EARTH DAY 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).

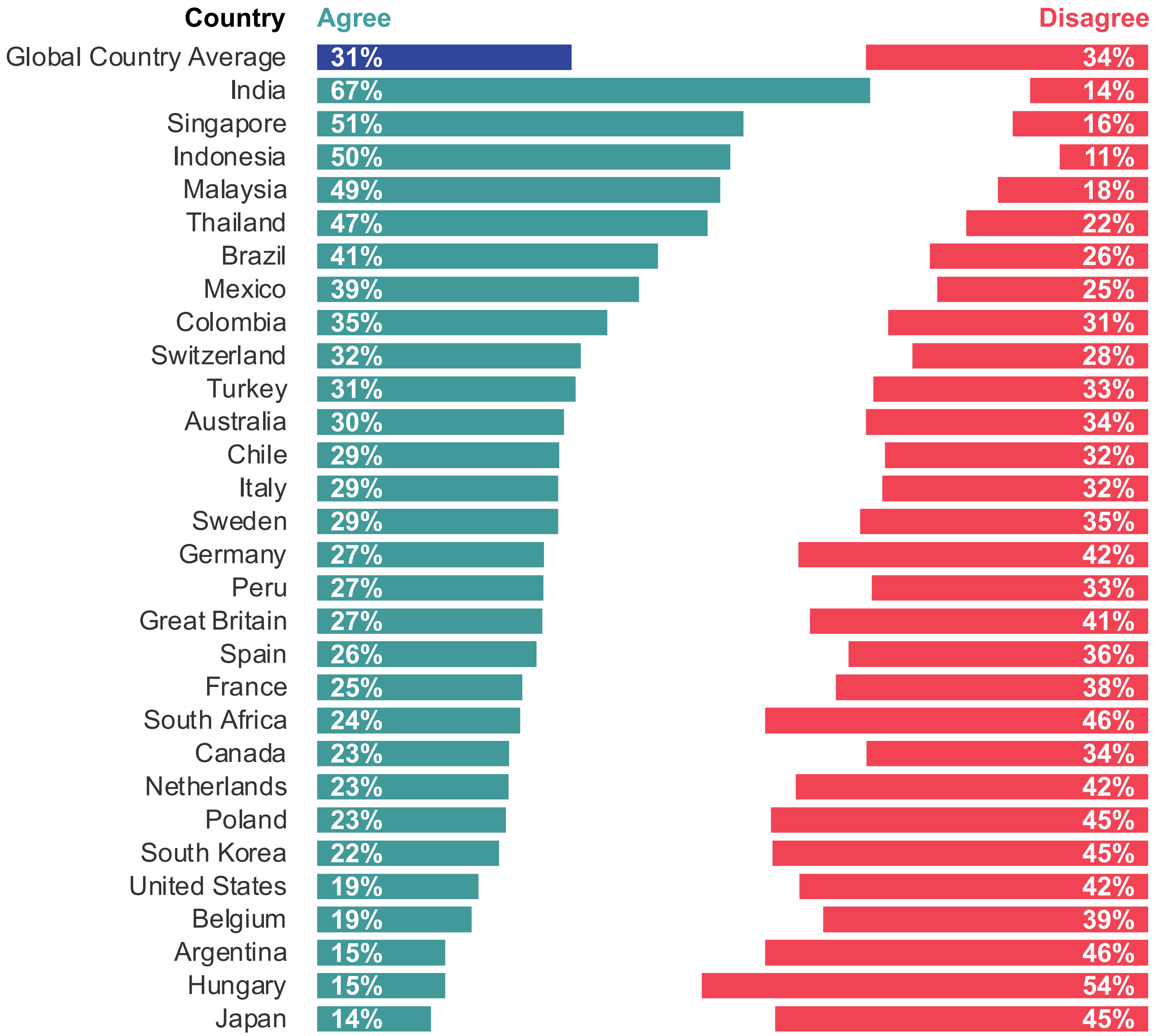
What is the plan?

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 no strong agreement from citizens that their government has a clear plan to tackle climate change



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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

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.

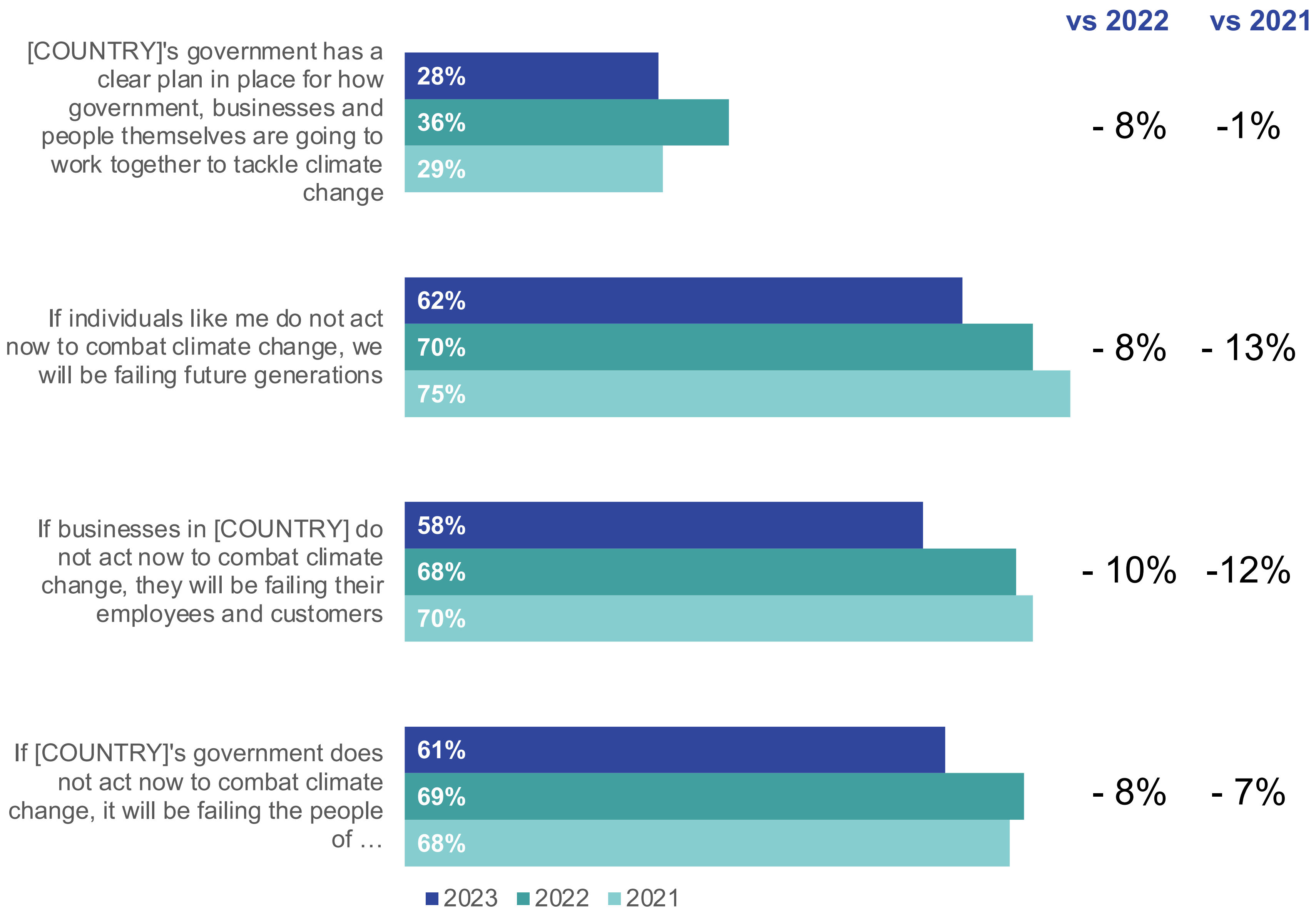
59% say that if businesses do not act now to combat climate change then they are failing their employees and customers – a decrease of 10pp from 2022.

61% say that if their national government does not act now to combat climate change then it is failing citizens.

