EARTH DAM 2023

Public opinion on climate change

April 2023 Ipsos Global Advisor

Is concern and focus slipping on climate change?



A Global Country Average of just under a third (31%) agree that their government has a clear plan in place for how government, businesses and people are going to work together to tackle climate change. This has declined slightly since last year, an indication perhaps of the change in government focus due to the need to tackle more immediate political, social and economic issues. This is supported in other findings where division is seen about whether now is the right time to be investing in climate change or not. Although a majority disagree that the negative impact of climate change is too far in the future to worry about.



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. Although, this recognition of the need to act has also slipped back slightly and noticeably so when looking at the perceived role of business.



Despite the weakening perception of governments having a plan to act as well as the reduced view of the responsibility that everyone needs to take, there is an acknowledgment, across the 29 countries, that the **economic cost of climate change** itself will be larger than the cost of measures to reduce it. Linked to this there is consensus that a **collaborative effort across countries** will be needed to fully tackle climate change whilst also stating that **those countries who have contributed most to climate change** should take stronger financial responsibility for funding that change.



Is concern and focus slipping on climate change?



At an **individual citizen level**, there is still a sentiment of hope that **climate change is not beyond our control (48%)** and people generally accept the positive impact that **small individual actions can have in tacking climate change (70%)**.



Aligned with this, close to a third of citizens globally (30%) say they would be willing to pay more taxes to help prevent climate change. And that they would be most encouraged to take more action to fight climate change though financial incentive/tax cut for environmentally friendly purchases (38%) or having easy access to information (36%) which would help encourage them to take more action to fight climate change. There is also a notable gap in the opportunity for citizens to change with only just over 1 in 10 (14%) saying they are already doing everything they can.



Contrasting to last year there has been an increase in understanding surrounding the behaviours that **households could take to reduce their carbon footprint**. Particularly, 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).



What is the plan?

Who should act to combat climate change?

A Global Country Average of just **under a third** (31%) agree their 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 from **36%** last year.

However, there is a sense of shared responsibility between citizens, government, and businesses to combat climate change.

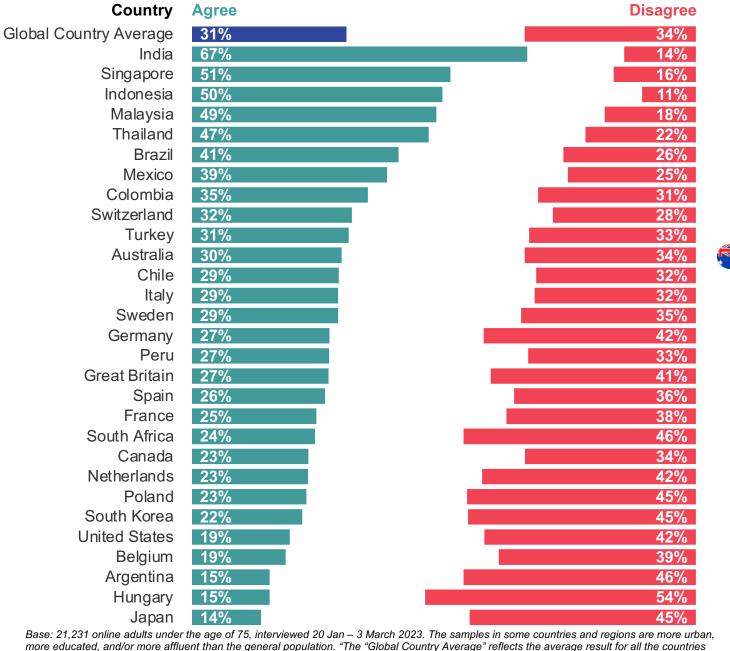


Outside of India & SE Asia there is not strong agreement from citizens that their government has a clear plan to tackle climate change

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



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."

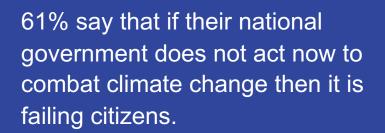
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The public perceive combatting climate change as a shared responsibility

Globally, roughly two-thirds of the public believe that governments, businesses and individuals need to play their part, or risk failing others, although this has decreased in all cases when compared to 2022.



A Global Country Average of 63% agree that if individuals do not act now to combat climate change they will be failing future generations. 59% say that if businesses do not act now to combat climate change then they are failing their employees and customers – a decrease of 10pp from 2022.





