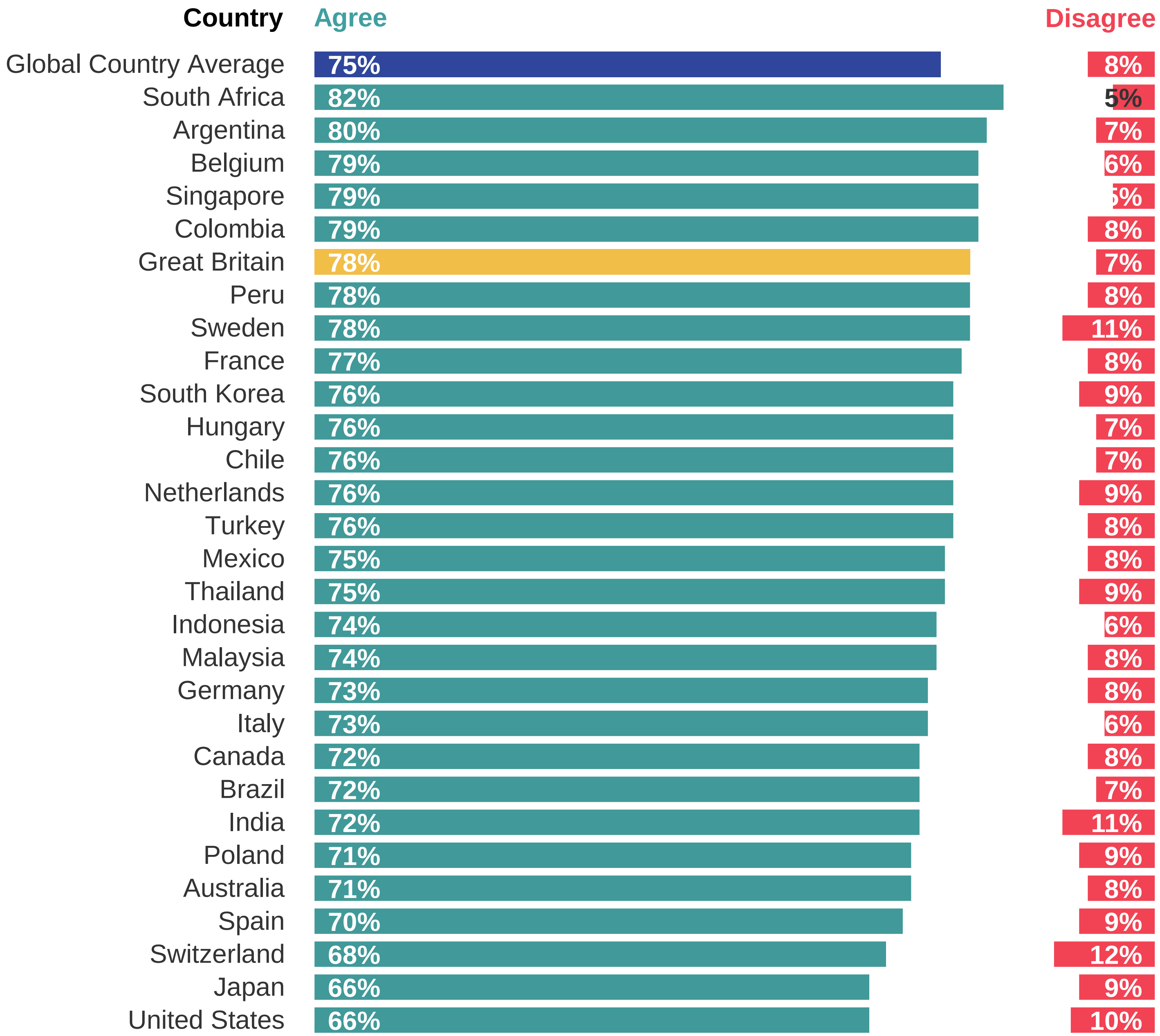
Britons strongly agree that that we cannot fully tackle climate change unless all countries collaborate

Country data

Q. To what extent do you agree or disagree with the following:

We can’t fully tackle climate change unless all countries work together



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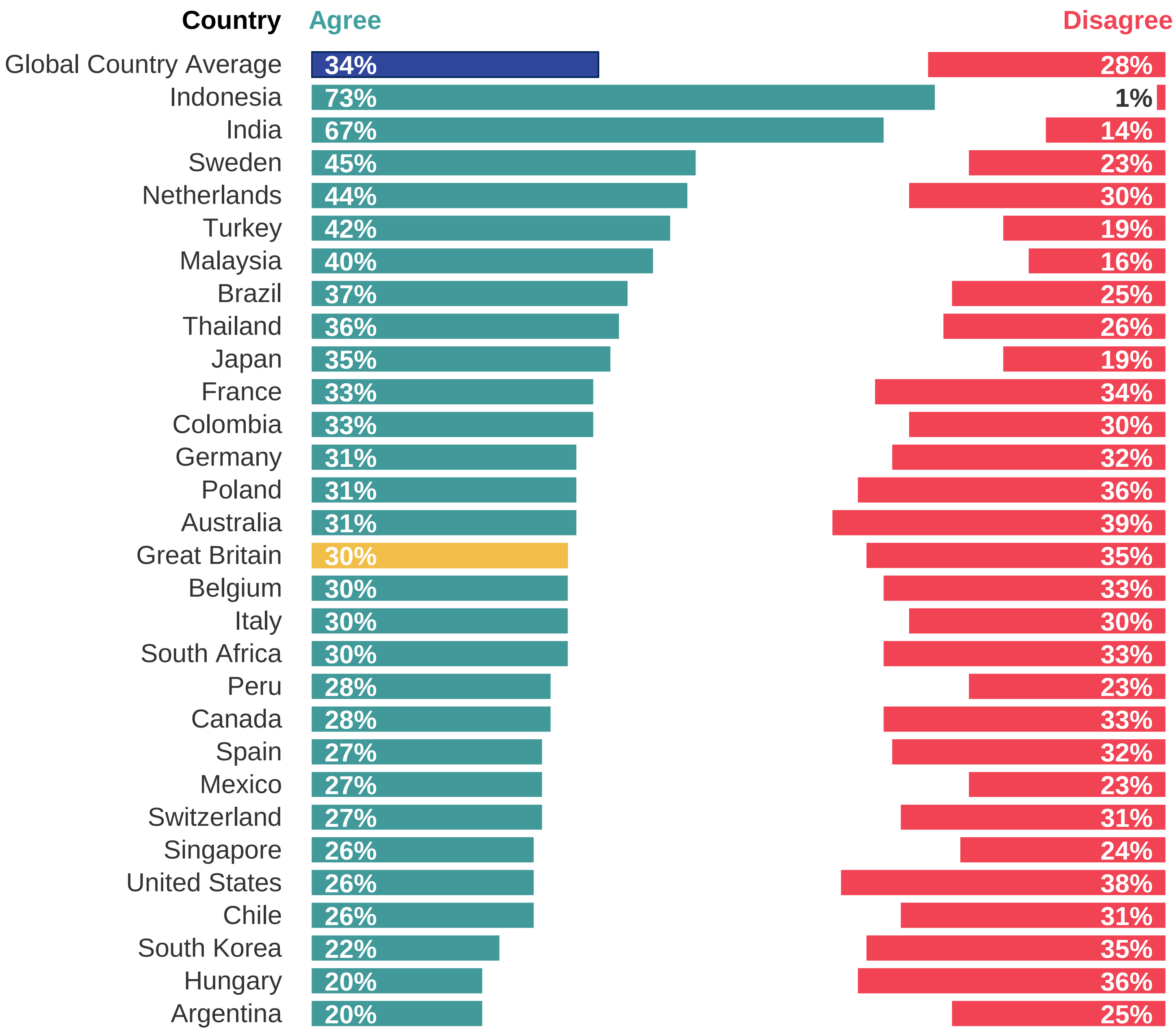
There is clear division in Britain as to whether they feel the country is being asked to sacrifice too much to tackle climate change

Country data

Q. To what extent do you agree or disagree with the following:

My country is being asked to sacrifice too much in order to tackle climate change



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What are we going to do?

There is stronger belief of the **importance of individual action** in tackling climate change (57%) versus those that think there is no point in changing their own behaviours (23%). But when it comes to funding that, there is division on **paying more taxes** towards tacking climate change.

