

Global Public Confidence Study on Climate Change



MARKET
RESEARCH
WORLDWIDE

Introduction

- The 2023 IRIS Global Public Confidence Study provides a multi-country view of public sentiment across the most important issues of the day. The project aimed to understand:
 1. Public assessments of the economy and personal finances
 2. Levels of confidence and concern about climate change
 3. Perspectives on the state of healthcare systems
- **This report presents the climate results. Separate reports address views on economic confidence, and on health care.**
- **Nearly 19,000 people were surveyed across 27 countries (18,688).**
- Fieldwork was completed during February, March, and April 2023 (with one additional country added in June).
- A nationally representative sample of 500 to 1,000 adults was interviewed in each country.
- Data were collected online in 25 countries, by telephone (CATI) in Turkey and in-person (TAPI) in Bulgaria.



Participating Countries

To learn more about IRIS and its member companies: <https://www.irisnetwork.org/network>

Australia			France			Japan			South Korea		
Austria			Finland			Lithuania			Spain		
Brazil			Greece			Mexico			Switzerland		
Bulgaria			India			Netherlands			Turkey		
Canada			Indonesia			Panama			UK		
Colombia			Ireland			Poland			USA		
Germany			Italy			Romania					

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Executive Summary

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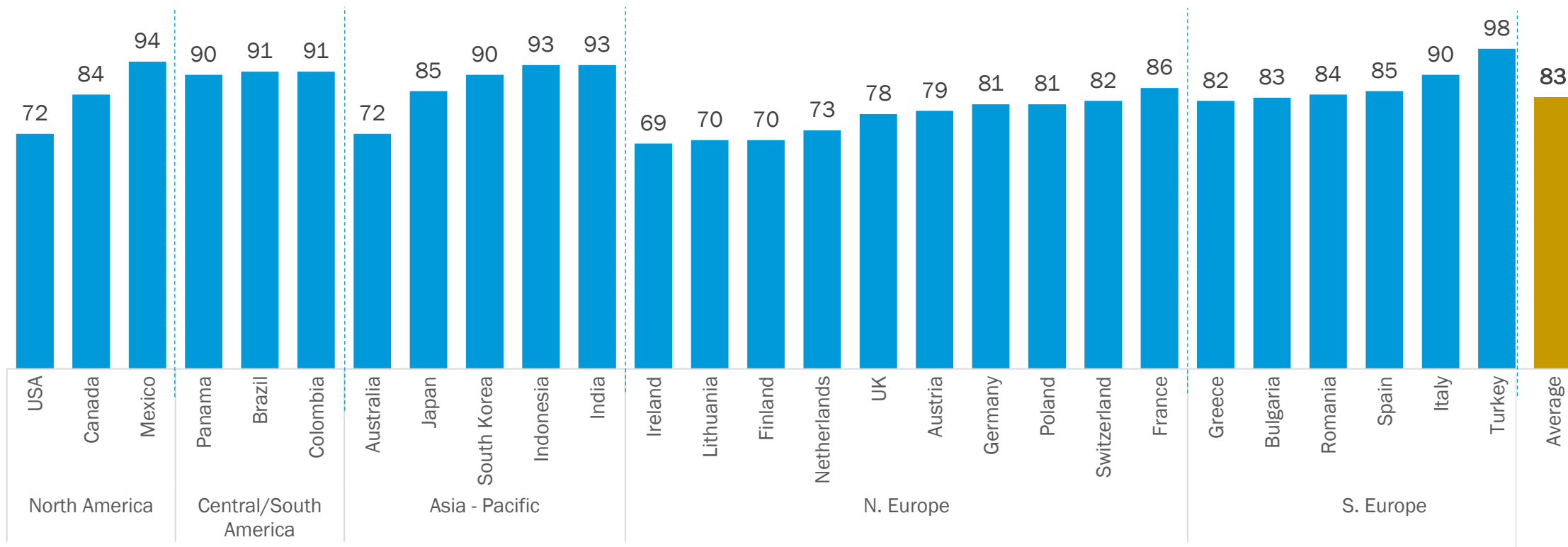
- It has often been argued that during times of economic stress, people pay less attention to other issues like the environment and health care, but concern remains in this study. Concern about climate change is high across most countries with an overall average of eight in ten saying they are at least somewhat worried.
- In almost every country, climate change is seen as a more serious problem for the planet, than for the country, and least so in the local area where people live. Many people look at climate change as a distant problem, not something of direct local concern or relevance – which may be limiting people’s willingness to act. An exception is Turkey, where concern is high locally, nationally and globally.
- Asked how important the development of renewable energy should be for their country, overall, 50% consider this a top priority. That reaches eight in ten in Mexico and Panama, and two in three in Brazil, Columbia, India, Romania and Italy. Small proportions rate this a top priority in Bulgaria, Turkey, Lithuania, and the Netherlands.
- When asked if knowing that a company uses a range of sustainability factors influences the purchase decision, about four in ten say that a company reducing packaging, limiting use of plastics, reducing CO2 emissions and reducing energy or water waste, would definitely affect their decision. The proportions vary considerably across countries. Amongst these factors, reducing CO2 emissions is the least influential on the purchase decision.
- Almost six in ten say products that are healthy/safe to use and clean/toxin free would definitely affect their decision, which make these factors more effective at differentiating brands.