Although still perceived to be a shared responsibility, there is less belief in the need to act on climate change to prevent failing people

26 comparator countries – trended

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

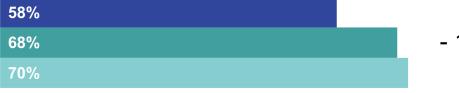
8 © Ipsos | Earth Day 2023 | April 2023 | Version 3 | Internal/Client Use Only ...'s government has a clear plan in place for how government, businesses and people themselves are going to work together to tackle climate change



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

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





- 10% -12%

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



Base: 2023: 21,231 online adults under the age of 75, interviewed 20 Jan – 3 March 2023; 2022: 22,033 online adults under the age of 75, interviewed 18 Feb – 4 Mar 2022; 2021: 20,511 online adults under the age of 75, interviewed 19 Feb – 5 Mar 2021. The samples in some countries and regions are more urban, more educated, and/or more affluent than the general population. **The 26 comparator countries include:** 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 USA

There is strong agreement that if governments don't tackle climate change now they will be failing their citizens, but this has weakened

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]

Country	Agree	Disagree
Global Country Average	61%	14%
Colombia	76%	8%
South Africa	75%	10%
Thailand	72%	9%
Peru	71%	9%
Brazil	70%	10%
Mexico	69%	9%
Chile	68%	9%
Argentina	68%	11%
India	67%	13%
Indonesia	66%	8%
Great Britain	66%	15%
Hungary	65%	8%
Malaysia	65%	11%
France	65%	12%
Spain	63%	13%
Singapore	61%	10%
Australia	61%	18%
Belgium	60%	10%
Turkey	59%	15%
Canada	56%	18%
Italy	55%	13%
Netherlands	54%	22%
Poland	54%	17%
United States	54%	21%
Sweden	53%	26%
Germany	49%	22%
Switzerland	49%	24%
South Korea	47%	21%
Japan	36%	25%



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

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

Country	Agree	Disagree
Global Country Average	59%	15%
Colombia	72%	11%
South Africa	70%	11%
Mexico	69%	6%
Brazil	69%	10%
Chile	69%	9%
India	67%	13%
Peru	66%	11%
Thailand	66%	8%
France	64%	12%
Indonesia	64%	8%
Great Britain	63%	15%
Argentina	61%	12%
Hungary	60%	11%
Spain	60%	13%
Netherlands	60%	17%
Malaysia	59%	12%
Singapore	58%	10%
Belgium	58%	14%
Australia	57%	18%
Turkey	57%	14%
Canada	55%	18%
Italy	52%	15%
United States	52%	22%
Sweden	52%	28%
Poland	51%	17%
Switzerland	49%	22%
Germany	49%	22%
South Korea	42%	23%
Japan	28%	29%

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."

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Individuals also see they too need to act to combat climate change, but this has also lessened

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

Country	Agree	Disagree
Global Country Average	63%	14%
Colombia	78%	7%
Mexico	76%	6%
South Africa	74%	10%
Argentina	74%	10%
Brazil	73%	8%
Chile	73%	8%
Peru	71%	11%
Singapore	70%	9%
Thailand	69%	8%
India	69%	13%
Indonesia	67%	2%
Great Britain	66%	14%
Turkey	65%	12%
France	64%	13%
Spain	63%	14%
Malaysia	63%	9%
Hungary	62%	12%
Italy	62%	10%
Canada	60%	20%
Poland	58%	14%
Australia	58%	19%
Belgium	58%	16%
Netherlands	57%	19%
Sweden	56%	25%
South Korea	54%	17%
Germany	54%	19%
United States	53%	21%
Switzerland	53%	21%
Japan	30%	30%

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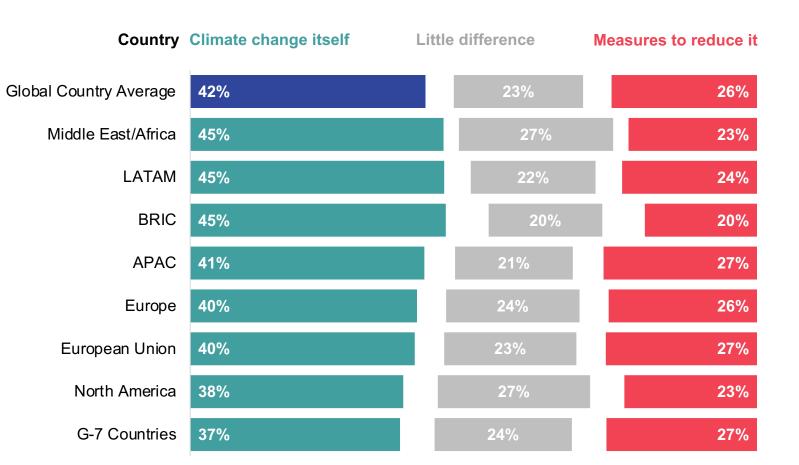
Generally, more citizens say that the economic cost of climate change itself will be larger than the cost of measures to reduce it.