There is optimism that **climate change is not beyond our control** (57%) versus those that think it is too late (20%) and is a more immediate concern. And that if **everyone made small changes in their everyday lives** this could have a big impact on tackling climate change (72%). With **financial incentive/tax cuts** for environmentally friendly purchases (43%) being the main factor to drive action.

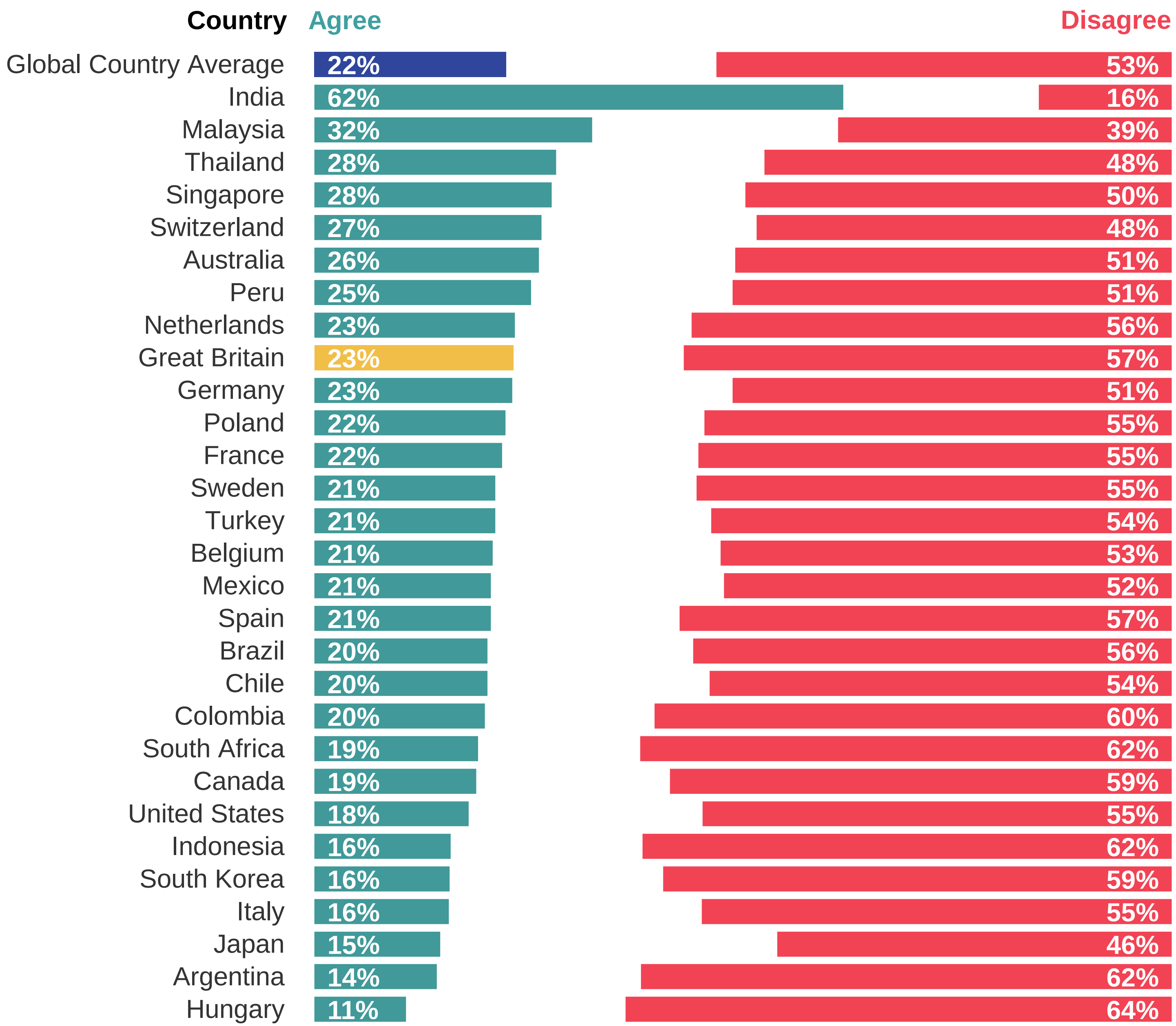
Brits perceive many actions as having a far greater impact on reducing emissions than they do but understanding about the **role of renewables has improved.**

British citizens do not generally dismiss the importance of individual action

Country data

Q. To what extent do you agree or disagree with the following:

There is no point in changing my own behaviour to tackle climate change because it won’t make any difference anyway



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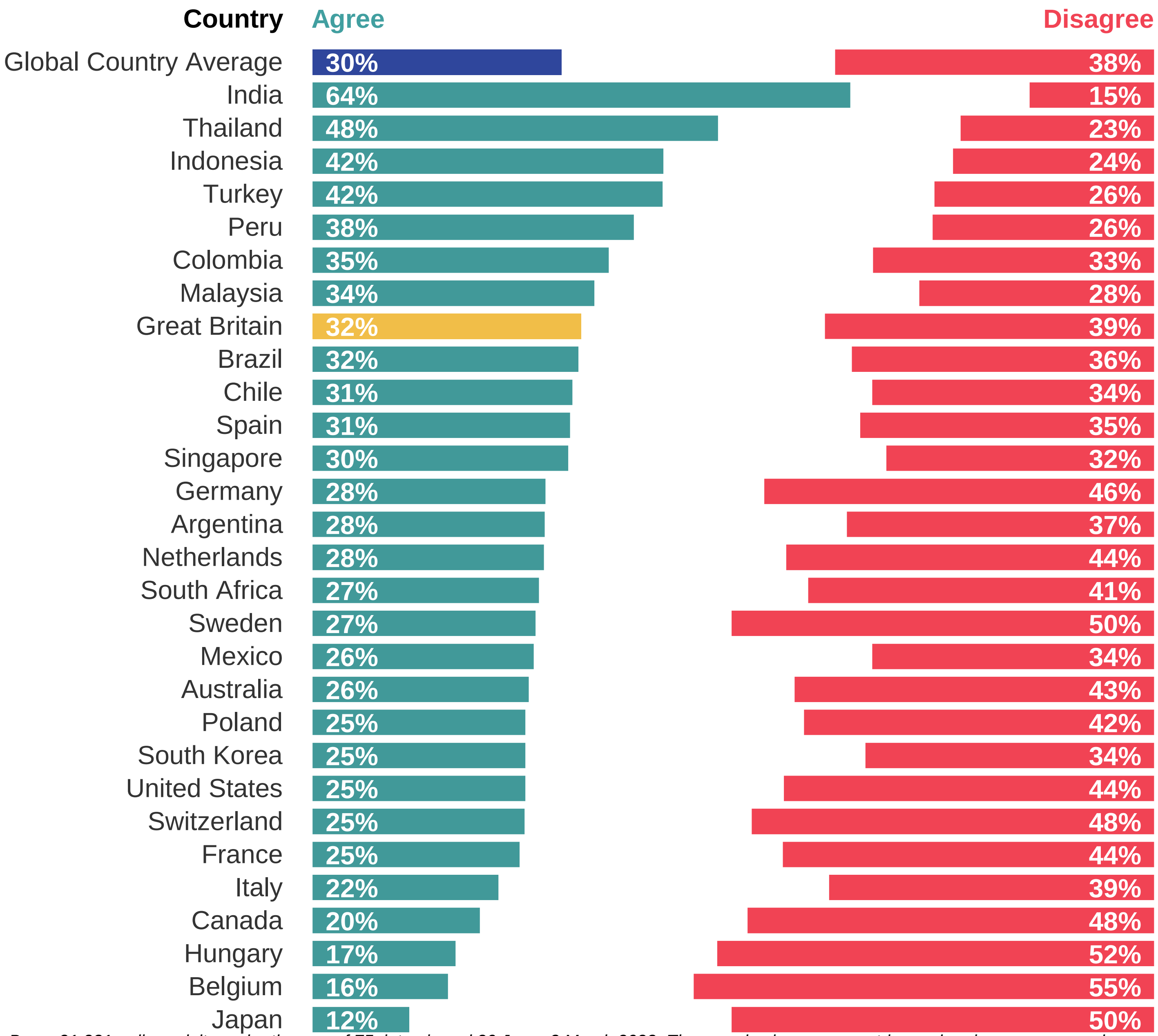
Opinion is very divided amongst Britons on whether they would be willing to pay more taxes to help prevent climate change

Country data

Q. To what extent do you agree or disagree with the following:

I would pay more of my income in taxes than I currently do now to help prevent climate change



