

CLIMATE *Policy & Strategy*

Climate Policy & Strategy: France
Baseline survey, June 2021



CLIMATE *Policy & Strategy*

This project is unique because its starting premise is that the climate transition requires both political leaders and CEOs to be successful.

It's the only survey that looks at political leaders and their parties, and CEOs and their companies, and shows how each is impacted by current trends on climate in society, politics and the market.

It's the only research that plays out the politics of climate as government enacts new measures — with leaders making their case to the public and companies changing their business models, policies and branding.

Whether this period is successful and brings changes in policy will be played out in each country.

This deck tells you the story of France, for its leaders and for the companies in this Climate Policy and Strategy project.

At the end, you can see how the climate policy and politics and company positioning compares in Germany, France, the UK, and the US.

What this is based on

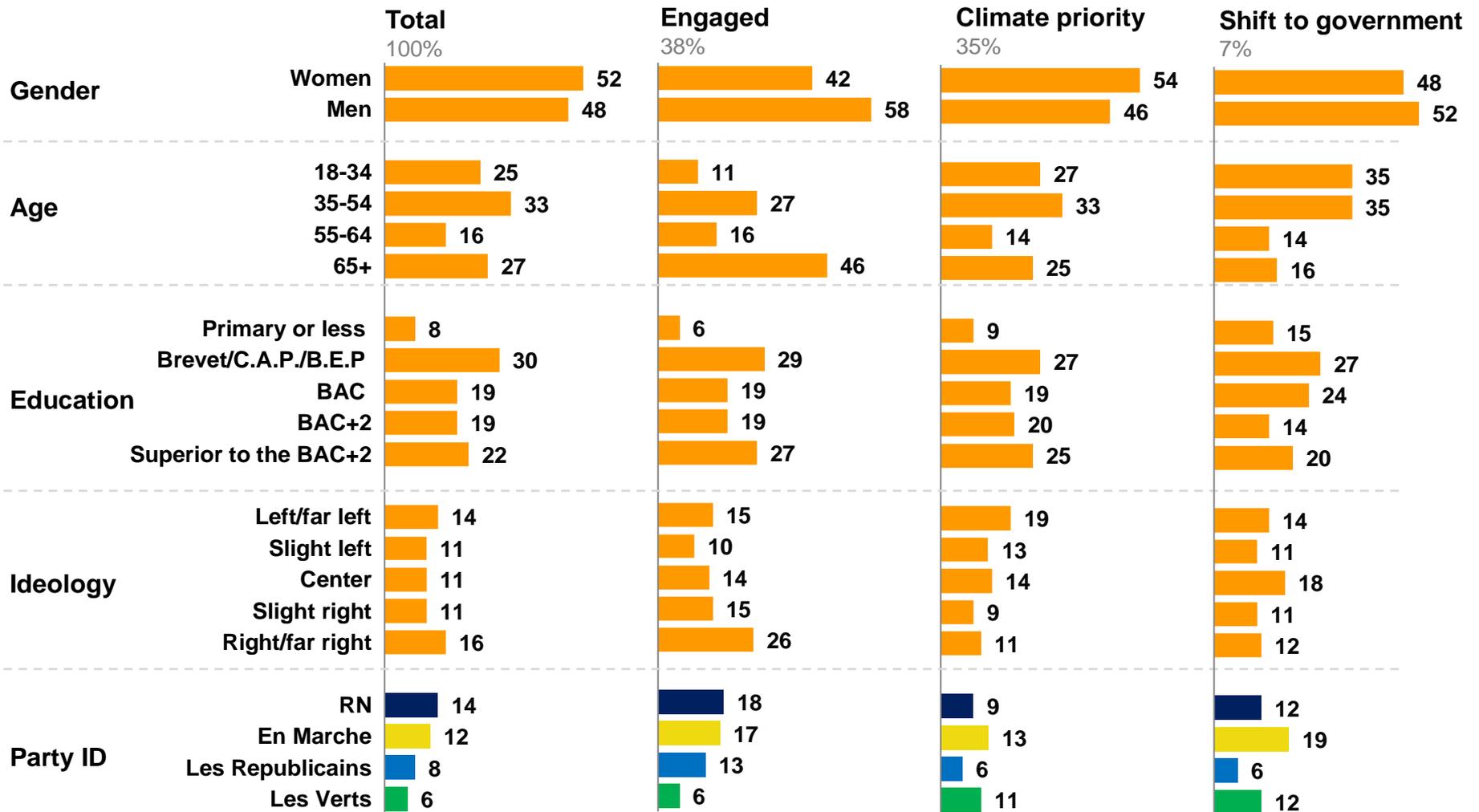
Our poll

- N=2000
- Fieldwork: June 14-22
- Online, 20-minute questionnaire
- Nationally representative
- Weighted to national statistics on gender, age, region, education, employment and past voting behaviour

Groups analysed

Target group	Definition
Total	All respondents – represents whole France population
Engaged	Those most likely (10/10) to vote in elections
Climate priority	Chose climate as a top priority for government
Shift to government	Initially <i>don't approve</i> of how government is handling climate & energy transition, but after balanced messaging, <i>do approve</i>

Targets: climate priority audience more women, BAC+2, and left; shift to government, younger, center and left



What you need to know

- The French are pessimistic about the direction of the country, and focused on the economic recovery, crime, and healthcare, more than climate change. It does rise to the same level as immigration and secularism and is the top issue for the left.
- Although they disapprove of their government's performance on the climate, French citizens are positive about the new climate law. They want to see strong action from government, including a "green" recovery from Covid. The left and center say it should lead, not wait for others.
- French citizens are favorable to policies curbing air travel, insulating buildings and punishing environmental damage. They are strongly against policies that take on cars, including fuel taxes and low-emission zones.
- After hearing government policy approaches, most people are sanguine about the costs consumers could face: they tend either to believe technology will deliver an affordable transition, or would be comfortable with an increase in bills. Between one-fifth and one-sixth oppose changes on cost grounds, depending on the size of the hit to bills (5-15%).
- The government's strongest messages in favor of its approach are that France can act on climate while maintaining its social settlement, and that its climate actions support both economy and environment. However, many citizens buy arguments that the reforms don't go far enough, and that a more significant transformation is needed.
- Macron does not raise his personal standing by acting on climate. After hearing his messages and policies, alongside arguments from other groups, people don't change their level of approval of the President. However his government gets a decent boost in its rating for action on climate.
- Businesses raise their standing when they acknowledge a climate crisis and say they must change business models. CEOs of major companies are generally very distrusted, but those taking this position are admired. Leading here enables them to be part of a process where government is shaping the framework that drives the transition to zero carbon emissions.

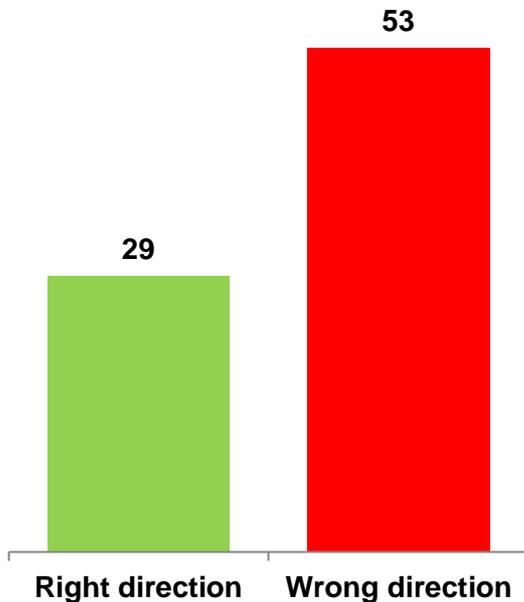
Climate Context



The French are pessimistic about the direction of the country, economy and their household finances

Direction of country

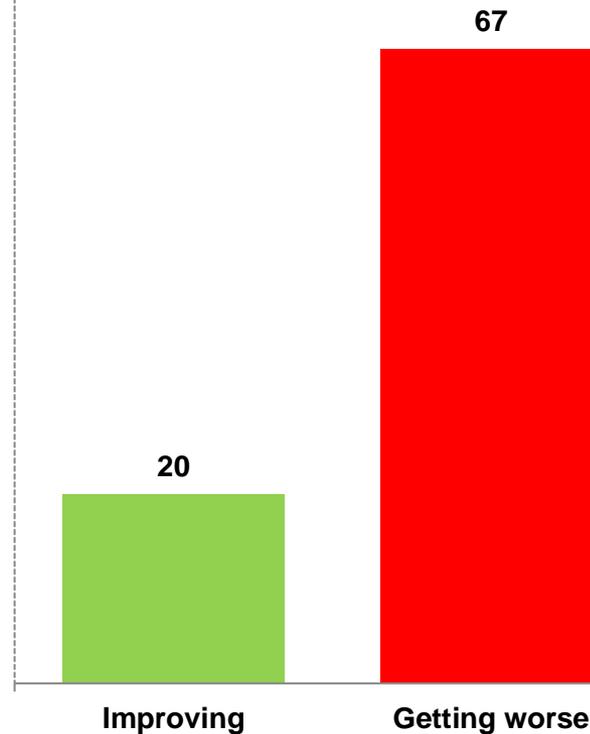
Generally speaking, do you think that things in France are going in the right direction, or do you feel things are going in the wrong direction?



Changes in the economy

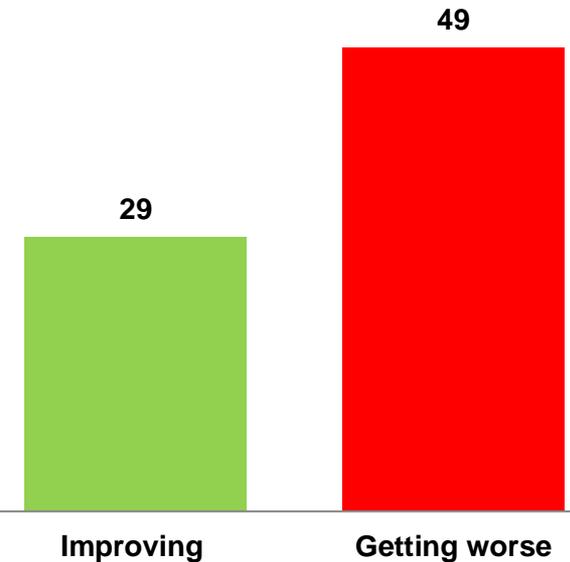
Economy

Overall do you think that the ECONOMY in this country is improving or getting worse?



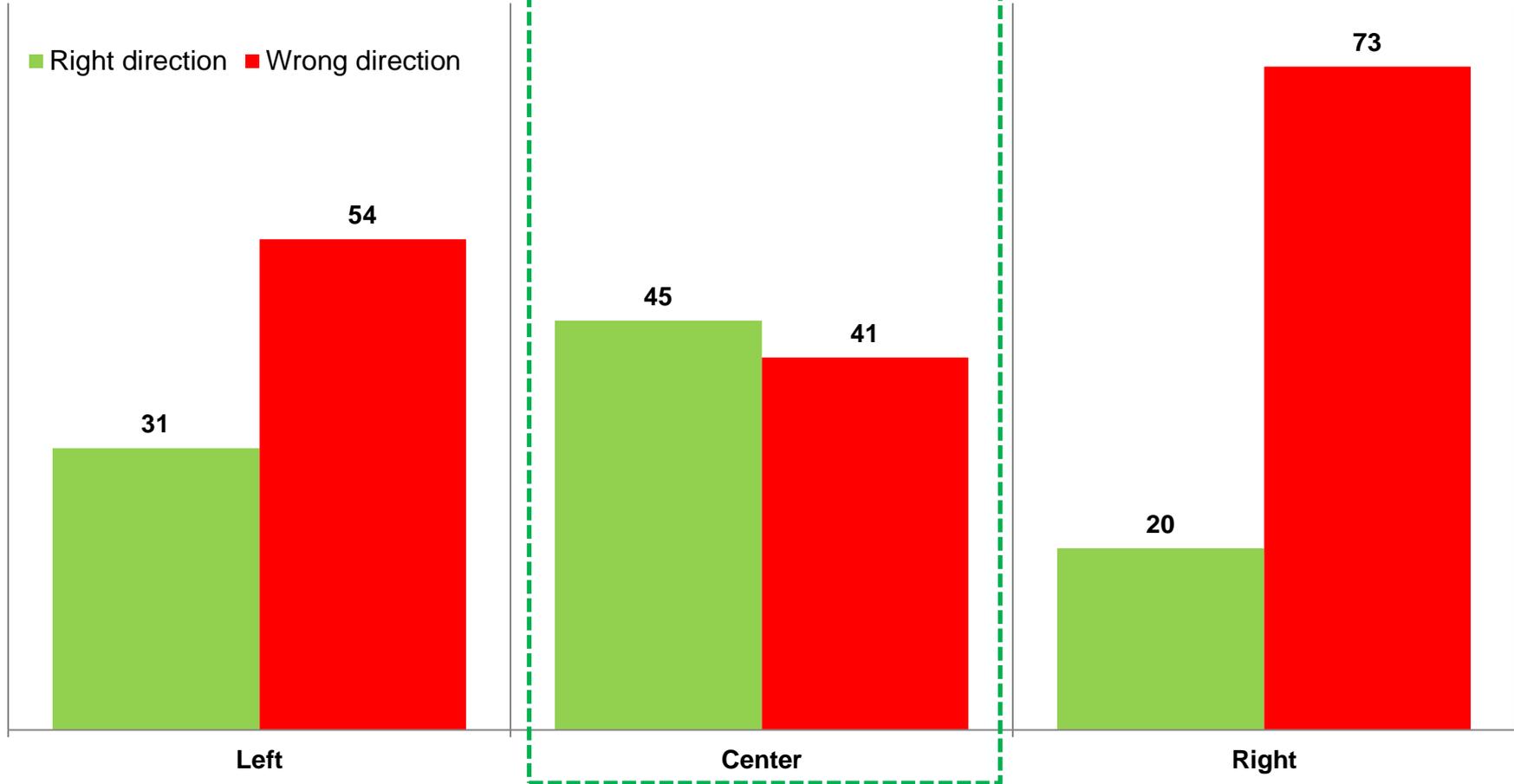
Household finances

Overall, are your PERSONAL FINANCIAL CIRCUMSTANCES improving or getting worse?



Centrists feel the country is going in the right direction, but those on both right and left are pessimistic

Direction of country, by ideology

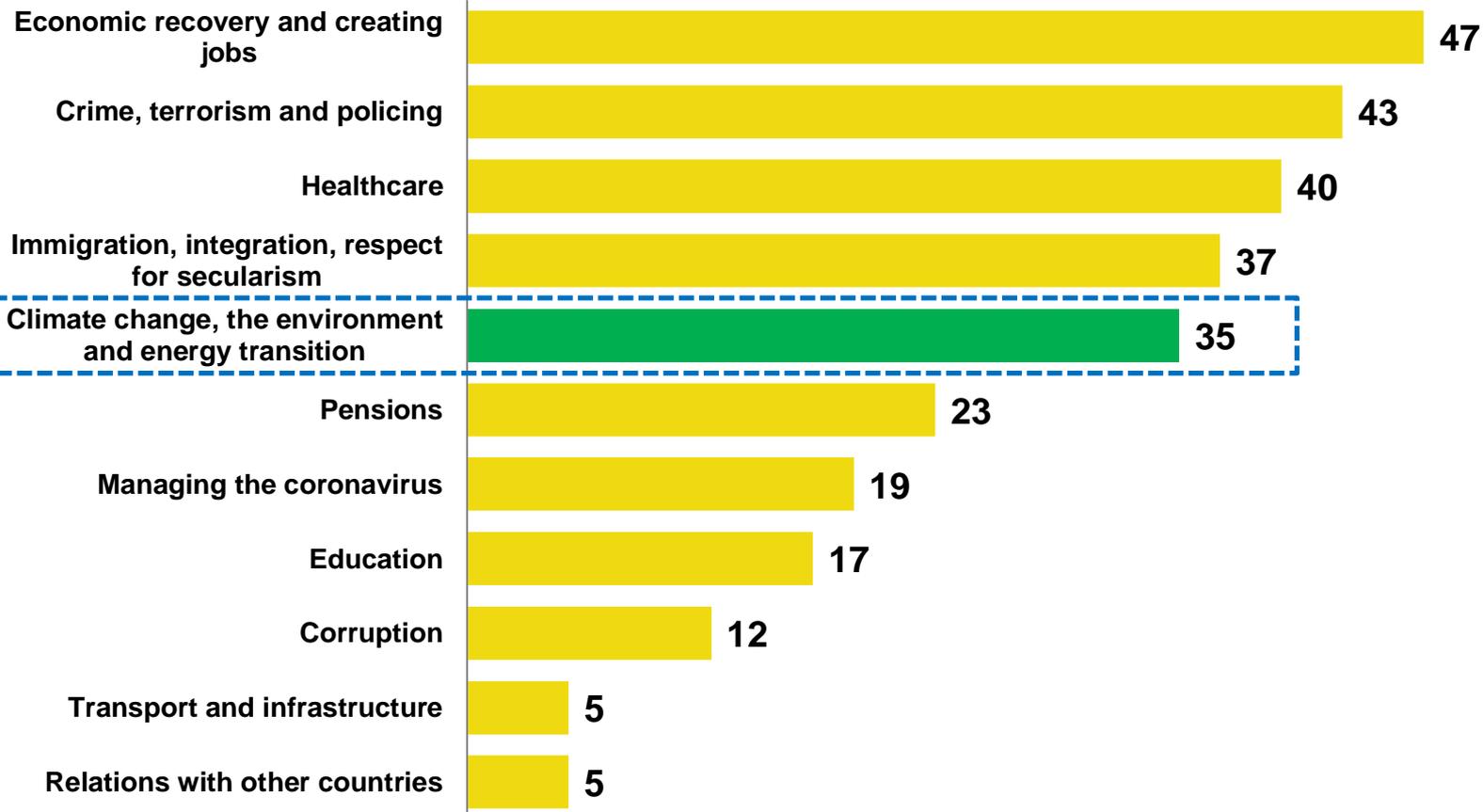


Generally speaking, do you think that things in France are going in the right direction, or do you feel things are going in the wrong direction?

