

CLIMATE
Policy & Strategy

Climate Policy & Strategy: France
Tracking survey, June 2022



What this is based on

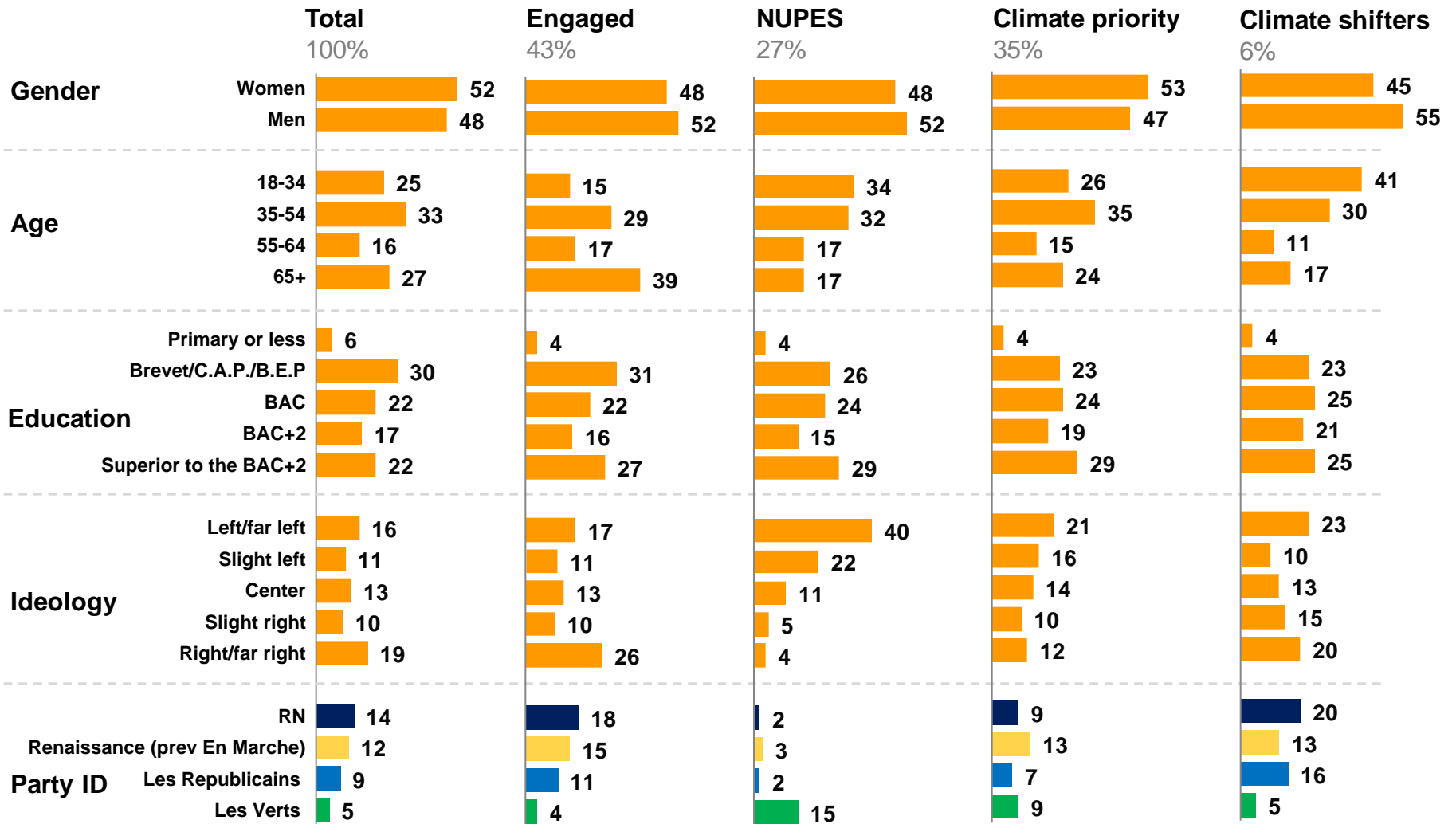
Our poll

- N=2,000 nationally representative survey of France
- Fieldwork: 6-9 June 2022
- Online, 20-minute questionnaire
- Weighted to national statistics on gender, age, region, education, social grade, ethnicity, and past voting