But this was **not a consensus or a majority**: twofifths (42%) globally said this, but a quarter (26%) 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?





Aside from Japan, there is stronger belief that the economic cost of climate change itself will be larger than the cost of measures to reduce it

Country data

14

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?

Singapore	48%	16%	30%
Turkey	46%	27%	22%
Argentina	46%	23%	21%
Colombia	45%	22%	26%
Spain	45%	20%	27%
Chile	44%	24%	20%
Malaysia	44%	13%	30%
Great Britain	44%	25%	22%
South Africa	43%	28%	23%
Sweden	43%	19%	30%
Mexico	43%	19%	27%
Peru	42%	24%	25%
Australia	42%	23%	25%
France	42%	17%	28%
India	42%	20%	16%
South Korea	42%	21%	34%
Netherlands	41%	26%	23%
Switzerland	40%	18%	31%
Poland	40%	26%	25%
Italy	38%	16%	35%
Germany	38%	28%	25%
United States	38%	25%	24%
Canada	38%	29%	23%
Thailand	36%	24%	29%
Belgium	36%	25%	25%
Hungary	35%	33%	23%
Japan		29%	30%
more educated, and/or more affluer	e age of 75, interviewed 20 Jan – 3 March 2023. It than the general population. "The "Global Count conducted. It has not been adjusted to the popula	ry Average" reflects the average re-	sult for all the countries

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54%

49%

Indonesia

Brazil

Little difference

Measures to reduce it

26%

24%

23%

Who is leading the pack?

Globally, citizens generally **do not see their country as being a leader** in tackling climate change.

There is consensus that countries should do more to combat climate change, and that the greater burden should fall on countries that have contributed more to climate change historically, and countries that are currently more economically developed.

There was general agreement that **developed countries are leading the fight against climate change** (46%) but there was more division on whether their **own country was being asked to sacrifice too much** to tackle climate change.



Only a third globally see their 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?

Country	Agree		Disagree
Global Country Average	31%		33%
India	71%		9%
Malaysia	51%		13%
Brazil	42%		24%
Mexico	41%		25%
Sweden	41%		27%
Colombia	39%		31%
Singapore	38%		25%
Thailand	37%		25%
Indonesia	36%		17%
Switzerland	32%		26%
Germany	32%		31%
Great Britain	32%		26%
United States	32%		24%
Chile	31%		31%
Peru	31%		33%
Canada	30%		24%
_ Italy	28%	_	38%
France	27%		37%
Argentina	26%	_	31%
Netherlands	26%		38%
Spain	26%		38%
Turkey	26%		50%
Australia	24%	_	35%
South Korea South Africa	20%		38%
	19%		45%
Belgium	14% 13%		44%
Japan Poland	13%		<u>48%</u> 62%
			66%
Hungary	10%		00%



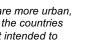
A majority agree that their country should do more in the fight against climate change

Country data

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

Country	Agree	Disagree
Global Country Average	66%	11%
Mexico	80%	4%
Colombia	80%	7%
Argentina	79%	3%
Chile	78%	6%
India	76%	5 <mark>%</mark>
Thailand	76%	6 <mark>%</mark>
Peru	76%	7%
Brazil	75%	6% .
Turkey	72%	12%
South Africa	72%	10%
Italy	71%	8%
Hungary	71%	7%
Singapore	70%	5 <mark>%</mark>
Malaysia	68%	6%
Indonesia	68%	1%
Spain	67%	11%
France	63%	13%
Great Britain	63%	12%
Australia	60%	16%
Poland	60%	16%
Canada	57%	17%
Sweden	57%	22%
United States	57%	17%
South Korea	56%	15%
Germany	55%	20%
Belgium	54%	15%
Switzerland	52%	
Netherlands	51%	
Japan	47%	

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."



