

PEOPLE AND CLIMATE CHANGE

Public attitudes to the climate crisis
and the transition to net zero

April 2026

Foreword

Welcome to the *Ipsos People and Climate Change* report which explores perceptions of the risks facing us from the climate crisis as well as attitudes to the energy transition.

Three of the last four years have been the hottest on record. Yet the individual desire to act on climate change has fallen over the same period. That tension sits at the heart of this report.

What the data tells us is not a story of apathy. People still believe action is needed — in 28 of 31 countries, a majority say individuals must do more. But exhaustion is setting in, and expectations are shifting. Citizens are increasingly looking to governments

and businesses to lead.

This year's report covers the full landscape of that shift: from changing consumer values to the growing conditionality around the energy transition, and what rising geopolitical instability means for our relationship with fossil fuels.

Fieldwork was completed before the current conflict in Iran, yet its effects are already visible — sharpening anxieties about energy dependence and raising urgent questions about whether this moment accelerates the transition to cleaner energy or stalls it.

We explore what this means for electric

vehicle uptake, why values-based shopping is proving more resilient than many expected, and how cost of living and conflict are reshaping public attitudes in ways that matter for business, policy and society.

This document contains headline data from the study. For the full question set and country-level data, please get in touch.

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[You can find our latest insights and what actions Ipsos is taking on ESG here.](#)



Key findings

61%



on average say **if individuals do not act now, we will be failing future generations.**

However, among the 26 countries included in our 2021 and 2026 reports, all have seen a decline in agreement in the last five years.

27%



agree that **their country is a world leader** in the fight against climate change. **34%** disagree.

33%



say my country is being asked to **sacrifice too much** in order to tackle climate change. **29%** disagree.

57%



say if **businesses do not act now to combat climate change**, they will be failing their employees and customers.

52%



disagree that there is no point changing our behaviour because it won't make any difference to climate change.

Summary

Individual action, collective exhaustion

The desire to act is fading – but not gone. Across every country we surveyed, people still believe individuals need to do more on climate change. In 28 of 31 countries, that's a majority view. And one in two reject the idea that it's already too late. The will exists. But it's fraying at the edges. People are less likely to think if individuals don't act on climate change, they will be failing future generations.

What's shifting is where people think responsibility should sit. Governments are failing the leadership test: more people believe their government lacks a clear plan to tackle climate change than believe one exists. The message from citizens is less "we give up" and more "we're waiting for you to lead."

The energy trilemma is real

Cost, security and climate: people want all three, and they know they can't always have them. Seventy-four percent on average across 31 countries are worried about rising energy prices – in Great Britain, that rises to 86%. For half of those surveyed, keeping prices low takes priority even if emissions rise as a result.

Yet the same people are acutely aware of what dependence costs. Sixty-three percent worry their country relies too heavily on foreign energy sources. Fifty-five percent support paying more for energy if it means genuine independence. The conflict in the Middle East has sharpened what was already a growing anxiety. Energy security is no longer an abstract policy debate. It feels personal.

Conscience is holding, but just

The conscious consumer isn't retreating. The North American Conscious Consumer Index (PUBLIC Inc) rose from 38% to 40%, a quiet but meaningful gain made against the headwind of cost-of-living pressure. Half of North American consumers say they have switched products for ethical reasons in the past year. Forty percent have actively boycotted or "buycotted" a brand.

What's shifting is the language that moves people. Claims rooted in immediate, human benefit – not distant environmental outcomes – drove purchase motivation for seven in ten consumers. The implication for brands is clear: lead with what's real and relevant to people's lives today. The values are there. The framing just needs to catch up.

What this means for...



Brands

- 1. Don't stay silent. Reframe with credibility and support people.** Across all 26 countries, fewer people now believe individuals need to act on climate change compared to 2021. Concern remains, but a sense of powerlessness is growing. People are not disengaging – they are looking beyond themselves for leadership.
- 2. Retreating is not the answer.** Businesses are becoming more cautious. 80% of leaders expect brands to be more tentative in ESG communication, and only one in five favor speaking out. Yet this silence comes at a cost. 62% of consumers in the US and Canada want to hear about companies' impact, but 75% don't trust what they hear. This creates a clear confidence gap: businesses are seen as capable but not trusted to act. However, expectations remain high: 77% in Europe and 65% in the US expect companies to stay true to their values, despite political pressure. What is needed is not more messaging, but better messaging grounded in real action.
- 3. Trust today is built on two things: capability and character.** Brands cannot communicate away weak fundamentals – they need to demonstrate impact, and communicate it in a way that is clear, human and relevant. Sustainable growth will not come from saying less, but from being more credible, more consistent, and more connected to people's realities.

What this means for...



Governments

- 1. There are high expectations for governments to lead on climate change.** Many see government as the actor with the greatest ability to drive environmental and social outcomes reinforcing the idea that climate change is now viewed as a system-level responsibility rather than an individual one. This expectation extends more broadly: 65% globally say government should be primarily responsible for reducing inequality, highlighting the central role people assign to public institutions in addressing large-scale challenges.
- 2. However, there is a confidence gap.** People are more likely to say their government does not have a clear plan to tackle climate change than to say it does (32% vs. 30%). This lack of clarity weakens trust and slows momentum. A broader confidence gap is also visible. While many believe governments have the ability to act, fewer trust them to deliver – particularly in the US, where 52% see government as best placed to drive impact, yet confidence drops by 24 points. As with business, perceived capability does not automatically translate into credibility.
- 3. Public support for climate action is becoming more conditional,** shaped by cost of living, energy prices and economic trade-offs. The challenge for governments is no longer to convince people that climate change matters, but to make the transition feel clear, fair and achievable – through concrete plans and visible delivery.

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Taking Action on Climate Change



As the temperature rises, the responsibility to act falls

The last 11 years have been the warmest in the modern era, according to the UN Weather Agency. Despite the rising temperatures, the individual need to act towards climate change is lower than the start of the decade.