Groups analysed

Target group	Definition
Total	All respondents – represents national 18+ population of France
Engaged	Those likely to vote in elections (8-10/10)
Climate priority	Chose climate as a top priority for government
NUPES	Vote for a party in the left-wing NUPES bloc (second place in Parliamentary election)
Climate shift to government	Initially answer disapprove or don't know on government's handling of climate & energy transition, but after balanced positioning, approve
Pro Climate CEOs	Cool/negative/neutral/undecided to 'CEOs of major companies' but warm/positive to 'CEOs of major companies who say climate change is a crisis and companies must change the way they do business'
Shift to businesses	Those whose views of Boeing, BP, GM and Morgan Stanley get warmer/more positive after hearing their positioning

Targets: political



What you need to know (1/2)

- Concern about the direction of the country is rising, driven by rising concerns about the cost of living and healthcare. But as other major issues such as crime, immigration and corruption fall in salience, consistently more than a third of the population prioritize climate, making it the third-biggest issue.
- Climate is a particularly big issue for voters of the newly-powerful NUPES (left wing) bloc in Parliament.
- Despite the increased cost of energy, a plurality of French voters (and majority of NUPES voters) think the climate crisis is bigger than the energy crisis. Big, intense majorities among all target groups endorse major action on the climate crisis even in the face of high costs.
- They blame the high cost of energy on the Ukraine war and high global prices for oil and gas, but also on the gas tax. About a quarter also blame corporate profiteering; the transition to green energy is almost irrelevant in this debate.
- Support for sanctions on Russia is high, including cutting off energy supplies despite a possible impact on price. The war drives stronger support for renewable energy, rather than putting people off.
- A plurality of French voters back there being a Europe-wide energy policy, with majorities of NUPES voters and those who prioritize the climate in favor.

What you need to know (2/2)

- There is strong support for the low-carbon tech sector – which rivals agriculture as a priority for the government to champion. The energy crisis also changes the equation on nuclear, with more in support of a new generation of reactors than opposed.
- Overall favorability to nuclear is high, on par with EV's and ahead of environmental groups. Oil and gas companies, and CEOs, have negative reputations.
- Only around a fifth of voters anticipate that the transition will lead to an unacceptable rise in energy costs for them. Most others expect the challenges to be solved without requiring bills to rise, or that any rise would be acceptable.
- Although in principle they prefer the government to ban polluting activity rather than tax it, a majority would support companies having tax incentives for tackling climate change.
- The government's strongest climate message is on food independence. Left-wing opposition messages don't stick, but right-wing attacks, especially on fuel prices and taxes, do land. The net impact of messaging leaves the government where it started – no net gain or loss.
- Corporate executives get a major boost to their reputation for acknowledging that climate is a crisis and business models need to change. All companies tested, and chief executives, receive significant boosts in favorability from getting their policies and messages on climate across to people.