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

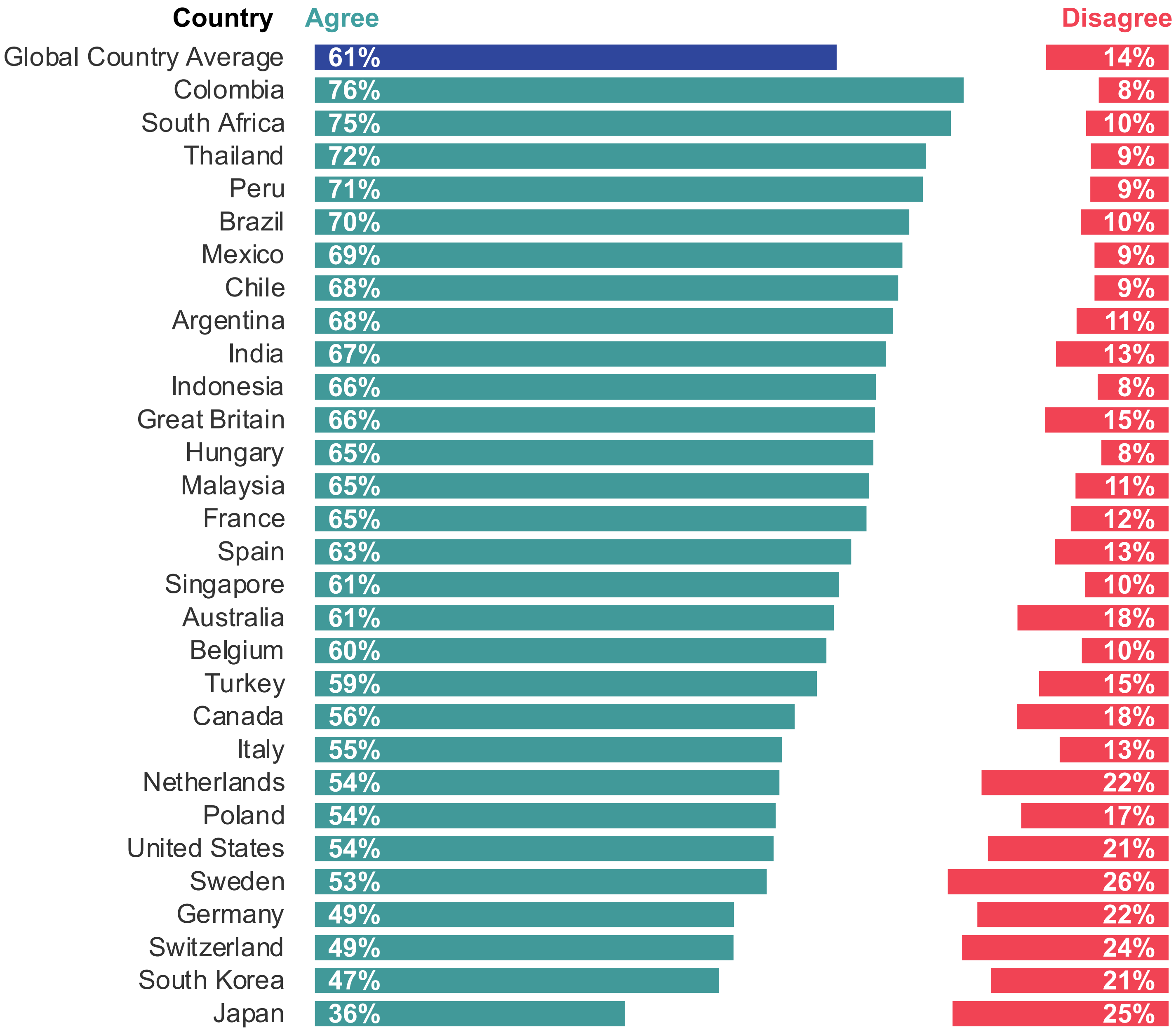
26 comparator countries – trended

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



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



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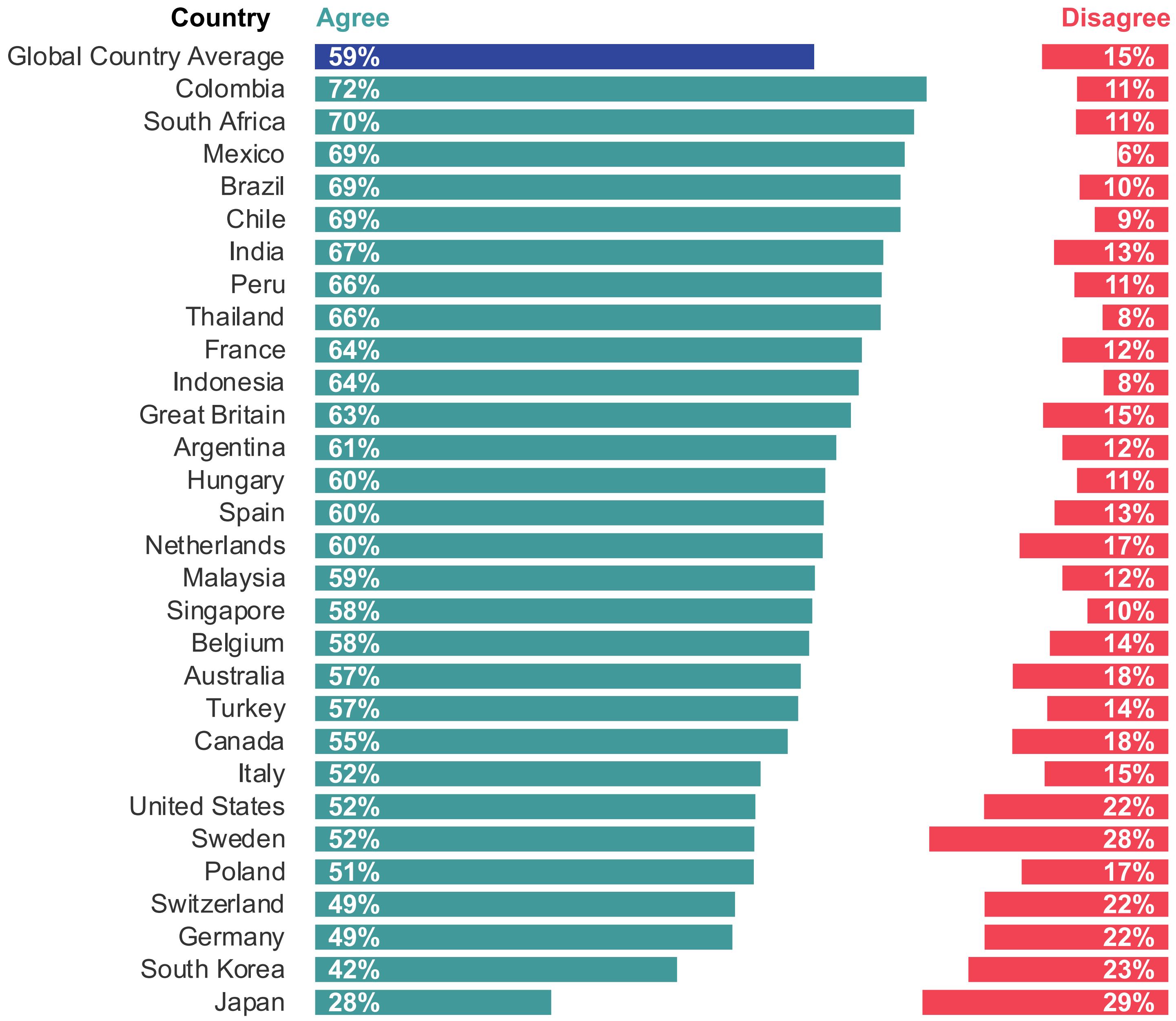
Country data

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]

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

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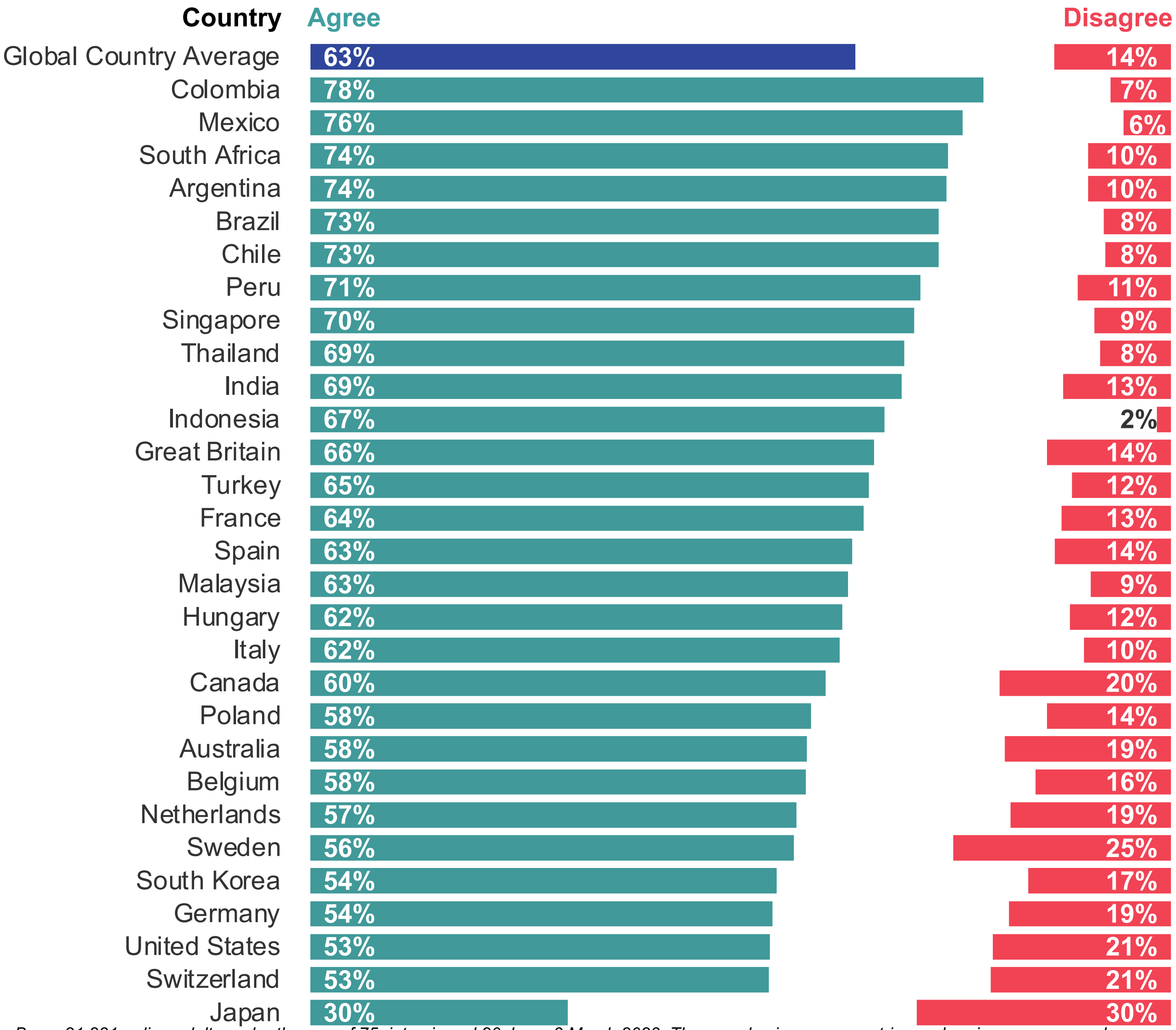
Individuals also see they too need to act to combat climate change, but this has also lessened

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



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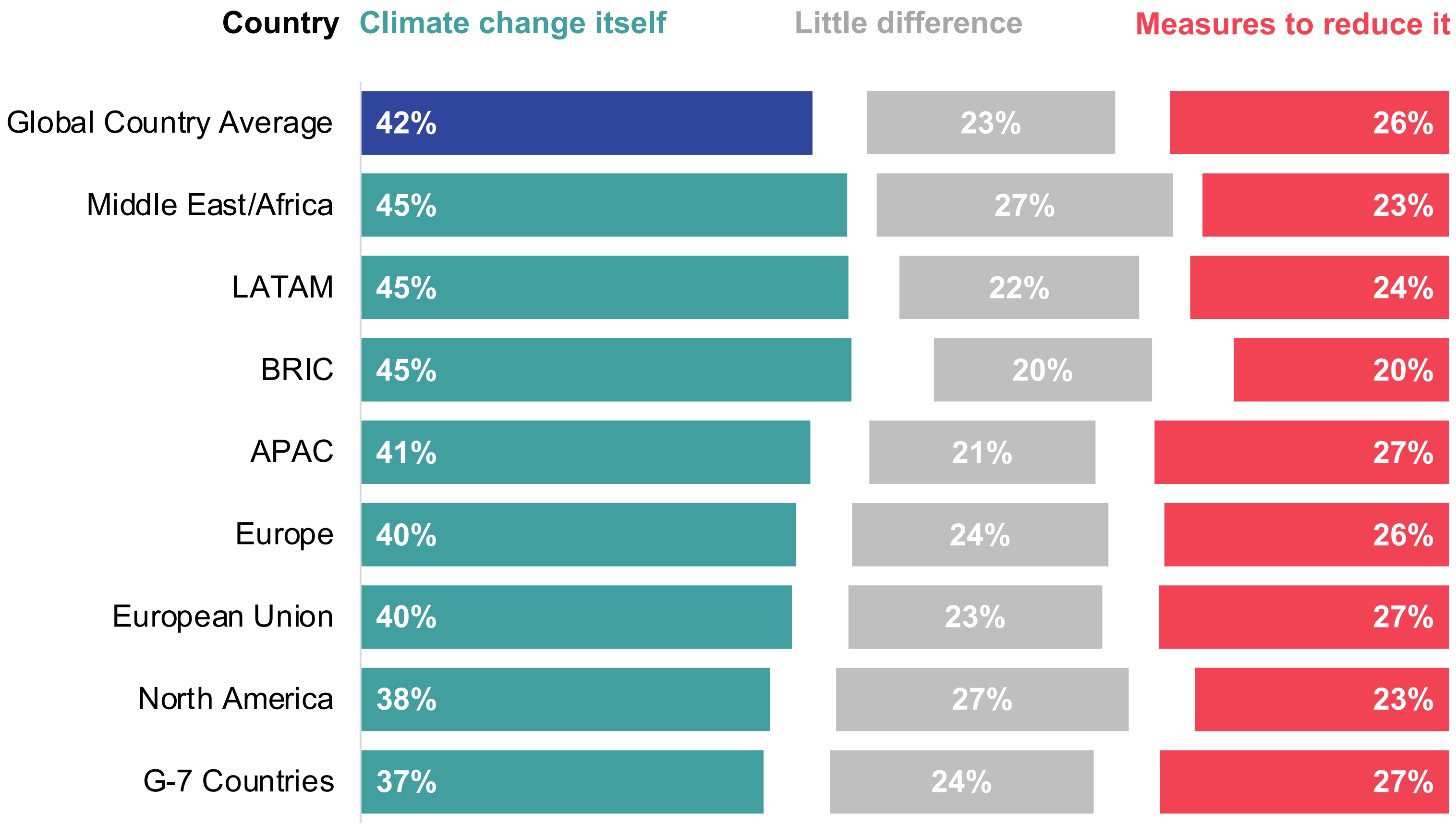
Generally, more citizens say that the **economic cost of climate change itself will be larger than the cost of measures to reduce it**.