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There is a strong consensus that those countries most responsible for the climate emergency 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

Country	Agree	Disagree
Global Country Average	62%	12%
Peru	73%	8%
Colombia	72%	8%
Chile	69%	8%
Brazil	69%	6%
South Korea	69%	10%
Indonesia	69%	7%
Singapore	69%	7%
Thailand	68%	7%
India	67%	13%
Mexico	65%	8%
Netherlands	64%	14%
Hungary	64%	8%
Turkey	63%	10%
Spain	62%	12%
South Africa	62%	11%
Malaysia	61%	9%
Italy	61%	10%
Argentina	60%	11%
Switzerland	60%	14%
Belgium	59%	12%
Poland	58%	10%
Sweden	58%	17%
Germany	58%	16%
France	57%	16%
Great Britain	56%	17%
Australia	55%	14%
Canada	50%	19%
United States	46%	19%
Japan	45%	14%

Country Agroo

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."



Disagroo

There is agreement 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

Country	Agree	Disagree
Global Country Average	46%	18%
Indonesia	74%	4%
India	70%	13%
Thailand	68%	8%
Peru	56%	12%
Malaysia	55%	12%
South Africa	54%	14%
Spain	54%	14%
Mexico	52%	14%
Brazil	50%	20%
Turkey	50%	19%
South Korea	50%	18%
Colombia	49%	23%
Singapore	49%	15%
Sweden	48%	20%
France	48%	22%
Netherlands	47%	19%
Poland	46%	19%
Great Britain	43%	17%
Argentina	42%	17%
Chile	41%	22%
Italy	40%	23%
Belgium	39%	19%
Australia	38%	19%
Switzerland	37%	25%
United States	36%	19%
Canada	35%	19%
Germany	34%	26%
Hungary	28%	28%
Japan Base: 21,231 online adults under th	26% e age of 75, interviewed 20 Jan – 3 March 2023. The samples in some count	ies and regions are more urban,



But, there is also overwhelming consensus 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

United States 58% 13% Japan 58% 12% 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."

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Country	Agree		Disagree
Global Country Average	70%		9%
Colombia	80%		7%
Peru	79%		7%
Chile	77%		6%
Argentina	76%		6%
Indonesia	76%		2%
Turkey	76%		8%
South Africa	75%		8%
Brazil	75%		6%
Thailand	75%		6%
Mexico	75%		5%
South Korea	74%		9%
India	74%		11%
Singapore	73%		7%
Poland	72%		8%
Hungary	71%		6%
Italy	70%		7%
Spain	70%		9%
Great Britain	69%		9%
France	69%		9%
Belgium	65%		11%
Malaysia	64%		10%
Germany	64%		12%
Sweden	64%		15%
Australia	63%		11%
Switzerland	63%		13%
Canada	62%		12%
Netherlands	61%		13%
United States	58%		13%
Japan	58%	rah 2022. The complex in come o	12%

Countries are united in agreeing 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

Country	Agree	Disagree
Global Country Average	75%	8%
South Africa	82%	5%
Argentina	80%	7%
Belgium	79%	6%
Singapore	79%	5%
Colombia	79%	8%
Great Britain	78%	7%
Peru	78%	8%
Sweden	78%	11%
France	77%	8%
South Korea	76%	9%
Hungary	76%	7%
Chile	76%	7%
Netherlands	76%	9%
Turkey	76%	8%
Mexico	75%	8%
Thailand	75%	9%
Indonesia	74%	6%
Malaysia	74%	8%
Germany	73%	8%
Italy	73%	6%
Canada	72%	8%
Brazil	72%	7%
India	72%	11%
Poland	71%	9%
Australia	71%	8%
Spain	70%	9%
Switzerland	<u>68%</u>	12%
Japan	<u>66%</u>	9%
United States Base: 21,231 online adults under th	66%	10%

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."



Disagree

Country Agree

There is division on whether countries feel they are 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

Country	Agree		Disagree
Global Country Average	34%		28%
Indonesia	73%		1%
India	67%		14%
Sweden	45%		23%
Netherlands	44%		30%
Turkey	42%		19%
Malaysia	40%		16%
Brazil	37%		25%
Thailand	36%		26%
Japan	35%		19%
France	33%		34%
Colombia	33%		30%
Germany	31%		32%
Poland	31%		36%
Australia	31%		39%
Great Britain	30%		35%
Belgium	30%		33%
Italy	30%		30%
South Africa	30%		33%
Peru	28%		23%
Canada	28%		33%
Spain	27%		32%
Mexico	27%		23%
Switzerland	27%		31%
Singapore	26%		24%
United States	26%		38%
Chile	26%		31%
South Korea	22%		35%
Hungary	20%		36%
Argentina Base: 21,231 online adults under th	20% e age of 75, interviewed 20 Jan – 3 M	larch 2023. The samples in some o	countries and regions are more urban,

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What are we going to do?