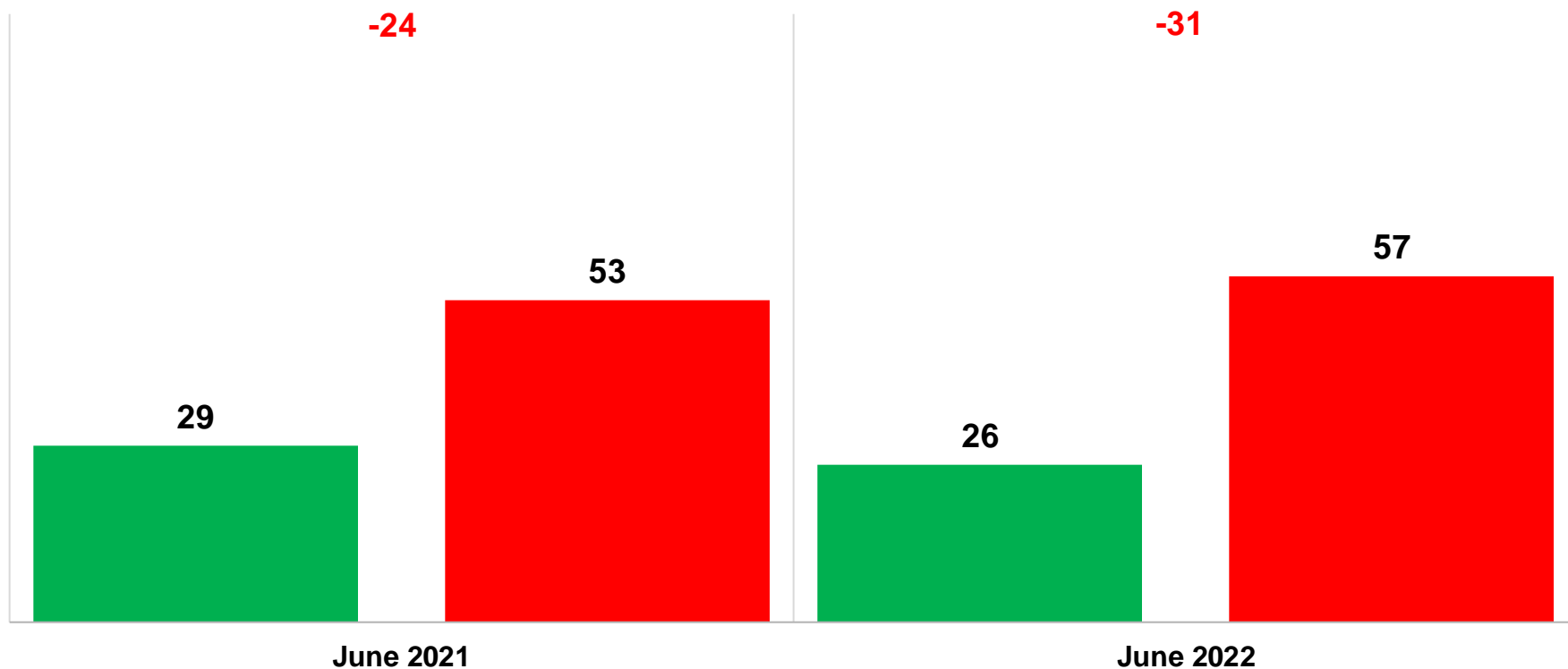
Climate Context



The French public are increasingly dissatisfied with the direction the country is going in