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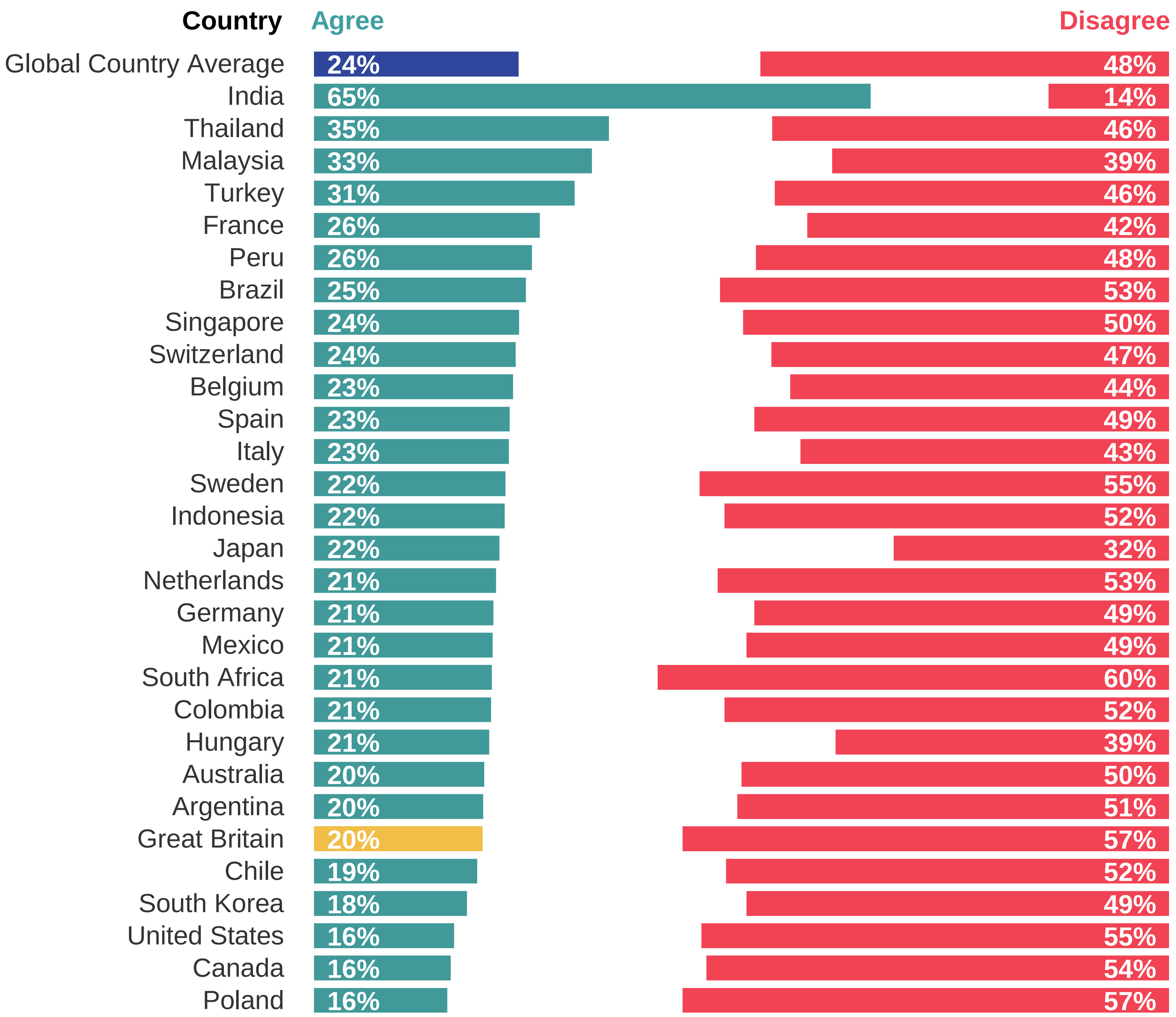
Most Britons disagree that climate change is beyond our control

Country data

Q. To what extent do you agree or disagree with the following:

Climate change is beyond our control – it's too late to do anything about it



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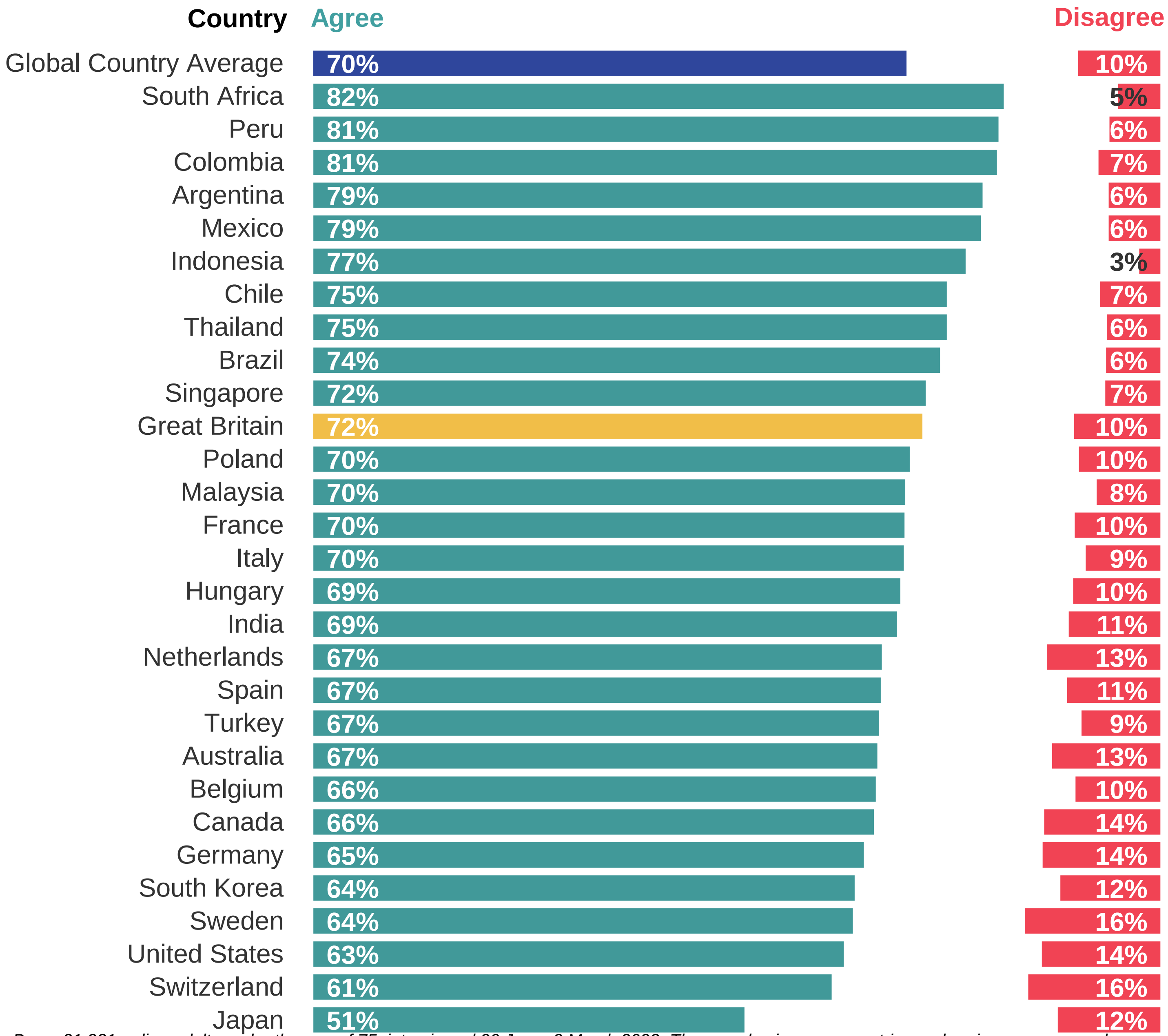
There is strong agreement by Britons that if everyone made small changes this could have a big impact on tackling climate change

Country data

Q. To what extent do you agree or disagree with the following:

If everyone made small changes in their everyday lives this could have a big impact on tackling climate change