In the last five years, all countries surveyed in this report in both 2021 and 2026 have seen falls in the proportion who agree that individuals would be failing future generations by not acting against climate change. However, while fewer feel the responsibility to

act than 2021, in all countries surveyed this year people are more likely to think individuals need to do something than not.

The urgency to act on climate change has cooled, but what has brought this on?

There is a perceived lack of leadership from governments around the world on the problem. Few think their country is a world leader in tackling climate change. Across 31 countries 27% agree their country is a world leader, while 34% disagree.

G7 countries don't fare any better with only 25% thinking their country is leading the way on climate change (35% disagree). A mere 6% in the G7 strongly agree their country is a world leader.

There is strong belief across the countries surveyed their country could be taking greater action. On average 59% think their country should be doing more, with 15% disagreeing that more action is needed.

However, we do see a marked divide in attitudes between countries.

27%

agree that their country is a world leader in the fight against climate change. 34% disagree.

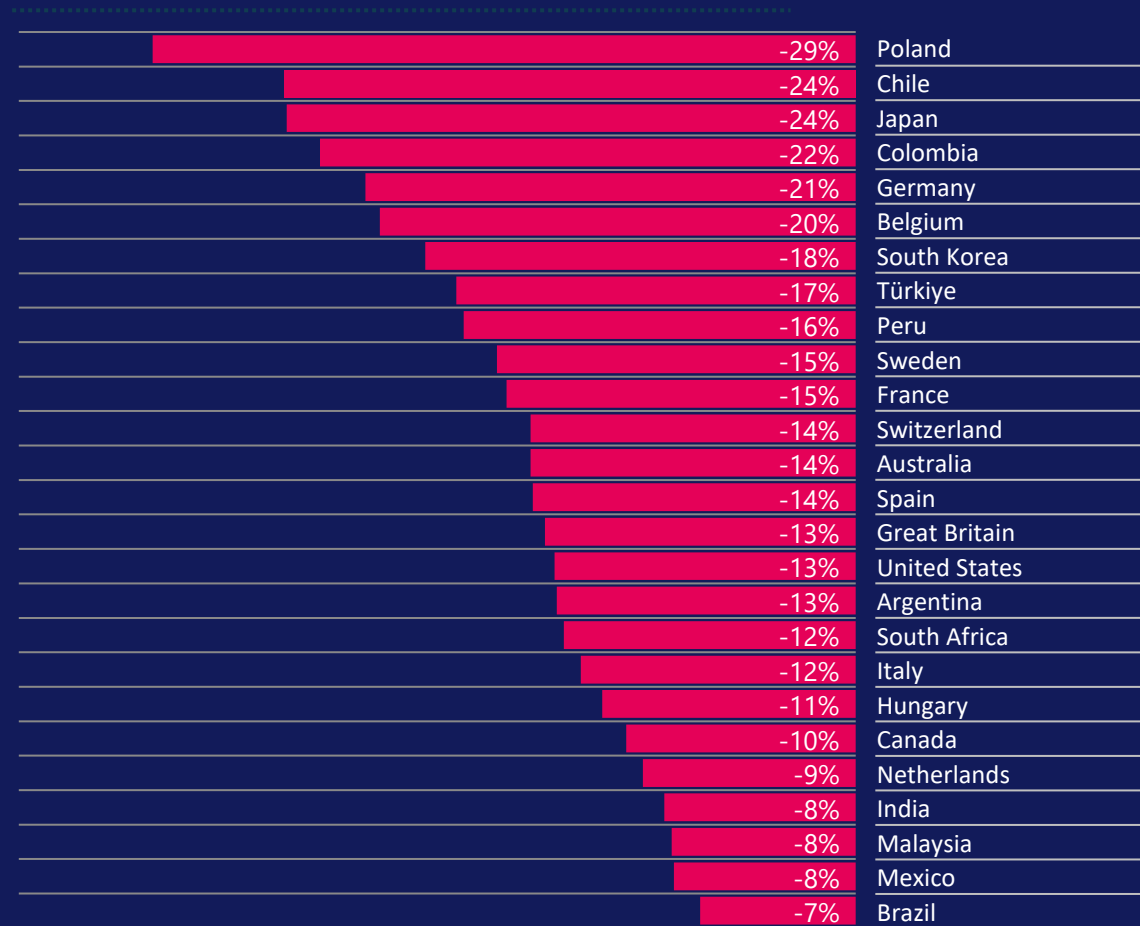
The responsibility to act is falling across the world

Among the 26 countries included in our 2021 and 2026 reports, all have seen a decline in those that feel individuals need to act now to combat climate change.

Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

Q: If individuals like me do not act now to combat climate change, we will be failing future generations. Change in net agree between 2021 and 2026

% decline in the proportion who agree in 2026



As the temperature rises, the responsibility to act falls

In middle-income countries, 71% think more action needs to be taken, while in high income countries only 53% feel the same, despite higher-income places historically bearing greater responsibility for the causes of climate change.

However, there are some areas to explore for brands and policy-makers who want to make sustainable improvements.

While on average across 31 countries people are slightly more likely to think they are already sacrificing too much to

fight climate change, in the most advanced economies people are more likely to think this is not the case for them.

What's more in the US, France and Italy the proportion who think they are sacrificing too much is lower than 12 months ago.

Jamie Stinson, Director, Global Advisor, Ipsos

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59%

think their country should be doing more on climate change.