Country direction, total sample

■ Right direction ■ Wrong direction

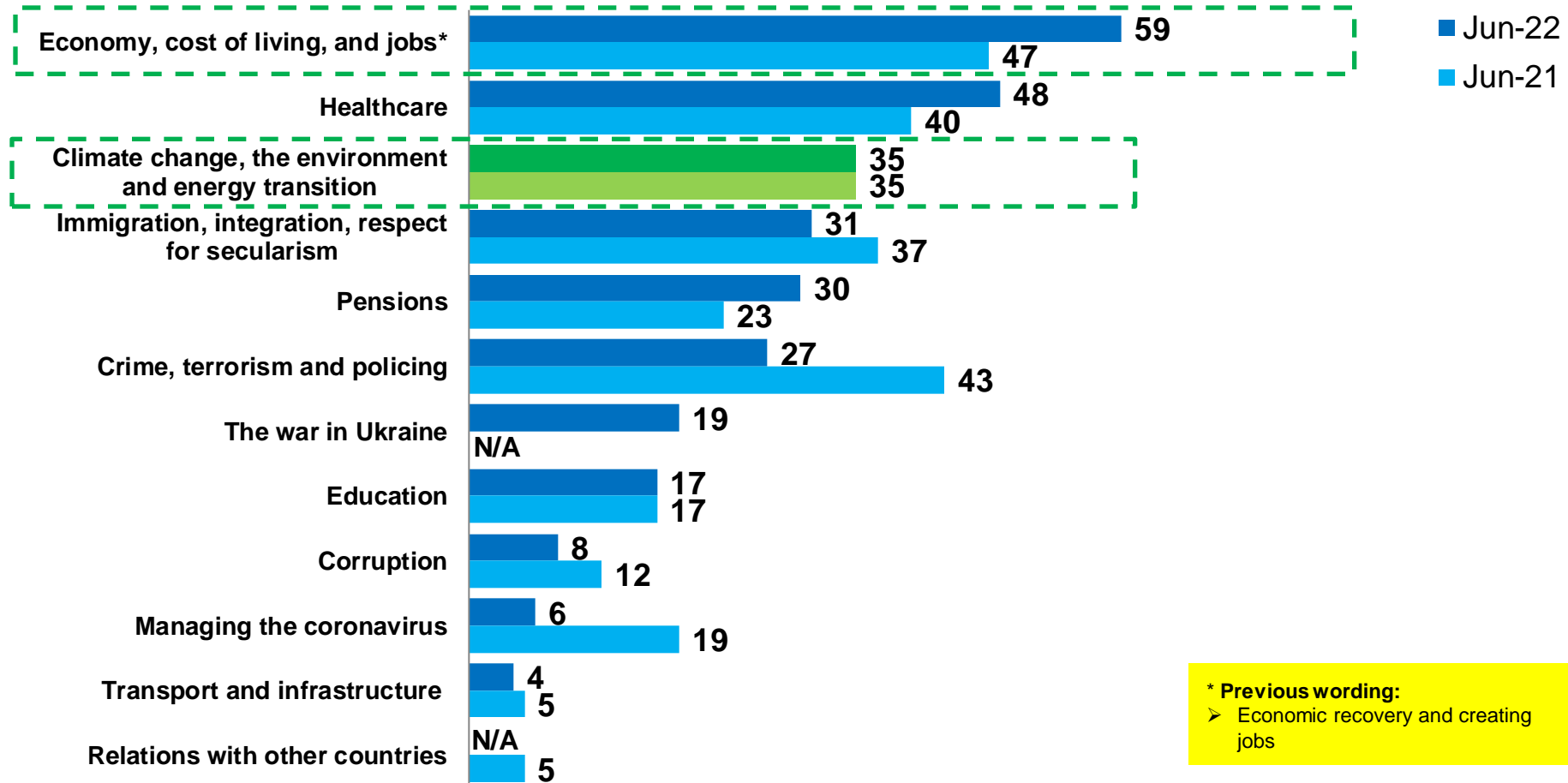


Generally speaking, do you think that things in this country are going in the right direction, or do you feel things are going in the wrong direction?

Total sample, n=2,000

Concerns about the economy and cost of living surge, but climate change remains high-priority even as issues like immigration and crime fall in salience

