

Obs'COP 2020

CLIMATE AND PUBLIC OPINIONS INTERNATIONAL OBSERVATORY

Barometer of perception of climate change in 30 countries

CLIMATE CHANGE: CITIZENS ARE WORRIED BUT TORN BETWEEN A NEED TO ACT AND A REJECTION OF CONSTRAINTS

Paris, DECEMBER 1ST 2020 - As a key global player in the energy sector that is committed to achieving carbon neutrality by 2050, EDF presents the findings of a new, broad scope opinion study conducted by Ipsos for the second consecutive year in 30 countries, covering two-thirds of the world's populationⁱ and featuring some of the biggest CO₂ emitters. EDF's goal is to produce a yearly international status report on opinions, knowledge, expectations and levels of commitment with regard to climate change, to nurture thinking and contribute to the constructive search for solutions for the future.

>> The findings are publicly accessible at www.edf.fr/observatoire<<

I- THE COVID-19 CRISIS HAS NOT ECLIPSED CONCERNS ABOUT THE ENVIRONMENT AND HAS EVEN STRENGTHENED IT IN THE SOUTHERN COUNTRIES

- At present, the majority of public opinionⁱⁱ places **Covid-19** at the top of their list of concerns (59%), far ahead of the cost of living (47%), unemployment (45%), poverty/inequality (45%) and the healthcare system (43%). **The environment nevertheless ranks 6th** among concerns with a score of 39%. Among the countries that place the environment **among their top 5 concerns**: a large number of European states and large countries such as Canada, Australia, India and China.
- But when it comes to the question of whether **a link exists between epidemic and environment** (in the sense that the former would be due to the negative impact of human activity on the latter), **the western countries view things very differently** from the rest of the world. The first group distance the Covid-19 / environment link, headed up by: Norway (37% of its population think that a link exists), Australia (38%), Sweden (40%), with France and Germany coming close behind, both at 41%. The **Southern countries** on the other hand assert that this link does exist, with a high level of conviction, notably 88% in China, 85% in Turkey, 83% in India and 81% in Colombia.
- Consequently, while 60% of the world's population do in fact state that Covid-19 has led them to pay more attention to their impact on the environment, **a split** can once again be seen between **a South** claiming to be devastated by the epidemic and **a North** which, on the contrary, asserts that the epidemic has not particularly boosted its level of concern about the environment. This is notably the case in Africa and the Middle East (79%), South America (76%) and Asia (73%), but a lot less so in Europe (39%) and North America (42%).

- Finally, within this health crisis context, and despite a worsening economic situation, a little over a half (51%) of the public think that **priority should be given to the environment**, even if that could slow down economic growth in their country and cause job losses. This average score conceals **some heavy disparities** however. A few countries are highly favorable (+ 60%) to “green growth”: Colombia, Brazil, Chile, China, Turkey, Mexico, India. But in most countries, there is no absolute majority for that option and populations are split, notably across a social divide in which people on lower incomes remain attached to job-creating growth. Note that there is no North/South split in this case, since the most divided countries include the USA, but also Nigeria and Indonesia...
- Among the problems linked to the environment, **climate change** and its most visible consequence, **extreme climate events**, feature among the most worrying topics (just behind waste accumulation, packaging, plastic (48%) and air pollution (42%), **also showing the biggest increases since 2019** (respectively 45% and 41%, +5 points) while scores for the other concerns have tended to drop). Note that the level of concern has not increased most in the countries that have experienced ecological disasters this year (USA, Australia, Russia), but in Turkey (+13), Indonesia (+12), and Sweden (+9) ...
- In all countries, **climate change has already had very concrete effects**, already observed in their region (78%), notably in the Southern countries: South America (91%), the Middle East, Africa (82%) and Asia (84%). The most feared risk is by far **the increase in extreme climate events** (61%), the most visible “expression” of climate change ahead of pollution and desertification. Note that the development of infectious diseases has leaped forward by 12 points and now ranks 5th among climate-change-related risks. This awareness linked to Covid is sharpest in Asia, but not in the countries counting the most deaths per inhabitant (Belgium, USA, Brazil...).