SPOTLIGHT: THE UNITED STATES

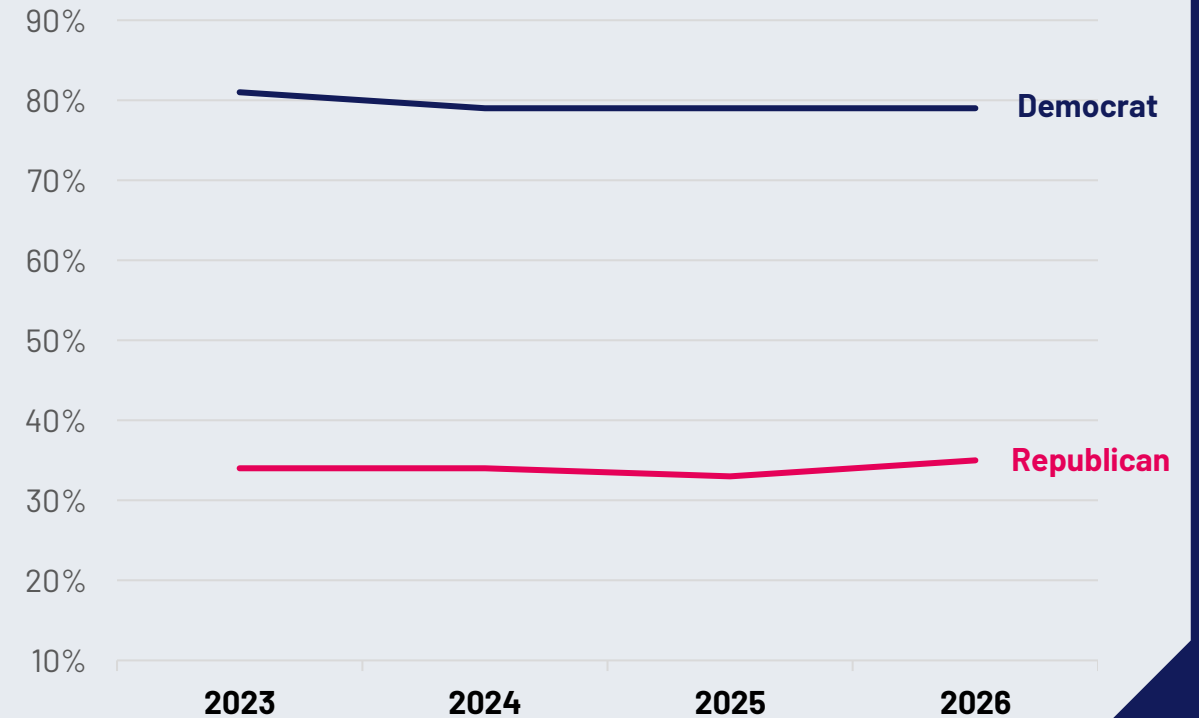
From midwives to mail carriers and mechanical engineers, most people in the US are aware of and experiencing the effects of climate change. Droughts, heatwaves, and severe weather—coupled with immediate concerns for family safety and rising energy, insurance, and housing costs—are the primary ways we feel it. However, we don't experience it equally. Depending on our generation, geography, and gross income, our levels of anxiety and exposure vary widely.

Even more interesting is that while our attitudes toward

climate policy often fall along party lines - with 80% of Democrats and 35% of Republicans agreeing the US should do more in the fight against climate change - our underlying values remain remarkably aligned. This suggests that the opportunity to drive action rests not only in data, but also in a few core American values:

- **Stewardship & Legacy.** The responsibility to leave a better world for our children and future generations resonates across every demographic.

Q: To what extent do you agree or disagree with the following? **[COUNTRY]** should do more in the fight against climate change. % agree 2023-2026. **US only**



Base: 1,001 US adults between the age of 18 and 74 between 23 January 2026 and 6 February 2026.

SPOTLIGHT: THE UNITED STATES

• **Economic Pragmatism.** We value hard work and prosperity. Energy independence, job creation, and lower utility costs are benefits we easily cheer for.

• **Local Community Protection.** We love our coastlines, rivers, farms, towns, urban centers, parks, and homes. Climate action is about protecting what's ours and our diverse ways of life, and we can all rally around that.

• **Freedom & Self-Determination.** Framing solutions as individual

empowerment and national security aligns with our cultural desire for independence.

In the last 12 months, the falling proportion of Americans who say they are 'sacrificing too much' points to a rise in conscious consumerism: sustainability is increasingly seen as a tool for resilience rather than a luxury or burden.

To be sure, environmental and social sustainability are inseparable.

Q: When you think about the natural environment in the area where you live, which of the following best describes how you feel and think?



Base: 1,208 US adults aged 18-74 between 6th and 13th April 2026.

Severe weather threatens millions from Midwest to New York this week — with some states already getting tornadoes

Nearly half of Americans think they'll see catastrophic impacts of climate change in their lifetimes

February 17, 2026

Do Americans Worry About Climate Change? New Polling Shows Concern Is at a Near Record High

There were 23 billion-dollar weather disasters in the U.S. in 2025

Climate Change Is Here —and America's Most Marginalized Communities Are on the Front Lines

Powerful Storms Prompt Tornado Watches Across the Central U.S.

More than 125 million people face some risk of severe weather on Tuesday, forecasters warned, amid a multiday outbreak of storms.

Winds, blizzards and triple-digit heat put over half of U.S. in path of extreme weather

Source: Headlines in the US media between February and April 2026 outlining extreme weather.

SPOTLIGHT: THE UNITED STATES

Green transitions only gain universal traction when they are rooted in equity—ensuring that progress is measured not only by efficiency, but also by the empathy and trust built through expansive community participation. Shifting to a cleaner future must be a collective journey that creates opportunity for everyone, regardless of zip code.



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Climate Resilience



Short-term fear counters longer-term preparation

Among both risk experts and the general public globally, climate change comes top as the biggest risk for the next five to ten years. But how ready are we to face the changing climate of the future?

While this year marks the fifth consecutive year that climate change has ranked the #1 biggest emerging risk in [the Ipsos/AXA Future Risks Report](#), the gap is narrowing. Concern is increasingly being crowded out by anxieties about other emergencies, with geopolitical instability, cybersecurity, and AI

gaining ground.