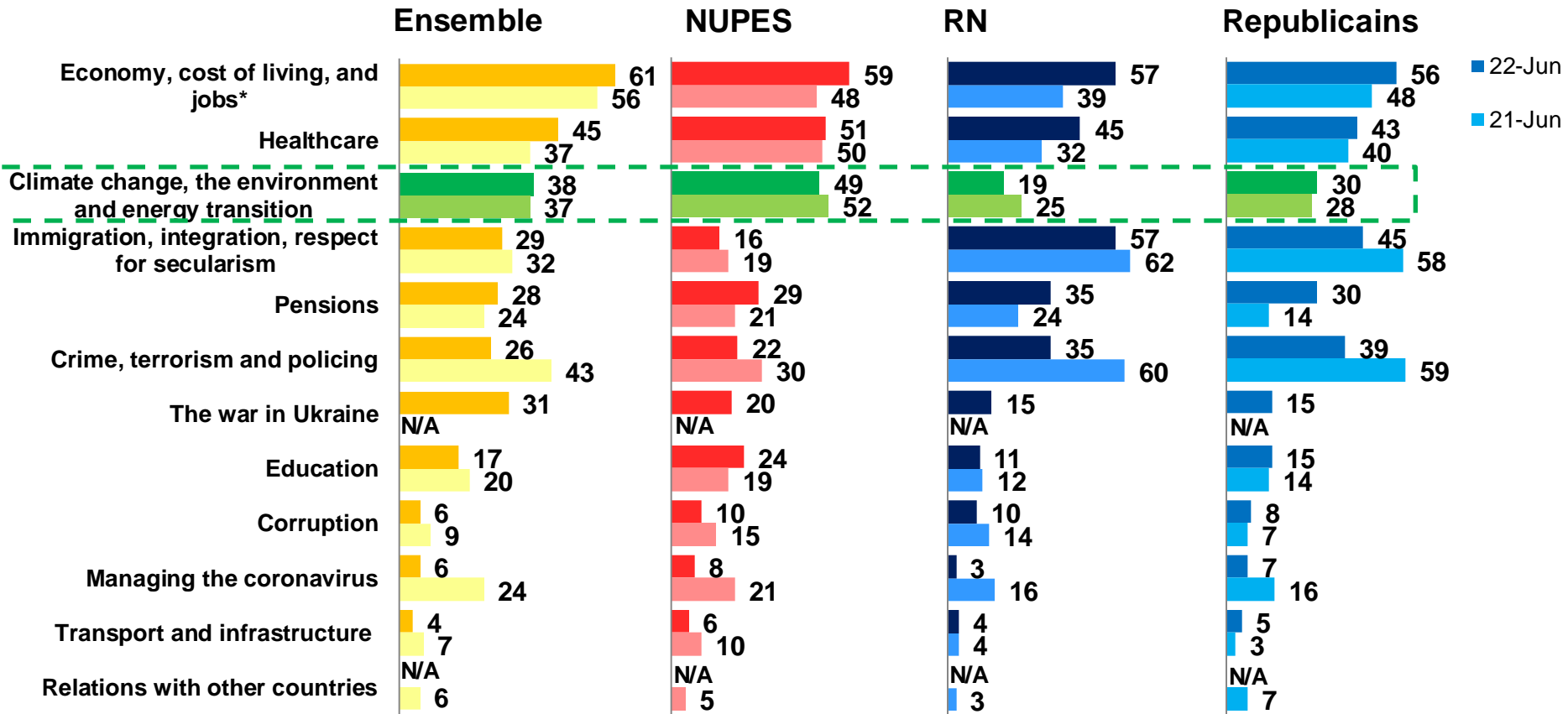
Priorities for government, total sample



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

Climate is a major concern for voters of Macron's Ensemble; left bloc NUPES; and even increases for Republicans as other issues fall

Priorities for government, by vote intention



* Previous wording:
 > Economic recovery and creating jobs

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

Wave 2, vote intention: Ensemble, n=372; NUPES, n=532; RN, n=354; Republicans, n=165

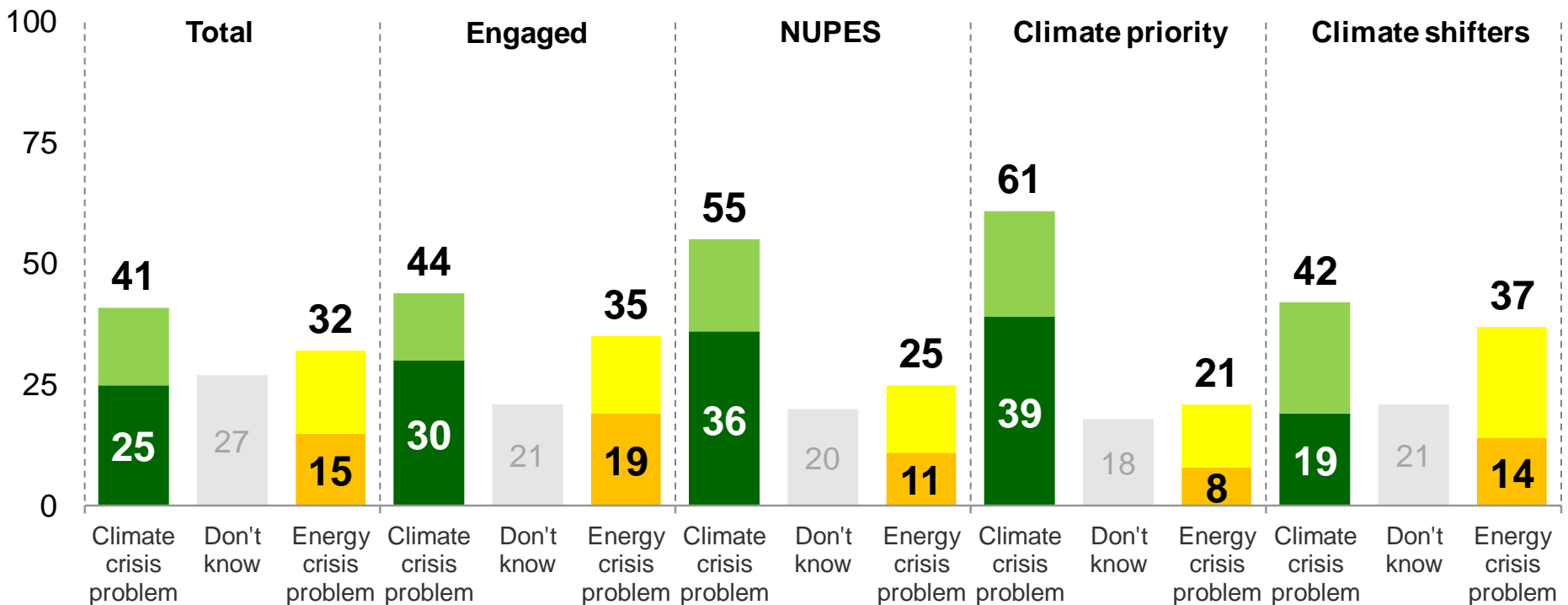
Wave 1, vote intention: Ensemble, n=332; NUPES, n=414; RN, n=366; Republicans, n=182

Climate crisis is seen as bigger than energy crisis by a plurality – but strong majority among NUPES supporters

1) The climate crisis is the more fundamental problem.

2) The energy crisis is the more fundamental problem.