Left, n=270; Center, n=664; Right, n=319

Main priorities for government are economic recovery, crime and healthcare; climate at level of immigration

Priorities for government, total sample

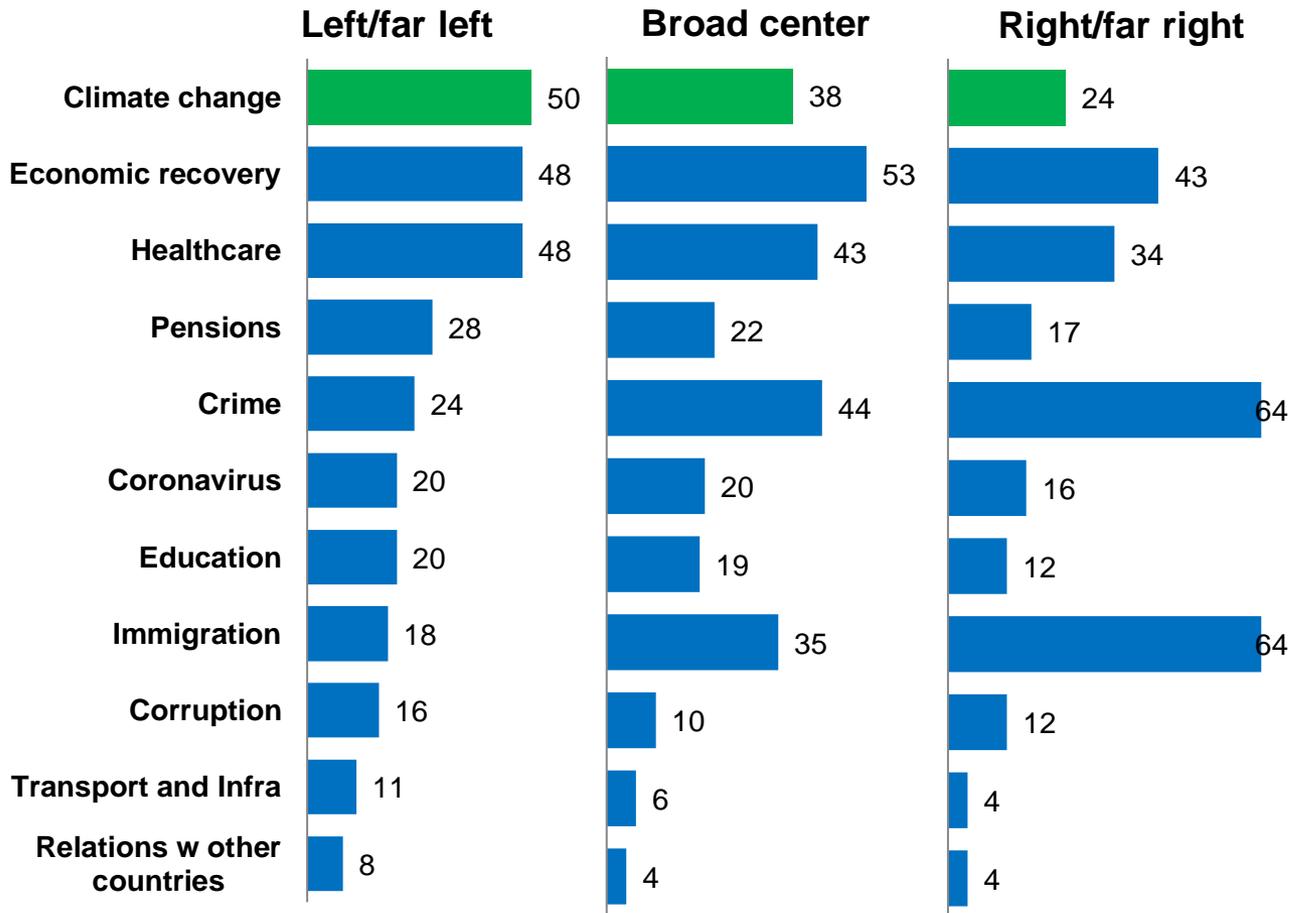


What are the THREE issues you think should be the top priorities for government?

Total sample, n=2,000

The left prioritizes climate; the center, economic recovery; and the right, crime and immigration

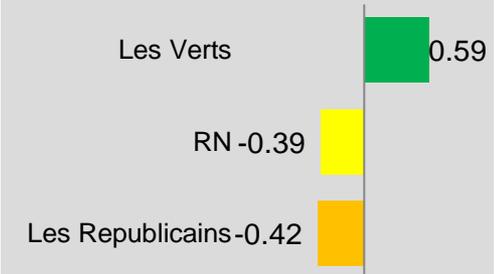
Priorities for government, by ideology



Regressions: climate change a priority, by political party

Past votes for 3 parties had a significant impact on likelihood to choose climate change as a priority for government. Voting Europe ecologie Les Verts has a positive relationship with prioritizing climate change, while voting Les Republicains and Rassemblement National are have a negative relationship. Voting La Republique En Marche did not have a significant relationship.

Regression coefficients

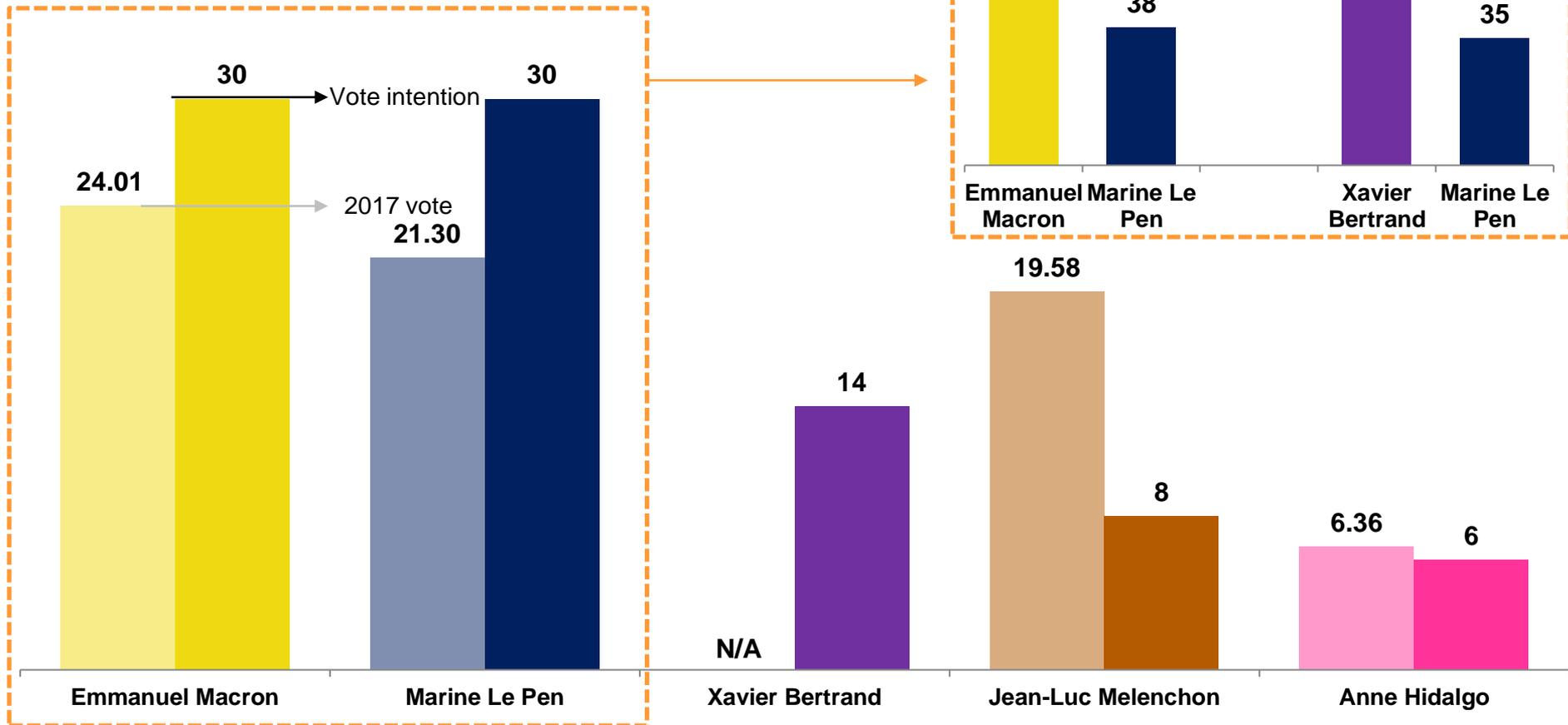


What are the *THREE* issues you think should be the top priorities for government?

Left/far left, n=270; Broad center, n=664; Right/far right, n=319

Presidential voting intention: Macron tied with Le Pen on first preferences, would win second round

Voting intention, Likely voters with "don't know" allocated

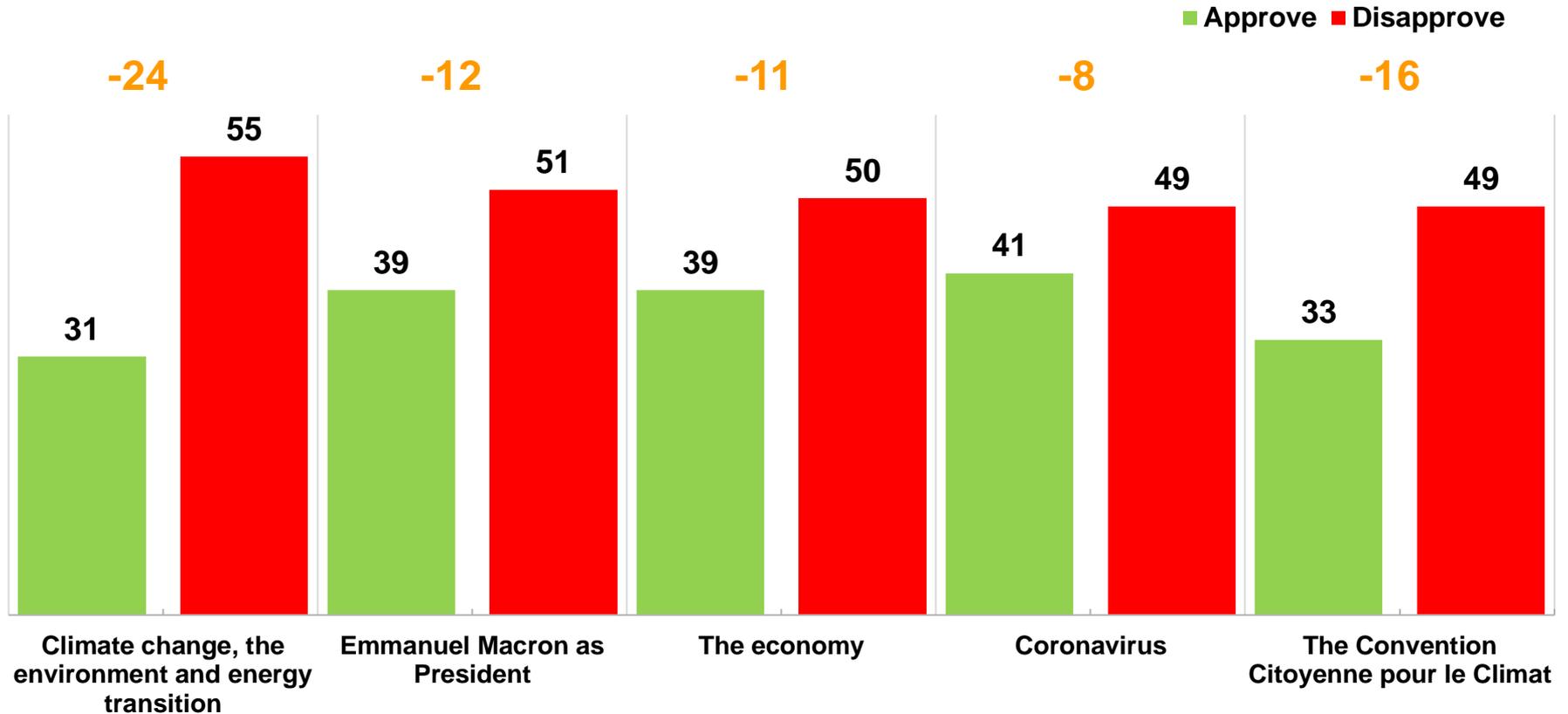


If there was a presidential election tomorrow and the candidates in the first round were the ones shown below, for which candidate would you vote?

Likely voters, n=985

The French disapprove of their government's job – particularly on climate

How the government is handling..., total sample

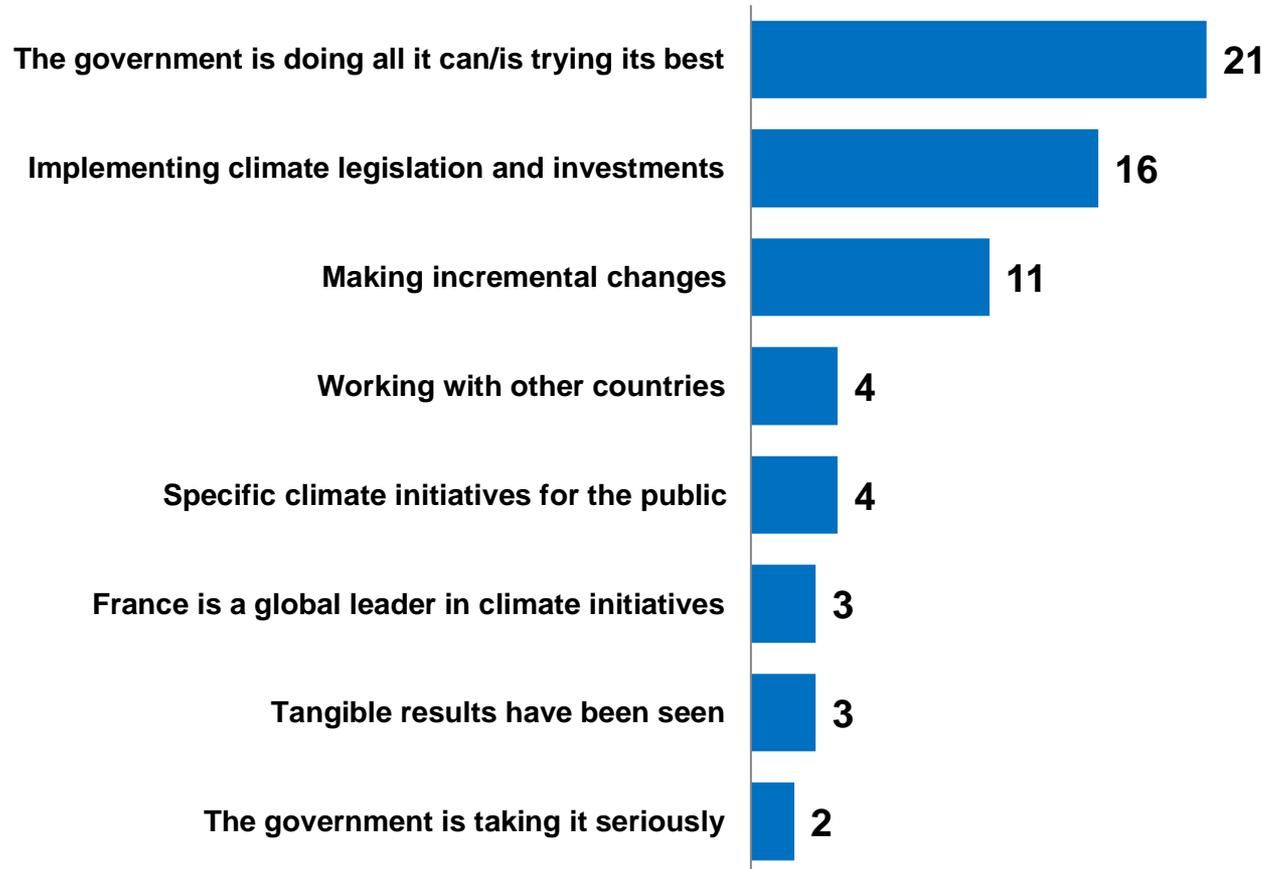


How much do you approve or disapprove of each of the following? / The National Assembly and Senate are currently debating a new climate law. From what you know or have heard, do you approve or disapprove of the new law?