But this was **not a consensus or a majority**: two-fifths (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?



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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

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?

Country	Climate change itself	Little difference	Measures to reduce it
Global Country Average	42%	23%	26%
Indonesia	54%	20%	24%
Brazil	49%	20%	23%
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	23%	29%	30%

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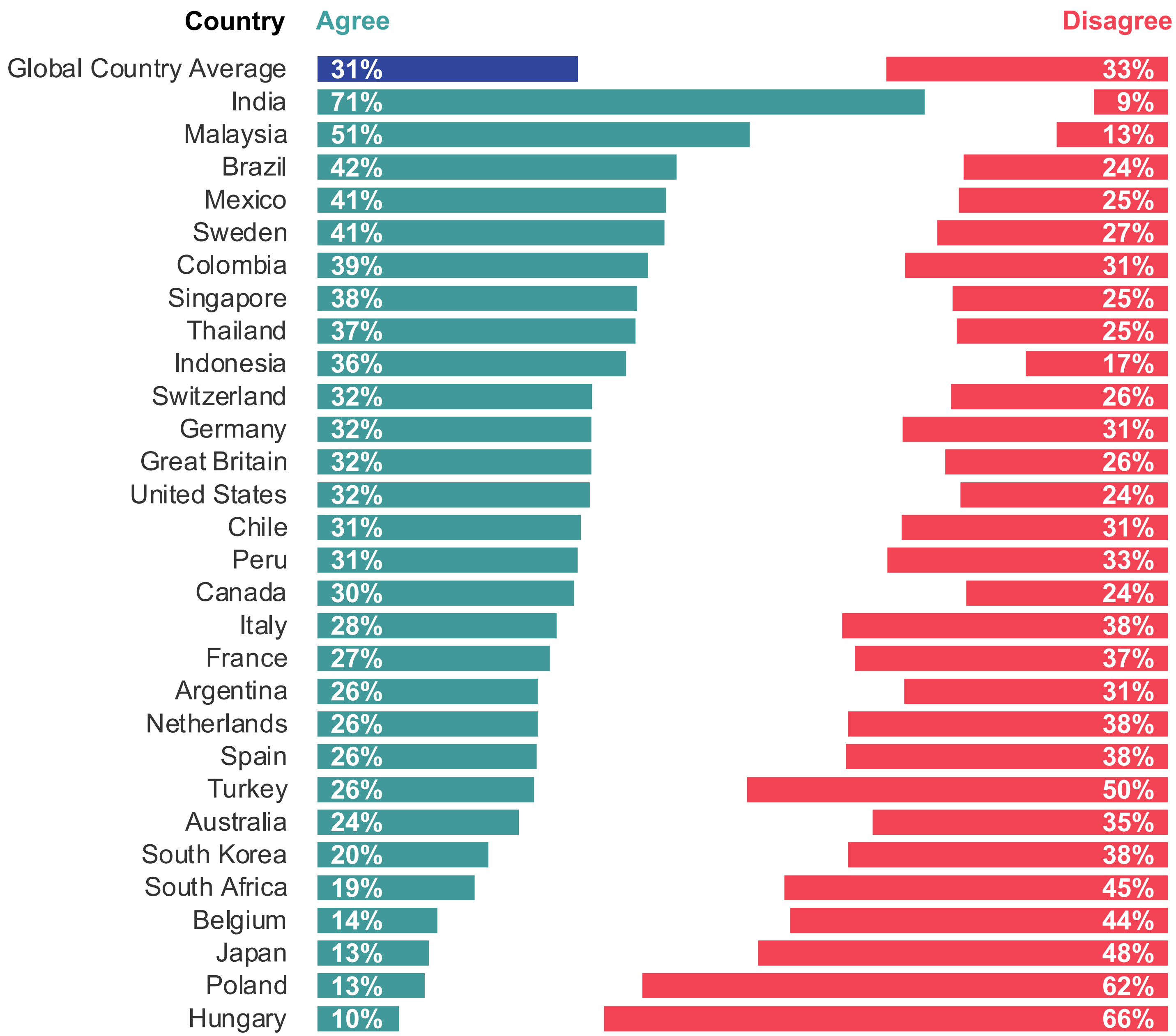
Who is leading the pack?

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



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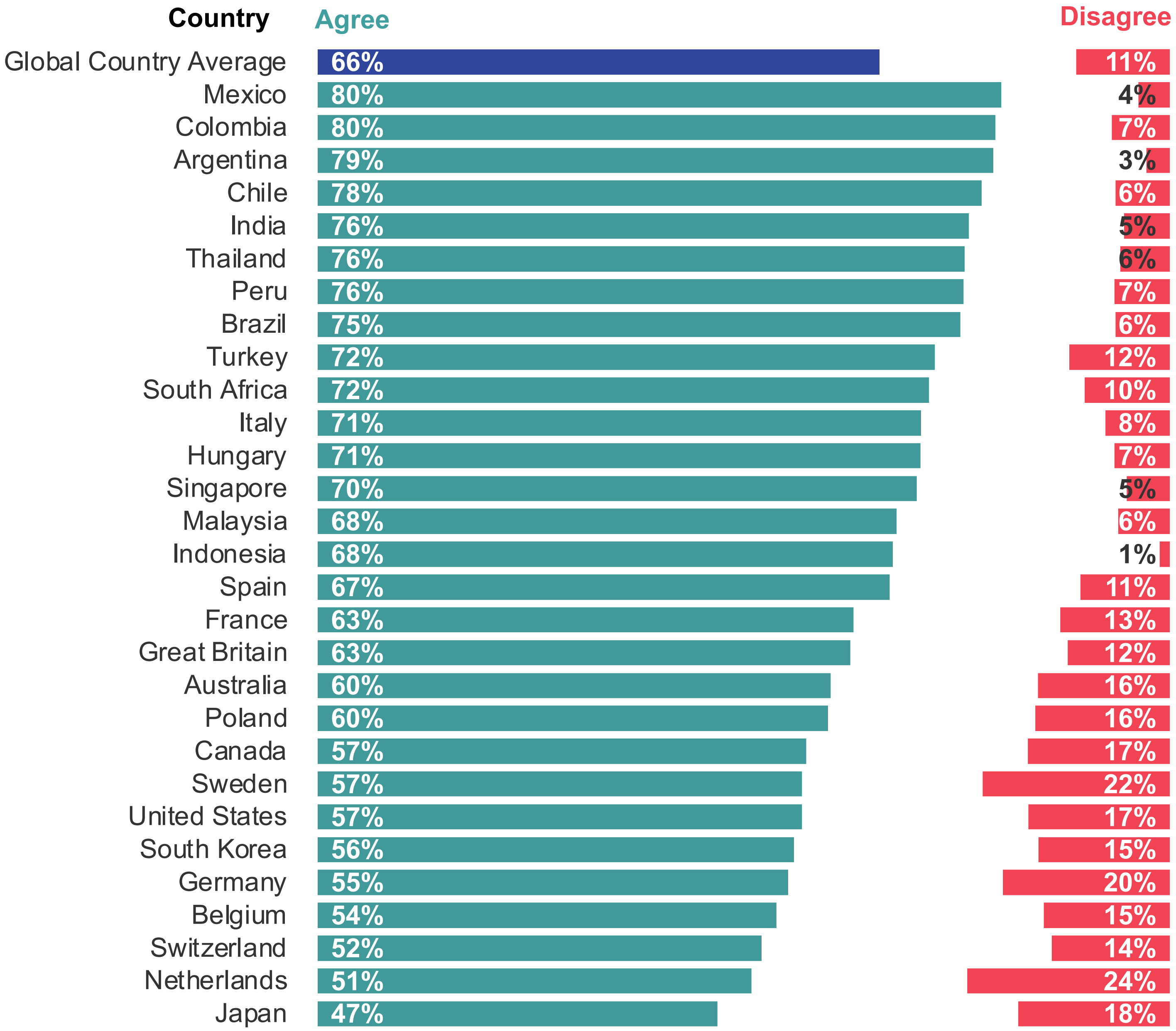
Country data

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

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?