And while it may rank as the biggest risk for the next five to ten years, when it comes to the local present day, our [What Worries the World](#) survey finds concern about climate change in 11th place, behind more tangible, immediate worries issues like crime, unemployment, and inflation.

Yet concern about climate change today is still present. 66% of risk experts and 75% of the general public say they feel vulnerable to climate change in their daily lives. It is less that

climate change is losing importance, and more a deepening of our polycrisis era, as more immediate risks dominate concerns.

When it comes to preparing for the future, this poses major problems. Short-term concern about more immediate, day-to-day issues overshadows long-term planning.

Just one in three people (32%) globally believe public authorities are well prepared to handle the changing climate of the future.

66%

of risk experts and 75% of the general public say they feel vulnerable to climate change in their daily lives.



Short-term fear counters longer-term preparation

This falls to just 12% among risk experts.

People worry more about immediate risks, such as the destruction of infrastructure and property as a result of natural catastrophes (45% among experts, 41% among general public) than the broader, systemic changes needed to prevent the intensification of climate change in the longer term. In comparison, insufficient collective action to support the climate transition scores just 19% and 11% among experts and the

public, respectively.

While acknowledgement of the future risks posed by climate change is widespread, competing, and often more urgent, priorities pose problems for an informed and effective management of those risks.

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People feel there is still time to act on climate change

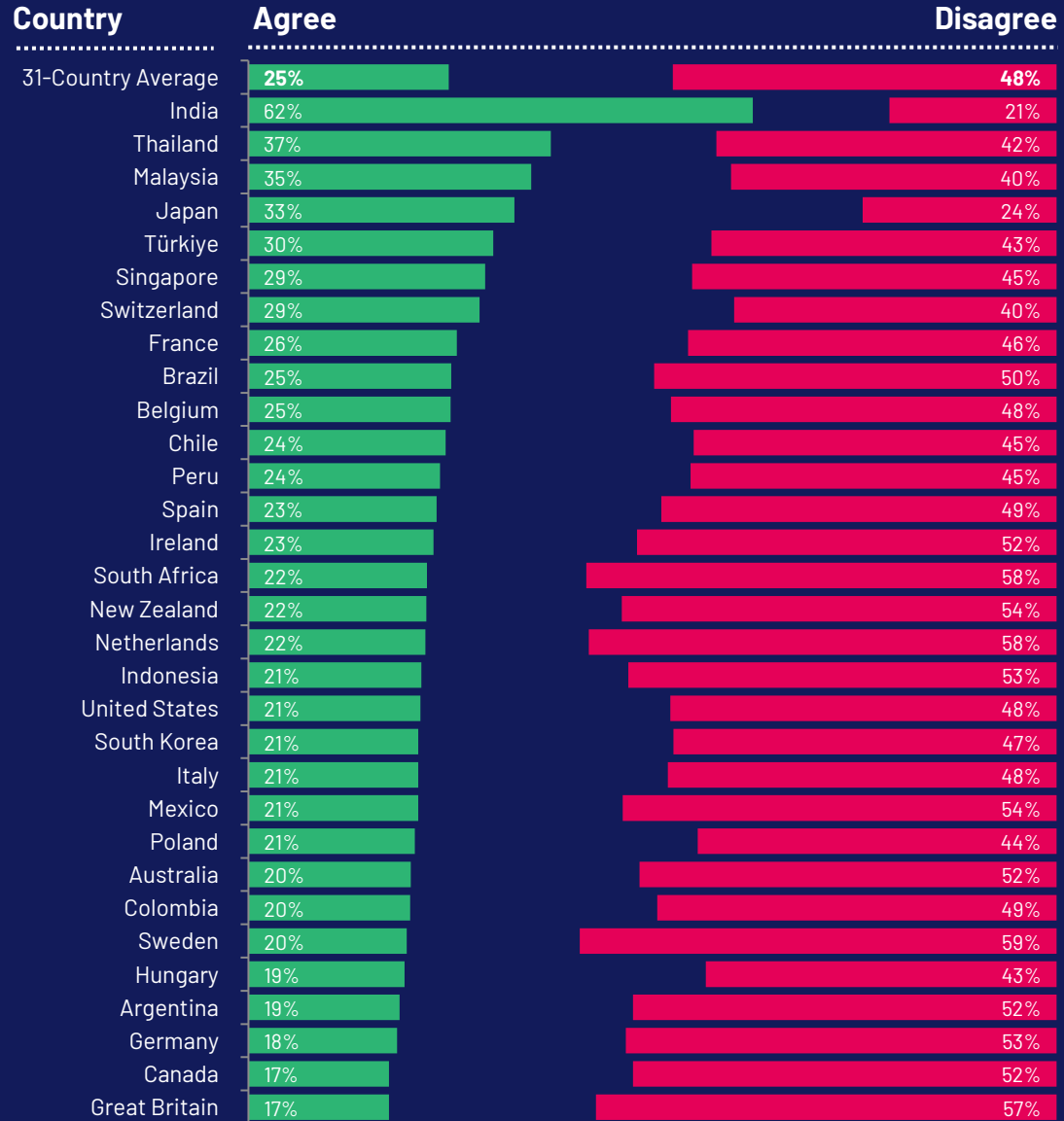
One in two (48%) on average across 31 countries disagree that it is too late to do anything about climate change. Only 25% agree with this statement.

In 29 countries of the 31 countries surveyed people are more likely to disagree that is too late than agree.

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

Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.





“I am only too aware of the massive destruction caused to families and communities, as well as to Nature, by bushfires, floods, cyclones and droughts. Extreme weather events of every kind are becoming both more frequent and more ferocious in their impact. Nowhere is this phenomenon more evident than in Australia.”

King Charles,
writing in [an open letter](#) to Northern Territory residents after a series of natural disasters during this year’s wet season.