Total sample, n=2,000

People approving of government performance on climate see them acting: they are “doing what they can”

Reasons for approval, total sample

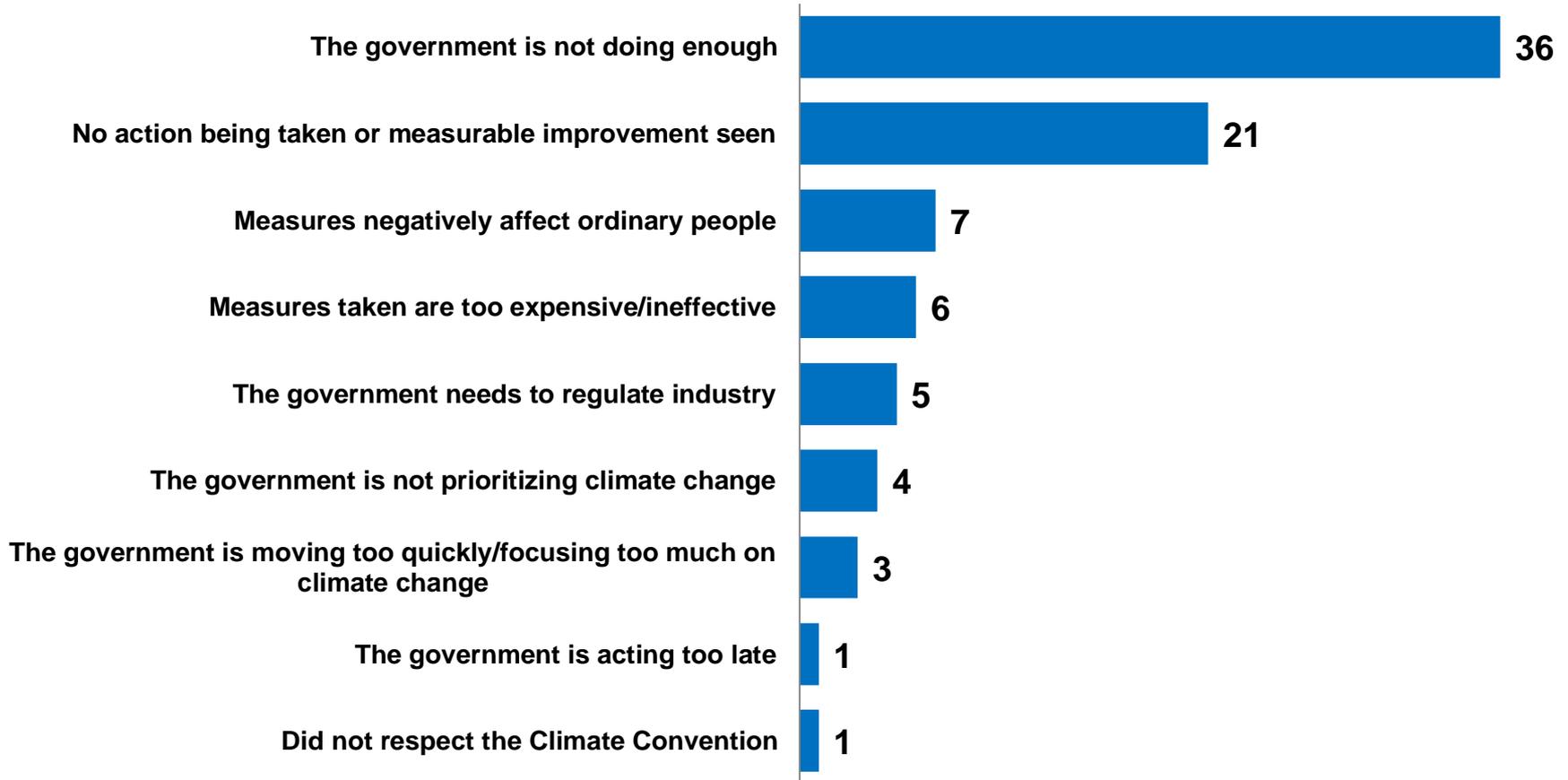


Why do you approve of how the government is addressing climate change, the environment and energy transition?

Total sample, n=506

Those who disapprove are concerned government isn't doing enough and haven't seen any measurable improvement

Reasons for disapproval, total sample

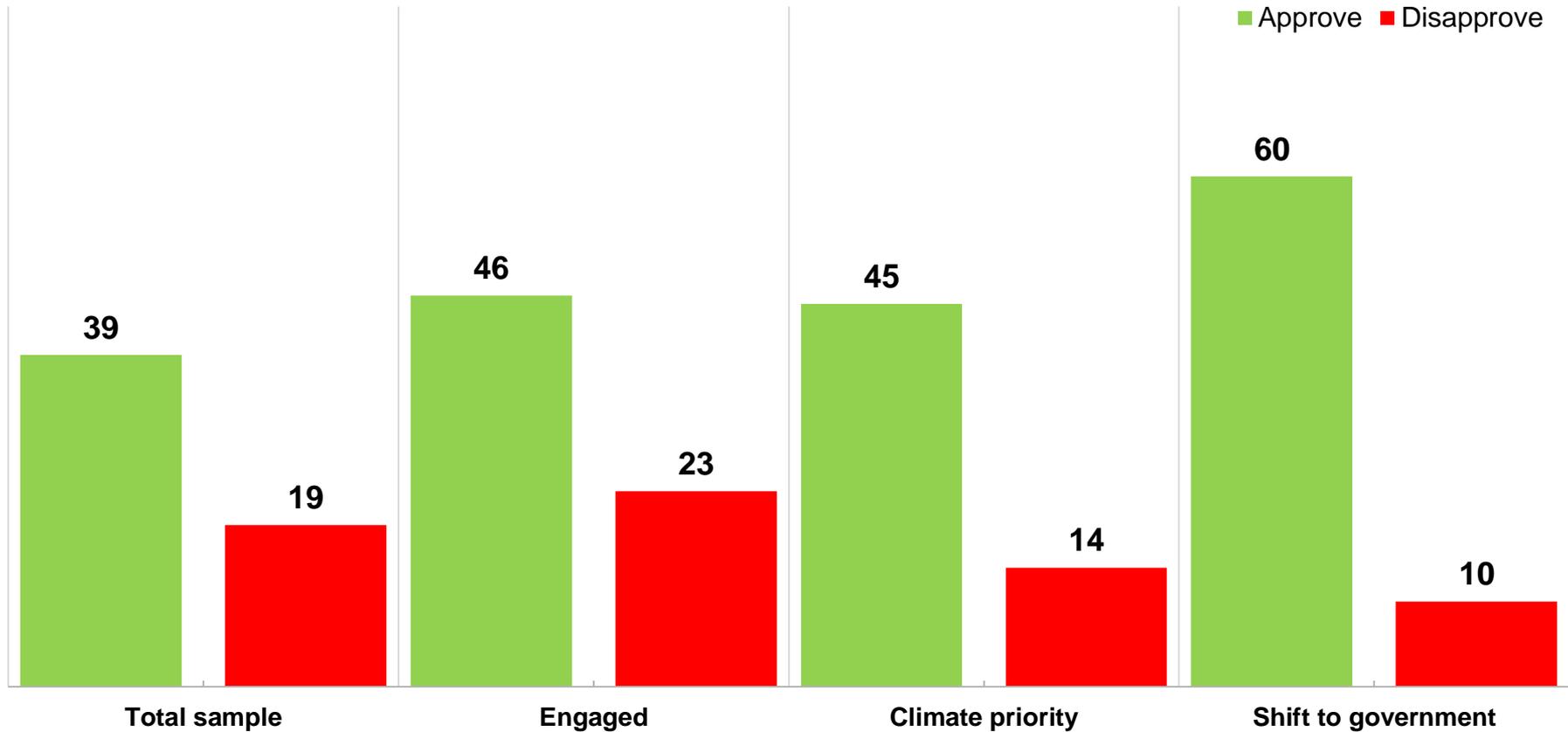


Why do you disapprove of how the government is addressing climate change, the environment and energy transition?

Total sample, n=901

But there is widespread approval of the new climate law

Climate law approval, by target



The National Assembly and Senate are currently debating a new climate law. From what you know or have heard, do you approve or disapprove of the new law?

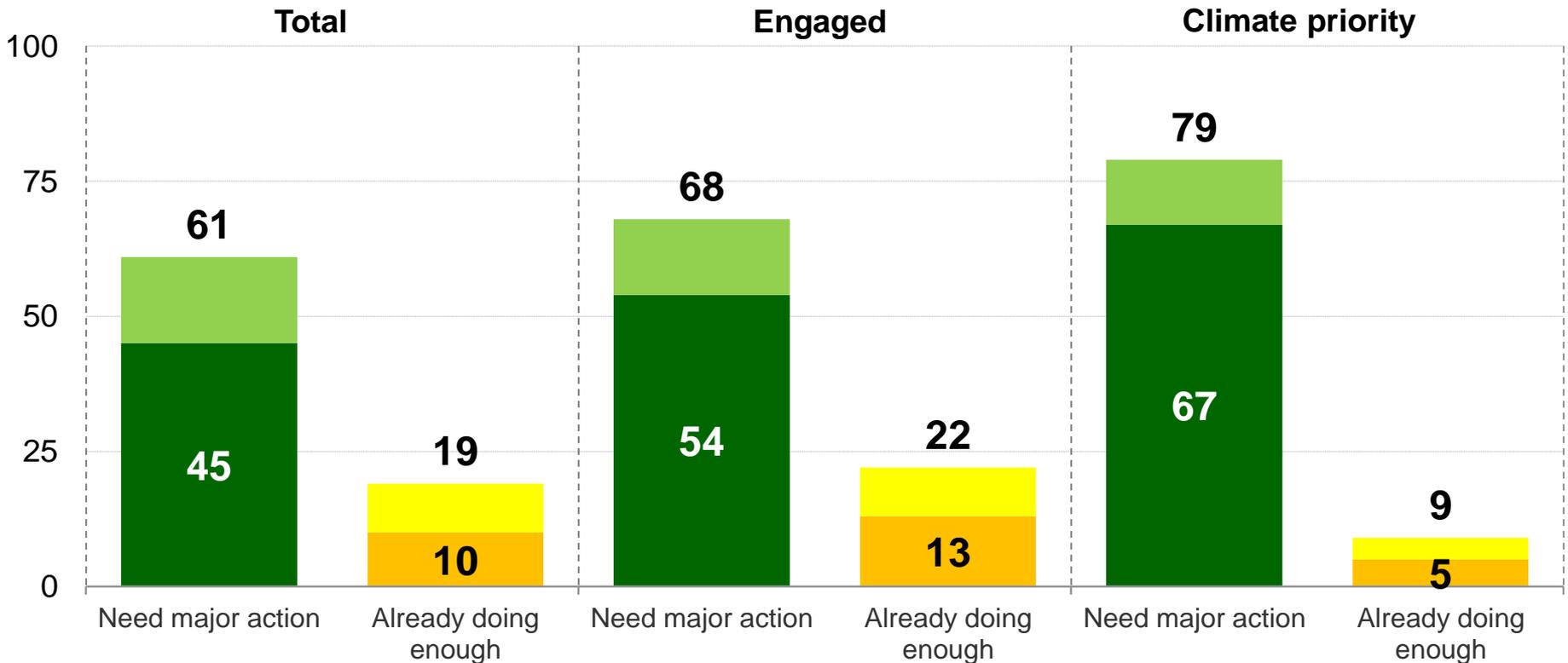
Total sample, n=2,000; Engaged, n=616; Climate priority, n=704; Shift to government, n=146

Strong majorities think we need major action to combat climate change

Climate change is a threat and we need major action to combat it.

The threat of climate change is exaggerated and we are already doing enough.

■ Statement 1, much closer ■ Statement 1, somewhat ■ Statement 2, much closer ■ Statement 2, somewhat



On the following pages are some pairs of statements. For each, please indicate whether the FIRST statement or the SECOND statement comes closer to your views, even if neither is exactly right.

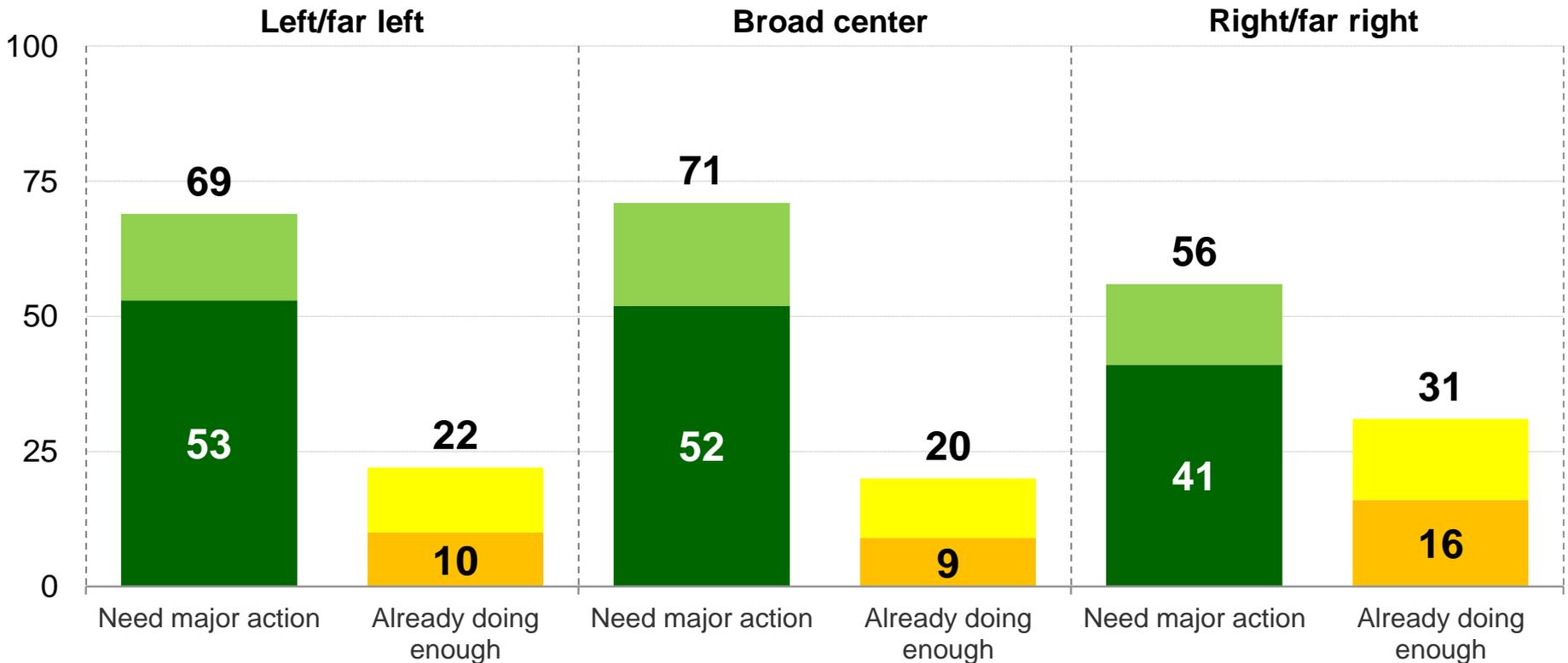
Total sample, n=2,000; Engaged, n=616; Climate priority, n=704

Left and centrists share desire for bold climate action

Climate change is a threat and we need major action to combat it.

The threat of climate change is exaggerated and we are already doing enough.

■ Statement 1, much closer ■ Statement 1, somewhat ■ Statement 2, much closer ■ Statement 2, somewhat

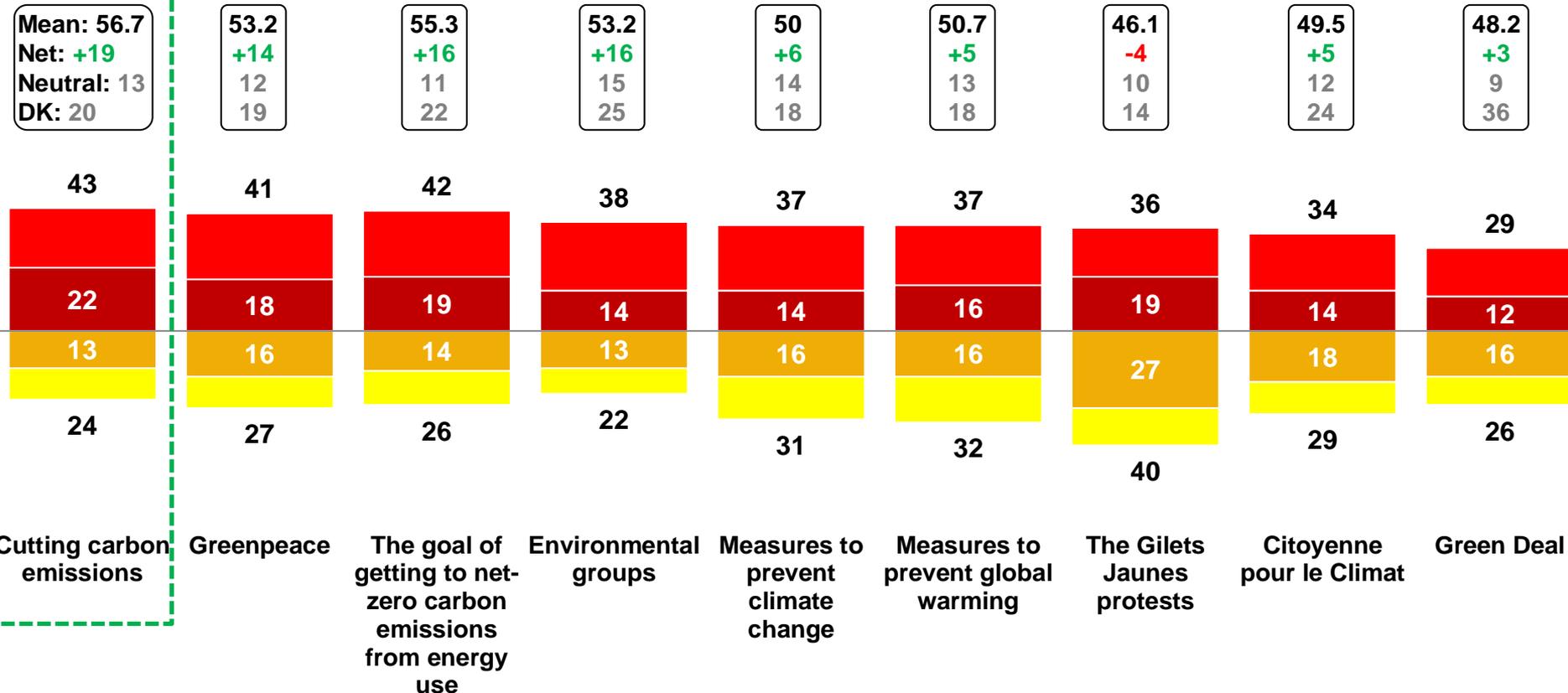


Left/far left, n=270; Broad center, n=664; Right/far right, n=319

“Cutting carbon emissions” received more warmly than “net zero from energy use” and “measures to prevent climate change/global warming”

Feelings toward environmental issues, total sample

■ Very warm (75-100)
 ■ Warm (51-74)
 ■ Very cool (0-25)
 ■ Cool (26-49)



Please rate your feelings toward some people and organisations, with 100 meaning a very warm FAVOURABLE feeling; 0 meaning a very cold, UNFAVOURABLE feeling; and 50 meaning not particularly warm or cold.