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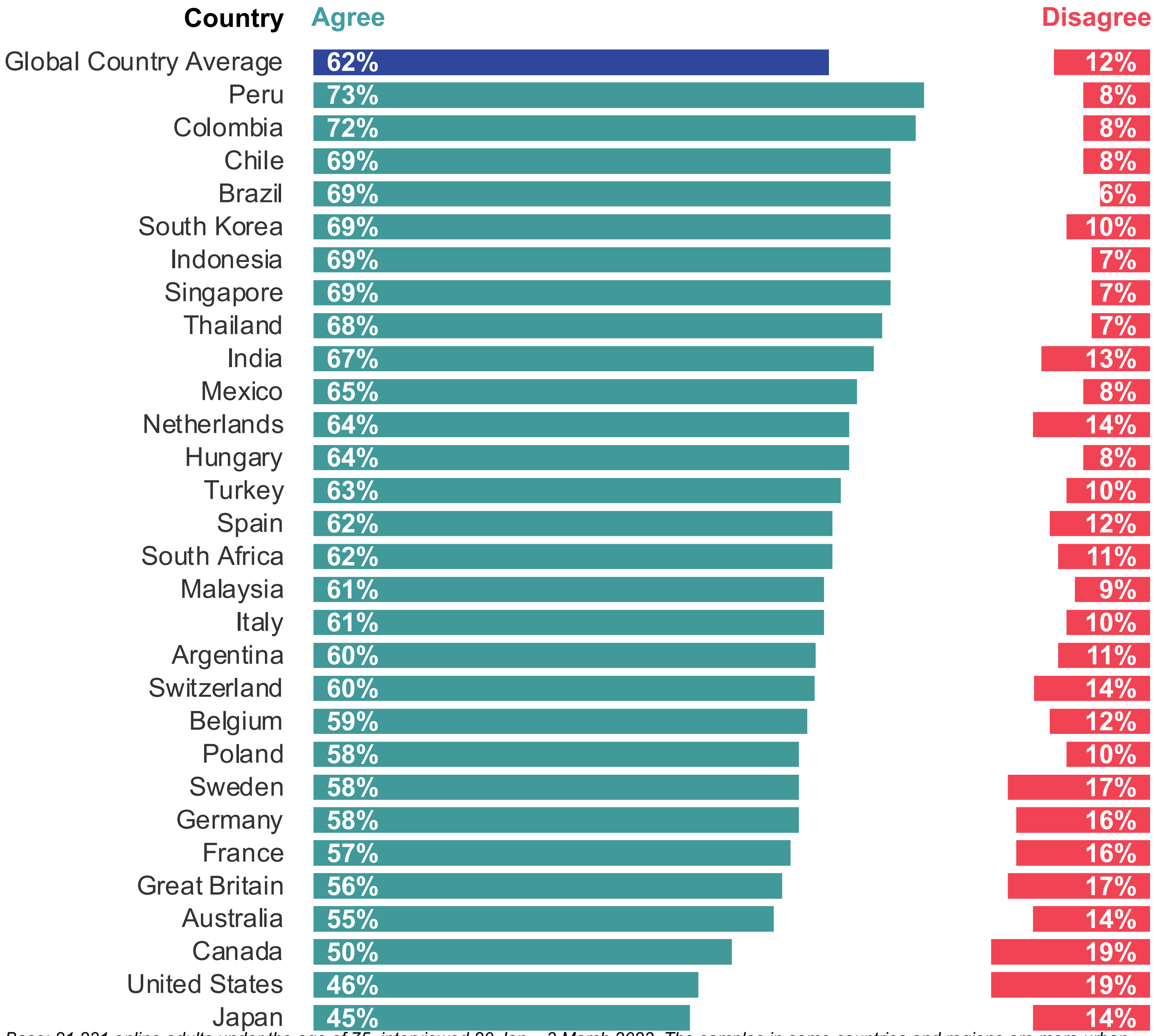
There is a strong consensus that the countries most responsible for the climate emergency should pay more to solve the problem

Country data

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

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



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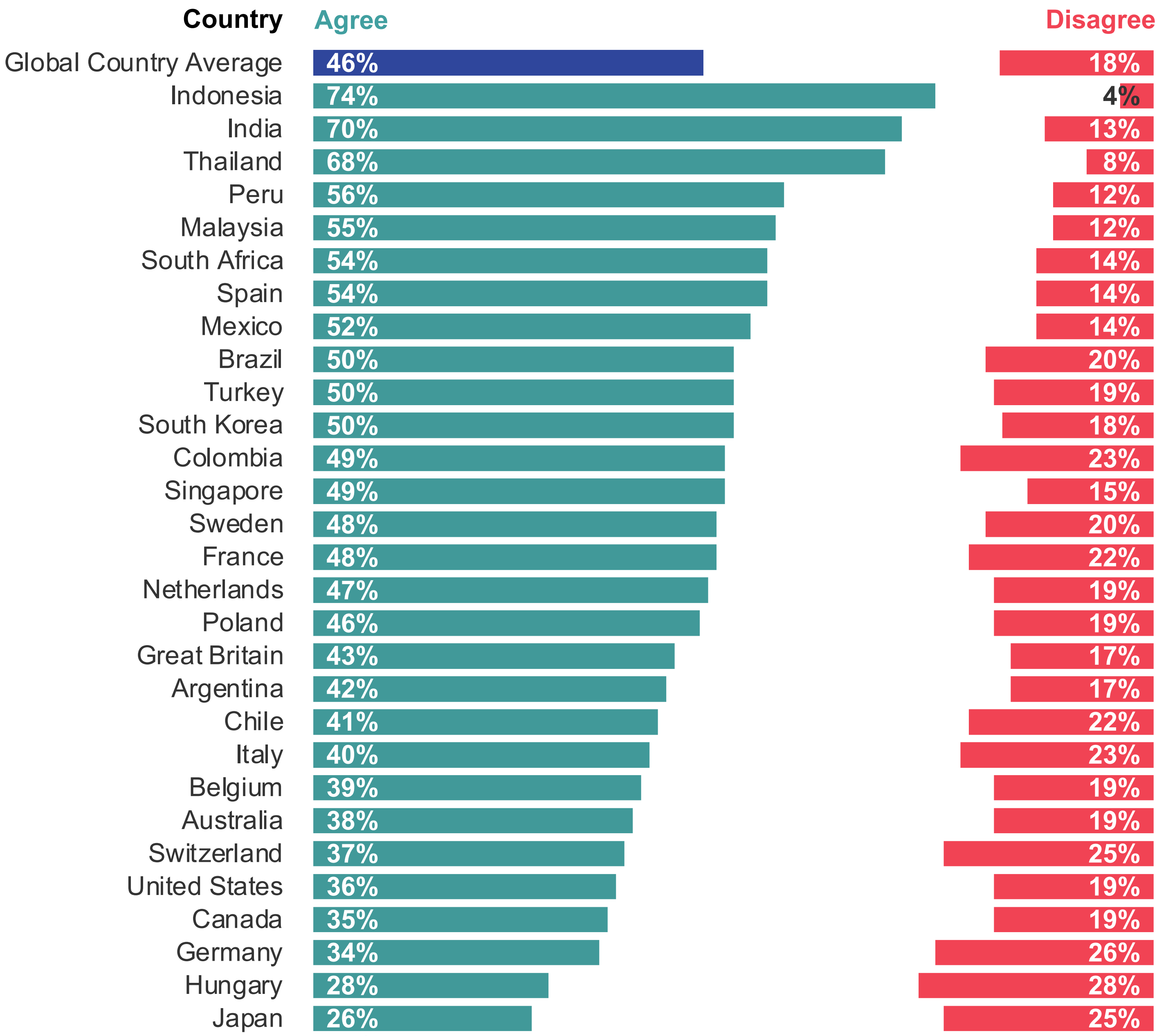
There is agreement that developed countries are leading in the fight against climate change

Country data

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

Developed countries are leading in the fight against climate change



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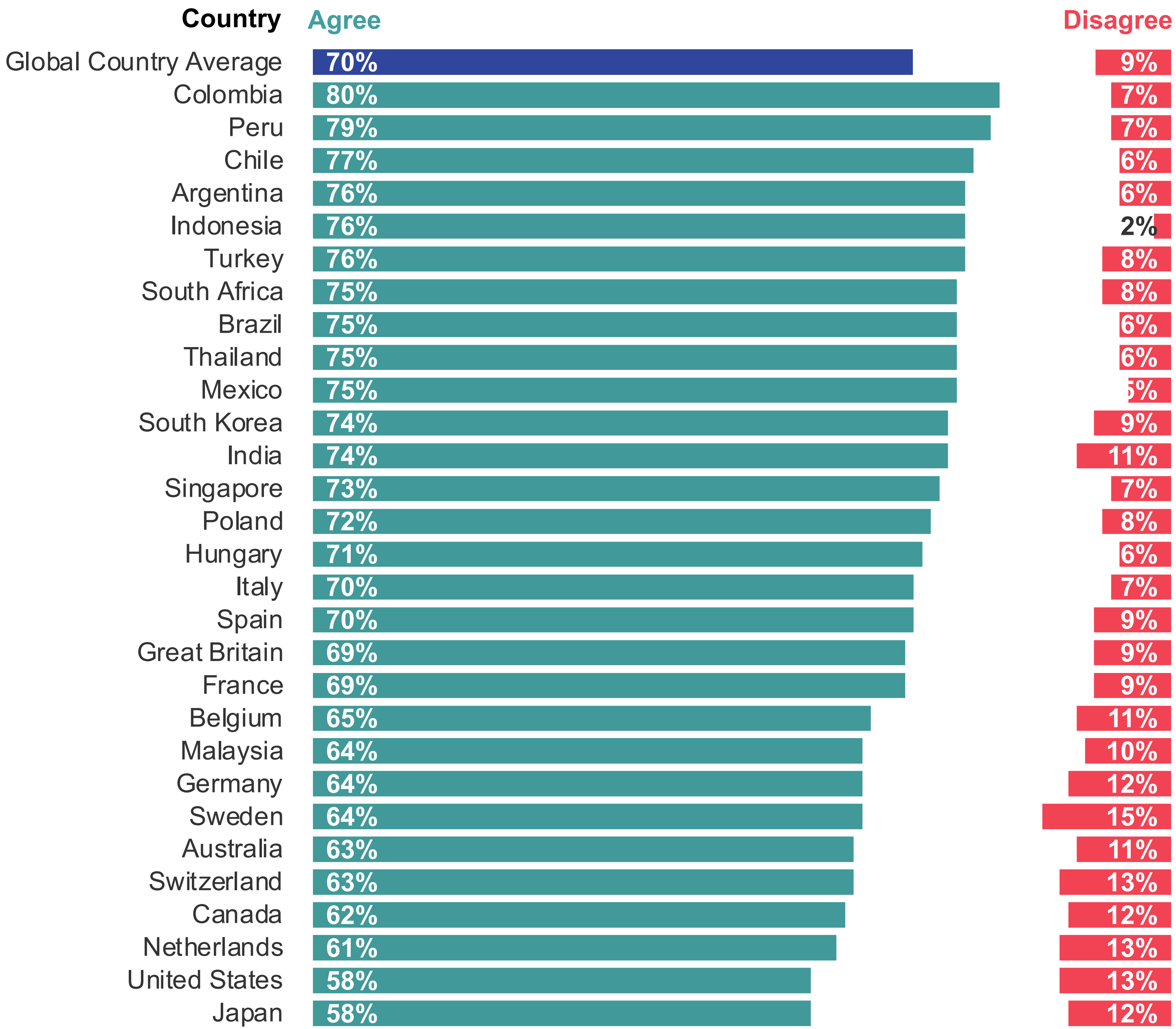
But, there is also overwhelming consensus that developed countries should do more to combat climate change