SPOTLIGHT: AUSTRALIA

Feeling the impacts of climate change

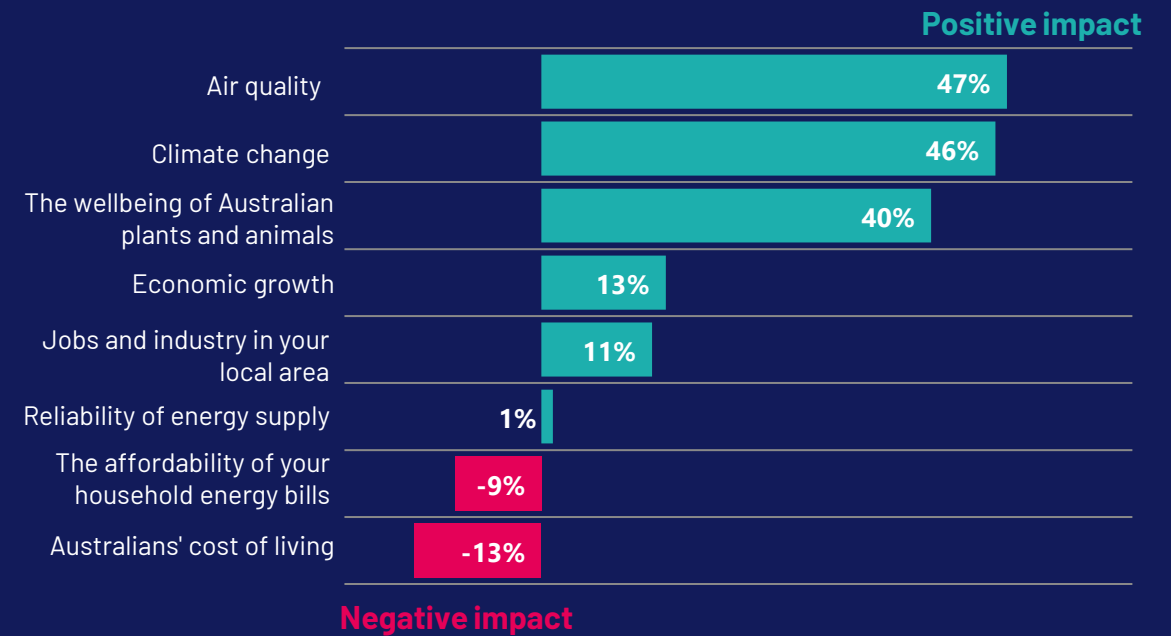
Australia's National Climate Risk Assessment (NCRA), published in September 2025, set out stark warnings for Australia's future. The report outlined a growing trend of cascading extreme weather events and compounding risks with far-reaching consequences for the natural environment, the economy, health services, emergency services, food systems and more. Many Australians are experiencing the increased frequency of extreme weather

events firsthand. This sentiment is most prevalent outside Australia's capital cities, with one in five people living in regional areas saying they've experienced at least three extreme weather events.

Concern about personal and environmental impacts

Looking to the future, three in ten (28%) Australians think it's almost certain that their households will be affected by severe heat in the next five years, one in four (25%) expect the same for severe storms.

Q: How do you think reducing the number of gas and coal-fired power stations and increasing the amount of power generated from renewable energy sources such as solar and wind is likely to impact the following?



Base: 1,000 Australian adults between 24 June to 4 July 2025.

Source: Ipsos Climate Change Report

SPOTLIGHT: AUSTRALIA

Nearly nine in ten (85%) Australians say they are concerned about climate change's impact on their country's plants and animals, and a majority believe environmental losses (58%), species extinctions (55%) and great barrier destruction (63%) are already underway.

While the impacts of climate change are of deep concern to many Australians, there is also concern about the negative impacts of climate action. Despite the majority of Australians seeing environmental benefits to the transitioning to

renewable energy, more than 40% believe the transition will negatively impact energy costs.

A preference for preservation

Against this backdrop, the majority of Australians favor environmental preservation over economic expansion. Sixty-percent would prefer to prioritize biodiversity, even if it means restricting some economic activities vs just 17%

who would instead want Australia to prioritize economically beneficial projects, even if it means the loss of biodiversity.

But Australians remain

unconvinced that enough will be done. Only 25% think it's likely that Australia will meet its 2030 emissions reduction target, with 58% supporting further action in an attempt to meet this commitment. With 37% Australians saying the federal government is doing too little to address climate changes, there's both a need and a want for more action.

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Moving to Net Zero



The energy transition is aligning with public priorities

The energy transition is no longer a future scenario, it is today's defining economic and security challenge. From record oil price shocks to surging electricity demand driven by AI, the forces reshaping global energy markets are hitting households and economies simultaneously.

The *Ipsos Energy Transition Barometer 2026* offers the clearest window yet into how citizens across 31 countries are responding: what they fear, what they support, and what trade-offs they're willing to accept.

Cost dominates the public conversation around energy and recent events have made that conversation far more urgent. The International Energy Agency (IEA) characterizes the current conflict in the Middle East as the "greatest global energy security challenge in history."

Even if the conflict ends today, the impact on energy, consumers, and financial prices is expected to last.

Our data confirms this anxiety is deeply felt even before the conflict. A striking 74% on average across 31 countries

express concern about rising energy costs.

This concern is not hypothetical, it is driving real change right now, which will impact economies, societies, and governments around the world in a big way.