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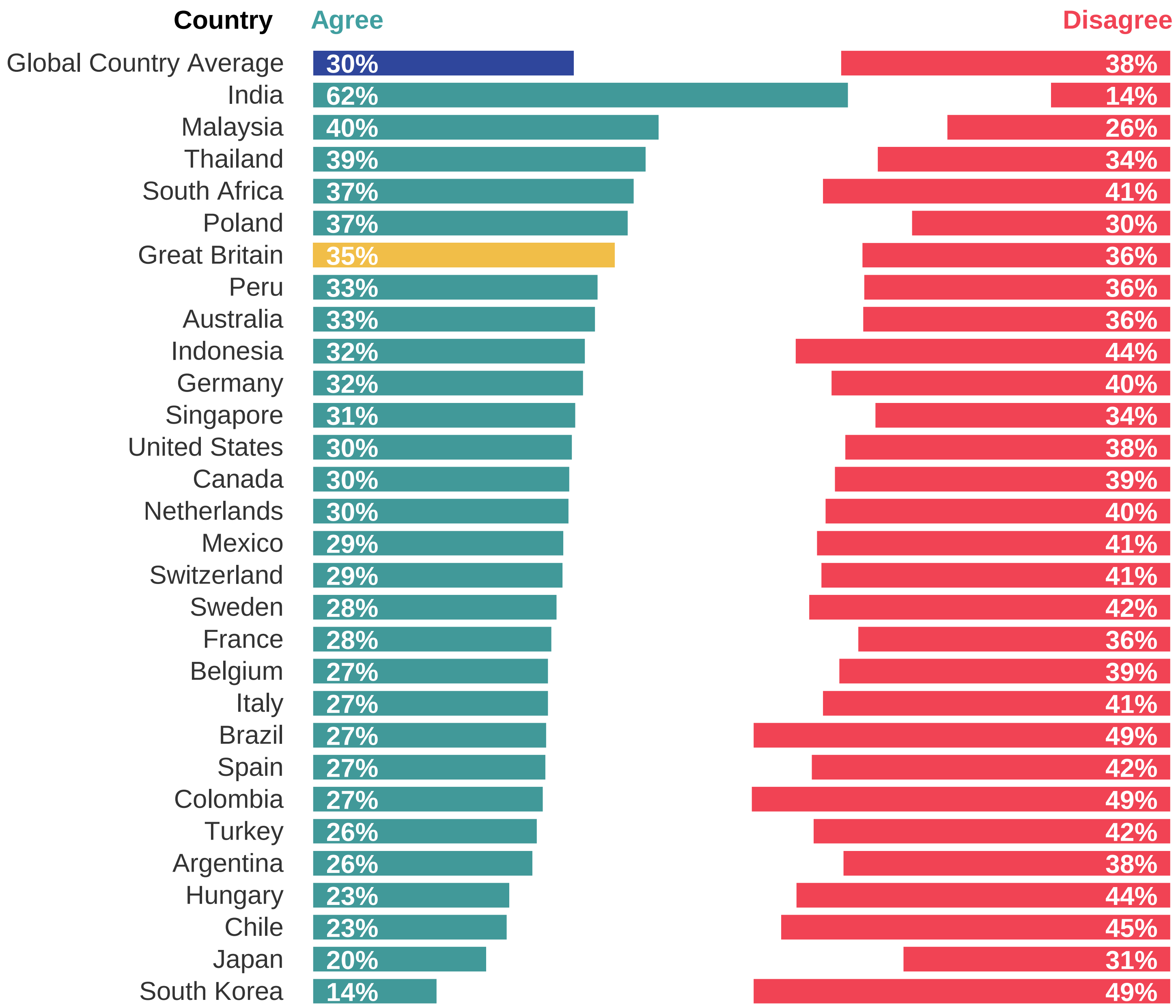
British citizens are divided on whether now is the right time, or not, to be investing in climate change

Country data

Q. To what extent do you agree or disagree with the following:

Now is not the right time to be investing in measures to reduce climate change given the tough economic conditions



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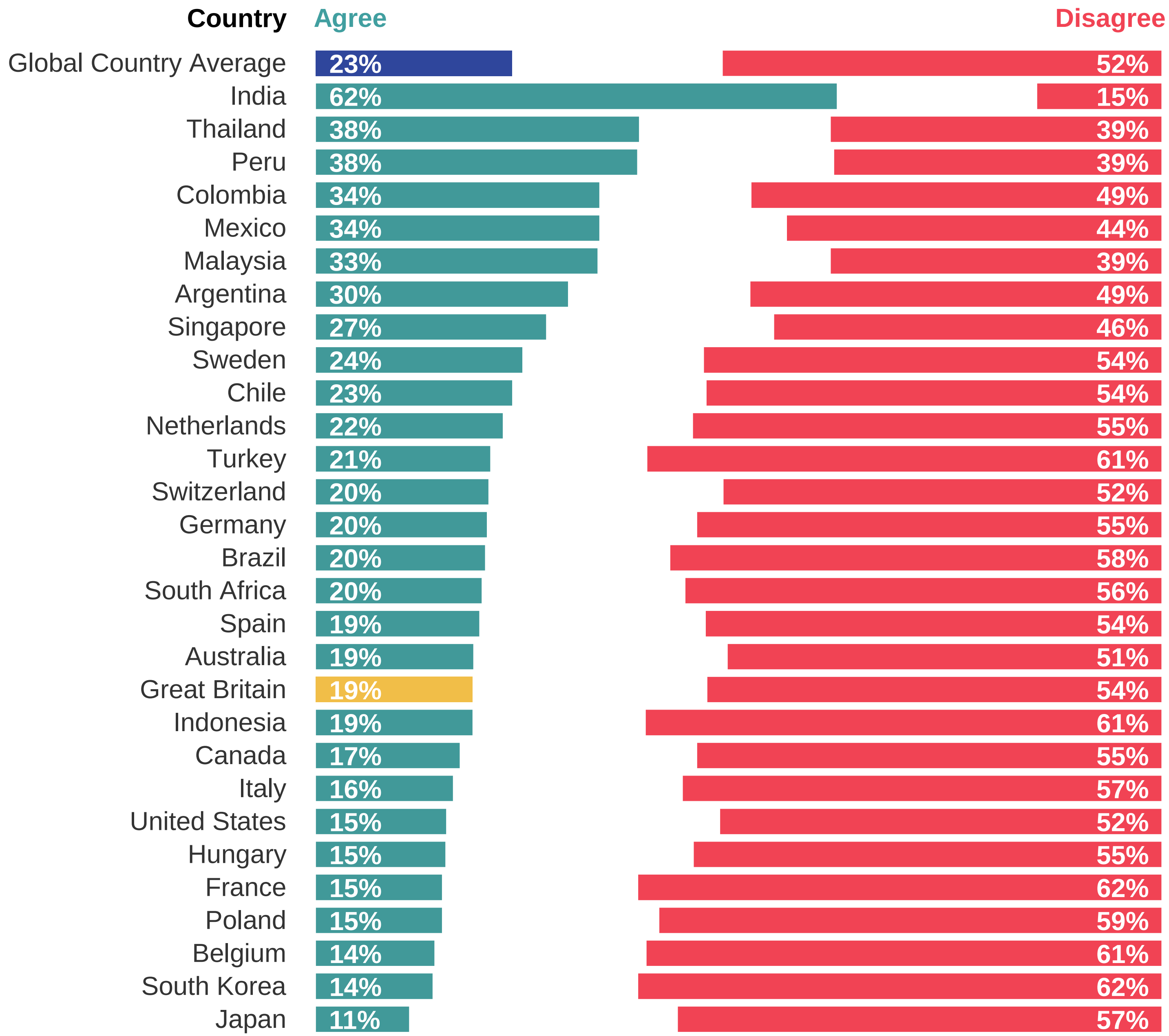
More than half of British citizens disagree that the negative impact of climate change is too far in the future to worry about

Country data

Q. To what extent do you agree or disagree with the following:

The negative impact of climate change is too far off in the future for me to worry about