Summary: public action



Citizens generally **do not dismiss the importance of individual action**, and there was strong **consensus that everyone making small changes in their everyday lives would have a big impact**. Also, most don't believe that climate change is **beyond our control**.



There was division on whether now is the right time or not to be investing in climate change, but most citizens **disagreed that the negative impacts of climate change were too far off to be worried about**.



Globally, roughly a third would pay more of their income in taxes to help prevent climate change. When asked what would **motivate them to make a change**, citizens favoured a **financial incentive or tax cut for environmentally friendly purchases**, or having **easy access to information** on the right choices. Citizens also said that seeing climate-driven weather events' impact on their own country would be a motivator to change their behaviours.



Citizens generally do not 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

Country	Agree	Disagree
Global Country Average	22%	53%
India	62%	16%
Malaysia	32%	39%
Thailand	28%	48%
Singapore	28%	50%
Switzerland	27%	48%
Australia	26%	51% 🌾
Peru	25%	51%
Netherlands	23%	56%
Great Britain	23%	57%
Germany	23%	51%
Poland	22%	55%
France	22%	55%
Sweden	21%	55%
Turkey	21%	54%
Belgium	21%	53%
Mexico	21%	52%
Spain	21%	57%
Brazil	20%	56%
Chile	20%	54%
Colombia	20%	60%
South Africa	19%	62%
Canada	19%	59%
United States	18%	55%
Indonesia	16%	62%
South Korea	16%	59%
Italy	16%	55%
Japan	15%	46%
Argentina	14%	62%
Hungary	11%	64%



On average, close to a third say they would pay more of their income in taxes to help prevent climate change – but opposition is greater in many **countries**

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

Country	Agree		Disagree
Global Country Average	30%		38%
India	64%		15%
Thailand	48%		23%
Indonesia	42%		24%
Turkey	42%		26%
Peru	38%		26%
Colombia	35%		33%
Malaysia	34%		28%
Great Britain	32%		39%
Brazil	32%		36%
Chile	31%		34%
Spain	31%		35%
Singapore	30%		32%
Germany	28%		46%
Argentina	28%		37%
Netherlands	28%		44%
South Africa	27%		41%
Sweden	27%		50%
Mexico	26%		34%
Australia	26%		43%
Poland	25%		42%
South Korea	25%		34%
United States	25%		44%
Switzerland	25%		48%
France	25%		44%
Italy	22%		39%
Canada	20%		48%
Hungary	17%		52%
Belgium	16%		55%
Japan	12%		50%



More people disagree than agree 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

Country	Agree		Disagree
Global Country Average	24%		48%
India	65%		14%
Thailand	35%		46%
Malaysia	33%		39%
Turkey	31%		46%
France	26%		42%
Peru	26%		48%
Brazil	25%		53%
Singapore	24%	I	50%
Switzerland	24%		47%
Belgium	23%		44%
Spain	23%		49%
Italy	23%		43%
Sweden	22%		55%
Indonesia	22%		52%
Japan	22%		32%
Netherlands	21%		53%
Germany	21%		49%
Mexico	21%		49%
South Africa	21%		60%
Colombia	21%		52%
Hungary	21%		39%
Australia	20%		50%
Argentina	20%		51%
Great Britain	20%		57%
Chile	19%		52%
South Korea	18%		49%
United States	16%		55%
Canada	16%		54%
Poland	16%		57%



There is strong agreement 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

Country	Agree	Disagree
Global Country Average	70%	10%
South Africa	82%	5%
Peru	81%	6%
Colombia	81%	7%
Argentina	79%	6%
Mexico	79%	6%
Indonesia	77%	3%
Chile	75%	7%
Thailand	75%	6%
Brazil	74%	6%
Singapore	72%	7%
Great Britain	72%	10%
Poland	70%	10%
Malaysia	70%	8%
France	70%	10%
Italy	70%	9%
Hungary	69%	10%
India	69%	11%
Netherlands	67%	13%
Spain	67%	11%
Turkey	67%	9%
Australia	67%	13%
Belgium	66%	10%
Canada	66%	14%
Germany	65%	14%
South Korea	64%	12%
Sweden	64%	16%
United States	63%	14%
Switzerland	61%	16%
Japan Base: 21 231 online adults under the	51% are of 75 interviewed 20 Jan – 3 March 2023. The samples in some countries and region	12%

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."