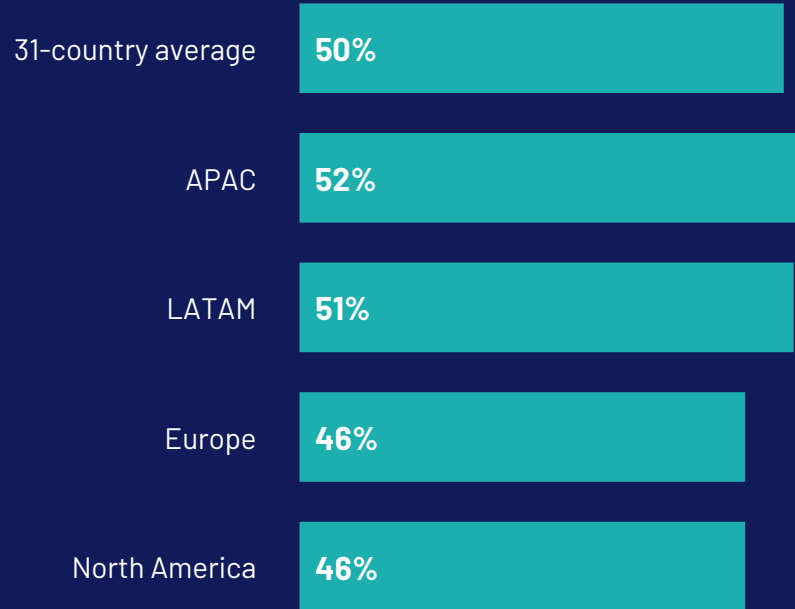
Geopolitical uncertainty has thrust energy security and independence into sharp focus. Citizens around the world are asking themselves how the geography of such a far-off place can have such a profound impact on their quality of life and their future.

“

Even if the conflict (in the Middle East) ends today, the impact on energy, consumers, and financial prices is expected to last.

The energy transition is aligning with public priorities

Q: My country's government should prioritize keeping energy prices low, even if greenhouse gas emissions increase.* % agree



*Fieldwork for this question was prior to the conflict in Iran

Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

Even before the Iran war a majority (63% on average) worried their country relied too heavily on foreign energy sources, and this anxiety is translating into support for self-sufficiency. Across 31 countries, 55% believe their country should prioritize energy independence even at higher costs to ultimately future-proof their energy sources and independence – even when affordability is such a high concern.

Citizens expect the lights to stay on, no matter what. Yet confidence

in future supply varies dramatically.

Only 46% globally feel confident their region will have enough electricity to meet future demand, and concerns about unplanned outages run high in many markets, with 39% worried about blackouts in the coming year. If there is concern about current demand, how are governments, utilities, and the private sector going to build the capacity needed and quickly to power the future?



The energy transition is aligning with public priorities

The motivation for climate-friendly energy policy is increasingly driven by competing forces. Exactly half (50% across 31 countries) support governments prioritizing low energy prices even if emissions increase. Yet support for renewable energy remains remarkably strong and increasingly so, as cost savings and energy security become compelling arguments in their own right.

Add to this the persistent anxiety around extreme weather events

caused by climate change with strong majorities concerned about heatwaves (63%), damaging storms (63%), and drought (60%) in their regions. Non-carbon emitting energy sources are being seen in a different light.

Support for the energy transition remains broad but increasingly pragmatic, shaped by concerns about affordability, reliability, security, and climate. These priorities are converging, not competing.

To learn more about the *Ipsos Energy Transition Barometer*, please get in touch.



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SPOTLIGHT: FRANCE

France remains heavily dependent on fossil fuels, which, according to the French public energy provider EDF, still account for 60% of its energy mix and weigh heavily on the trade deficit.

However, with a fully available nuclear fleet and the development of renewable energies, France finds itself in a situation of electricity overproduction with demand remaining relatively stable (positive effects of the austerity policy pursued since the 2022 energy crisis). Thanks to advantageous production costs

compared to its European neighbours, it manages to export some of the surplus (20%) but not all.

The [Ipsos/EDF The Climate and Public Opinions International Observatory](#) finds that for 65% of French people, replacing fossil fuels with electricity is a good solution to fight against global warming.

For production, they praise renewable energies (solar 82%, hydraulic 77%, wind 60%) and are increasingly favourable to nuclear (58%, 12 percentage points higher since 2021).

Recent geopolitical uncertainties tend to reinforce the advantages of this technology: energy independence, French production, excellence niche employment, and perceived low cost.

For heating/cooling, heat pumps are popular, as they promise budget savings, CO2 reduction, and cooling solutions. However, their high acquisition cost deters people from taking action, and the French expect financial assistance before they commit. Demand has also increased since the beginning of the war in Iran.

58%

of French people are favorable towards nuclear energy, up 12 percentage points since 2021.



SPOTLIGHT: FRANCE

Electric cars are considered a good idea, but desire remains low (47% are favourable but only 7% are considering purchase). They are judged to be too expensive (62%), too restrictive (lack of range (49%) and charging stations 24%) and not very efficient in limiting climate change (49%).

Rising fuel prices and the release of low-cost models, such as the Renault Etech 100% electric Twingo car sold at €14,000, might change the situation.

The French government is currently considering targeted

incentives to speed up the electrification of equipment for low-income groups.

The challenge is to move electricity from a perceived costly energy source reserved to an accessible solution that promotes the country's energy independence and reduces their bills and carbon footprint.

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Consumers and Sustainability



Values-based shopping is growing despite price pressures and political backlash

With rising affordability challenges and the decline in overall concern for and desire for policy action aimed at addressing environmental issues in both Canada and the US it would surprise no one if sustainable consumer behaviours were also in decline. But this does not appear to be the case.

The *Public Inc. 2026 Conscious Consumer Report* finds that values-based shopping is growing despite price pressures and political backlash in both

countries. The *Conscious Consumer Index* rose from 38% to 40%, indicating a larger share of purchasers now factor in social and environmental considerations when making purchases.

About half of Canadians and Americans have switched products for ethical reasons (ranging from 39% for wearables to 59% for consumables), 40% say they boycotted or “buycotted” a brand in the past year, and 50% intend to “vote with their wallet” next year.

The conscious consumer mindset

has maintained even as 56% of Americans and 62% of Canadians say price influenced their shopping more in 2025.

Addressing claims confusion was the biggest barrier in last year’s report and this year’s work highlights that “me now, not we later” language continues to out-perform abstract or science-heavy claims.

When it comes to consumables, “Simple, non-toxic ingredients that are better for your health” ranked first in both Canada and the US, followed by shared-

impact claims such as “Every purchase feeds your family and a family in need” and “Made by people receiving living wages in safe working conditions.”