Climate Outlook

Concern About Climate Change

Q. How worried are you about climate change?

% Worried / Very worried about climate change



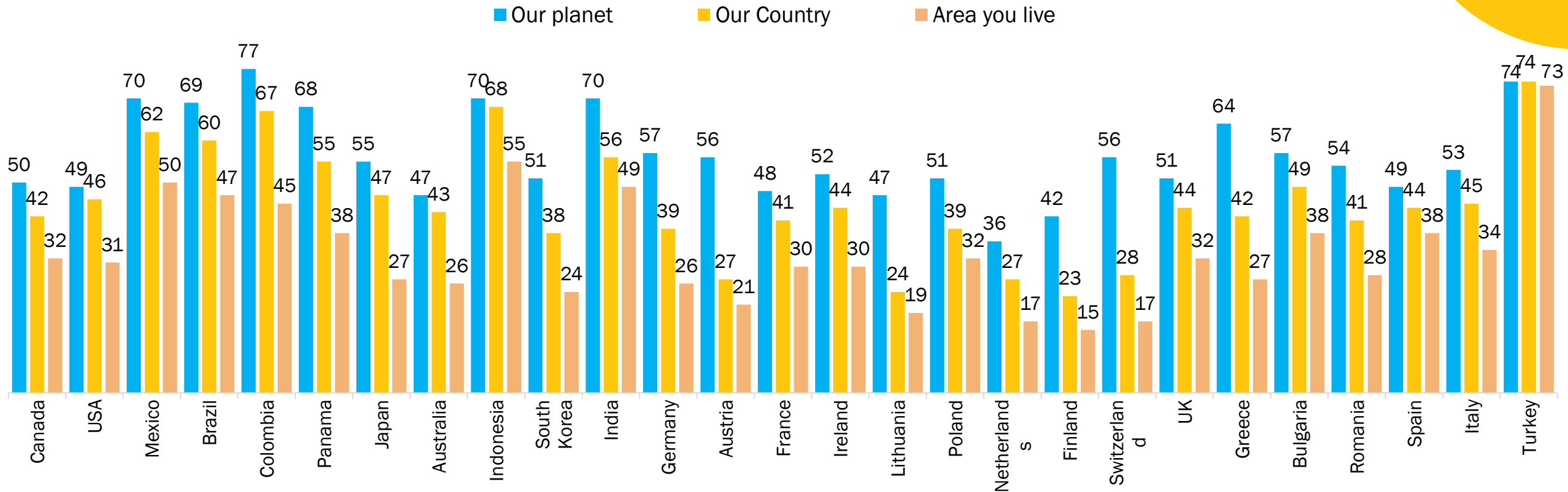
Climate change a serious problem?

Q. How serious a problem or not do you consider climate change for... our planet?

Q: How serious a problem or not do you consider climate change for... our country?

Q: How serious a problem or not do you consider climate change for... the area where you live?

% Very Serious



Negative Impacts due to Climate Change

Too late to prevent negative impact due to climate change vs. Not to late

Q. Is it too late to prevent major negative impacts due to climate change?

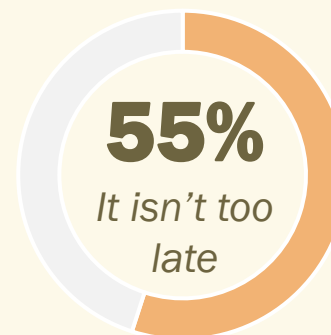
% Yes



Highest In....

India	41%
Switzerland	35%
Italy	35%
Austria	34%
France	34%
Finland	28%
Panama	27%
Germany	27%

% No



Highest In....