Country data

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

Developed countries should do more to combat climate change



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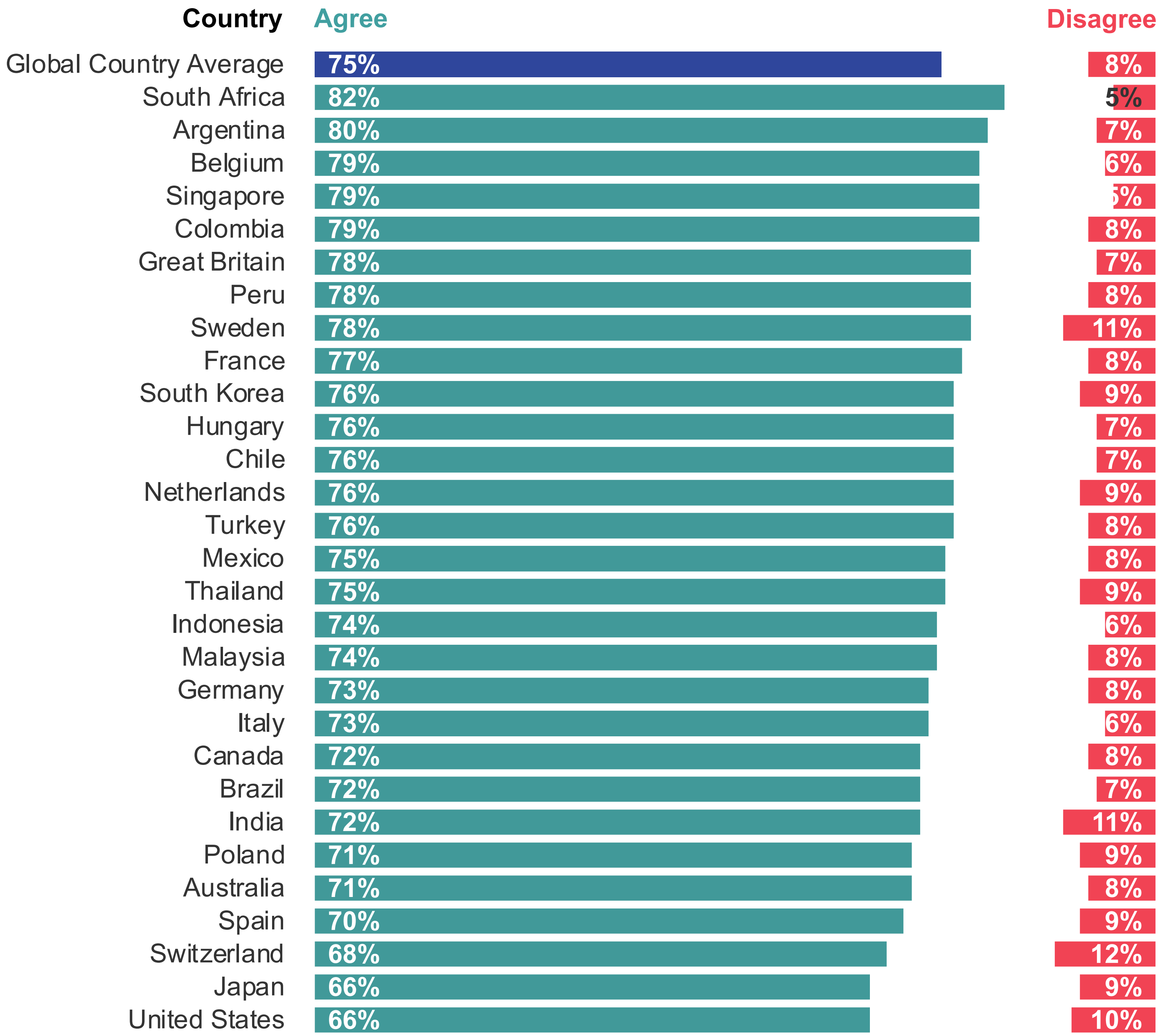
Countries are united in agreeing that we cannot fully tackle climate change unless all countries collaborate

Country data

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

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



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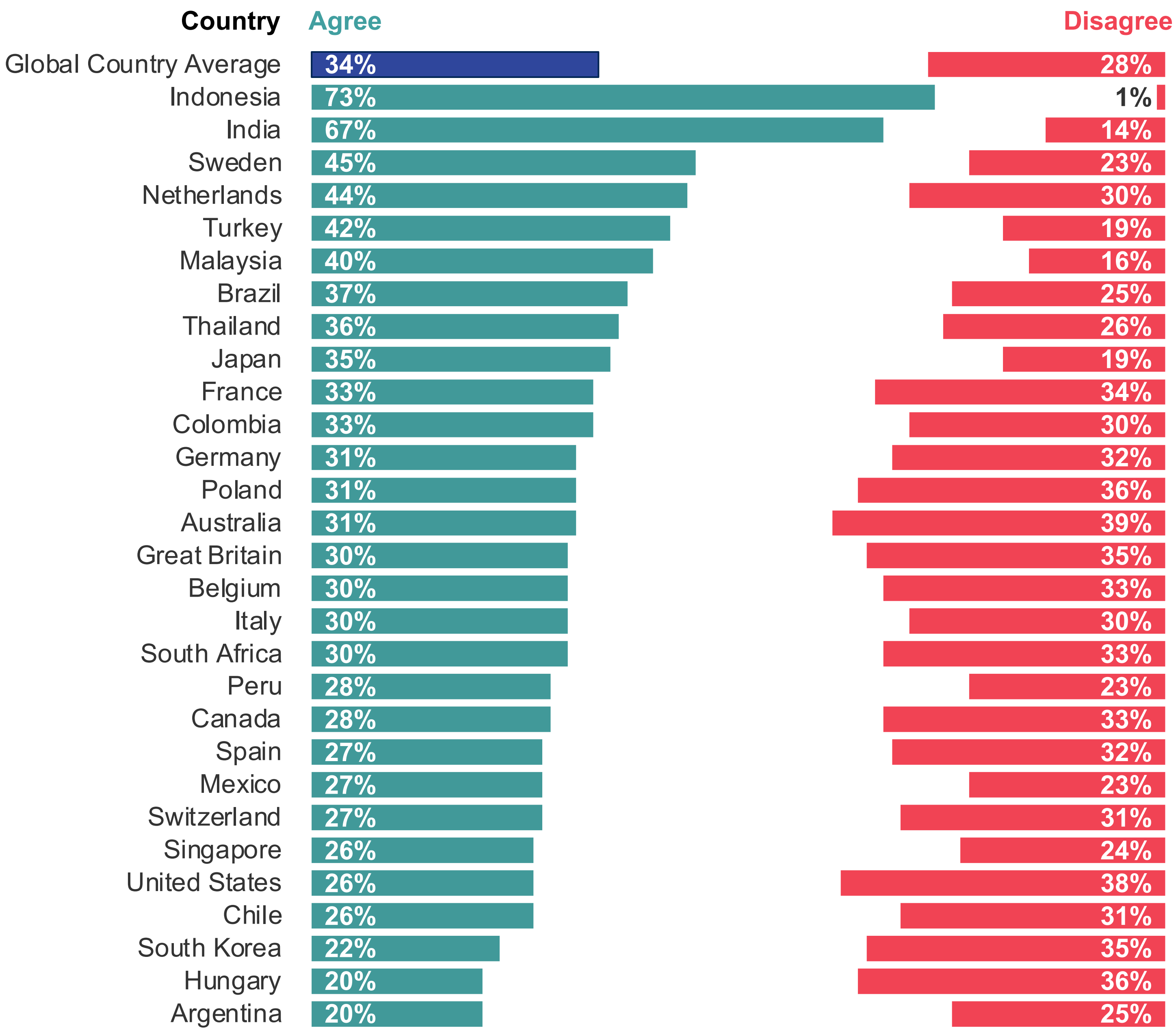
There is division on whether countries feel they are being asked to sacrifice too much to tackle climate change

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



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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**.

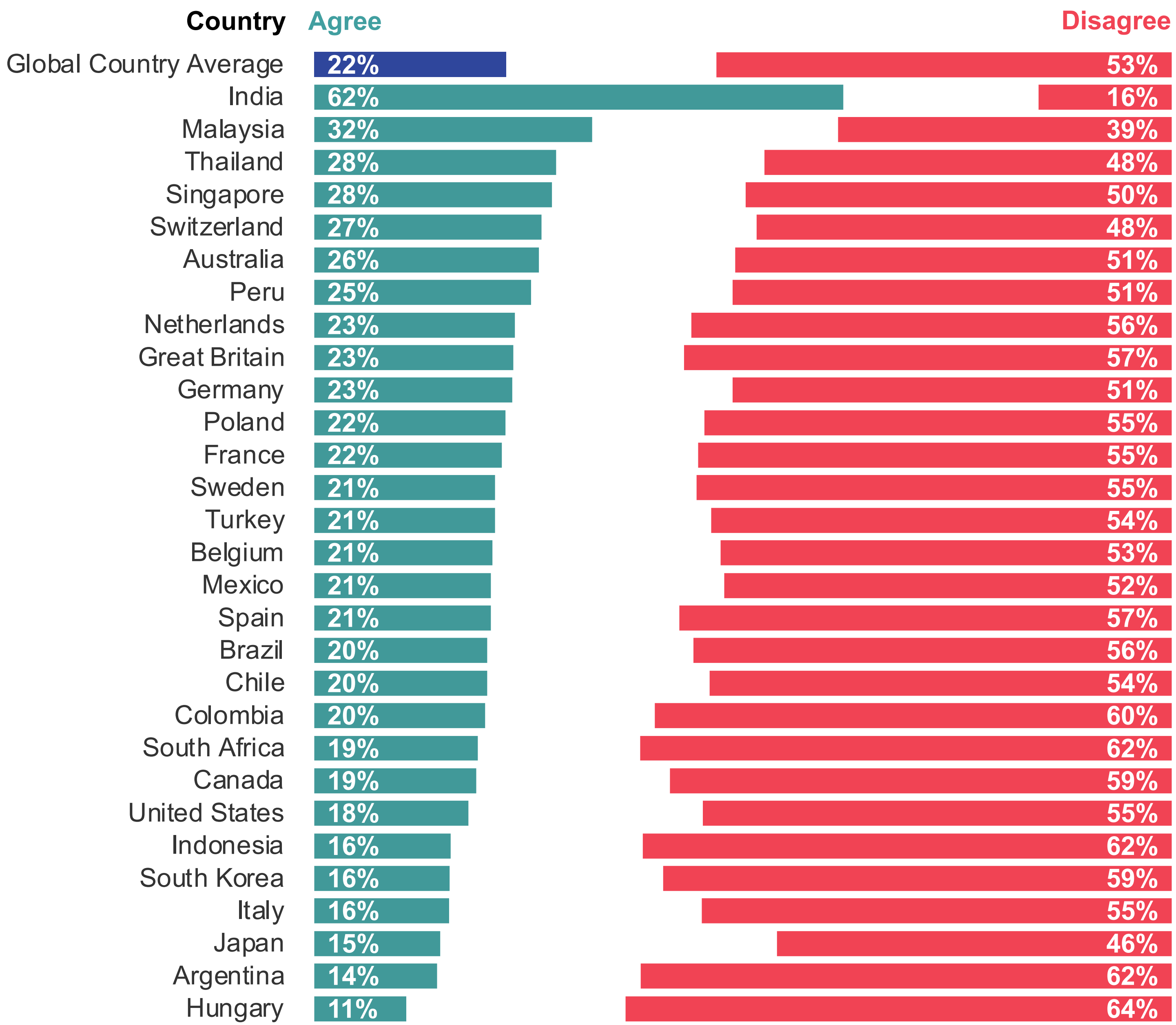
Globally, roughly a third would pay more of their income in taxes to help prevent climate change. When asked what would **motivate them to make a change**, citizens favoured a **financial incentive or tax cut for environmentally friendly purchases**, or having **easy access to information** on the right 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