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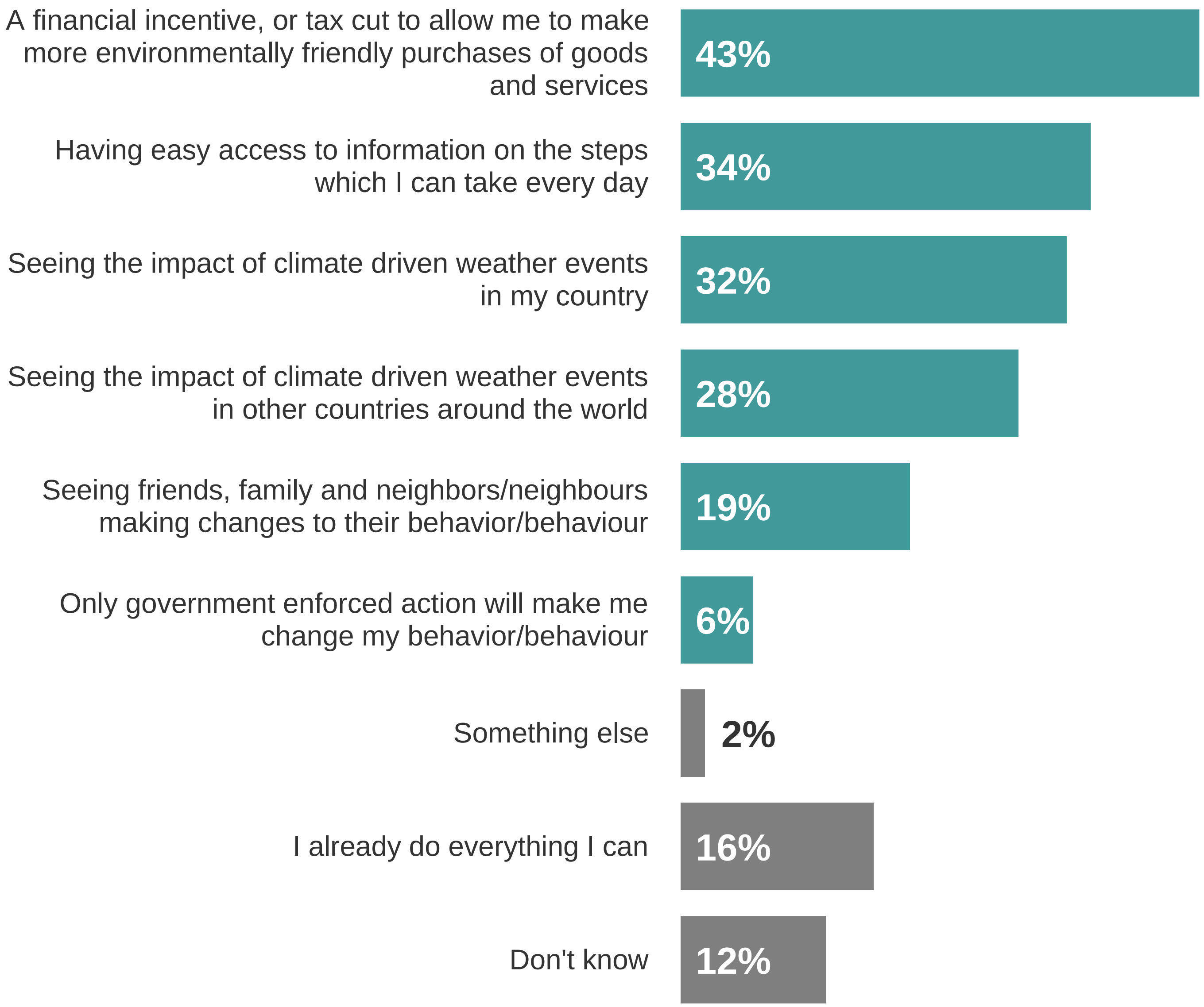
Brits say a financial incentive/tax cut for environmentally friendly purchases, followed by easy access to information would help encourage them to take more action to fight climate change

Great Britain

Q. Thinking about the actions you personally can take to help fight climate change, what could encourage you to take more action, if anything?

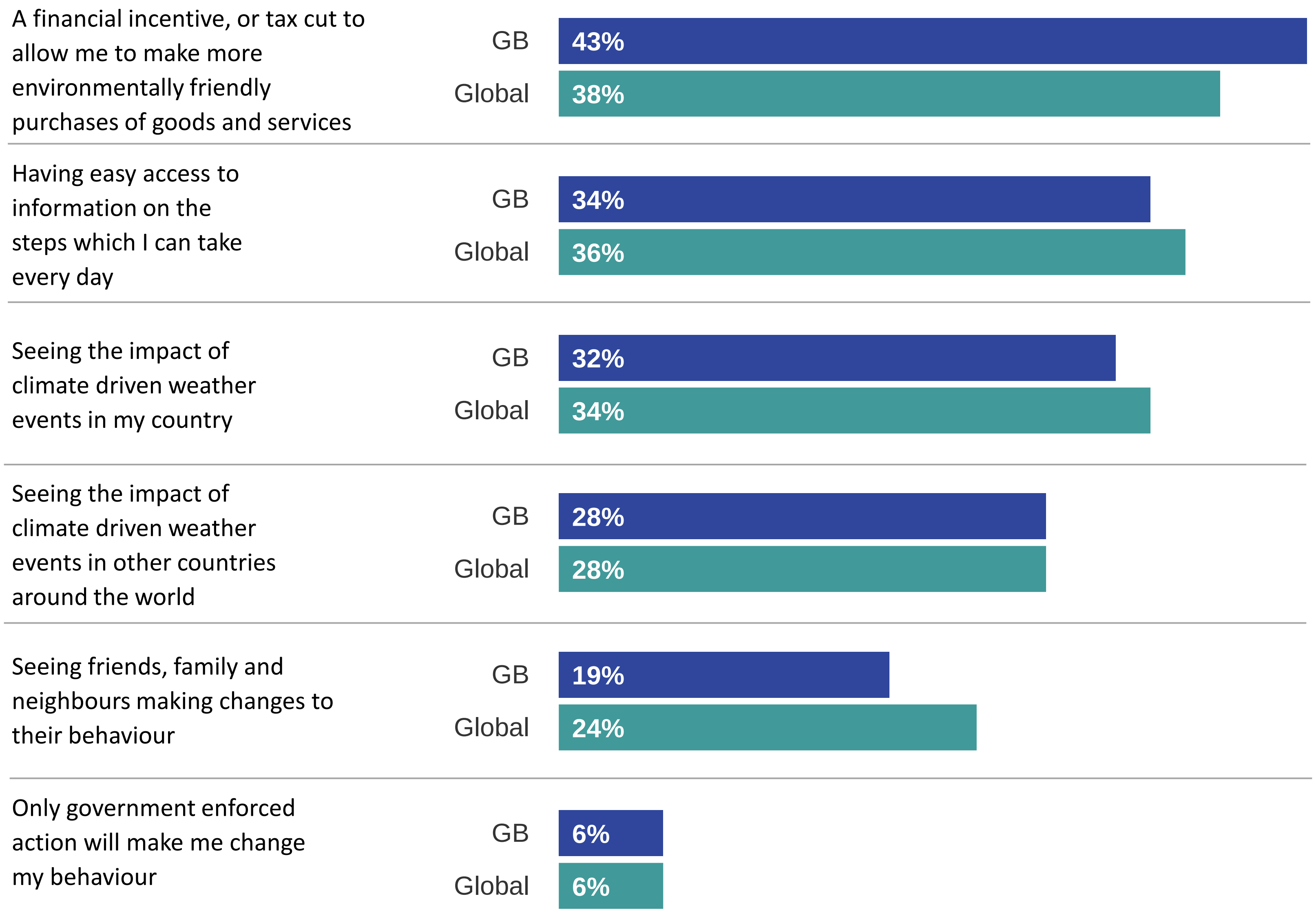


Base: 1,001 GB Online adults aged 16-74, 20 Jan – 3 Feb 2023

Britons more supportive of financial incentives or tax cuts to encourage more environmentally friendly purchases than global citizens

Global Country Average vs GB

Q. Thinking about the actions you personally can take to help fight climate change, what could encourage you to take more action, if anything?



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Likelihood to take action on climate change 2023 across countries

Q. Thinking about the actions you personally can take to help fight climate change, what could encourage you to take more action, if anything?