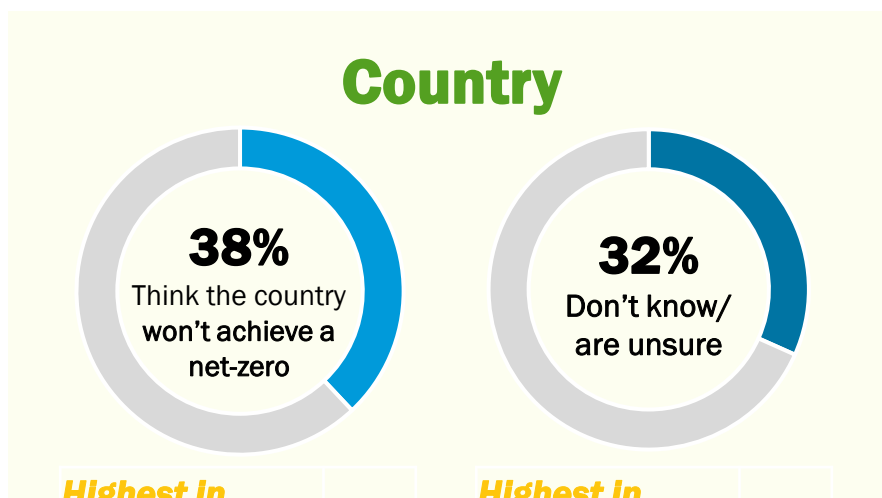
Spain	88%
Indonesia	82%
Turkey	76%
Colombia	70%
Mexico	68%
Brazil	68%
South Korea	58%
Greece	57%

Net-Zero Emissions

What year will a net-zero emissions economy be achieved?

Q. Based on current progress, in what year, if ever, do you think the country you live in will achieve a net-zero emissions economy?

Q. Based on current progress, in which year, if ever, do you think the world will achieve a net-zero emissions economy?

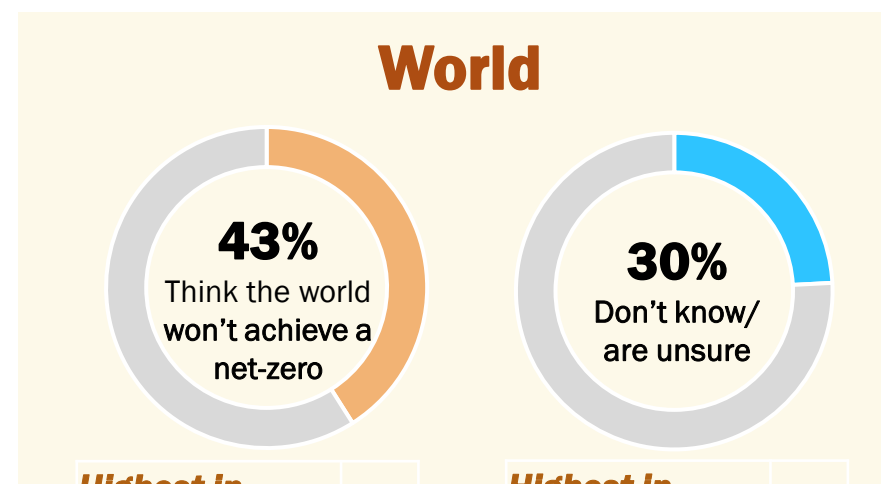


Highest In...

Lithuania	62%
Romania	62%
Colombia	58%
Austria	58%
Japan	55%
France	54%
Switzerland	54%

Highest In...

Panama	70%
Spain	60%
Poland	58%
Turkey	53%
Indonesia	51%
Netherlands	42%
Finland	39%



Highest In....

Austria	71%
Switzerland	69%
Colombia	67%
Lithuania	64%
Romania	63%
Japan	59%
Finland	56%

Highest In....