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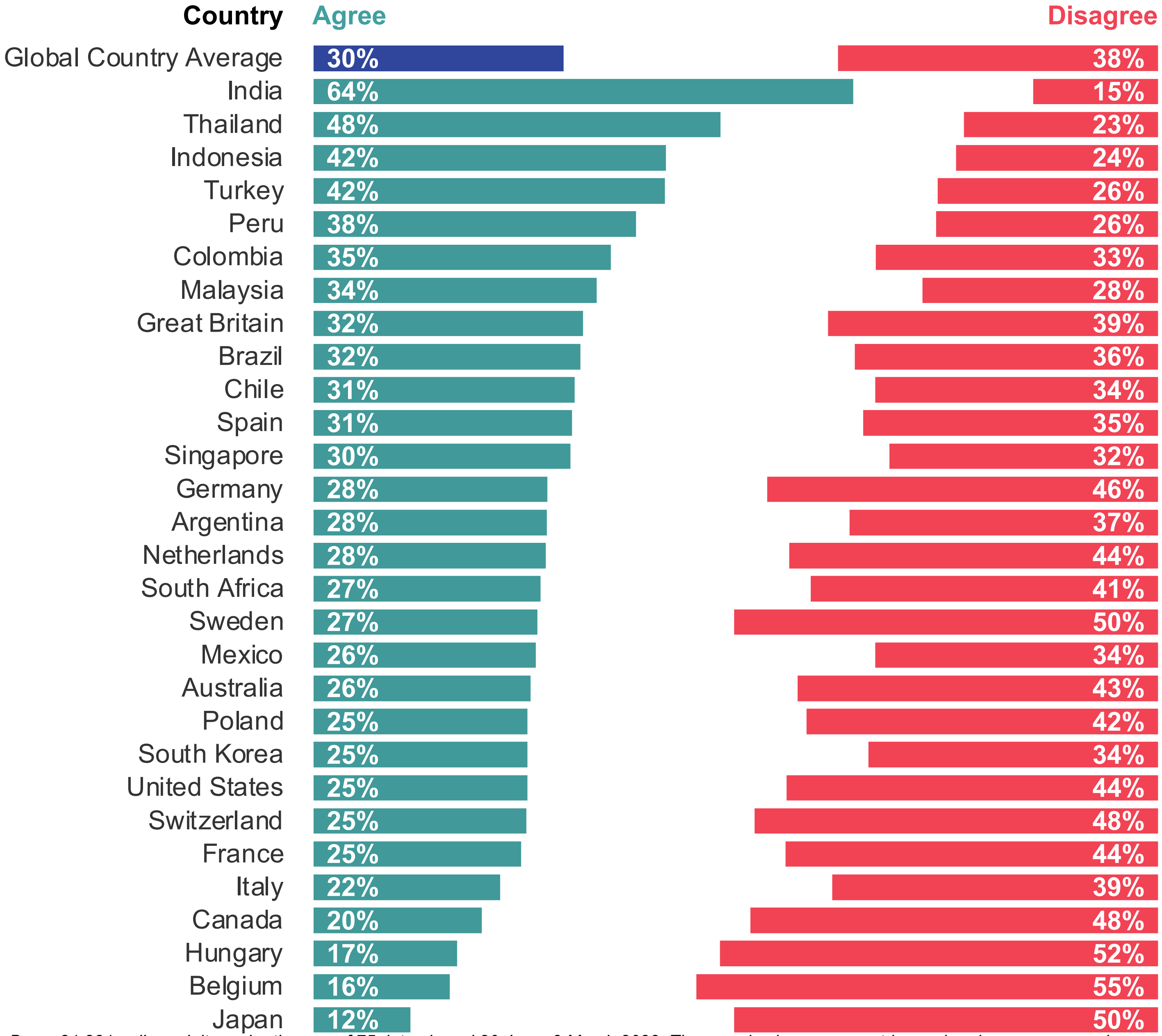
On average, close to a third say they would pay more of their income in taxes to help prevent climate change – but opposition is greater in many countries

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



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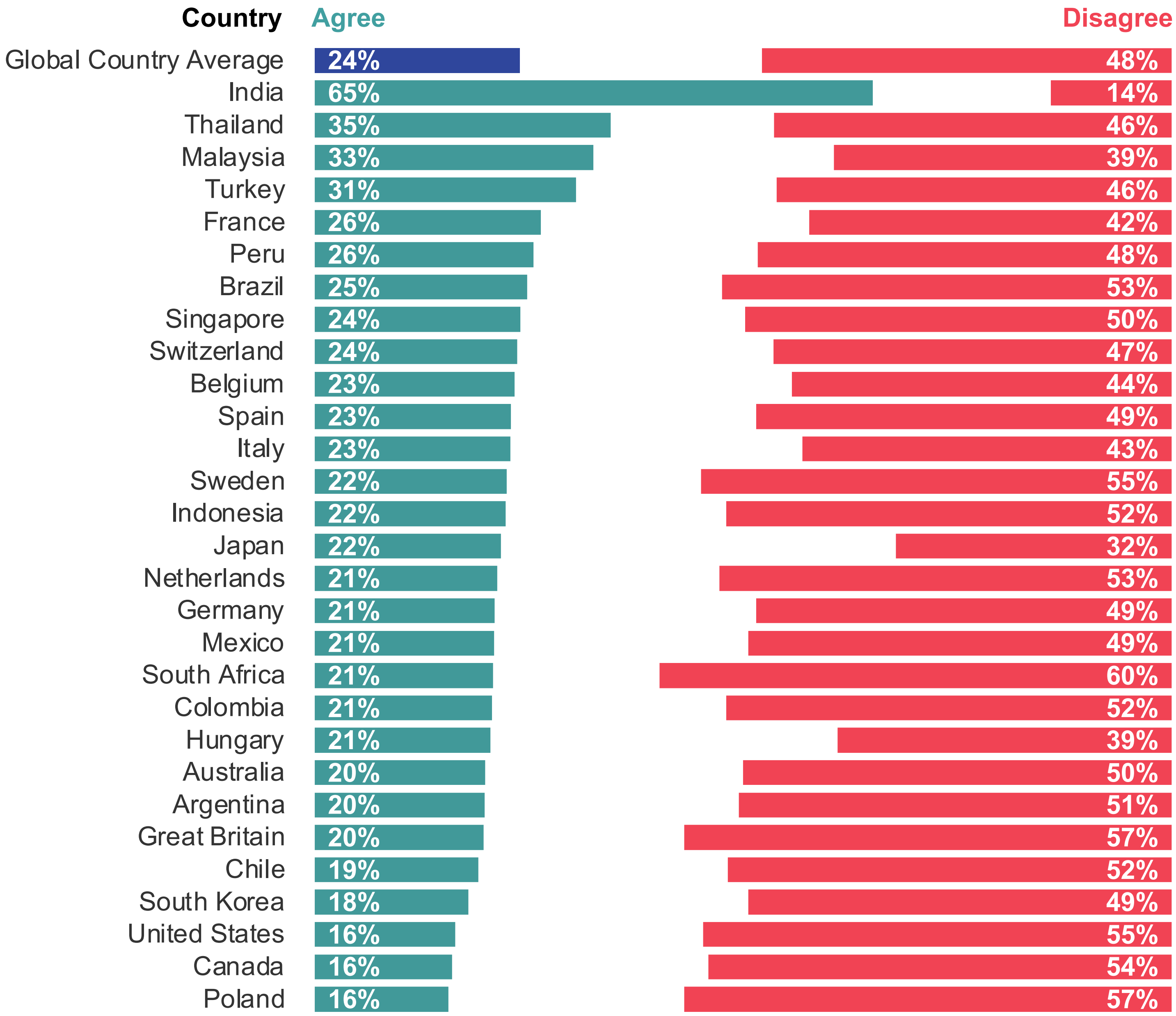
More people disagree than agree that climate change is beyond our control

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



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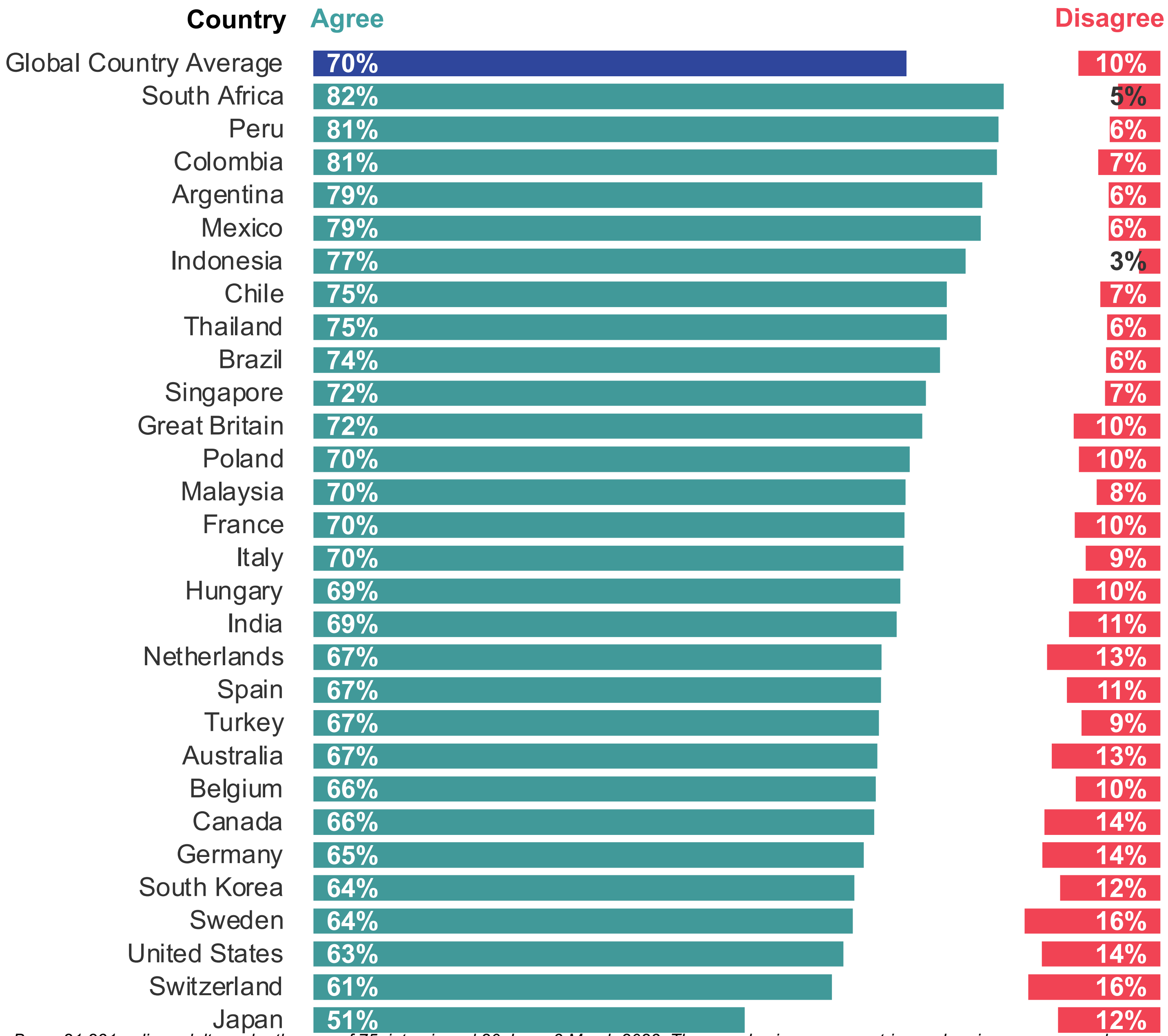
There is strong agreement that if everyone made small changes this could have a big impact on tackling climate change