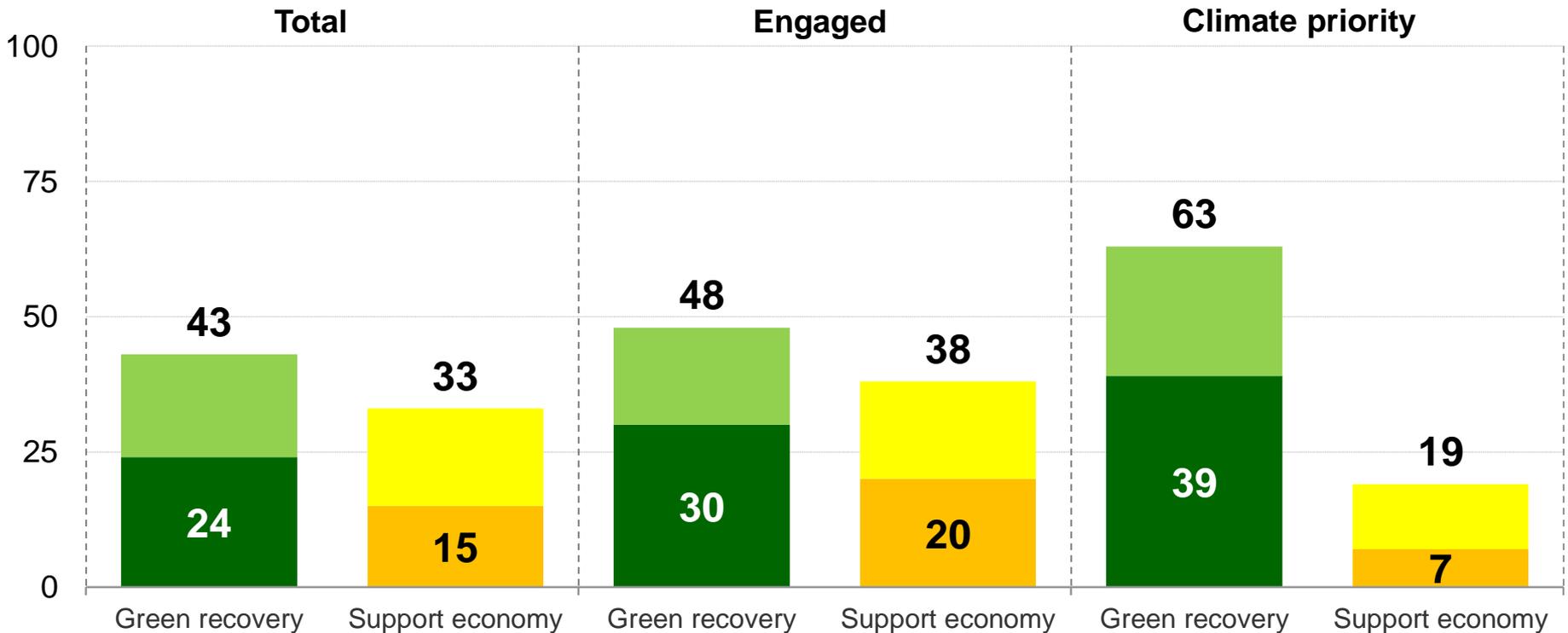
Total, n=2,000; options shown to 1/2-sample splits

The French want a green recovery from coronavirus

Government needs to promote a green recovery, making climate action a top priority.

The priority for government in the recovery should be supporting the economy. Climate change is not a priority.

■ Statement 1, much closer ■ Statement 1, somewhat ■ Statement 2, much closer ■ Statement 2, somewhat



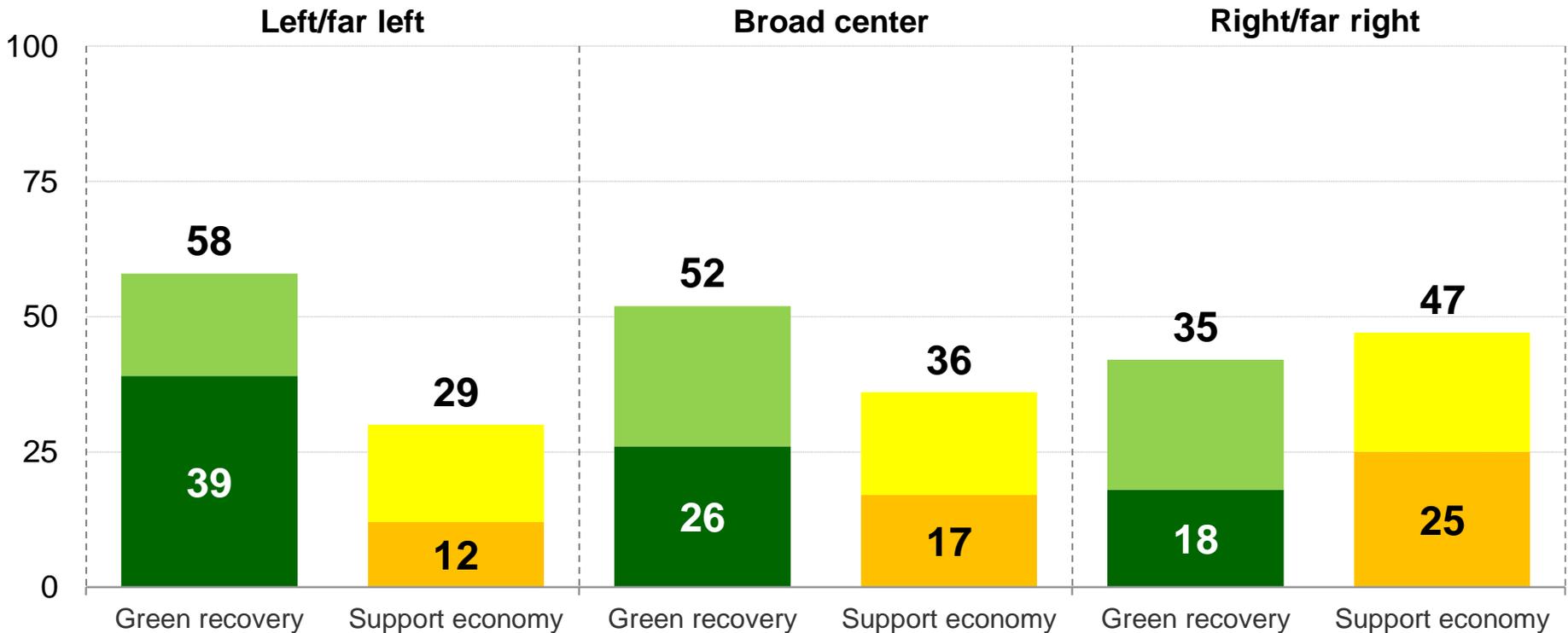
Total sample, n=2,000; Engaged, n=616; Climate priority, n=704

The left and center strongly support prioritizing a green recovery; those on the right, a plurality do not prioritize climate change.

Government needs to promote a green recovery, making climate action a top priority.

The priority for government in the recovery should be supporting the economy. Climate change is not a priority.

■ Statement 1, much closer ■ Statement 1, somewhat ■ Statement 2, much closer ■ Statement 2, somewhat



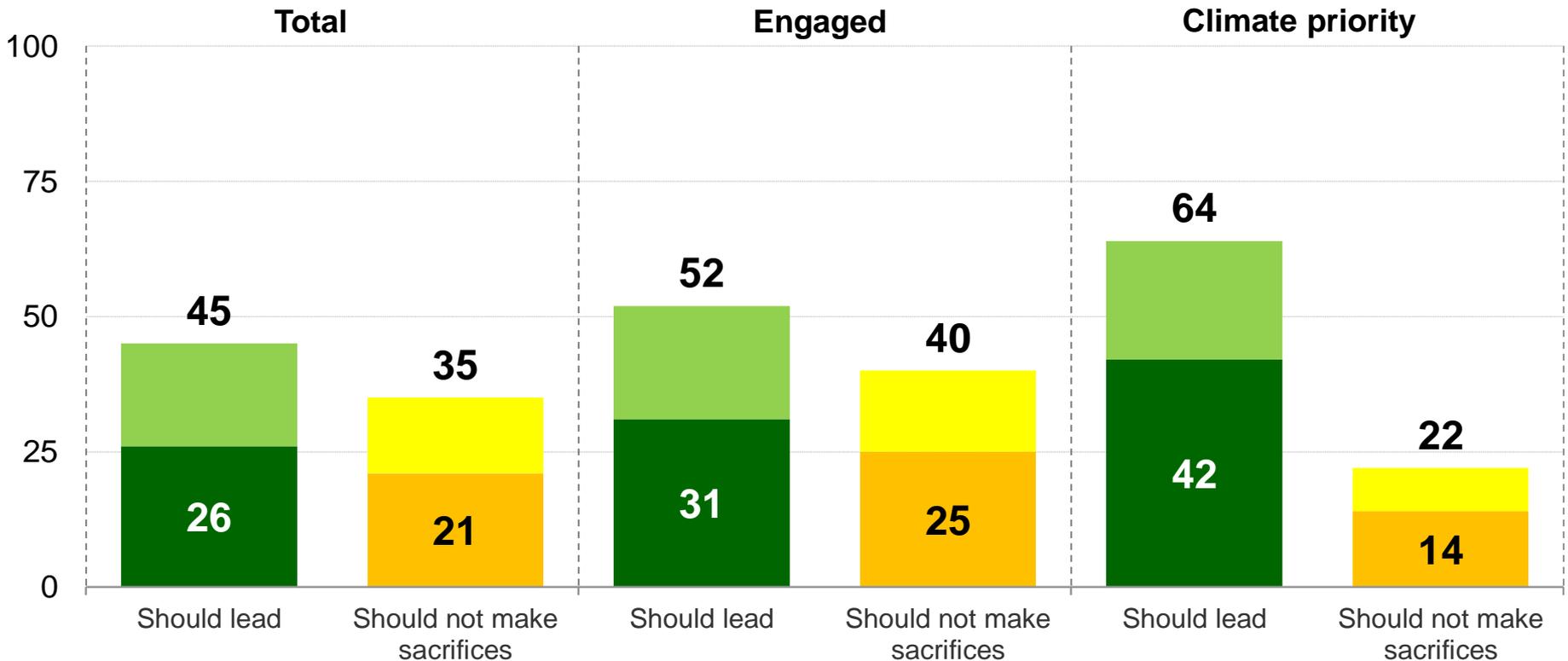
Left/far left, n=270; Broad center, n=664; Right/far right, n=319

The French agree that France should lead on climate change, regardless of other countries' efforts

France should lead on curbing greenhouse gas emissions, even if other countries are not willing to make similar commitments yet.

France should not have to make sacrifices to address climate change if the world's largest polluters are unwilling to make similar commitments.

■ Statement 1, much closer ■ Statement 1, somewhat ■ Statement 2, much closer ■ Statement 2, somewhat

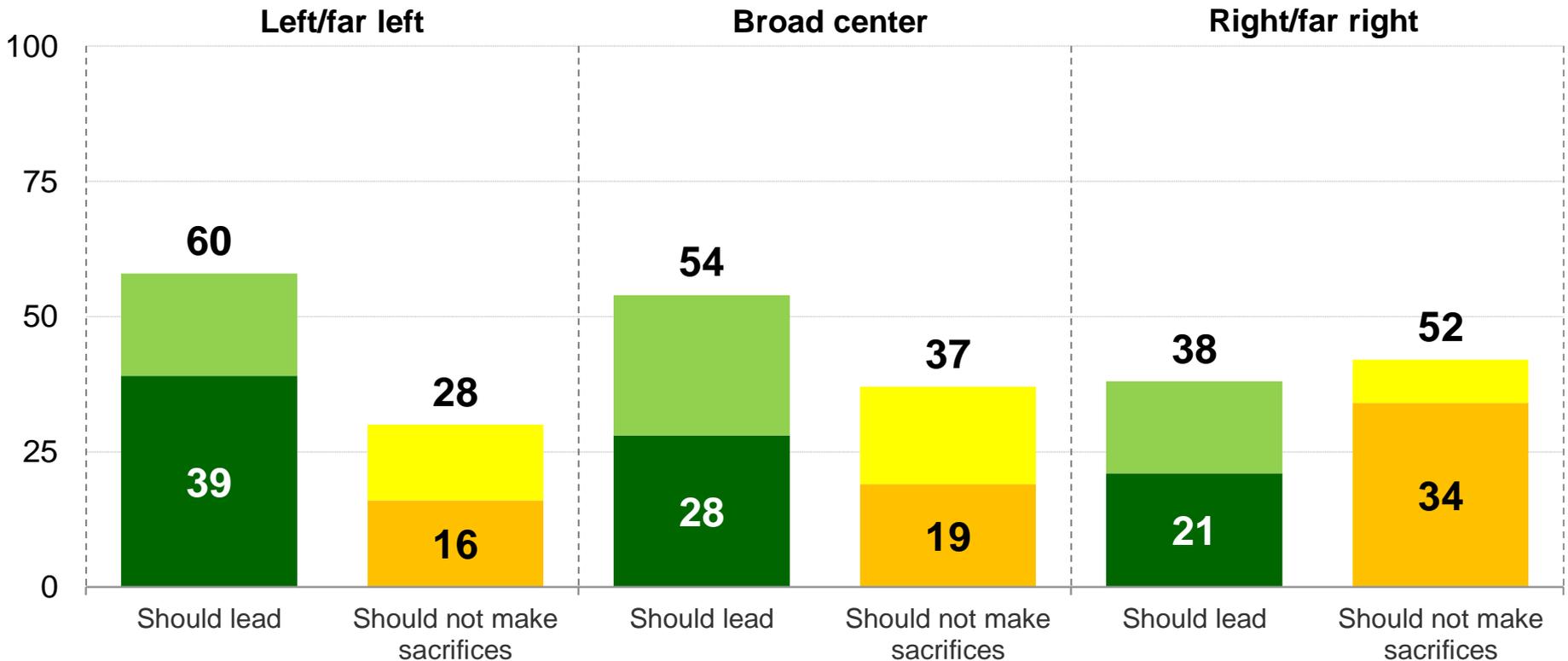


Big majorities of the left and center say France should lead on greenhouse gases, even if others don't make similar commitments

France should lead on curbing greenhouse gas emissions, even if other countries are not willing to make similar commitments yet.

France should not have to make sacrifices to address climate change if the world's largest polluters are unwilling to make similar commitments.

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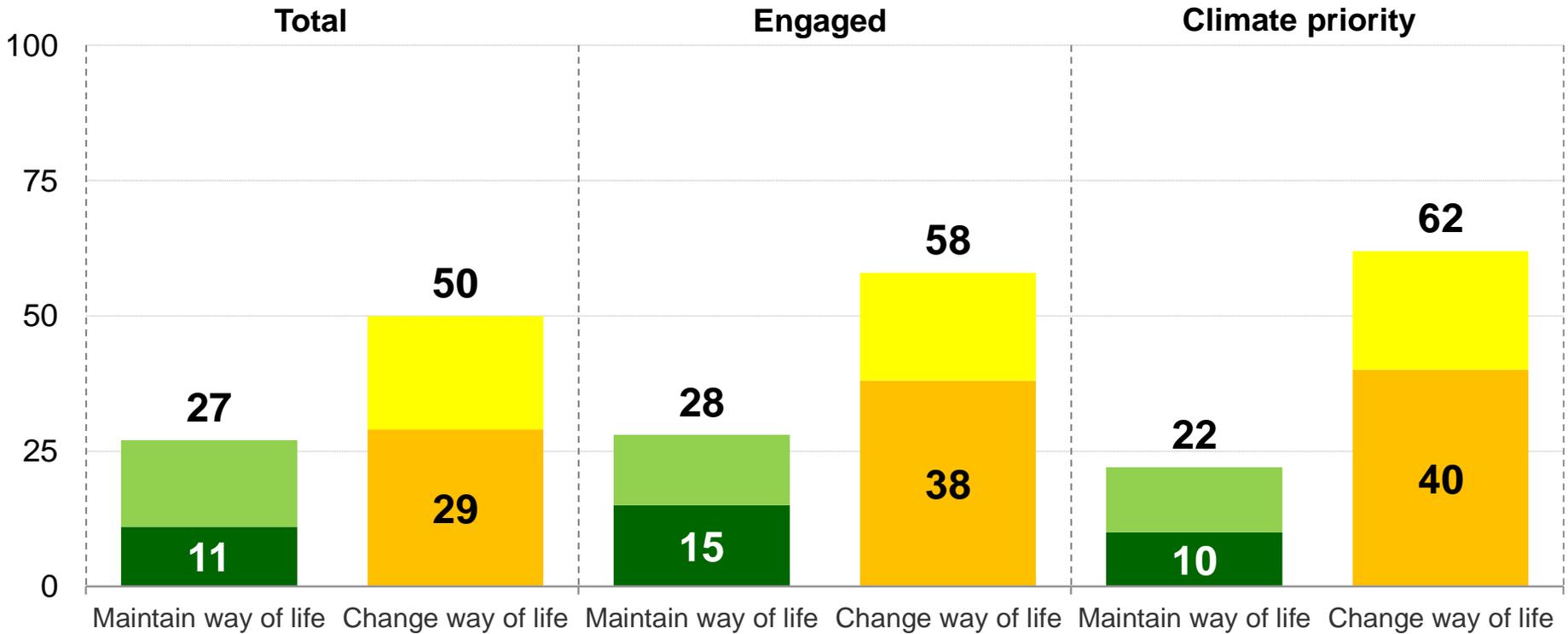
Left/far left, n=270; Broad center, n=664; Right/far right, n=319

Majority feel that lifestyles must change to stop climate change

With new, clean technology we can maintain our way of life and prevent climate change.