II- CONFUSION ABOUT THE CAUSES OF CLIMATE CHANGE AND CLIMATE SKEPTICISM AMONG A MINORITY, BUT PERSISTENT

- **Greenhouse gases** are recognized by 6 out of 10 people as a cause of climate change, especially in the most developed countries, a score that doubtless expresses an as yet incomplete understanding – in any case among the 40% who did not mention GG – of the warming mechanism. The fact that 46% blame air pollution relates to continued confusion between CO₂ and pollution. In contrast, **deforestation** was quoted by “only” 42% of respondents. These also, **wrongly**, attribute climate change to other phenomena, such as the hole in the ozone layer (32% globally) or a natural phenomenon of warming of the planet (30%). So climate change is clearly still a phenomenon that populations are struggling to grasp.
- Even more importantly, one third (32% + 1 point compared to 2019) of respondents on a global level do not associate climate change with a phenomenon caused by human activity, making them climate skeptics, admittedly less determined than those (few in number: 7%) who deny the phenomenon’s very existence. **Climate skepticism remains localized**, with the **USA becoming the most climate-skeptic country** in the world: 52% of Americans do not believe in climate change caused by human activity (+ 7 points compared to 2019). They are closely followed by **Saudi Arabia (51%), Norway (50%) and Australia (43%)**: in the latter country, the wildfires that ravaged the country for months failed to shake convictions among climate skeptics. Note also that these countries are all leaders in oil or gas productionⁱⁱⁱ. The European Union, for its part, shows relatively homogeneous scores, with Italy and Spain being the most

convinced of the human origin of climate change (75%) and Germany the least convinced at 64% (France: 68%).

- All in all, while climate-skepticism is particularly strong in a few countries, this appears to concern a **“substantial minority”** in almost all countries, with the lowest rates at a little under 20% in Colombia, Mexico and South Korea.
- Another phenomenon can decrease global mobilization in favor of the climate: **only half of populations** think that climate change **has only negative consequences**, while 38% think that climate change can also have **positive effects**: that is the case both in Northern countries like Canada (44%), Sweden (51%) and Norway (61%), but also in Southern countries like Nigeria (53%), South Korea (51%), Saudi Arabia (46%) and the United Arab Emirates (43%), which tends to show that the climate isn't influencing this perception.

III. CITIZENS TORN BETWEEN A NEED TO ACT AND A REJECTION OF CONSTRAINTS

1- Citizens recognize the need to act on their own level... although translating that into concrete action can be difficult in their everyday lives

- While almost a third of respondents hope that a solution will come from technological innovation, a majority still think that the fight against climate change primarily involves a **change in lifestyles** (54%), **especially in the countries that believe more in the human causes of climate change**: Colombia (83% believe in the human causes of climate change and 76% believe in a solution that goes via a change in lifestyle), Mexico (respectively: 83% and 75%) and Chile (respectively: 80% and 69%).
- The **Individual actions** tested (prioritizing seasonal fruits and vegetables, limiting heating or air conditioning in their home, avoiding traveling by car...) are still generally **not well integrated into everyday life on a global level**: only sorting waste is carried out systematically or almost by half the population questioned. In contrast, traveling by bike (16%), using domestic renewable energies (18%) are **the 2 actions** carried out least systematically or almost by the respondents on a global level, and these actions are carried out even less by the French (respectively 10% and 14%).
- However, the question might be raised as to how **possible it is for citizens to carry out these various actions in their respective countries**. Hence, selective sorting is highly developed in certain countries, such as France, due to a very proactive public policy: thus, 81% of French people *systematically* sort their waste, i.e. 30 points higher than the global average. More generally, in 7 out of 10 cases, the level of integration of actions on a day-to-day basis, like choosing seasonal fruits and vegetables (61% vs 43%), is stronger in France than the global average.
- **Information continues to be crucial**. Hence among citizens who are sure that they know what to do (1 out of 5 citizens), these actions are more widespread: 55% of respondents who are sure that they know what to do to fight climate change systematically carry out at least 4 of the tested actions vs 14% of those who have no idea what to do.

2 – ... And ask their government to do more, while having trouble accepting any potential measures with a restrictive or financial impact on their everyday lives