Top three actions:
- #1 in country
- #2 in country
- #3 in country

	TOT	ARG	AUS	BEL	BRA	CAN	CHE	CHL	COL	FRA	GER	GBR	HUN	IND	IDA	ITA	JPN	MAS	MEX	NED	PER	POL	SIN	RSA	KOR	ESP	SWE	THA	TUR	USA
A financial incentive, or tax cut to allow me to make more environmentally friendly purchases of goods and services	38%	39%	35%	42%	36%	41%	38%	39%	41%	36%	36%	43%	44%	26%	36%	39%	30%	34%	35%	41%	36%	41%	46%	41%	55%	37%	45%	18%	43%	33%
Having easy access to information on the steps which I can take every day	36%	46%	35%	27%	43%	32%	29%	45%	48%	29%	27%	34%	35%	32%	43%	29%	22%	38%	43%	33%	46%	37%	35%	49%	40%	31%	36%	36%	42%	34%
Seeing the impact of climate driven weather events in my country	34%	41%	35%	27%	36%	30%	23%	37%	33%	32%	25%	32%	38%	36%	54%	26%	33%	44%	41%	27%	36%	27%	39%	41%	36%	27%	29%	47%	33%	30%
Seeing the impact of climate driven weather events in other countries around the world	28%	20%	25%	23%	28%	22%	23%	22%	26%	21%	28%	28%	23%	33%	35%	20%	33%	40%	25%	30%	23%	25%	35%	34%	33%	23%	33%	41%	35%	23%
Seeing friends, family and neighbors/neighbours making changes to their behavior/behaviour.	24%	31%	22%	20%	31%	22%	18%	29%	33%	18%	15%	19%	20%	23%	18%	21%	12%	22%	26%	20%	31%	23%	28%	36%	20%	22%	20%	29%	34%	22%
Only government enforced action will make me change my behavior/behaviour.	6%	4%	4%	5%	8%	3%	7%	6%	4%	6%	4%	6%	2%	3%	4%	9%	7%	9%	8%	5%	8%	6%	8%	7%	7%	5%	6%	7%	5%	4%

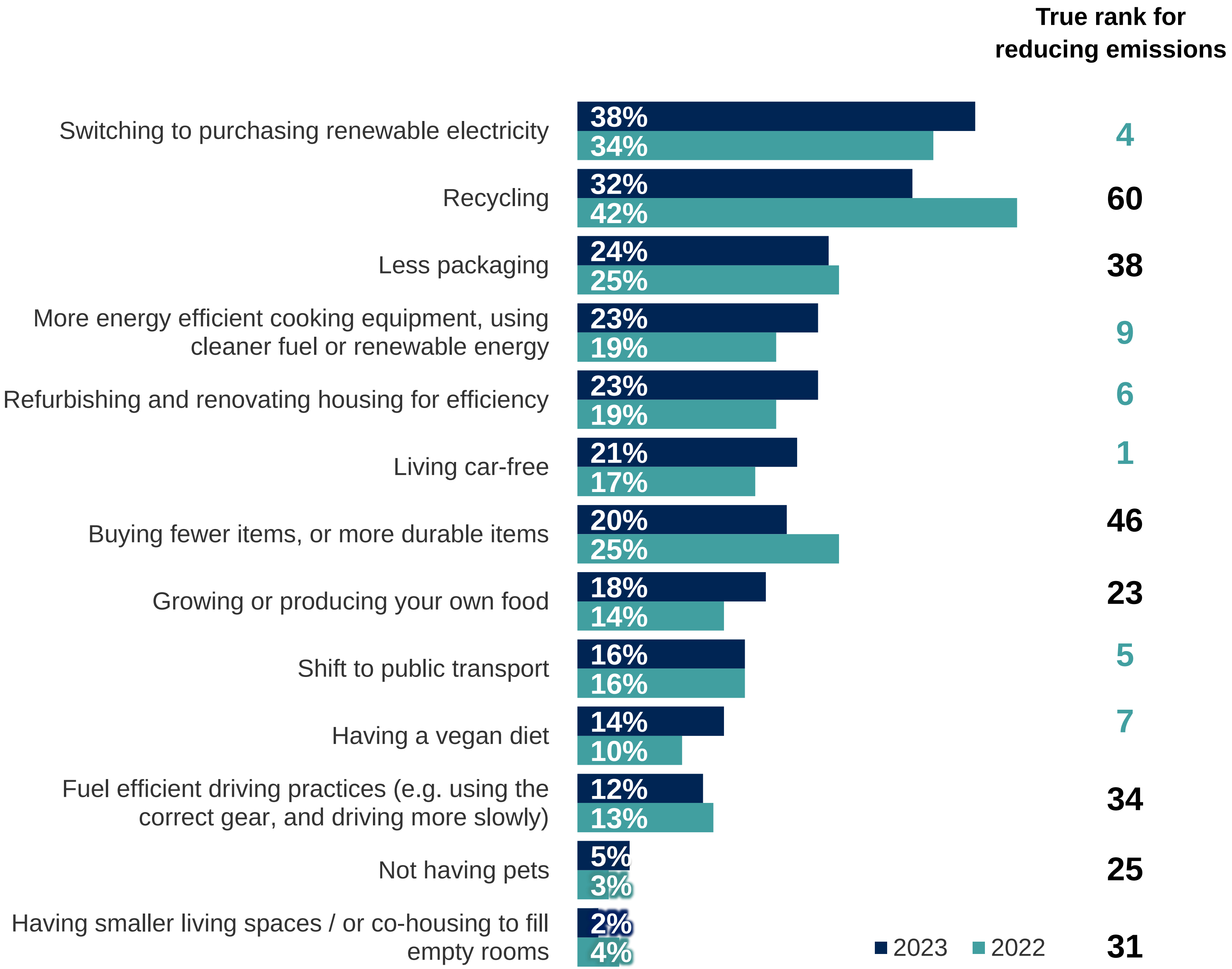
Base: 21,231 online adults under the age of 75, interviewed 20 Jan – 3 March 2023. The samples in some countries and regions are more urban, more educated, and/or more affluent than the general population. "The "Global Country Average" reflects the average result for all the countries and markets where 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."

Perils of perception

Brits perceive many actions as having a far greater impact on reducing emissions than they do but understanding about the role of renewables has improved relative to the impact of recycling

GB trended

Q. Below is a list of different ways in which households could change their behaviours to reduce global greenhouse gas emissions (or carbon footprints). Which three of the following actions, if any, do you think would have most impact on reducing greenhouse gas emissions?



Base: 2023: 1,001 GB Online adults aged 16-74; 2022: 1,001 GB online adults aged 16-74. Fieldwork dates: 20 Jan – 3 Feb 2023; 18 Feb – 4 Mar 2022.

Brits understanding of the relative contribution of actions towards global warming is similar to the global average

Global Country Average vs GB

Q. Below is a list of different ways in which households could change their behaviours to reduce global greenhouse gas emissions (or carbon footprints). Which three of the following actions, if any, do you think would have most impact on reducing greenhouse gas emissions?

	GB	Global	True rank for reducing emissions
Switching to purchasing renewable energy	38%	39%	4
Recycling	32%	33%	60
Less packaging	24%	24%	38
More energy efficient cooking equipment, using cleaner fuel or renewable energy	24%	23%	9
Shift to public transport	20%	20%	5
Growing or producing your own food	18%	18%	46
Refurbishing and renovating housing for efficiency	18%	18%	23
Living car free	18%	18%	1
Buying fewer items, or more durable items	17%	18%	6
Fuel efficient driving practices	12%	12%	34
Having a vegan diet	9%	8%	7
Not having pets	6%	5%	25
Having smaller living spaces / or co-housing to fill empty rooms	4%	3%	31

*Base: 2023: 1,001 GB Online adults aged 16-74; 2022: 1,001 GB online adults aged 16-74. Fieldwork dates: 20 Jan – 3 Feb 2023; 18 Feb – 4 Mar 2022.*Source: Ivanova et al., 2020. Quantifying the potential for climate change mitigation of consumption options. Available here: https://iopscience.iop.org/article/10.1088/1748-9326/ab8589/pdf*

Impact of actions on reducing climate change across countries

Q. Which three of the following actions, if any, do you think would have most impact on reducing greenhouse gas emissions?