In wearables, “Durable for longer use and less waste” led for the second year, with living-wage and clean-ingredient claims close behind.

Rewriting claims to emphasize immediate, human benefit increased purchase motivation for 71% of consumable claims and 67% of wearable claims.



The Conscious Consumer Index rose from 38% to 40%, indicating a larger share of purchasers now factor in social and environmental considerations when making purchases.

Public Inc. 2026 Conscious Consumer Report

Values-based shopping is growing despite price pressures and political backlash

Notably, reframing “made with less water” to “made using recycled water to keep our rivers and lakes cleaner” doubled its score and moved it from last to mid-pack. Two claims declined. “Less packaging, less hassle” and a “give to charity and get money off” offer, likely due to unclear or less compelling personal benefits. Importantly, claim preferences were remarkably consistent across all five segments.

A widening confidence gap threatens progress. While 62% want to learn about companies’

social and environmental actions, nearly three in four report low or no trust in such communications.

Consumers believe government has the greatest ability to drive societal and environmental outcomes, with business ranked second, but they are less confident business will act. In the US, confidence in government action dropped sharply in this year’s report.

In this 2026 report, consumers are making it clear that using their leverage to reward products and offers that align with their social

and environmental values is becoming a foundational part of their purchasing behaviour. It is an opportunity one would not have seen from reading the daily news headlines.

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Sustainable Transport



Will rising oil prices lead to more sustainable transport habits?

Last month we released the [Ipsos Mobility Report](#), which explored the importance of cars in people's lives as well as attitudes to new car technologies and electric vehicles.

One of the things we found when it came to electric vehicles was the lack of appetite among many countries surveyed.

While 47% on average across 31 countries said driving an electric vehicle appealed to me, this feeling was much lower in Europe and North America.

In Japan, Belgium, France, Germany, Canada and the US, people were more likely to *disagree* that driving an electric vehicle was appealing than agree.

This raises the question, with petrol prices almost doubling, will this lead to more sustainable transport habits? We are already beginning to see some changes.

In March, soon after the start of the Iran war, 58% of Americans told us they were driving less overall because of rising fuel prices. In Australia some states have made public transport free

to respond to the price at the pump heading skyward.

The move from cars with an internal combustion engine to an electric car is seen as integral to lowering emissions and achieving transition to net zero.

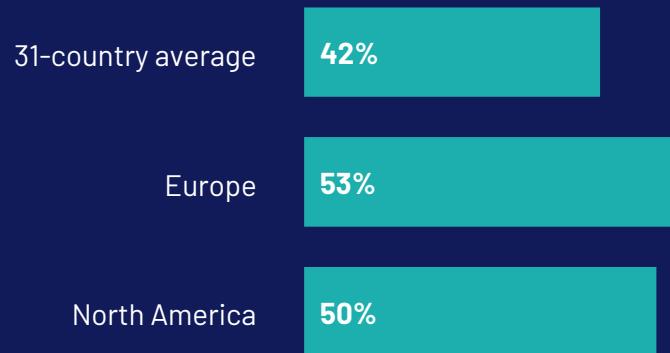
With the current oil crisis, will we see an uptick in those buying an electric vehicle? As the cost of fuel rises, the higher upfront cost of an electric vehicle compared to a petrol or diesel car will be offset sooner.

35%

in Germany agree that driving an electric vehicle appeals to me. 40% disagree.

Will rising oil prices lead to more sustainable transport habits?

Q: What are the main reasons why you don't intend to get a 100% electric car?* % who choose *price is too high*



*Asked only to those who did not intend to get a 100% electric car.

Base: 23,500 online adults aged 16 and over between 18 August and 29 September 2025 in 30 countries.

Source: [ObsCop 2025](#)

When we asked people what was the biggest barrier for them buying a 100% electric car, price came out top. Europeans and North Americans were more likely to see price as an obstacle than the global average.

We are already beginning to see the rising oil prices are beginning to have an effect. In the US in the first quarter of the year used EV sales were up 12% year-on-year and up 17% on the previous quarter.

34%

in France agree that driving an electric vehicle positively impacts the environment. Below the 31-country average of 54%.

Source: [Ipsos Mobility Report](#)



Will rising oil prices lead to more sustainable transport habits?

In Australia, March 2026 EV sales were 50% higher year-on-year.

Chinese electric carmaker BYD said in Australia they are seeing two types of customer at the moment: those already in the market for an EV, and “those that were intent on buying an EV at some point, bringing forward their purchase decision.”

It remains to be seen whether this will lead to a long-term shift or will be reversed if the oil price falls.



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Reputation and ESG

The quiet integration of ESG

In the recent past, companies were eager to speak out on major social, and environmental issues.

From climate action and LGBT Pride to #MeToo to Black Lives Matter, taking a public stand, whether entirely authentic or not, could yield significant reputational gains.

These times are no more. The ESG landscape has dramatically shifted and in today's current polarised atmosphere, the era of loud corporate activism is being replaced by a reticence.

Businesses are increasingly adopting a posture of 'strategic silence', preferring to say nothing rather than sticking one's head above the parapet and risk backlash.

Just 21% of Ipsos Reputation Council Members prefer to speak out on potentially divisive issues. Thirty-two percent prefer to stay quiet; for 47% it depends on the situation. In a similar vein, 80% of Council Members believe that businesses will be more tentative about ESG communications over the next 12 months.

But a quieter approach externally

has been accompanied with a quiet resilience and deepening integration of ESG throughout businesses.

Instead of wide, public broadcasts, companies are focusing on communicating their activities internally and directly with stakeholders.

The internal business case remains strong; 81% of Council Members agree that ESG initiatives provide a competitive advantage in attracting and retaining new talent, and 60% agree that poor ESG performance now has material consequences.

21%

of Ipsos Reputation Council members prefer to speak out on potentially divisive issues.