Poland	59%
Turkey	56%
Indonesia	54%
Spain	49%
India	40%
Netherlands	40%
Brazil	35%

* No World data for Panama

* UK n=0

Planning for 2050

Few in any country think we are on track for 2050

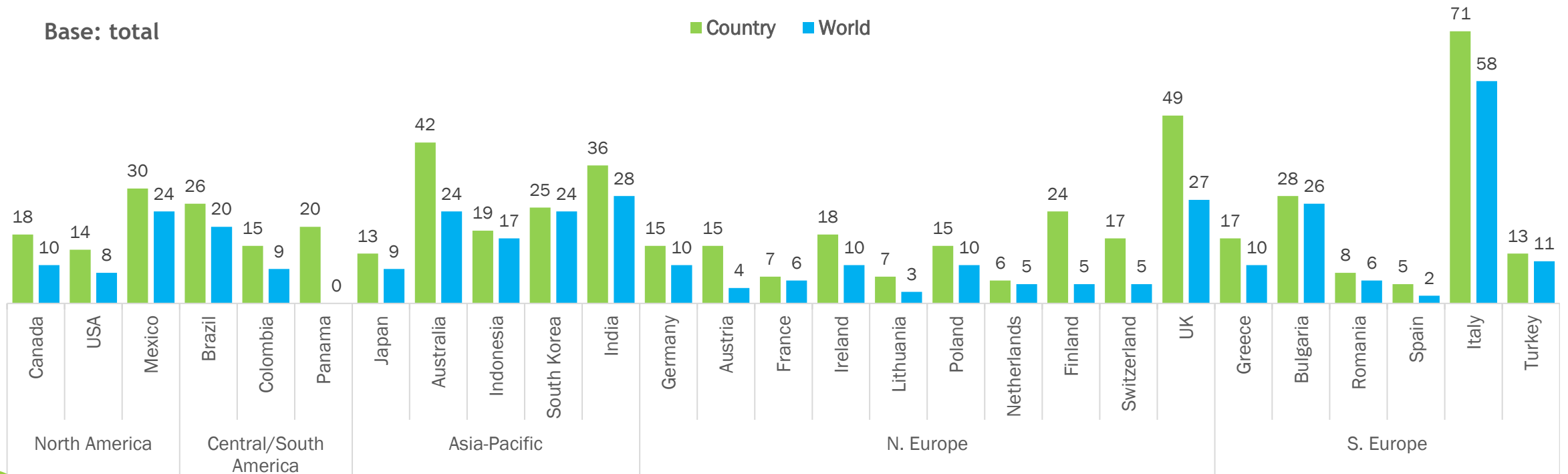
Q. Based on current progress, in what year, if ever, do you think the country you live in will achieve a net-zero emissions economy?

Q. Based on current progress, in which year, if ever, do you think the world will achieve a net-zero emissions economy?

% Country/World will achieve a net-zero emissions economy by 2050

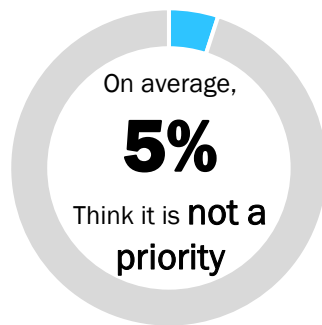
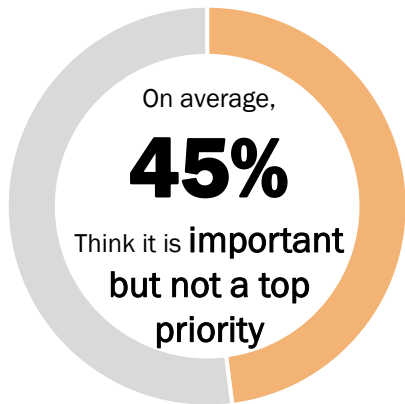
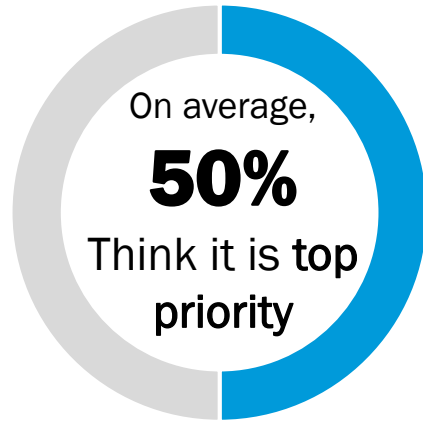
Base: total