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



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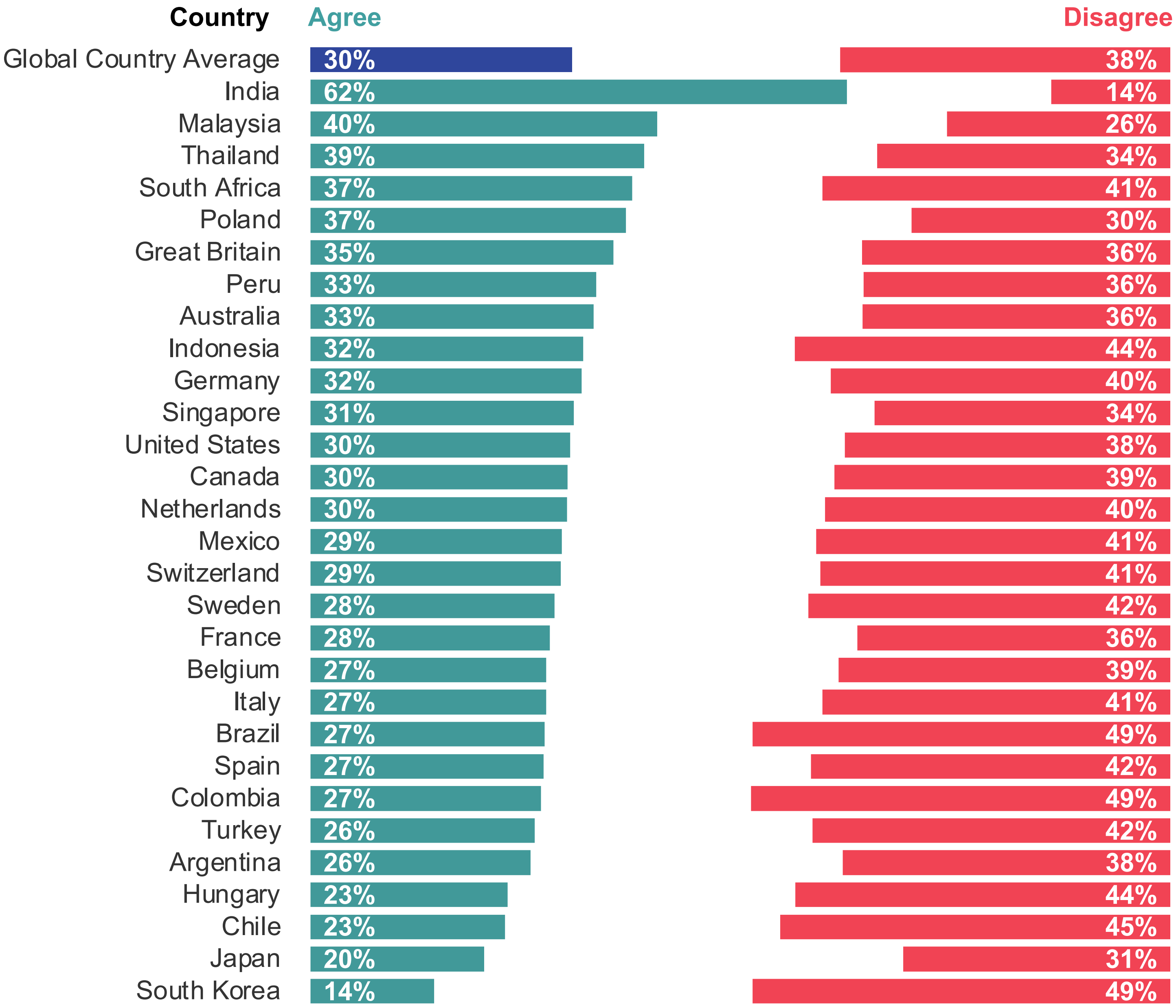
There is division on whether now is the right time, or not, to be investing in climate change

Country data

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

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



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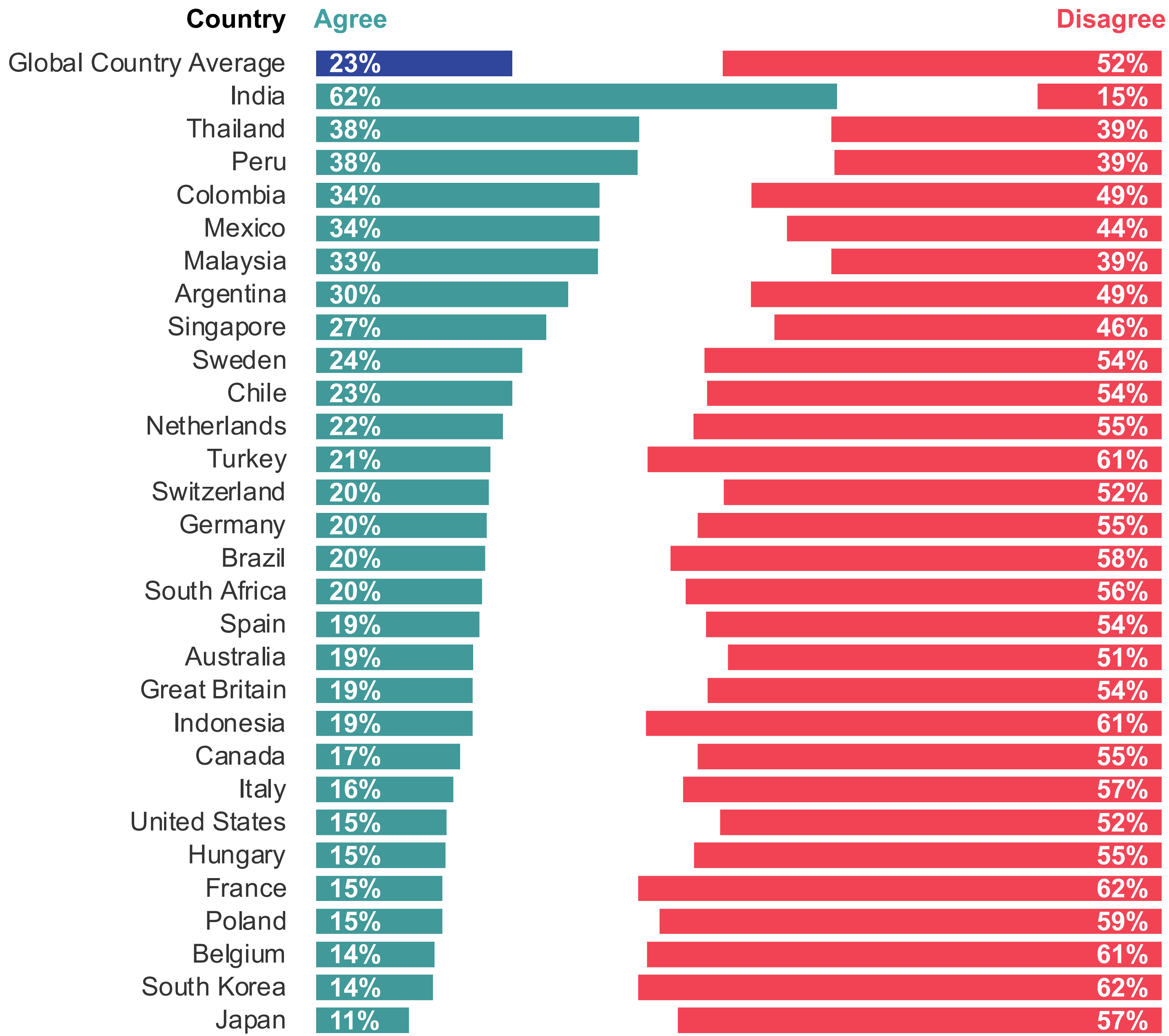
The majority disagree that the negative impact of climate change is too far in the future to worry about

Country data

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

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



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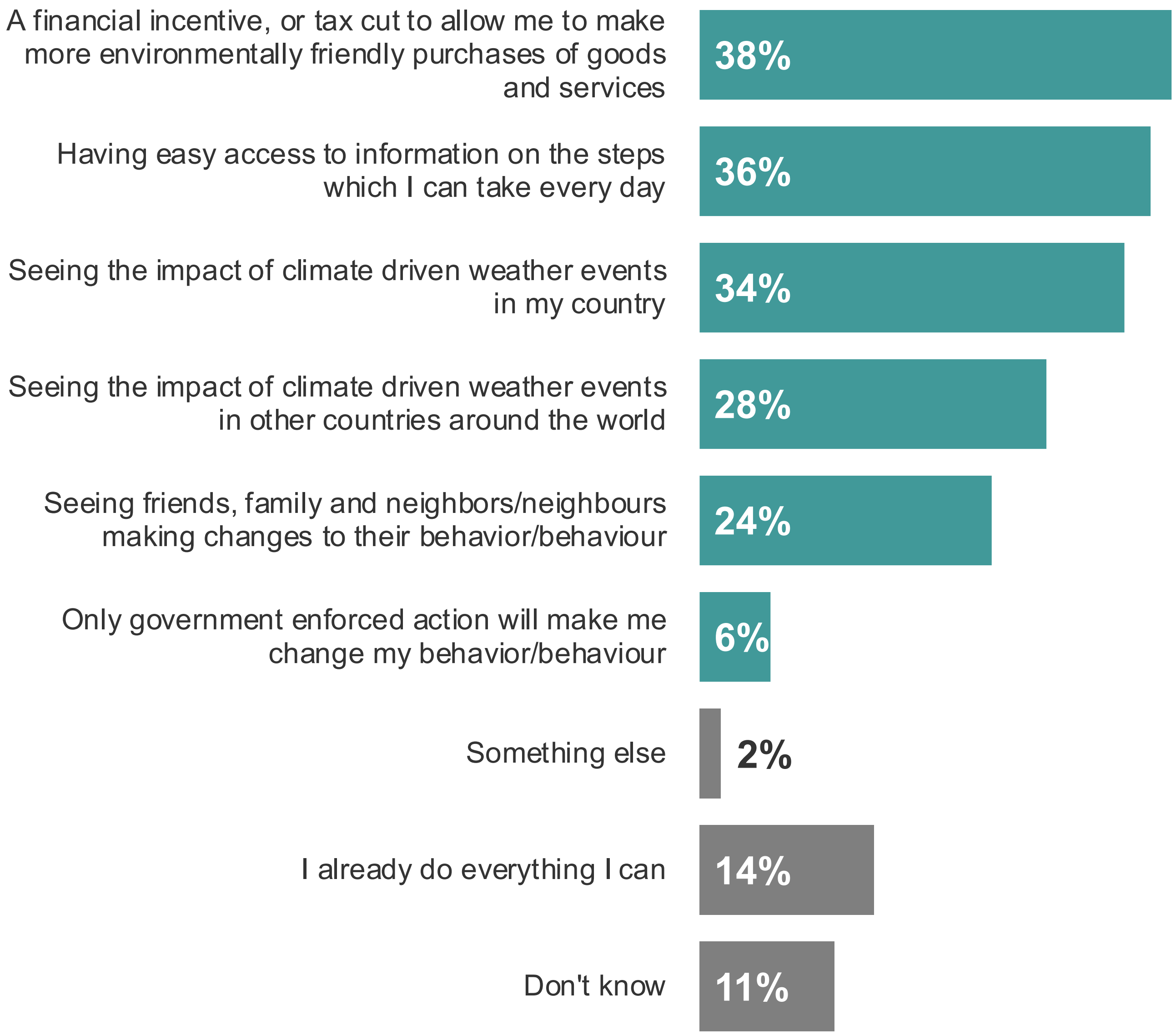
Citizens say a financial incentive/tax cut for environmentally friendly purchases or having easy access to information would help encourage them to take more action to fight climate change