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There is division on whether now is the right time, or not, to be investing in climate change

Global

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

Country	Agree			Disagree	
I Country Average	30%			38%	
India	62%			14%	
Malaysia	40%			26%	
Thailand	39%			34%	
South Africa	37%			41%	
Poland	37%			30%	
Great Britain	35%			36%	
Peru	33%			36%	
Australia	33%			36%	f,
Indonesia	32%			44%	
Germany	32%		I	40%	
Singapore	31%			34%	
United States	30%			38%	
Canada	30%			39%	
Netherlands	30%			40%	
Mexico	29%			41%	
Switzerland	29%			41%	
Sweden	28%			42%	
France	28%			36%	
Belgium	27%			39%	
Italy	27%			41%	
Brazil	27%			49%	
Spain	27%			42%	
Colombia	27%			49%	
Turkey	26%			42%	
Argentina	26%			38%	
Hungary	23%			44%	
Chile	23%			45%	
Japan	20%			31%	
South Korea	14%			49%	

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."

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The majority disagree that the negative impact of climate change is too far in the future to worry about

Global

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

Country	Agree			Disagree
I Country Average	23%			52%
India	62%			15%
Thailand	38%			39%
Peru	38%			39%
Colombia	34%			49%
Mexico	34%			44%
Malaysia	33%			39%
Argentina	30%			49%
Singapore	27%			46%
Sweden	24%			54%
Chile	23%			54%
Netherlands	22%			55%
Turkey	21%			61%
Switzerland	20%			52%
Germany	20%			55%
Brazil	20%			58%
South Africa	20%			56%
Spain	19%			54%
Australia	19%			51%
Great Britain	19%			54%
Indonesia	19%			61%
Canada	17%			55%
Italy	16%			57%
United States	15%			52%
Hungary	15%			55%
France	15%			62%
Poland	15%			59%
Belgium	14%			61%
South Korea	14%			62%
Japan	11%	rah 2022 The same	1	57%



Citizens say a financial incentive/tax cut for environmentally friendly purchases or having easy access to information would help encourage them to take more action to fight climate change

Global Country Average

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





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		•	ĸ			(*)	C					<u> </u>		۲									C:						(+	
#2 in country				-				-					<u> </u>	-			\sim								N <i>H</i>					-
#3 in country	тот	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%
	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%
Having easy access to information on the steps which I can take every day																														
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%



Perils of perception

In general, the public tend to perceive many actions as having a far greater impact on reducing emissions than they actually do – globally, the "believe-true gap" persists.

Globally, citizens were fairly divided on which sectors contribute the most or least to global warming, placing greater emphasis on products that deplete the ozone than other, more polluting sectors such as industry and deforestation.



Citizens perceive many actions as having a far greater impact on reducing emissions than they do

Global Country Average

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?

	39%	Switching to purchasing renewable electricity
4	31%	Switching to purchasing renewable electricity
6	33% 51%	Recycling
3	24% 28%	Less packaging
9	22% 21%	More energy efficient cooking equipment, using cleaner fuel or renewable energy
:	19% 21%	Shift to public transport
2	19% 15%	Refurbishing and renovating housing for efficiency
	18% 22%	Buying fewer items, or more durable items
	18% 15%	Living car-free
4	18% 16%	Growing or producing your own food
3	12% 15%	Fuel efficient driving practices (e.g. using the correct gear, and driving more slowly)
7	8% 7%	Having a vegan diet
2	5% 3	Not having pets
■2023 ■2022 3	4 5%	Having smaller living spaces / or co-housing to fill empty rooms

True rank for reducing emissions

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Base: 2023: 21,231 online adults under the age of 75, interviewed 20 Jan – 3 March 2023; 22,022: 22,033 online adults under the age of 75, interviewed 18 Feb – 4 Mar 2022; 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 include: 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 USA

*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?