Top three actions:
- #1 in country
- #2 in country
- #3 in country

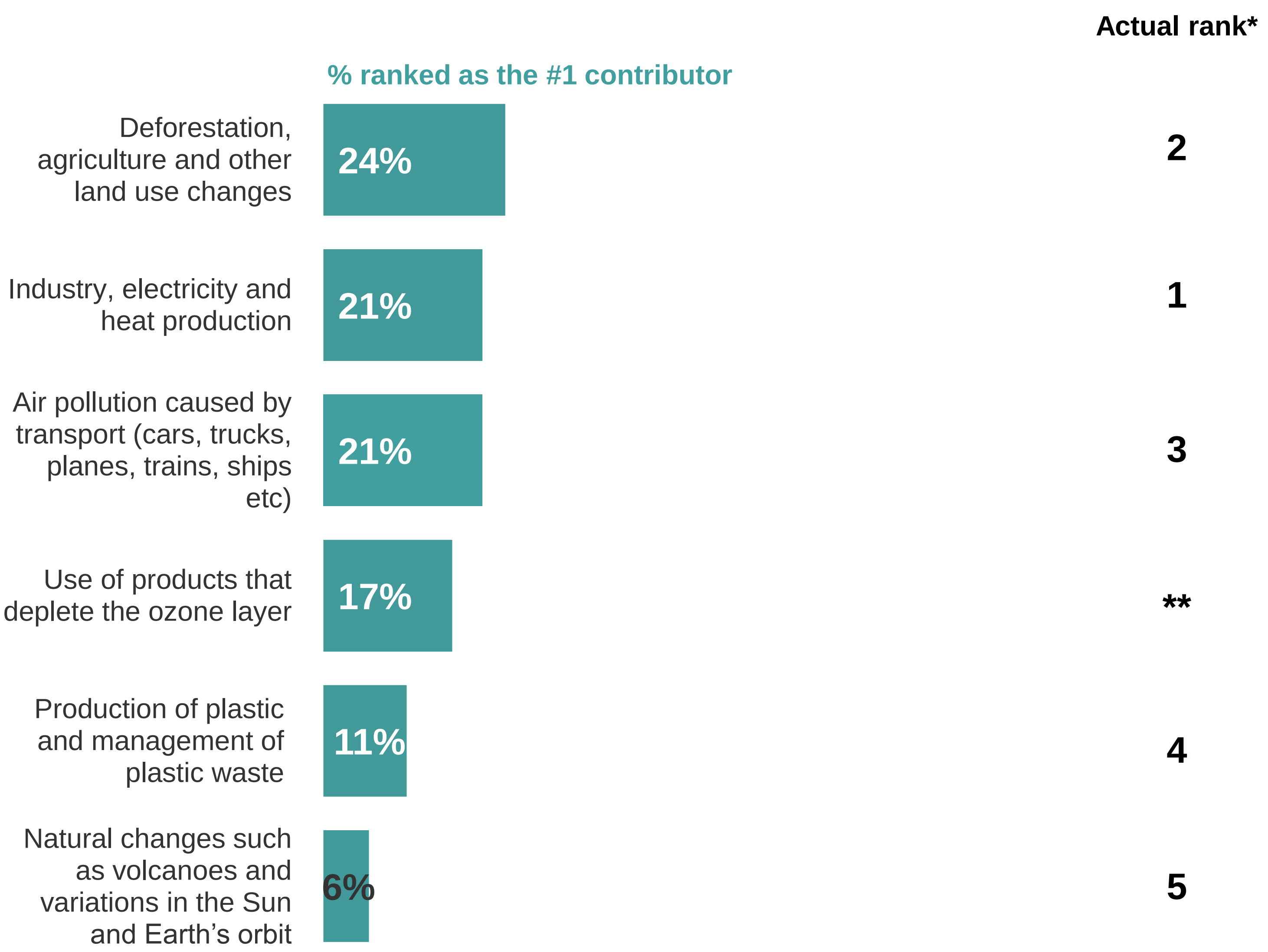
	TOT	ARG	AUS	BEL	BRA	CAN	CHE	CHL	COL	FRA	GER	GBR	HUN	IND	IDA	ITA	JPN	MAS	MEX	NED	PER	POL	SIN	RSA	KOR	ESP	SWE	THA	TUR	USA
Switching to purchasing renewable electricity	39%	58%	38%	33%	35%	27%	32%	56%	51%	28%	44%	38%	42%	18%	45%	42%	25%	32%	55%	35%	52%	43%	31%	51%	35%	42%	24%	33%	47%	34%
Recycling	33%	43%	35%	34%	38%	44%	31%	41%	50%	32%	25%	32%	30%	7%	31%	31%	31%	37%	40%	26%	41%	29%	34%	45%	24%	26%	30%	37%	25%	40%
Less packaging	25%	18%	27%	36%	36%	32%	34%	9%	13%	35%	32%	24%	19%	15%	31%	28%	25%	26%	12%	25%	12%	35%	28%	13%	30%	34%	21%	31%	20%	19%
More energy efficient cooking equipment, using cleaner fuel or renewable energy	23%	22%	23%	16%	22%	15%	13%	21%	28%	10%	8%	23%	29%	21%	38%	15%	23%	30%	22%	29%	29%	31%	26%	30%	30%	27%	10%	25%	37%	19%
Shift to public transport	20%	13%	17%	17%	16%	13%	14%	20%	19%	18%	17%	16%	14%	13%	30%	24%	25%	25%	22%	13%	17%	20%	35%	16%	41%	25%	23%	15%	30%	10%
Refurbishing and renovating housing for efficiency	18%	17%	16%	26%	9%	18%	28%	21%	10%	39%	24%	23%	39%	17%	12%	25%	6%	12%	12%	29%	10%	15%	12%	13%	14%	25%	14%	16%	10%	17%
Growing or producing your own food	18%	22%	23%	17%	18%	22%	15%	16%	20%	17%	10%	18%	13%	24%	30%	13%	8%	24%	20%	12%	21%	14%	14%	39%	7%	9%	22%	23%	17%	23%
Buying fewer items, or more durable items	18%	17%	21%	19%	14%	24%	19%	17%	19%	25%	21%	20%	16%	5%	12%	14%	20%	10%	16%	23%	17%	21%	21%	9%	23%	18%	40%	12%	13%	18%
Living car-free	18%	19%	14%	18%	21%	15%	17%	19%	22%	13%	19%	21%	23%	24%	11%	21%	17%	10%	28%	16%	21%	10%	27%	13%	15%	14%	24%	12%	26%	11%
Fuel efficient driving practices (e.g. using the correct gear, and driving more slowly)	12%	13%	11%	6%	14%	11%	10%	9%	10%	10%	12%	12%	9%	12%	13%	7%	18%	11%	15%	7%	13%	10%	12%	18%	17%	9%	10%	10%	8%	17%
Having a vegan diet	8%	4%	9%	5%	8%	6%	9%	7%	4%	8%	11%	14%	4%	26%	6%	7%	2%	13%	5%	13%	5%	5%	8%	9%	6%	7%	14%	8%	5%	5%
Not having pets	5%	2%	5%	6%	5%	4%	6%	2%	4%	3%	6%	5%	3%	17%	2%	4%	4%	6%	4%	9%	3%	5%	5%	4%	8%	5%	8%	4%	7%	4%
Having smaller living spaces / or co-housing to fill empty rooms	3%	5%	6%	6%	4%	3%	4%	3%	3%	3%	3%	2%	1%	4%	1%	2%	2%	2%	7%	3%	4%	3%	4%	4%	3%	3%	6%	5%	3%	4%

Base: 21,231 online adults under the age of 75, interviewed 20 Jan – 3 March 2023. The samples in some countries and regions are more urban, more educated, and/or more affluent than the general population. "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."

Brits were divided on what contributed the most to global warming, but were likely to choose one of the top 3 emitters as their #1 rank

Great Britain

Q. From the list below, please rank the top 3 from most to least in terms of how much you believe they contribute, if at all, to global warming.



*Base: 1,001 GB Online adults aged 16-74, 20 Jan – 3 Feb 2023. *Source: Ivanova et al., 2020. Quantifying the potential for climate change mitigation of consumption options. Available here: https://www.ipcc.ch/report/ar6/wg3/downloads/report/IPCC_AR6_WGIII_Chapter02.pdf **Not a major contributor to global warming*

Brits tend to have a better understanding of the top two sectors which contribute most to global warming than the average global citizen

Global Country Average vs GB

Q. From the list below, please rank the top 3 from most to least in terms of how much you believe they contribute, if at all, to global warming.

		% ranking as the #1 contributor	Actual rank*
Use of products that deplete the ozone layer	GB	17%	**
	Global	26%	
Air pollution caused by transport (cars, trucks, planes, trains, ships etc)	GB	21%	3
	Global	22%	
Deforestation, agriculture and other land use changes	GB	24%	2
	Global	19%	
Industry, electricity and heat production	GB	21%	1
	Global	16%	
Production of plastic and management of plastic waste	GB	11%	4
	Global	11%	
Natural changes such as volcanoes and variations in the Sun and Earth's orbit	GB	6%	5
	Global	6%	

*Base: 23,232 online adults across 32 countries, 20 Jan – 3 Feb 2023 in 31 countries and 17 Feb – 3 March in Switzerland, including 1,001 GB online adults. NB surveyed adults aged 18 years and older in India, 18-74 in, Canada, Israel, Malaysia, South Africa, Turkey and the United States, 20-74 in Thailand, 21-74 in Indonesia and Singapore, and 16-74 in 24 other markets. *Source: Ivanova et al., 2020. Quantifying the potential for climate change mitigation of consumption options. Available here: https://www.ipcc.ch/report/ar6/wg3/downloads/report/IPCC_AR6_WGIII_Chapter02.pdf **Not a major contributor to global warming*

Perceived contribution of different factors behind global warming

Q. From the list below, please rank the top 3 from most to least in terms of how much you believe they contribute, if at all, to global warming. *Table shows % ranking as the #1 contributor.*

.