To prevent climate change, we need new technology but our way of life must also change.

■ Statement 1, much closer ■ Statement 1, somewhat ■ Statement 2, much closer ■ Statement 2, somewhat

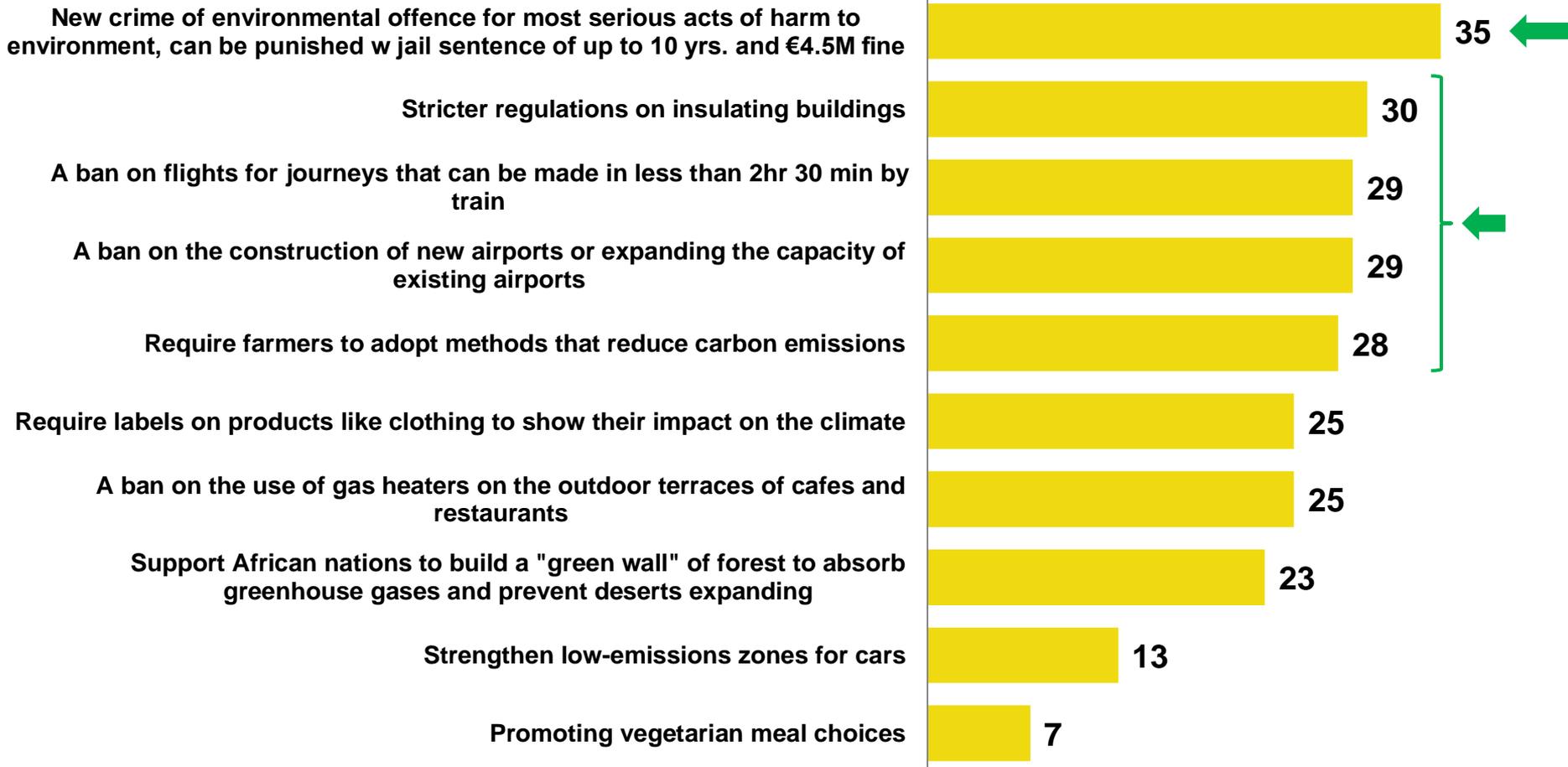


A blue-tinted photograph of two men in business suits shaking hands. In the background, a woman is smiling. The text 'Climate and energy policy' is overlaid in white, with a green horizontal line underneath it.

Climate and energy policy

Creation of environmental offence crime is most important government policy; insulation, curbing air travel and low carbon farming popular

Importance of government climate policies, total sample

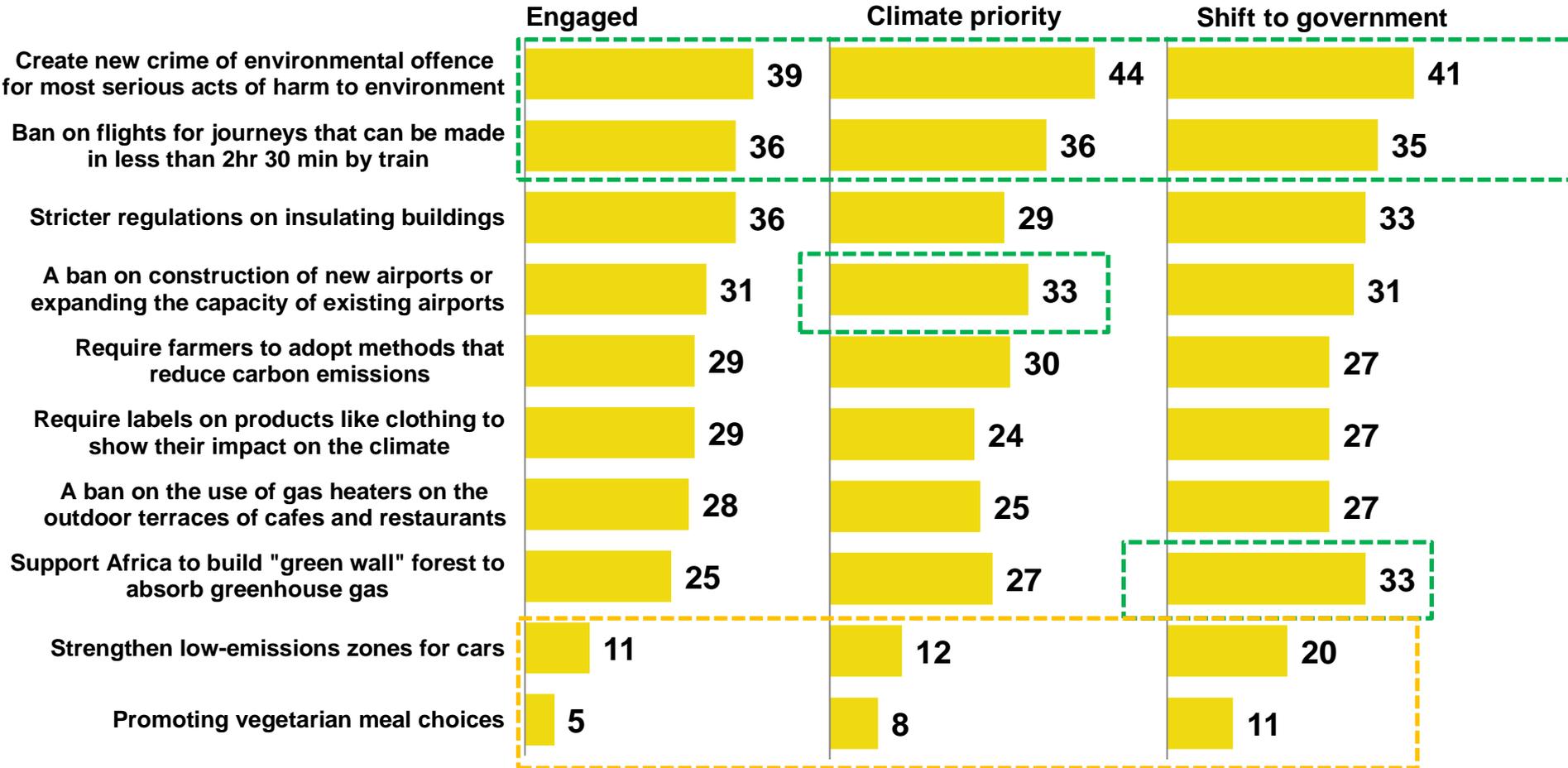


Below is a list of policies on climate change proposed by the gov't. Which THREE do you think are MOST IMPORTANT to do?

Total sample, n=2,000

Similar views across target groups; low-emission zones for cars and promoting vegetarianism unpopular

Importance of government climate policies, by target

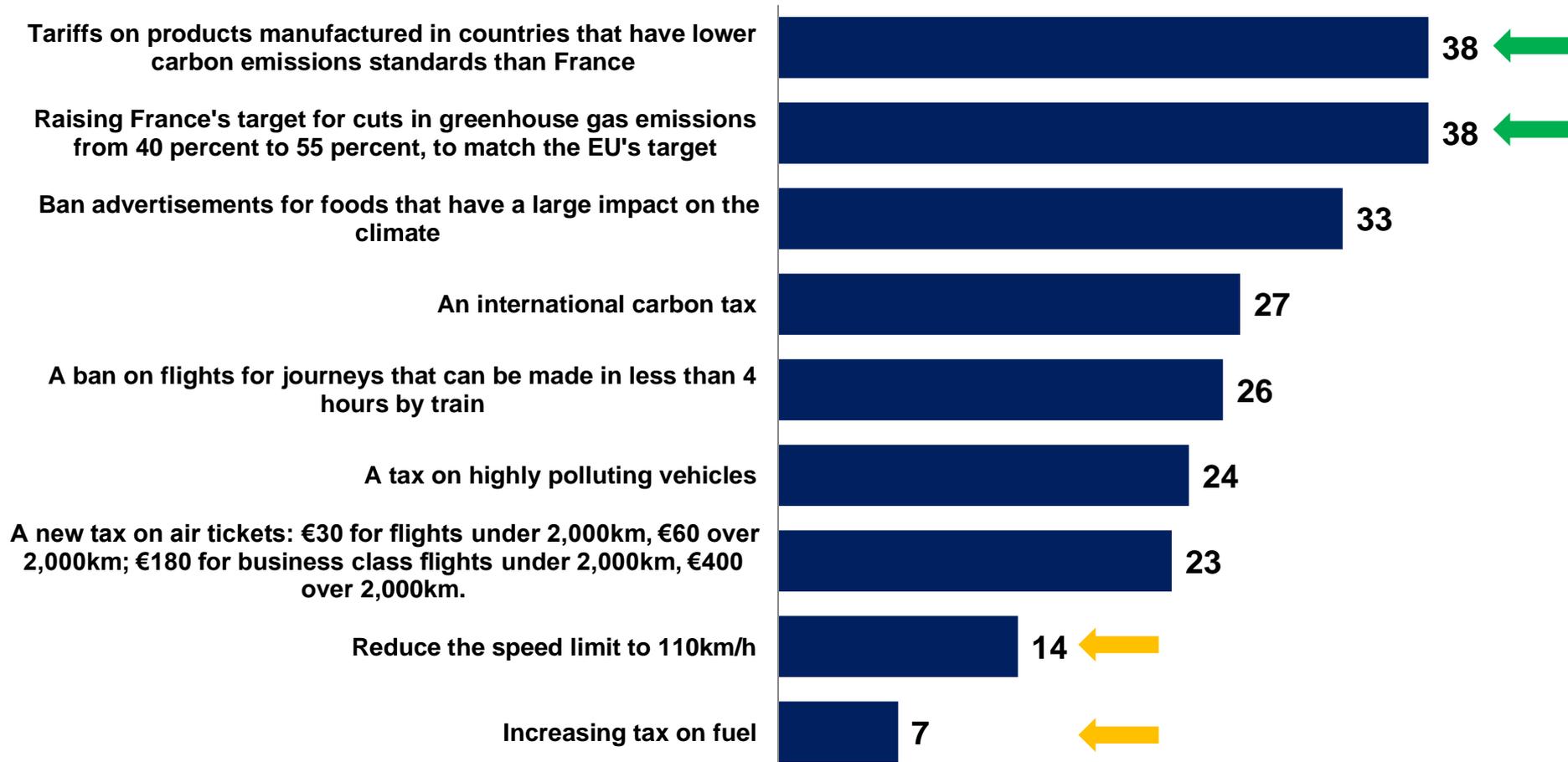


Below is a list of policies on climate change proposed by the gov't. Which THREE do you think are MOST IMPORTANT to do?

Engaged, n=616; Climate priority, n=704; Shift to government, n=146

Climate Convention's top policies are tariffs on countries with low emission standards, and raising emissions target to 55%; lower speed limit and fuel tax unpopular

Importance of climate policies from Citoyenne pour le Climat, total sample

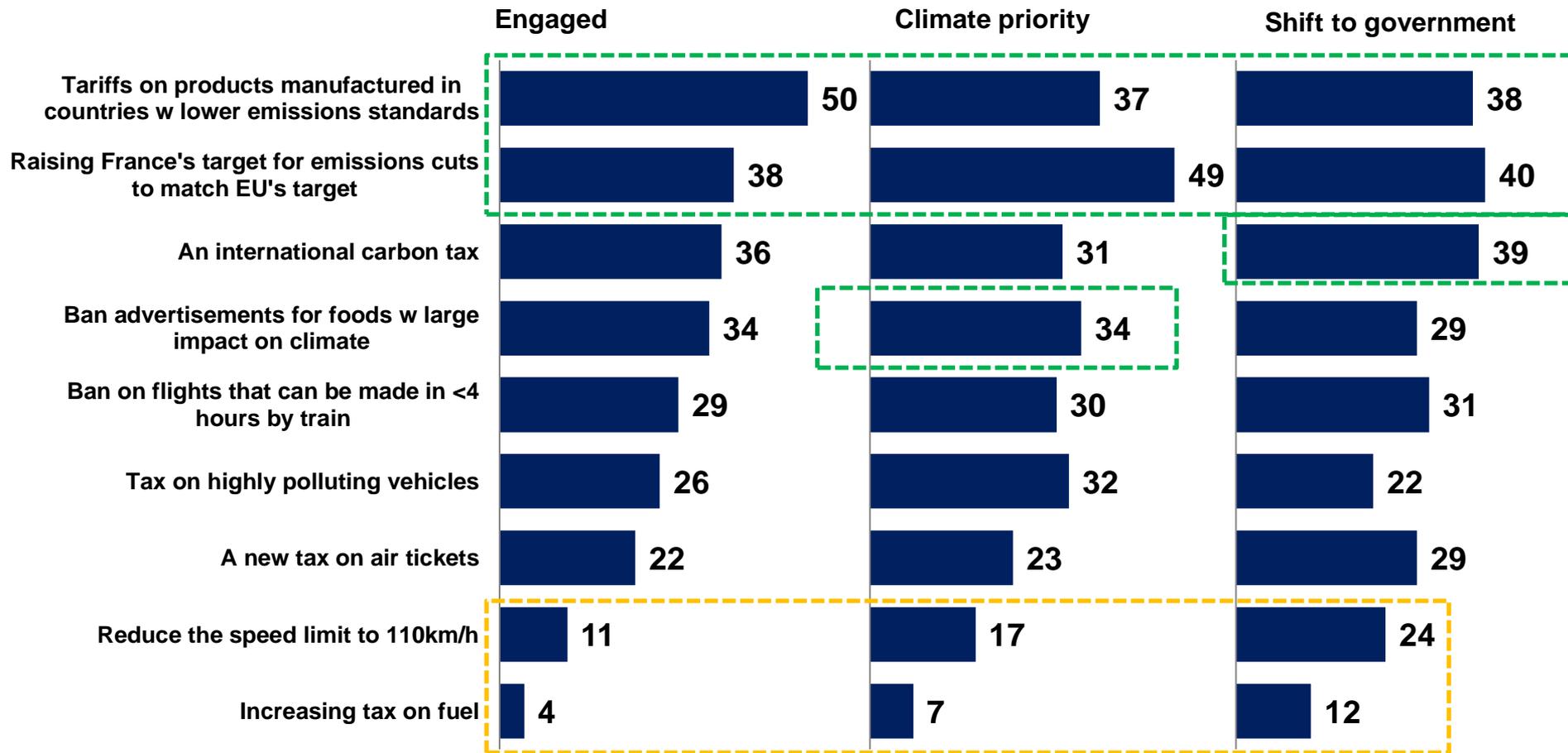


Below is a list of policies on climate change proposed by the Convention Citoyenne pour le Climat, but not included in the new climate law. Which THREE do you think are MOST IMPORTANT to do?

Total sample, n=2,000

Target groups view these two policies as most important, and similarly dismissive of curbs on driving

Importance of climate policies from Citoyenne pour le Climat, by target



Below is a list of policies on climate change proposed by the Convention Citoyenne pour le Climat, but not included in the new climate law. Which THREE do you think are MOST IMPORTANT to do?