								-																						
	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		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	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%
equipment, using cleaner fuel or																														
renewable energy																														
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			11%	6%	14%	11%	10%	9%	10%	10%	12%	12%	9%	12%	13%	7%	18%			7%	13%	10%	12%	18%	17%	9%	10%	10%	8%	17%
the correct gear, and driving more slowly)																														
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%	<u>14</u> %	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		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%



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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."

Top three actions:

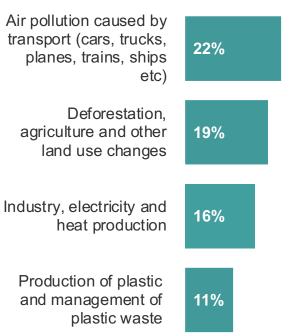
#1 in country#2 in country#3 in country

Citizens were divided on what contributed the most to global warming, but often under-estimated the contributions of the highest emitting sectors

Global Country Average

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.

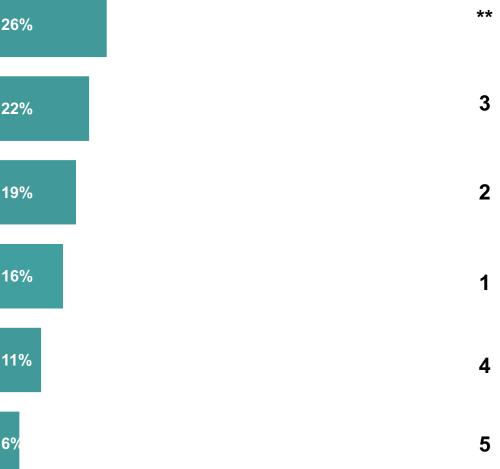
Use of products that 26%



Natural changes such as volcanoes and variations in the Sun and Earth's orbit

deplete the ozone layer

% ranking as the #1 contributor



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." *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



Actual rank*

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.*

💿 🇐 🛑 🎯 🔶 🛟	• 🛨 🕳 🕕 🖨 🏶) 🗢 🚭 🗕 () 🖲 👙 ()) 🚍 🌔 🕳 🤗 🃚 🧔	
-------------	-------------	---------------------	---------------	--

	тот	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."



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Top three actions:

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

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 <u>not</u> been adjusted to the population size of each country or market and is <u>not</u> 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:

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.

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:

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.

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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Ipsos's standards & accreditations provide our clients with the peace of mind that they can always depend on us to deliver reliable, sustainable findings. Moreover, our focus on quality and continuous improvement means we have embedded a 'right first time' approach throughout our organisation.



ISO 20252 – is the international market research specific standard that supersedes BS 7911 / MRQSA & incorporates IQCS (Interviewer Quality Control Scheme); it covers the 5 stages of a Market Research project. Ipsos UK was the first company in the world to gain this accreditation.



MRS Company Partnership – By being an MRS Company Partner, Ipsos UK endorse and support the core MRS brand values of professionalism, research excellence and business effectiveness, and commit to comply with the MRS Code of Conduct throughout the organisation & we were the first company to sign our organisation up to the requirements & self regulation of the MRS Code; more than 350 companies have followed our lead.



ISO 9001 – International general company standard with a focus on continual improvement through quality management systems. In 1994 we became one of the early adopters of the ISO 9001 business standard.



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.



The UK General Data Protection Regulation (UK GDPR) & the UK Data Protection Act 2018 (DPA) – Ipsos UK is required to comply with the UK General Data Protection Regulation and the UK Data Protection Act; it covers the processing of personal data and the protection of privacy.



HMG Cyber Essentials – A government backed and key deliverable of the UK's National Cyber Security Programme. Ipsos UK was assessment validated for certification in 2016. Cyber Essentials defines a set of controls which, when properly implemented, provide organisations with basic protection from the most prevalent forms of threat coming from the internet.



Fair Data – Ipsos UK is signed up as a 'Fair Data' Company by agreeing to adhere to ten core principles. The principles support and complement other standards such as ISOs, and the requirements of Data Protection legislation.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos UK Terms and Conditions {please remove if the work was under a MSA or client contract}.



ABOUT IPSOS

Ipsos is the third largest market research company in the world, present in 90 countries and employing more than 18,000 people.

Our research professionals, analysts and scientists have built unique multispecialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. We serve more than 5000 clients across the world with 75 business solutions.

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 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, countries 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.

"Game Changers" – our tagline – summarises our ambition to help our clients to navigate more easily our deeply changing world.



Thank you.

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