Country World

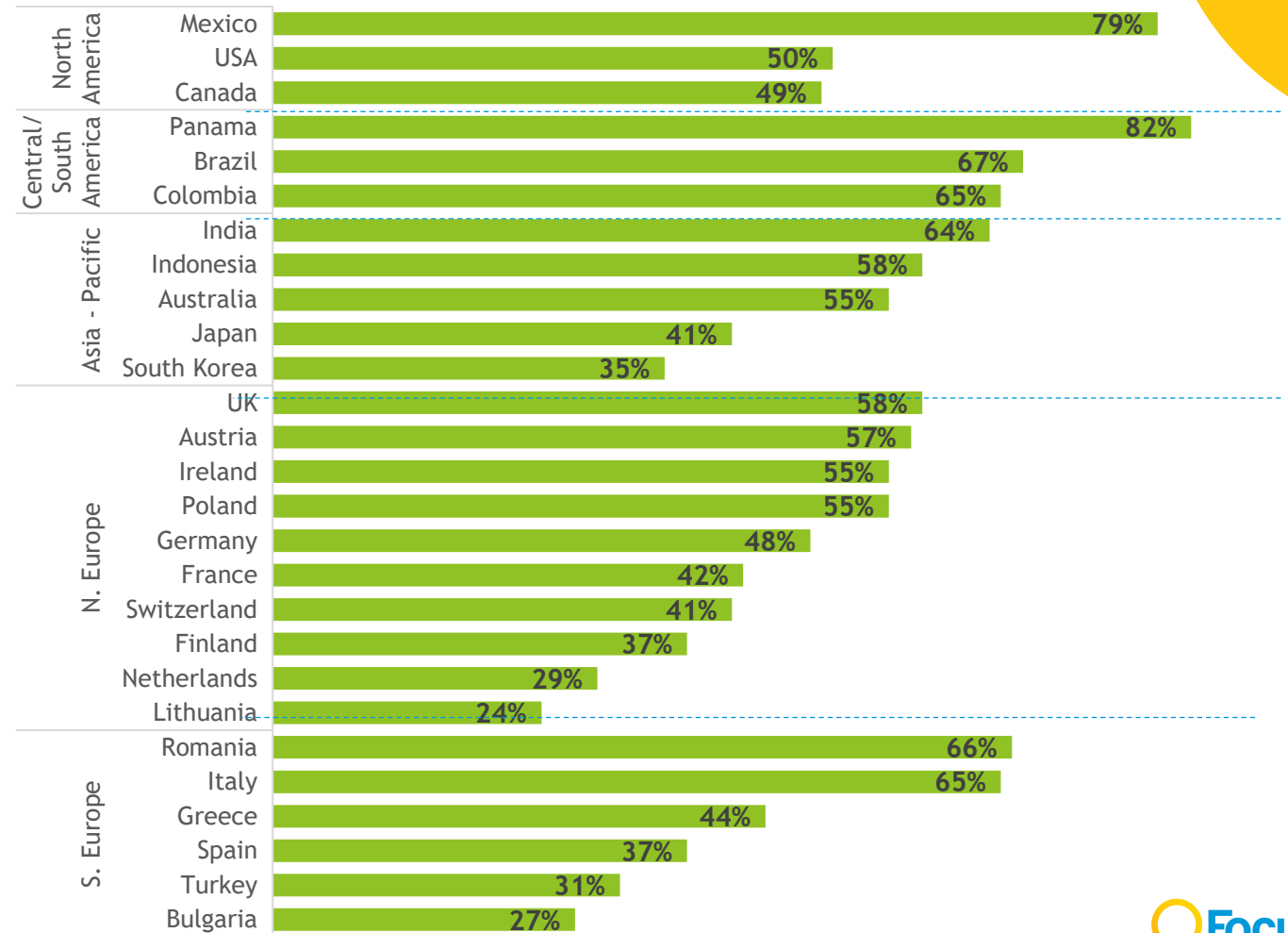


Clean/Renewable Energy

Q. How much of a priority should the development of clean/renewable energy be for your country?



% of top priority



Sustainability Impact on Purchase Decision

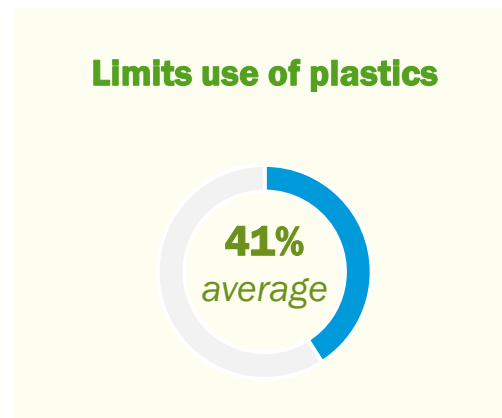
Sustainability Impact on Purchase

Q. To what extent would knowing that a company does the following influence your decision to choose that company's product or service over another? (definitely, maybe, not really, not at all)