Top three actions:

- #1 in country
- #2 in country
- #3 in country

	TOT	ARG	AUS	BEL	BRA	CAN	CHE	CHL	COL	FRA	GER	GBR	HUN	IND	IDA	ITA	JPN	MAS	MEX	NED	PER	POL	SIN	RSA	KOR	ESP	SWE	THA	TUR	USA
Use of products that deplete the ozone layer	26%	34%	18%	15%	37%	17%	19%	29%	28%	17%	22%	17%	20%	37%	37%	24%	27%	37%	35%	20%	37%	21%	28%	30%	24%	24%	16%	29%	33%	21%
Air pollution caused by transport (cars, trucks, planes, trains, ships, etc)	22%	18%	23%	23%	20%	29%	24%	19%	20%	22%	22%	21%	26%	22%	24%	23%	14%	18%	24%	25%	14%	21%	21%	21%	21%	27%	33%	19%	17%	24%
Industry, electricity, and heat production.	16%	7%	18%	18%	11%	15%	21%	13%	9%	19%	18%	21%	16%	18%	14%	18%	18%	13%	11%	24%	13%	23%	18%	19%	24%	13%	19%	12%	17%	16%
Deforestation, agriculture, and other land use changes	19%	28%	22%	29%	22%	19%	20%	22%	24%	28%	26%	24%	21%	13%	10%	18%	16%	20%	16%	20%	19%	15%	21%	15%	4%	17%	14%	21%	21%	21%
Production of plastic and management of plastic waste	11%	9%	11%	9%	6%	13%	10%	12%	12%	10%	7%	11%	14%	7%	10%	13%	14%	9%	10%	5%	12%	11%	9%	9%	23%	15%	9%	15%	9%	9%
Natural changes such as volcanoes and variations in the Sun and Earth's orbit	6%	4%	9%	6%	4%	7%	6%	5%	6%	3%	6%	6%	4%	3%	6%	4%	12%	2%	4%	6%	5%	9%	3%	5%	4%	4%	9%	5%	4%	9%

Base: 21,231 online adults under the age of 75, interviewed 20 Jan – 3 March 2023. The samples in some countries and regions are more urban, more educated, and/or more affluent than the general population. "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."

These are the findings of an Ipsos *Global Advisor* survey conducted between 20 January and February 3, 2023.

These are the results of a 29-country survey conducted by Ipsos on its Global Advisor online platform and, in India, on its IndiaBus platform, between Friday 20th January and Friday 3rd February 2023 in 31 countries and between Friday 17th February and Friday 3rd March 2023 in Switzerland.

For this survey, Ipsos interviewed a total of 21,231 adults aged 18 years and older in India, 18-74 in Canada, Malaysia, South Africa, Turkey, and the United States, 20-74 in Thailand, 21-74 in Indonesia and Singapore, and 16-74 in all other countries.

The sample consists of approximately 1,000 individuals each in Australia, Brazil, Canada, France, Germany, Great Britain, Italy, Japan, Spain, and the United States, and 500 individuals each in Argentina, Belgium, Chile, Colombia, Hungary, Indonesia, Israel, Malaysia, Mexico, the Netherlands, Peru, Poland, Singapore, South Africa, South Korea, Sweden, Thailand and Turkey.

The sample in India consists of approximately 2,200 individuals, of whom approximately 1,800 were interviewed face-to-face and 400 were interviewed online.

Samples in Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, the Netherlands, Poland, South Korea, Spain, Sweden and the U.S. can be considered representative of their general adult populations under the age of 75.

Samples in Brazil, Chile, Colombia, Indonesia, Israel, Malaysia, Mexico, Peru, Singapore, South Africa, Thailand, and Turkey are more urban, more educated, and/or more affluent than the general population. The survey results for these countries should be viewed as reflecting the more “connected” segment of their population.

India’s sample represents a large subset of its urban population – social economic classes A, B and C and in metros and tier 1-3 town classes across all four zones.

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

“The Global Country Average” reflects the average result for all the countries and markets in which 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.

When percentages do not sum up to 100 or the “difference” appears to be +/- 1 percentage point more/less than the actual result, this may be due to rounding, multiple responses, or the exclusion of “don’t know” or not stated responses.

The precision of Ipsos online polls is calculated using a credibility interval with a poll were N=1,000 being accurate to +/- 3.5 percentage points and of where N=500 being accurate to +/- 5.0 percentage points. For more information on Ipsos’ use of credibility intervals, please visit the Ipsos website.

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

This report contains findings from three sample sets:

1

Worldwide 29 country study 2023

A 29 countries around the world via Ipsos Global Observer online platform and, in India, on its IndiaBus platform. Total base: 21,231 adults aged 18-74 across 29 countries. Fieldwork dates: Friday January 20 to Friday, February 3, 2023 (Friday February 17 to Friday *March 3, 2023 in Switzerland). The* countries reporting herin are: Argentina, Australia, Belgium, Brazil, Canada, Chile, Columbia, France, Germany, Great Britain, Hungary, India, Indonesia, Israel, Italy, Malaysia, Mexico, the Netherlands, Japan, Peru, Poland, Singapore, South Africa, South Korea, Spain, Sweden, Thailand, Turkey, and the United States.

2

Worldwide 31 country study 2022

31 countries around the world via the Ipsos Online Panel system. Total base: 23,577 online adults aged 16-99 across 31 countries. Fieldwork dates: Friday, February 18 to Friday, March 4, 2022. The countries reporting herein are Argentina, Australia, Belgium, Brazil, Canada, mainland China, Chile, Colombia, France, Great Britain, Germany, Hungary, India, Ireland, Italy, Japan, Malaysia, Mexico, the Netherlands, Norway, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Switzerland, Turkey and the United States of America.

3

Worldwide 30 market study 2021

30 markets around the world via the Ipsos Online Panel system. Total base: 21,011 online adults aged 16-74 across 30 countries. Fieldwork dates: Friday, February 19 to Friday, March 5, 2021. The markets reporting herein are Argentina, Australia, Belgium, Brazil, Canada, China, Chile, Colombia, France, Great Britain, Germany, Hungary, Hong Kong, India, Italy, Japan, Malaysia, Mexico, the Netherlands, Peru, Poland, Russia, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Switzerland, Turkey and the United States of America.

Trended slides contain findings from several subsets:

1

A 26-country subset of the 29 countries in the 2023 worldwide study

This appears alongside a 26 market subset of the 30 markets in the 2021 worldwide study and 31 markets in the 2022 worldwide study. This is used to compare data for these markets / countries against those included in the 2022 and 2021 study.

Please consult the base notes of comparator charts for a full list of the countries included therein.

2

A 26-country subset of the 31 countries in the 2022 worldwide study

This appears alongside a 26 market subset of the 30 markets in the 2021 worldwide study and 29 markets in the 2023 worldwide study. This is used to compare data for these markets / countries against those included in the 2023 and 2021 study.

Please consult the base notes of comparator charts for a full list of the countries included therein.

3

A 26-country subset of the 30 countries in the 2021 worldwide study

This appears alongside a 26 market subset of the 31 markets in the 2022 worldwide study and 29 markets in the 2023 worldwide study. This is used to compare data between these markets / countries against those included in the 2023 and 2022 studies.

Please consult the base notes of comparator charts for a full list of the countries included therein.

For the comparator charts (2023, 2022, 2021) the following 26 countries are included: Argentina, Australia, Belgium, Brazil, Canada, Chile, Colombia, France, Great Britain, Germany, Hungary, India, Italy, Japan, Malaysia, Mexico, the Netherlands, Peru, Poland, South Africa, South Korea, Spain, Sweden, Switzerland, Turkey and the United States of America.

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ISO 27001 – International standard for information security designed to ensure the selection of adequate and proportionate security controls. Ipsos UK was the first research company in the UK to be awarded this in August 2008.

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You act better when you are sure.

***

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Thank you.

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