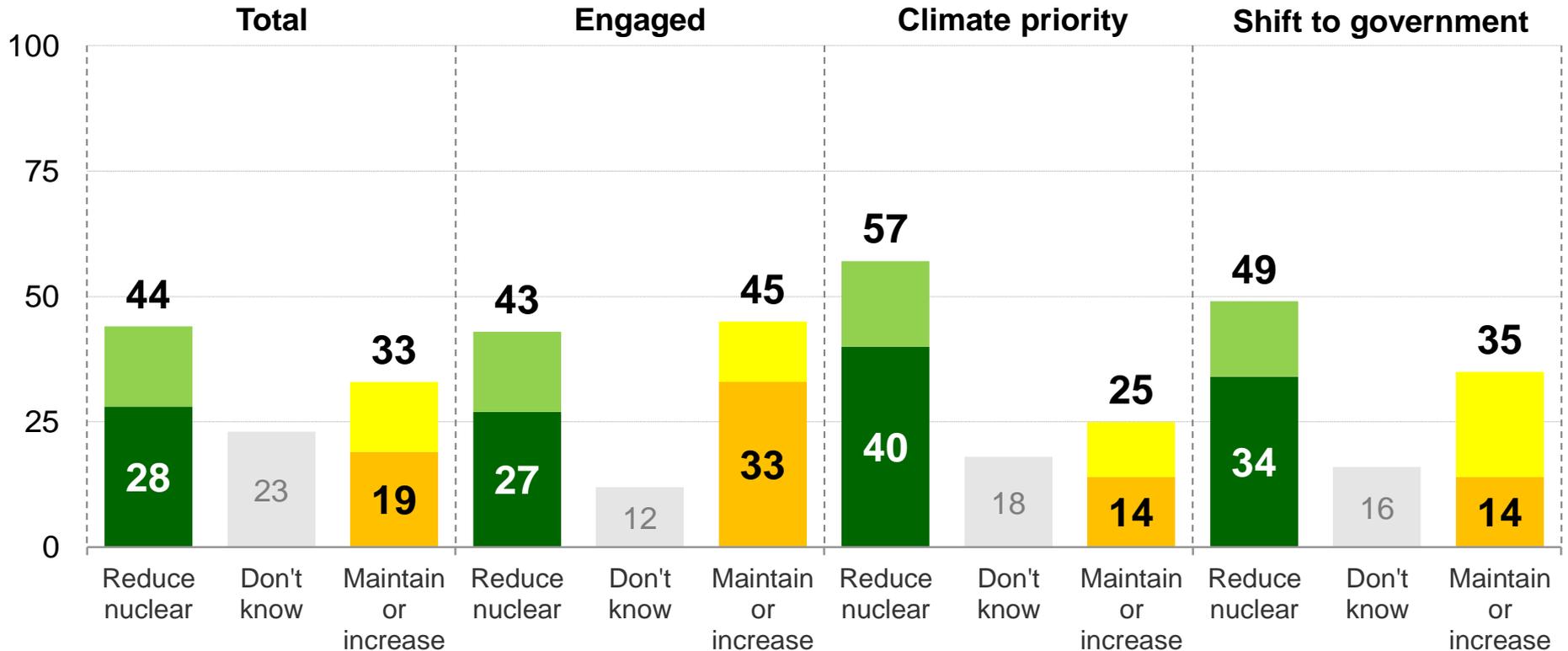
Engaged, n=616; Climate priority, n=704; Shift to government, n=146

Plurality would like France to reduce nuclear power in favor of renewables – engaged voters are unsure

France should reduce its use of nuclear power for electricity and use more renewable energy instead.

France should maintain or increase its use of nuclear power for electricity.

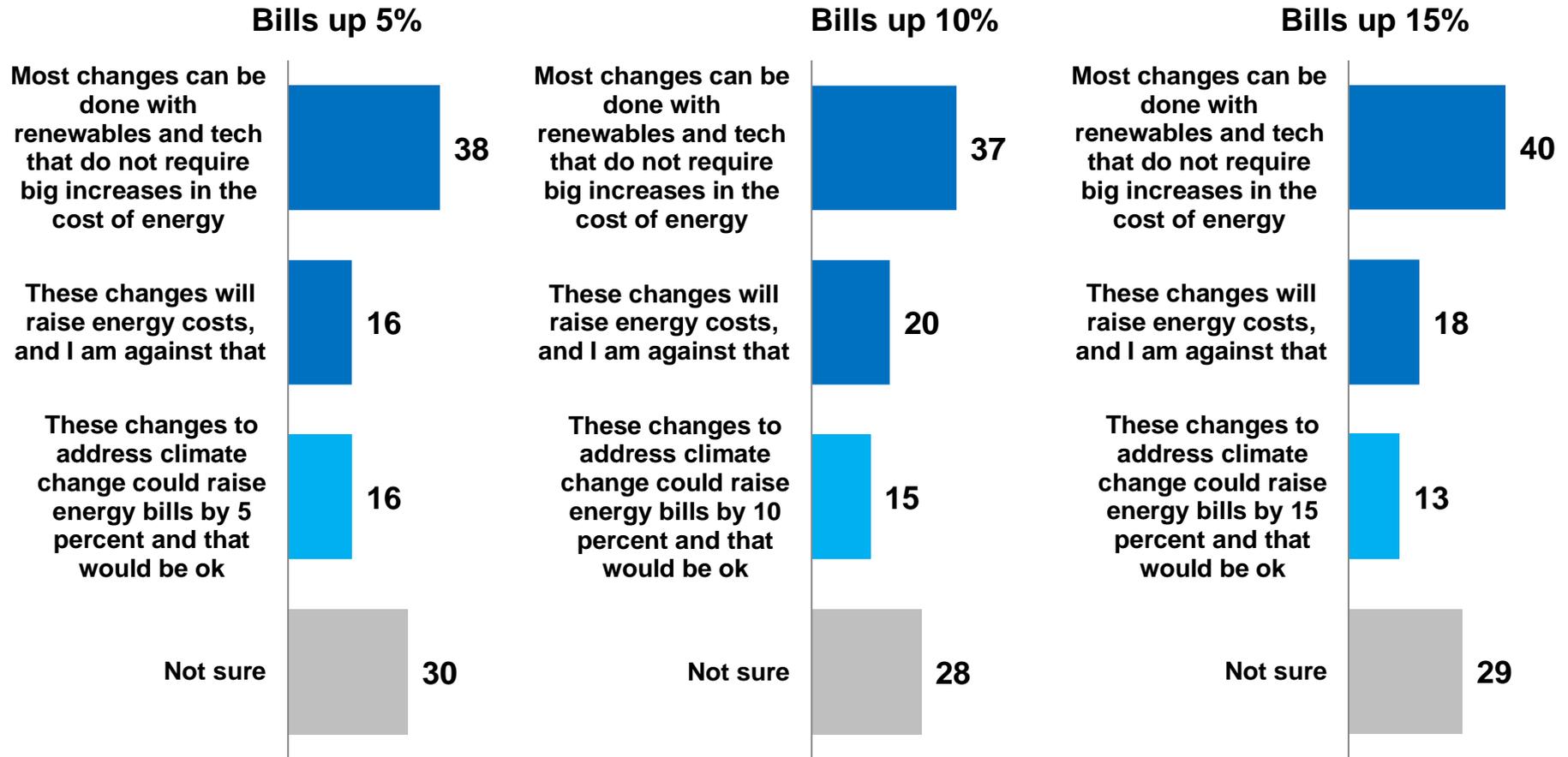
■ Statement 1, much closer ■ Statement 1, somewhat ■ Statement 2, much closer ■ Statement 2, somewhat



Total sample, n=2,000; Engaged, n=616; Climate priority, n=704; Shift to government, n=146

Consumers tend to think the transition can be affected without raising energy bills, but many unsure

Sensitivity to the cost of an energy transition, by how much bills would rise

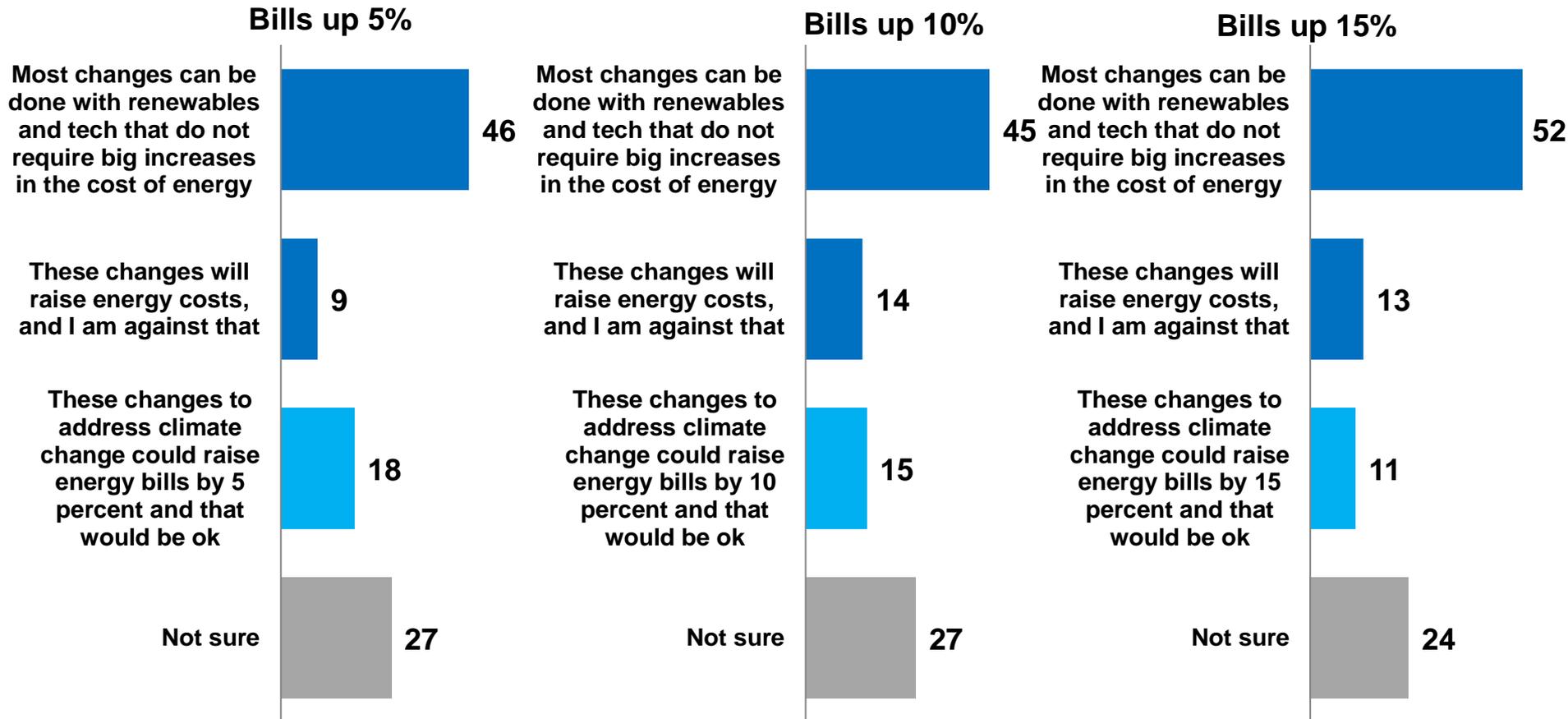


Which ONE of the following is true about the cost of these proposals to address climate change?

Total, n=2,000; each potential rise in bills shown to 1/3-sample splits

Those prioritizing climate are especially confident that technology will save them from bill increases

Sensitivity to the cost of an energy transition, climate priority



Which ONE of the following is true about the cost of these proposals to address climate change?

Climate priority, n=704; each potential rise in bills shown to 1/3-sample splits



Political Messaging on Climate

Political messages from the government: full wording

Effective, popular measures

The Convention Citoyenne pour le Climat was born because the carbon tax was not accepted. So now, rather than big words and huge and unachievable objectives that only generate social resistance, we are putting in place effective measures that can be accepted by the citizens.

Economic: transform and keep our social system

We are showing that you can reform your economy and transform the country from an ecological point of view while supporting those affected and keeping our social system. We are walking a fine line, making big changes while making sure it is economically and socially acceptable to the people.

Balance in economic crisis, meet target and not harm industry

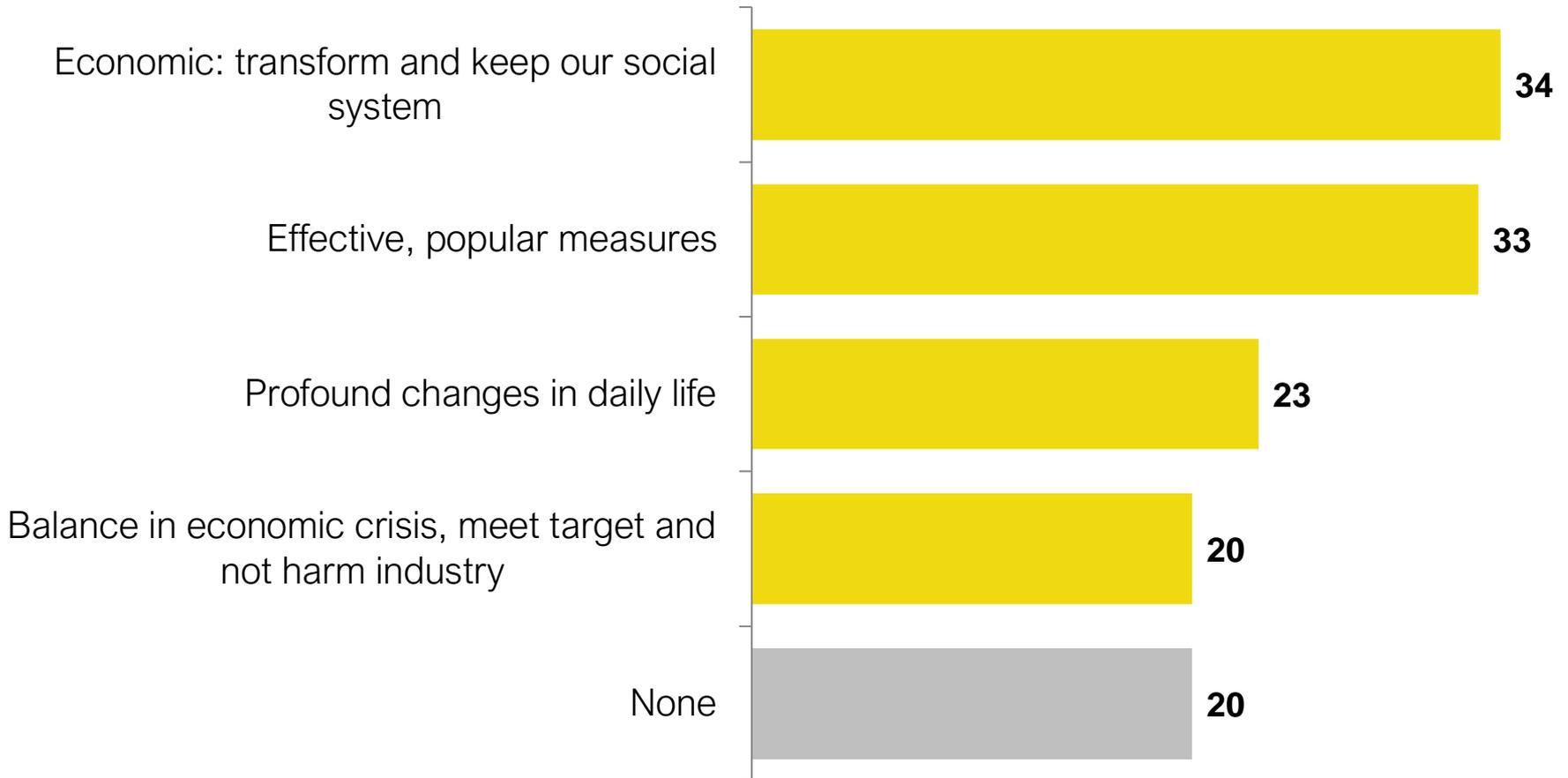
With all the measures in this law and in previous laws, we will reach our Paris climate target. The balance is right. We are in the middle of an economic crisis. We can't take measures that will harm the aviation sector, for instance, when it has ground to a halt.

Profound changes in daily life

This is one of the biggest laws of the President's term. It shows our commitment not just to new technology but to a real change of model for our economy and society. It will mean profound changes in the lives of our fellow citizens.