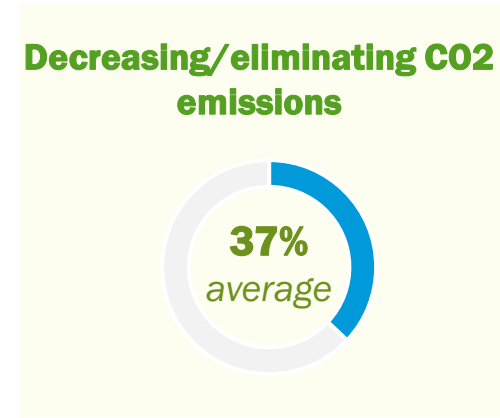
Higher In....	
Colombia	67%
Indonesia	64%
Panama	62%
Turkey	61%
Brazil	58%
Mexico	57%
Switzerland	54%

Lowest In....	
Japan	12%
South Korea	14%
Lithuania	18%
Netherlands	22%



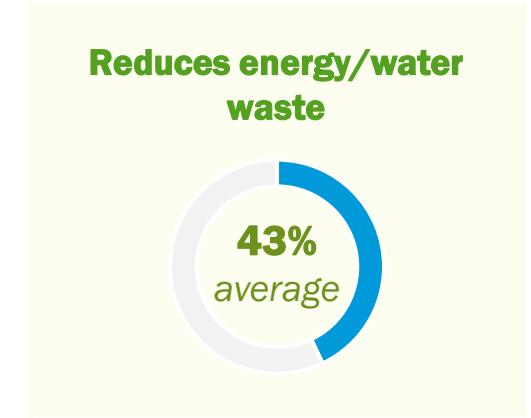
Higher In....	
Indonesia	66%
Panama	63%
Colombia	62%
Turkey	60%
Mexico	60%
India	58%
Brazil	52%

Lowest In....	
Japan	13%
South Korea	14%
Lithuania	20%
Netherlands	30%



Higher In....	
Indonesia	72%
Spain	68%
Turkey	59%
Colombia	58%
Panama	52%
Mexico	52%

Lowest In....	
Japan	14%
South Korea	15%
Lithuania	18%
Netherlands	21%



Higher In....	
Indonesia	74%
Panama	68%
Colombia	68%
Brazil	64%
Mexico	61%
India	58%
Turkey	57%

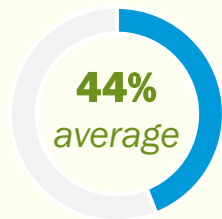
Lowest In....	
Japan	15%
South Korea	18%
Lithuania	23%
Finland	30%



Sustainability Impact on Purchase

Q. To what extent would knowing that a company does the following influence your decision to choose that company's product or service over another? (definitely, maybe, not really, not at all)

Uses natural ingredients/ raw materials



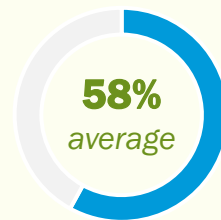
Higher In....

Indonesia	69%
Colombia	63%
Romania	63%
Turkey	61%
Mexico	60%
India	59%
Panama	58%

Lowest In....

South Korea	10%
Japan	13%
Netherlands	15%
Lithuania	33%

Products are healthy/safe to use



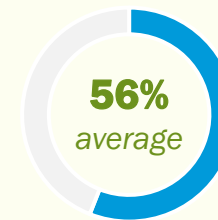
Higher In....

Indonesia	87%
Spain	85%
Brazil	71%
Colombia	71%
India	70%
Greece	68%
Romania	68%
Panama	68%

Lowest In....

Japan	25%
South Korea	39%
Lithuania	43%
Netherlands	45%

Products are clean/no chemicals/toxins



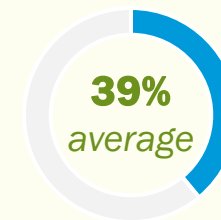
Higher In....

Indonesia	88%
Spain	77%
Colombia	69%
Romania	68%
Greece	67%

Lowest In....

Japan	20%
Netherlands	39%
South Korea	44%
Lithuania	46%

Makes biodegradable products



Higher In....

Indonesia	78%
Colombia	63%
Mexico	62%
Turkey	59%
India	56%
Brazil	56%
Panama	51%

Lowest In....

Japan	12%
Netherlands	20%
South Korea	20%
Lithuania	23%

Thank you



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GLOBAL ECONOMIC CONFIDENCE
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