- **In the eyes of citizens, the fight against climate change should first and foremost be driven by governments** (69% of respondents think that it is up to them to act). While governmental actions are recognized, they fail however to meet the public's high expectations (50% of respondents think that governments are really taking action, i.e. a 19% gap between expectations and reality). Certain countries such as France, Italy or Spain are even more critical of their government's action, with fewer than a third considering that it is really taking action (26% in France, 27% in Italy and 28% in Spain). In contrast, the countries of Northern Europe, such as Germany (58%) or Norway (60%) are more positive about governmental actions, and China is the world's most positive country in this respect (77%).
- Moreover, when populations are asked what they really think will happen in the months to come in their country, 59% of them seem convinced that **decisions will tend to be made in favor of the economy to the detriment of the environment, as opposed to 26% who think the opposite**. A perception doubtless exacerbated by the specific economic context linked to Covid-19.
- While governments are placed in the first line of players that must take action against climate change, the measures that could be implemented are still not well accepted by the public: they are even less well accepted when their impact on citizens is **restrictive and financial**. For example, **measures taken with regard to electricity production** by developing **renewable energies** or replacing coal/fuel-oil-fired power plants with gas-fired power plants enjoy a very high acceptance rate, respectively 86% and 68%. However, **acceptability decreases greatly when taxes are involved** (51% think it is acceptable to impose a higher tax on household waste and 52% to make products manufactured abroad more expensive) along with **travel restrictions** (47% think it is acceptable to introduce a tax on plane tickets and 46% to set up an urban tollbooth at the entrance to big cities, for example). This applies even more in the case of **low incomes**: hence, 49% of respondents on the lowest incomes think it is acceptable to *"increase the tax on household waste to encourage less waste"* (vs 60% of respondents with the highest incomes) and 57% of respondents with the lowest incomes think it is acceptable *"to oblige owners to insulate their homes"* (vs 68% of respondents with the highest incomes).

For Alexandre Perra, Executive Director in charge of Innovation, Corporate Responsibility and Strategy at EDF: *"Citizen mobilization, a spur to political action, is a real driver in the fight against climate change. So it seemed natural and useful to measure its scope and potential in the world, especially within the context of the health crisis that we're currently living through. With this extensive international survey, conducted for the second consecutive year and whose results will be publicly accessible again this year, we want to push forward the debate and action on one of the most crucial international stakes of the 21st century."*

According to Brice Teinturier, Deputy Managing Director of Ipsos France: *"The Observatory is a truly effective tool in terms of understanding and taking action for stakeholders involved in the fight against climate change. It enables us to draw up a brand new world map of the way climate change is viewed. Above all, it enables us to go beyond mere observation, highlighting the gaps between the level of concern – which is high – and its translation into action – still difficult –, whether it's actions on a day-to-day basis or the level of acceptability of collective measures."*

About Ipsos

Leader in the marketing research field in France and an expert in the field of consumer, citizen and employee behavior, Ipsos operates in all business sectors. Our experts have been assisting advertisers, decision-makers and institutions with their marketing strategies, HR problems, communications positioning and public opinion issues since 1975.

At Ipsos, we are passionately curious about individuals, markets, brands and societies. We help our clients navigate faster and more smoothly through a radically changing world. We bring them the inspiration they need to make strategic decisions. We are Game Changers.

About EDF

A key player in energy transition, the EDF Group is an integrated electricity company, active in all areas of the business: generation, transmission, distribution, energy supply and trading, energy services. A global leader in low-carbon energies, the Group has developed a diversified generation mix based on nuclear power, hydropower, new renewable energies and thermal energy. The Group is involved in supplying energy and services to approximately 38.9 million customers⁽¹⁾, 28.8 million of which are in France. It generated consolidated sales of €71 billion in 2019. EDF is listed on the Paris Stock Exchange.

(1) The customers were counted at the end of 2019 per delivery site; a customer can have two delivery points: one for electricity and another for gas.

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ⁱ Methodology: selection of countries based on their CO2 emissions in tons per year, according to their geographic location, their exemplariness in fighting climate change and their socio-economic model: Australia, Belgium, Brazil, Canada, Chile, China, Colombia, Egypt, France, Germany, India, Indonesia, Italy, Japan, Morocco, Mexico, Nigeria, Norway, Poland, Russia, Saudi Arabia, Singapore, South Africa, South Korea, Spain, Sweden, Turkey, United Kingdom, United Arab Emirates, USA. Representative samples of the population between 500 and 1000 individuals per country; quota method. Fieldwork carried out online between 09/09 and 29/09/19.

ⁱⁱ Here, the public opinion representing a global average is an arithmetic average of the results from the 30 countries, which does not take into account the population of each country. So it is for information purposes only.

ⁱⁱⁱ In 2019, the USA was number 1 in oil and gas production; Saudi Arabia, 3rd in oil production and 9th in gas; Norway, the 8th biggest producer and 4th biggest exporter of natural gas in the world; Australia ranks 7th in world production of natural gas. https://fr.wikipedia.org/wiki/Ressources_et_consommation_%C3%A9nerg%C3%A9tiques_mondiales#Production_annuelle_%C3%A9nerg%C3%A9tique_mondiale