The most convincing government messages highlight maintaining France's social system, listening to citizens, and minimal impact on ordinary people

Government messages, total sample

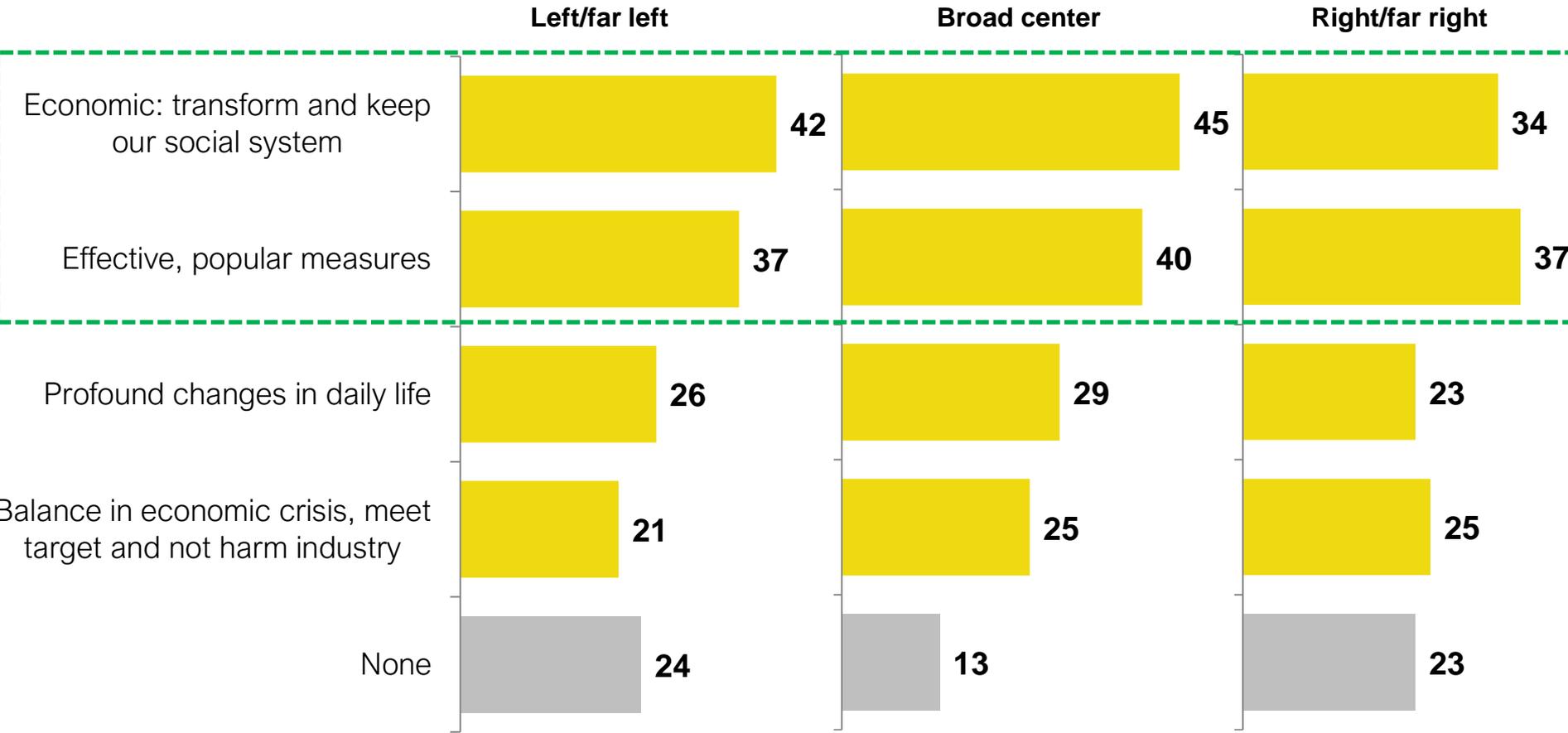


Below are some statements from the government supporting its plans on climate change. Which TWO do you find most CONVINCING?

Total sample, n=2,000

People across political spectrum agree on importance of maintaining social system and listening to citizens

Government messages, by ideology

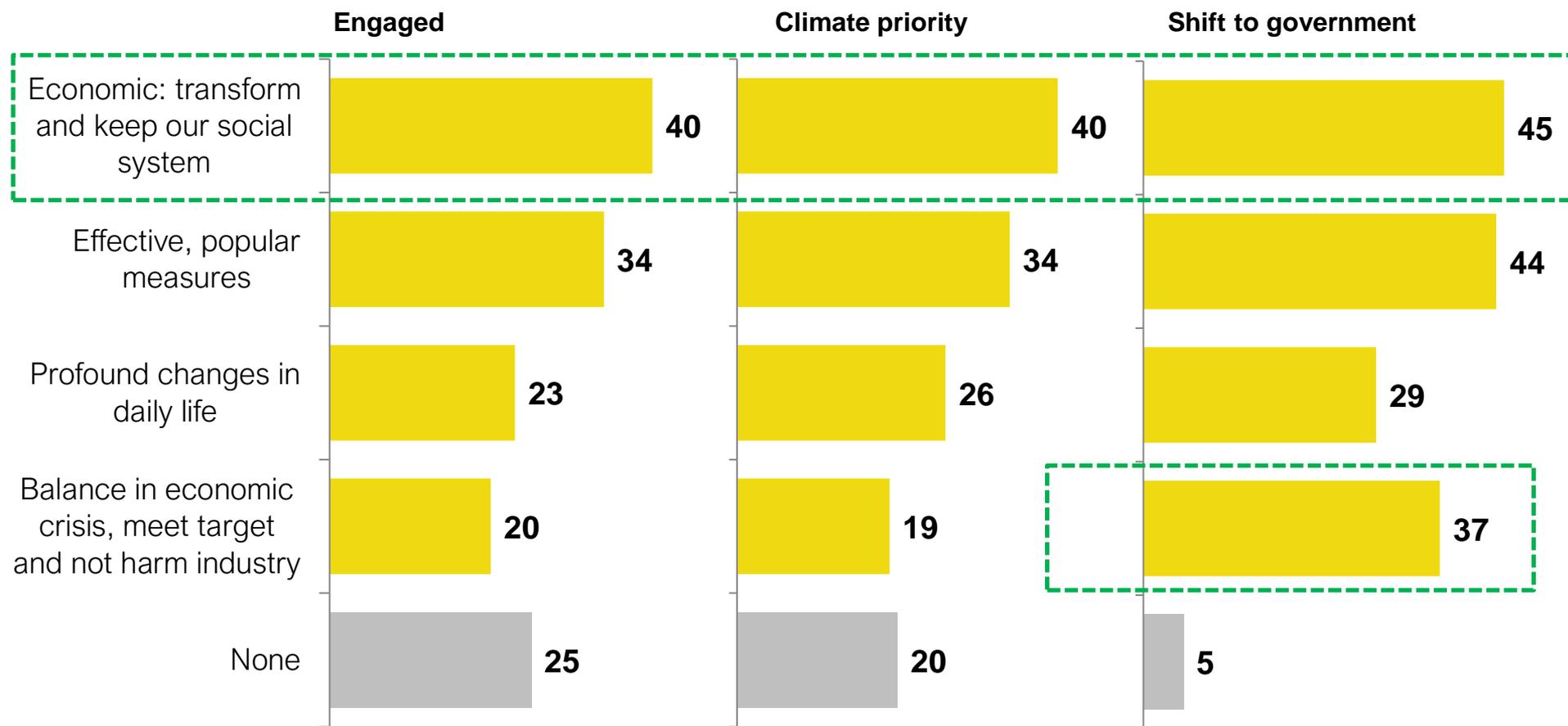


Below are some statements from the government supporting its plans on climate change. Which TWO do you find most CONVINCING?

Left/far left, n=270; Broad center, n=664; Right/far right, n=319

As do targets, though government supporters also value a balance between economic support and climate action

Government messages, by target



Below are some statements from the government supporting its plans on climate change. Which TWO do you find most CONVINCING?

Engaged, n=616; Climate priority, n=704; Shift to government, n=146

Political messages opposing government: full wording

Structural transformation of energy, transport and agriculture

To reach our climate targets, we need a structural transformation of energy, transport and agriculture. But at the moment we are taking only incremental steps. We need to change people's lifestyles. We have to do more to be the world's pioneers on transport, housing and agriculture.

Business lobbies over climate goals

The Convention Citoyenne pour le Climat had a clear mandate to work on proposals that would cut French carbon emissions by 40 percent, by 2030. But the government has given in to business lobbies and betrayed the Convention. With what's left, there's no way we can meet our objectives.

Unambitious targets

The new law might have been adequate 15 years ago, when the climate emergency was less pressing. In 2021, it will not be enough to effectively tackle global warming. The ambition of a 40 percent cut is too low, and the measures included will not even achieve that.

Skin deep commitment to climate action

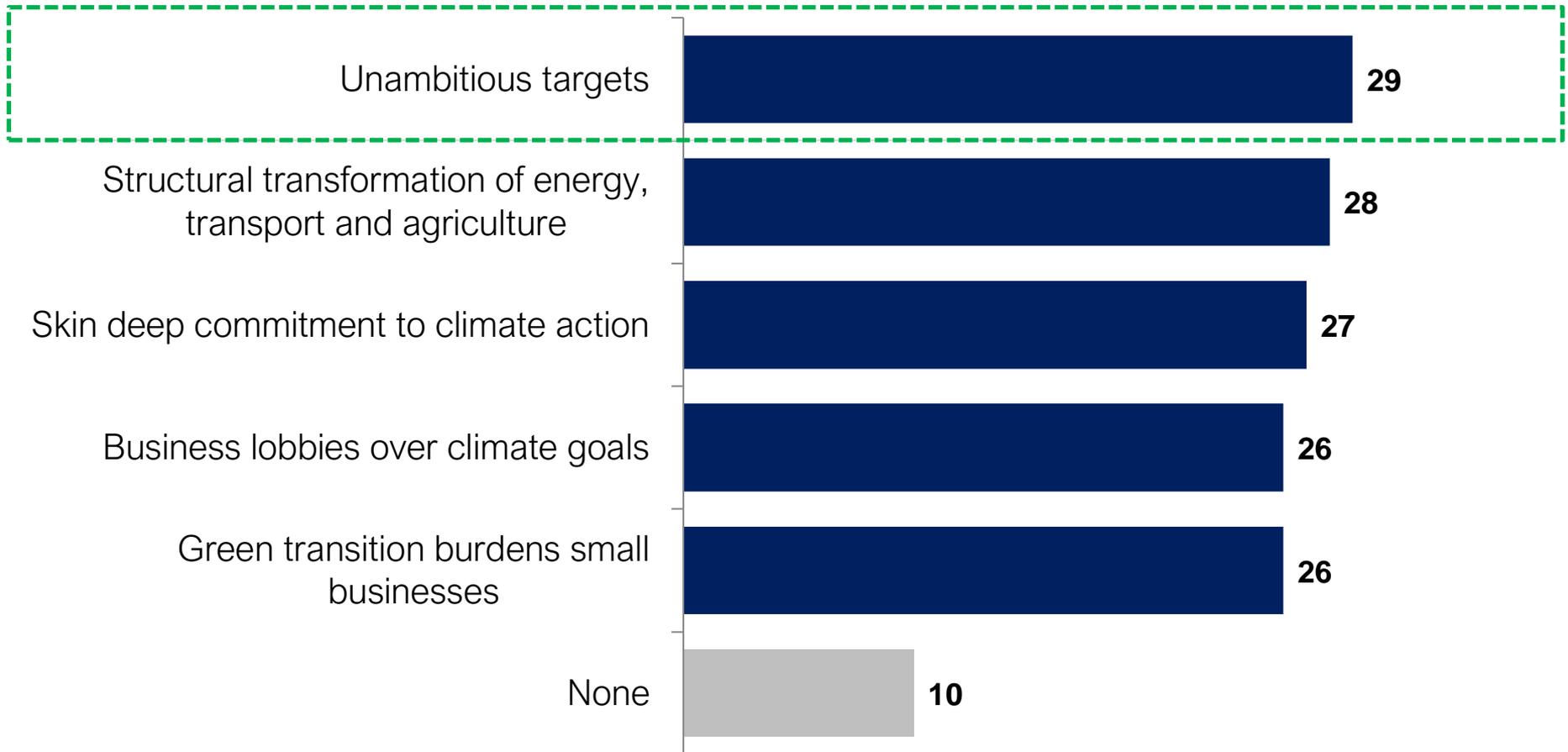
Macron's commitment to the climate is skin deep. It's all communication, smoke and mirrors. He lectures others, but in reality, his actions don't pass muster.

Green transition burdens small businesses

We want a law that reduces CO2 and government proposes a law with more taxes. The new regulations put another burden on companies that are already trying to survive the pandemic. For small businesses, this green transition is too difficult, they can't keep up with all the regulations and decrees.

Most convincing criticism of government policy: climate law is insufficient – and a quarter concerned about high taxes and regulation

Messages opposing government policy, total sample

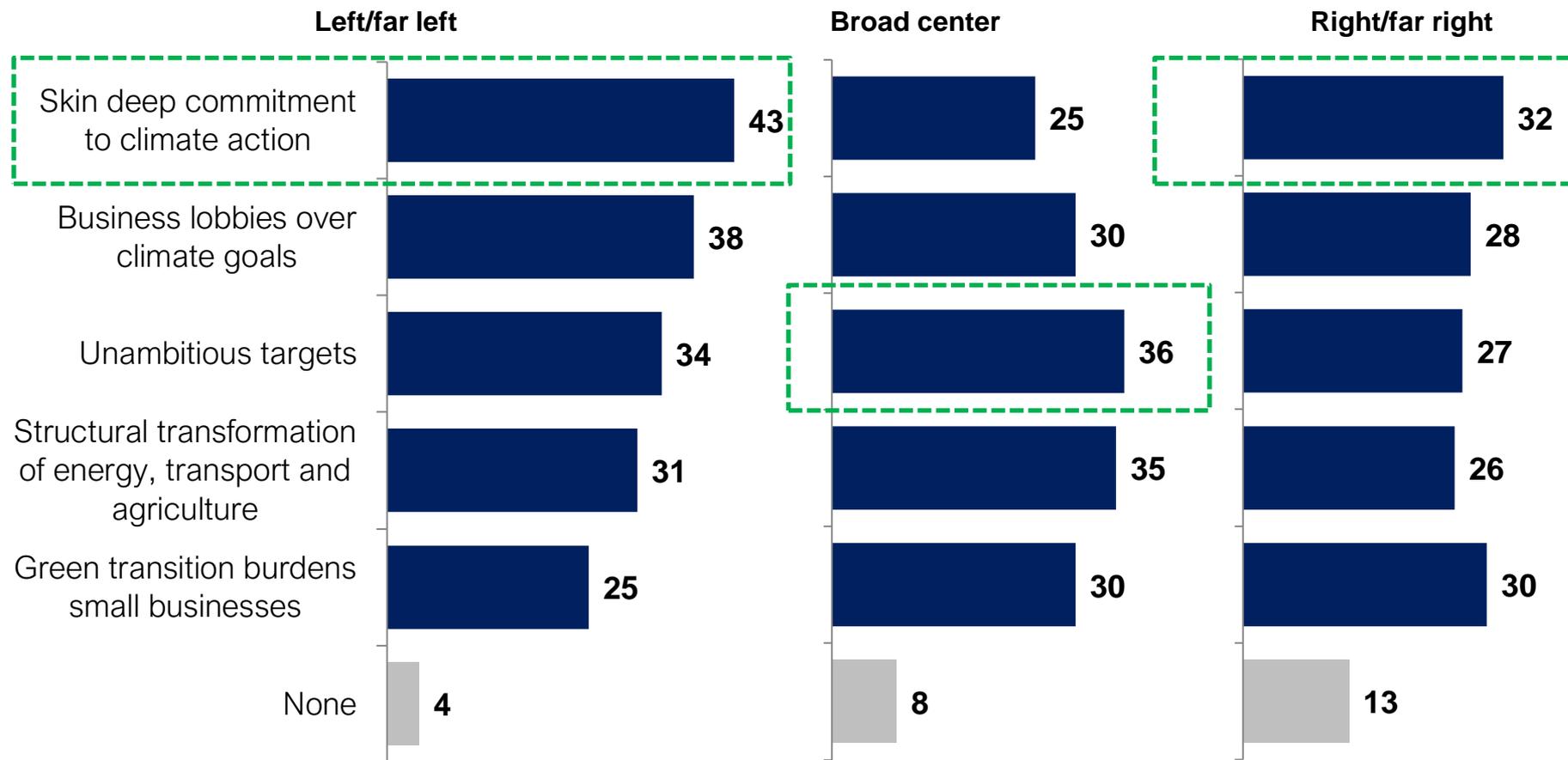


Below are some statements from organizations opposing the government's plans on climate change. Which TWO make you most WORRIED about these plans?

Total sample, n=2,000

Centrists agree climate law is insufficient, the left and right feel it is too superficial

Messages opposing government policy, by ideology

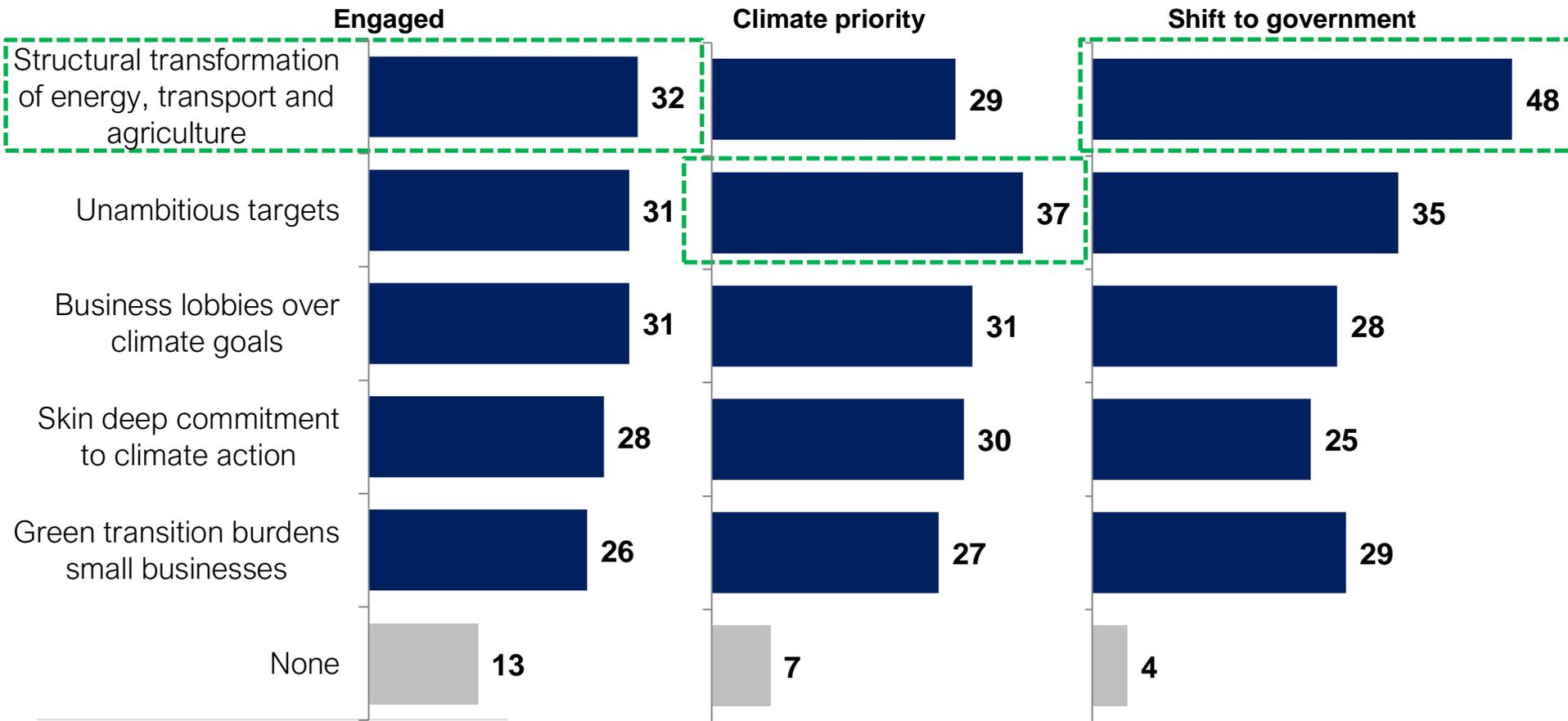


Below are some statements from organizations opposing the government's plans on climate change. Which TWO make you most WORRIED about these plans?