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?



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Likelihood to take action on climate change 2023 across countries

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

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

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

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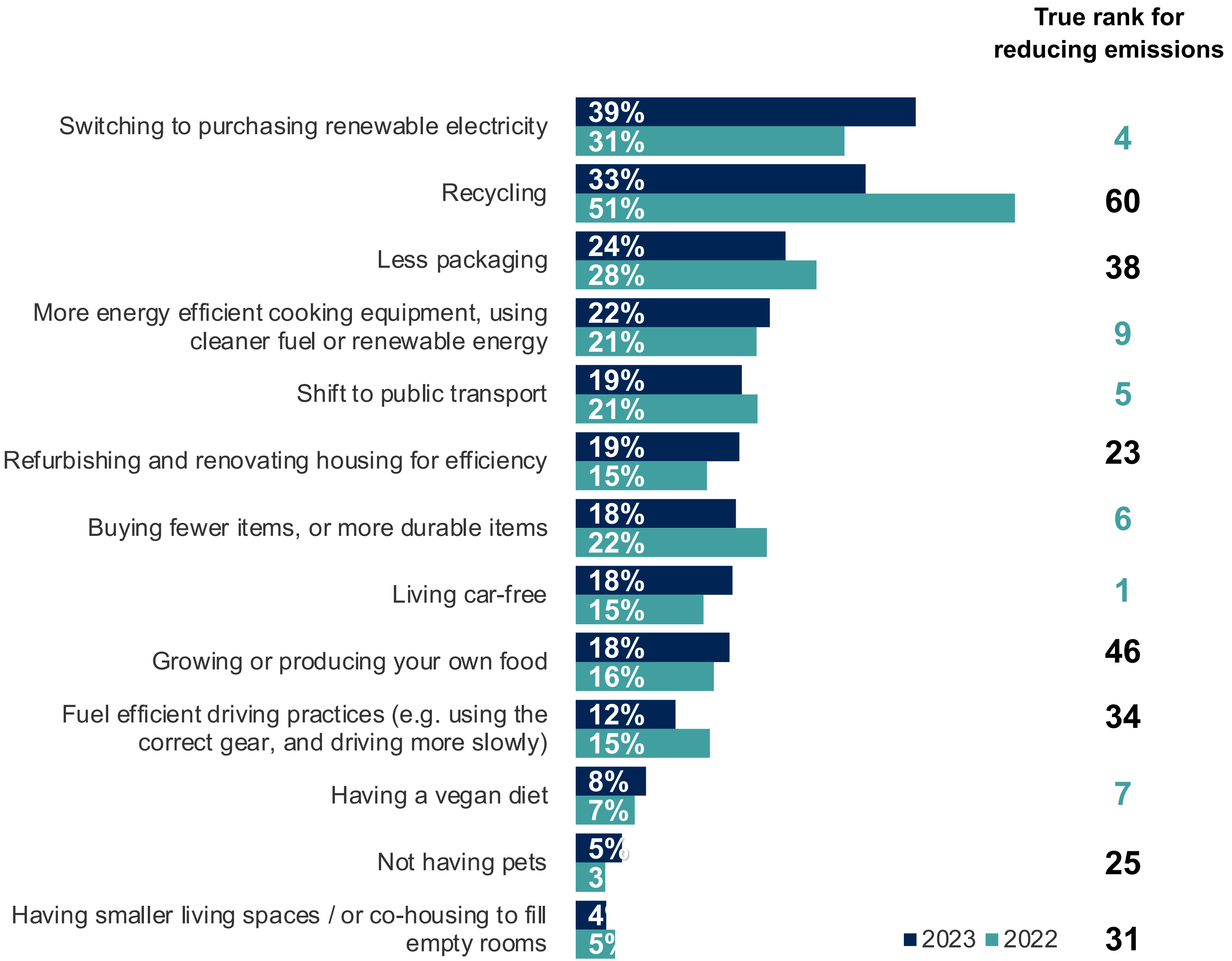
Perils of perception

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?

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; 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." 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

**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 the most impact on reducing greenhouse gas emissions?

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

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

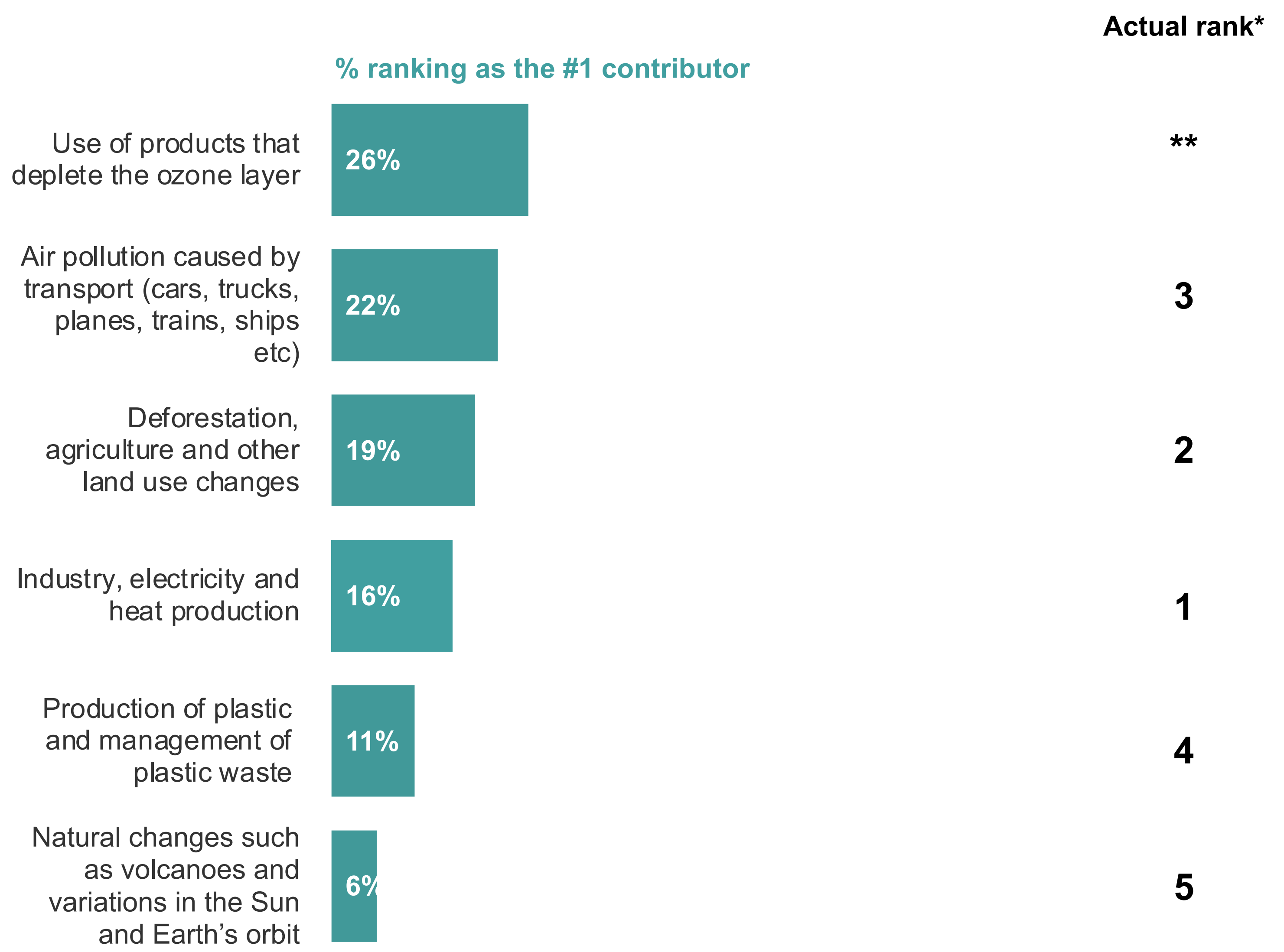
Base: 21,231 online adults under the age of 75, interviewed 20 Jan – 3 March 2023. The samples in some countries and regions are more urban, more educated, and/or more affluent than the general population. "The "Global Country Average" reflects the average result for all the countries and markets where the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result."

Ipsos

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.



*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*

Perceived contribution of different factors behind global warming

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

.

Top three actions:

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

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

Base: 21,231 online adults under the age of 75, interviewed 20 Jan – 3 March 2023. The samples in some countries and regions are more urban, more educated, and/or more affluent than the general population. "The "Global Country Average" reflects the average result for all the countries and markets where the study was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result."

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

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

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

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

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

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

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

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

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

"The Global Country Average" reflects the average result for all the countries and markets in which the survey was conducted. It has not been adjusted to the population size of each country or market and is not intended to suggest a total result.

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

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

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

This report contains findings from three sample sets:

1

Worldwide 29 country study 2023

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

2

Worldwide 31 country study 2022

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

3

Worldwide 30 market study 2021

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

Trended slides contain findings from several subsets:

1

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

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

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

2

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

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

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

3

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

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

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

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

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(for reports)

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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}.

THANK YOU

Dr. Pippa Bailey
Head of Climate Change & Sustainability Practice
Ipsos in the UK

Pippa.Bailey@ipsos.com

GAME CHANGERS

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