The quiet integration of ESG

While the US currently dominates the negative discourse surrounding ESG, the picture is much more positive in Europe and – especially – in Latin America. Globally, a majority of Council Members agree that ESG is fundamentally changing the way businesses operate today (52%), but this figure rises to 65% in Europe and 86% in Latin America.

The long-term consequences of a strategy of silence remain to be seen.

While silence protects companies from backlash, it may carry its own risks – from consumers and customers who read silence as a lack of action, and from frustrated employees who see their organisation meaningfully addressing a particular ESG issue behind the scenes only to shy away from being more of an activist on the topic externally.

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Strong belief businesses need to act

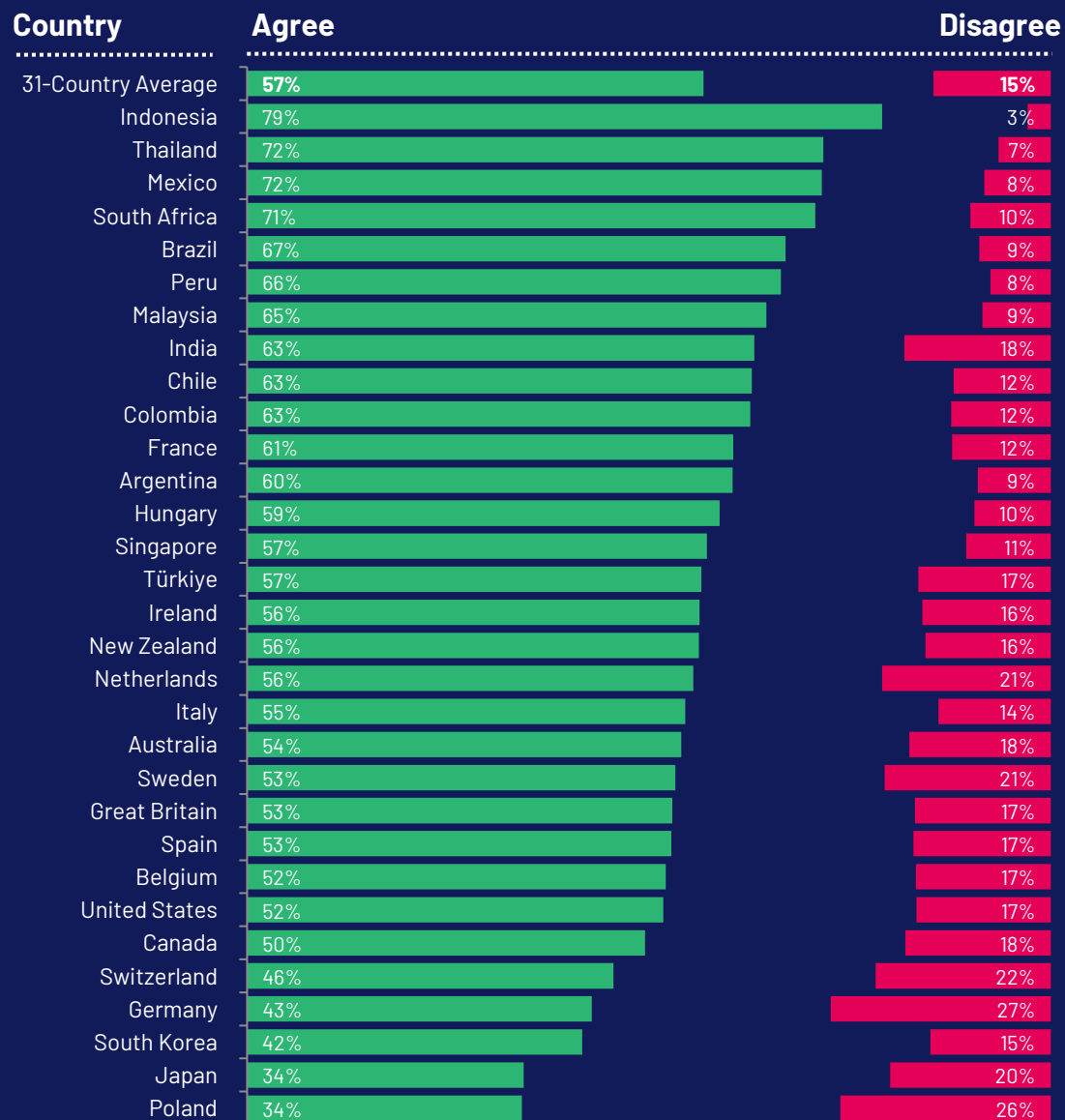
Six in ten (57%) across 31 countries feel companies have a responsibility to their employees and customers to combat climate change.

In all 31 countries surveyed are people more inclined to think businesses should be taking action than not.

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

Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.



Methodology



Methodology

These are the results of a 31-country survey conducted by Ipsos on its Global Advisor online platform and, in India, on its IndiaBus platform, between Friday, January 23, and Friday, February 6, 2026. For this survey, Ipsos interviewed a total of 23,704 adults aged 18 years and older in India, 18-74 in Canada, Republic of Ireland, Malaysia, South Africa, Türkiye, 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, Belgium, Brazil, Canada, France, Germany, Great Britain, Italy, Japan, Mexico, New Zealand, Spain, and the U.S., and 500 individuals each in Argentina, Chile, Colombia, Hungary,

Indonesia, Ireland, Malaysia, the Netherlands, Peru, Poland, Singapore, South Africa, South Korea, Sweden, Switzerland, Thailand, and Türkiye. 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, New Zealand, Poland, South Korea, Spain, Sweden, Switzerland, and the U.S. can be considered representative of their general adult populations under the age of 75. Samples in Brazil, Chile, Colombia, Indonesia, Ireland, Malaysia, Mexico, Peru, Singapore, Saudi Arabia,

South Africa, Thailand, and Türkiye 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 views of 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 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 where 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.

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