Left/far left, n=270; Broad center, n=664; Right/far right, n=319

Targets want to see structural change, not incremental steps; those who prioritize climate say policies do not go far enough

Messages opposing government policy, by target

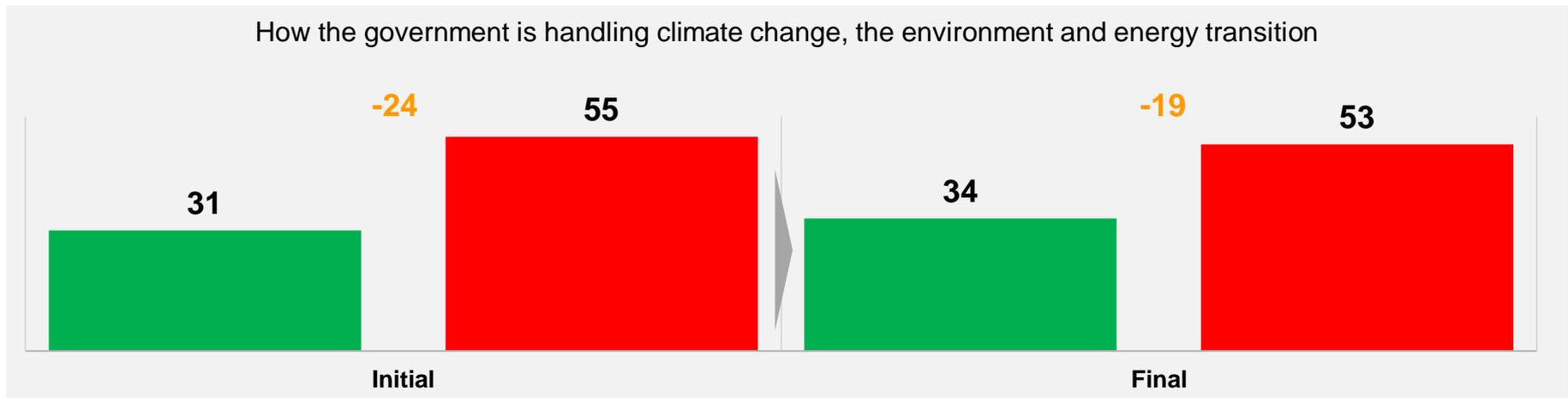
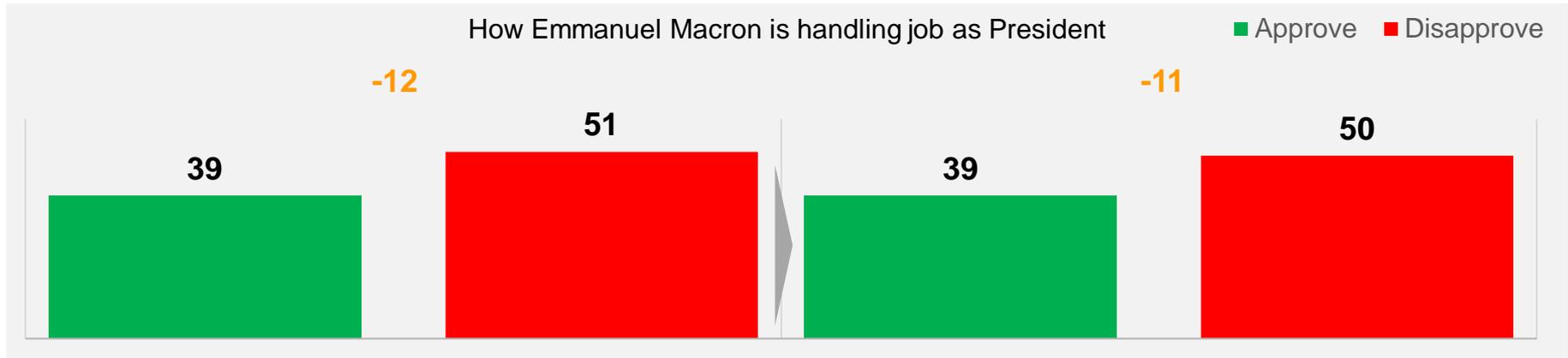


Below are some statements from organizations opposing the government's plans on climate change. Which TWO make you most WORRIED about these plans?

Engaged, n=616; Climate priority, n=704; Shift to government, n=146

Policies and messaging give small boost to government's approval on climate change, but not overall

Impact of policies and messaging on leader and government approval, total sample

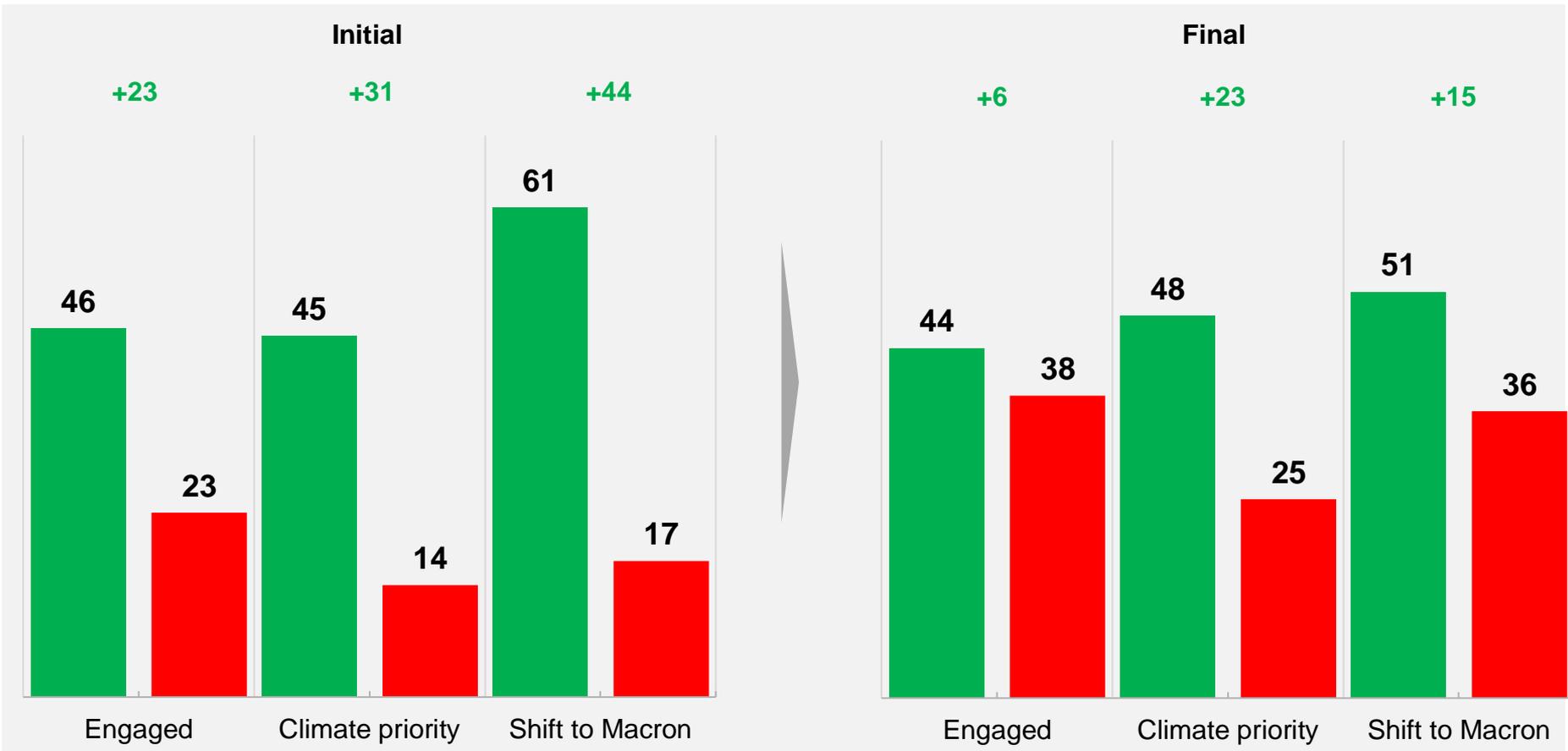


How much do you approve or disapprove of each of the following?

Total sample, n=2,000

Net approval for climate law significantly reduces across all target groups

Impact of policies and messaging on Climate law approval, total sample



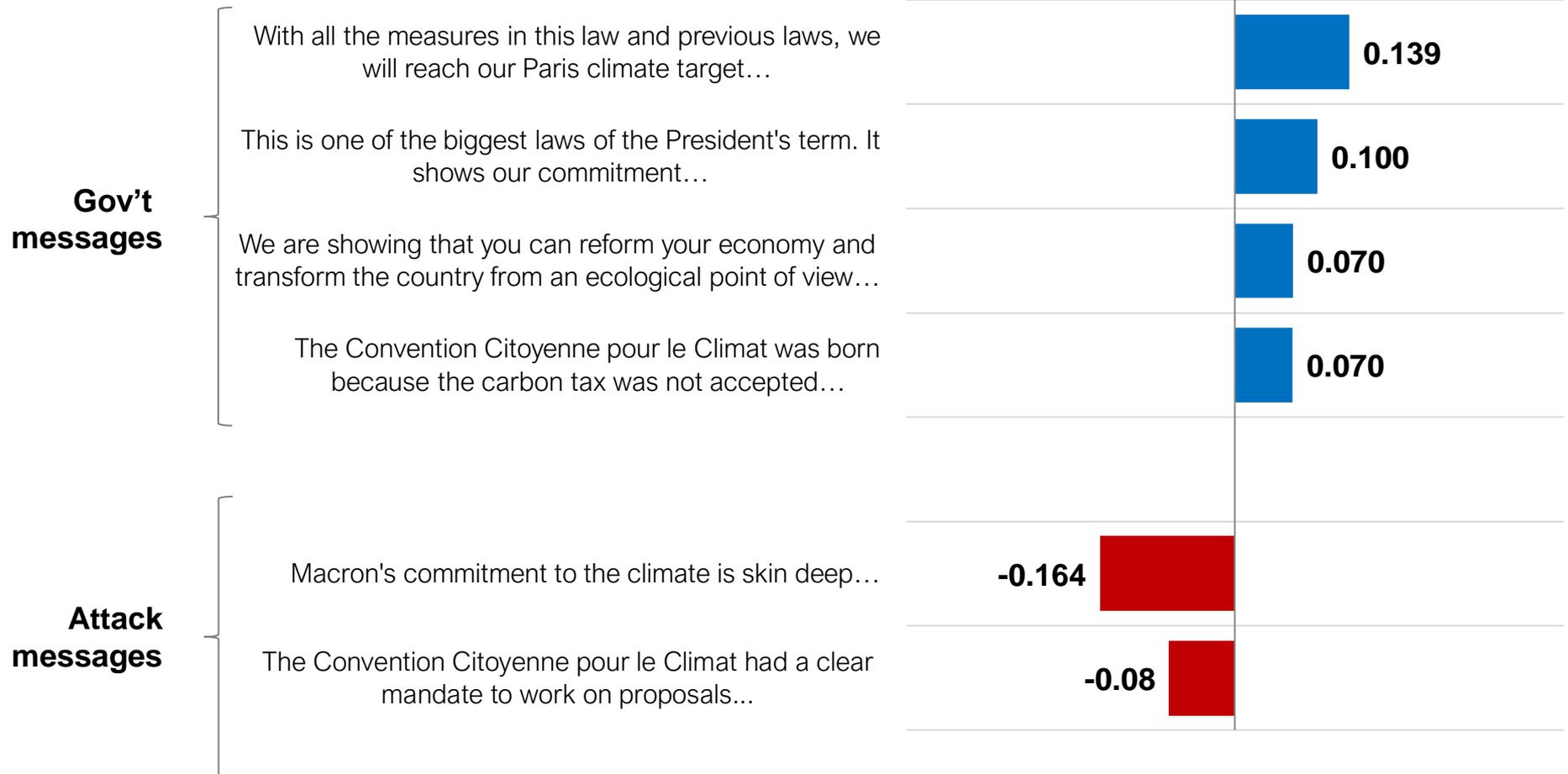
How much do you approve or disapprove of each of the following?

Engaged, n=615; Climate priority, n=704; Shift to Macron, n=113

Message that balances climate and economy has strongest positive impact on government approval on climate

Impact of policies and messaging on approval of government on climate change (reask)

Regression coefficients



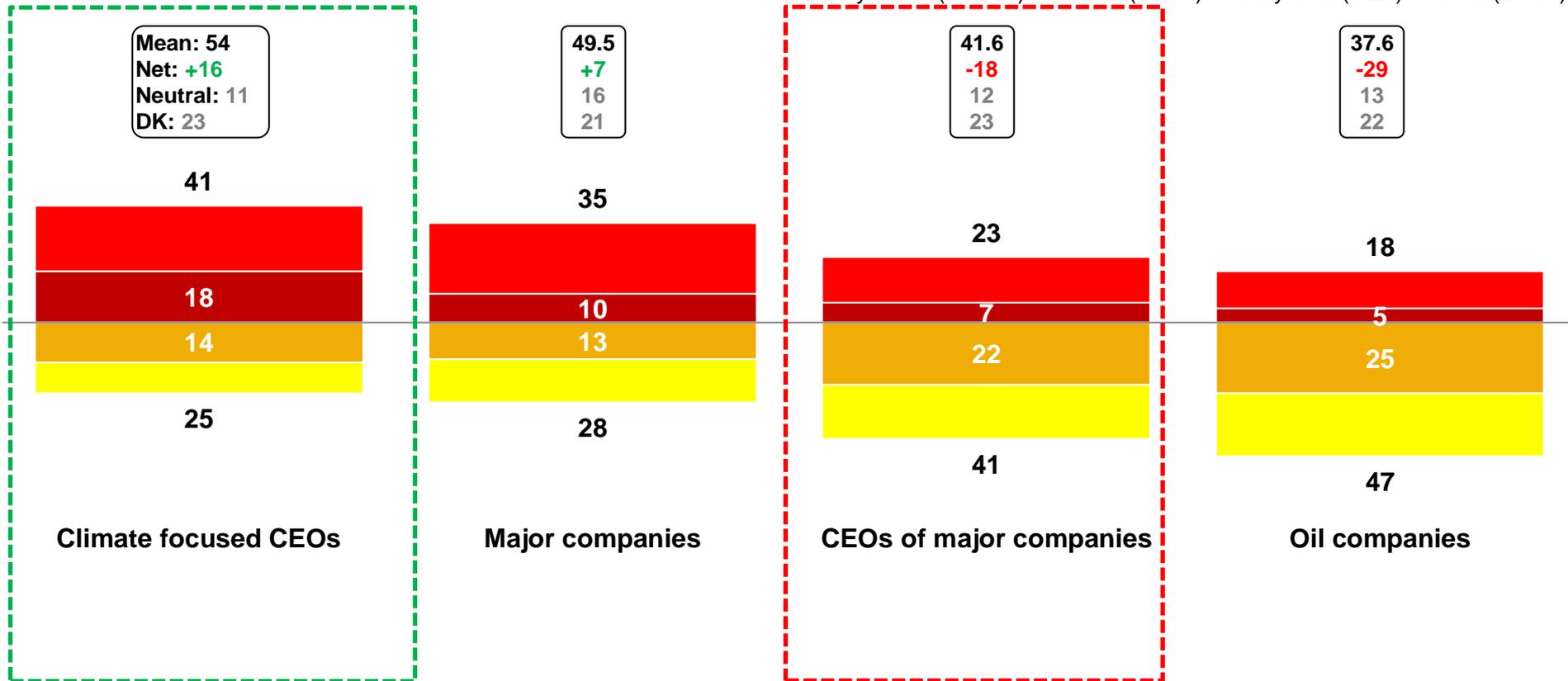
Perceptions of business



Major companies have positive reputation, though not their CEOs; that is transformed when take on climate change.

Feelings toward corporations, total sample

Climate focused CEOs = “CEOs of major companies who say climate change is a crisis and companies must change the way they do business”



Please rate your feelings toward some people and organisations, with 100 meaning a very warm FAVOURABLE feeling; 0 meaning a very cold, UNFAVOURABLE feeling; and 50 meaning not particularly warm or cold.

Total, n=2,000; options shown to 1/2-sample splits

CLIMATE *Policy & Strategy*

Climate Policy & Strategy: France
Baseline survey, June 2021