■ Statement 1, much closer ■ Statement 1, somewhat ■ Statement 2, much closer ■ Statement 2, somewhat ■ Don't know



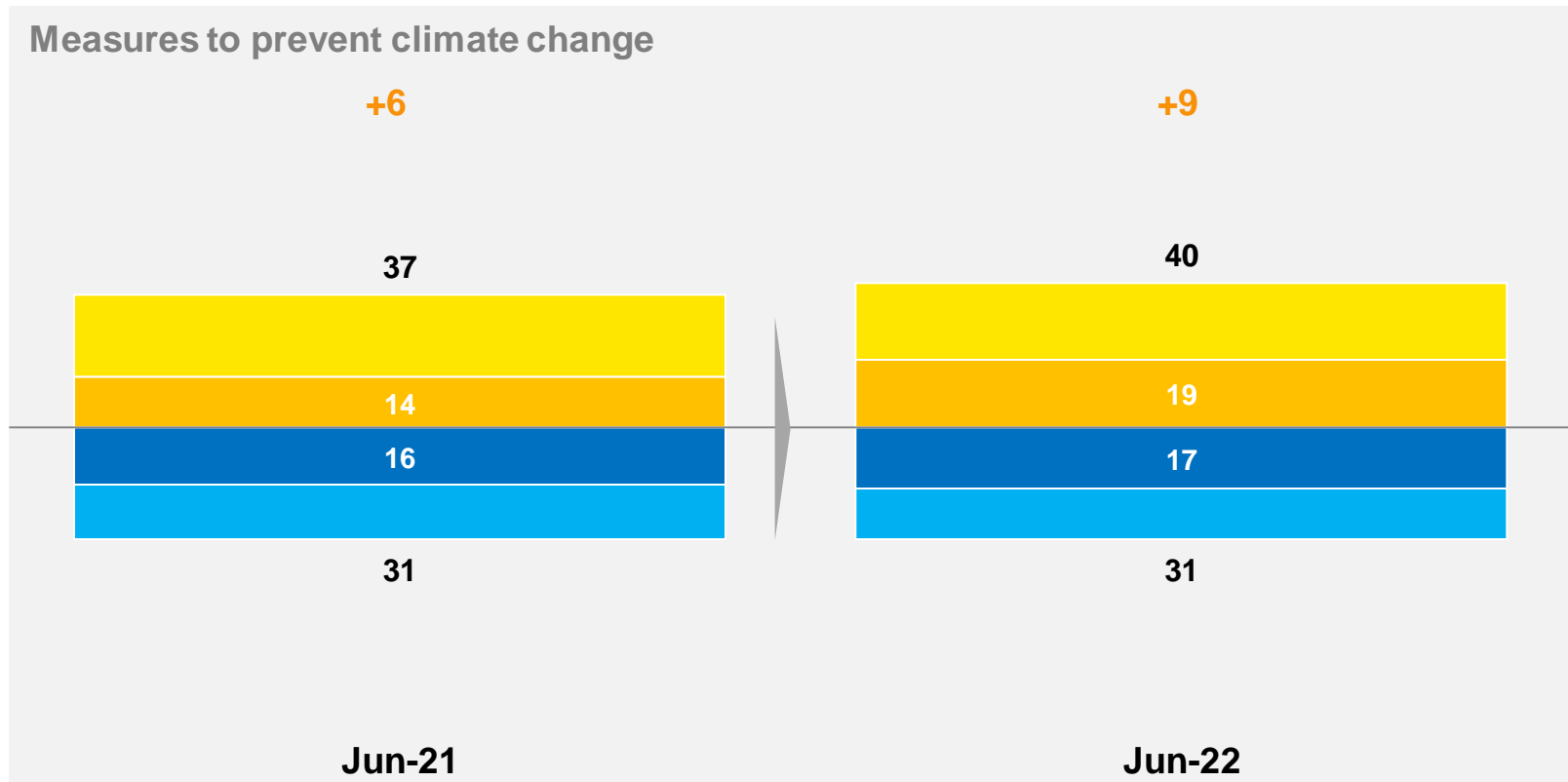
On the following pages are some pairs of statements. For each, please indicate whether the FIRST statement or the SECOND statement comes closer to your views, even if neither is exactly right.

Total sample, n=2,000; Engaged, n=853; NUPES, n=532; Climate priority, n=692; Climate shifters, n=129

Warmth toward preventing climate change has increased slightly, but is not as intense as in other countries

Favorability to measures to prevent climate change, total sample

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



Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVOURABLE feeling; zero meaning a VERY COLD, UNFAVOURABLE feeling; and fifty meaning not particularly warm or cold.

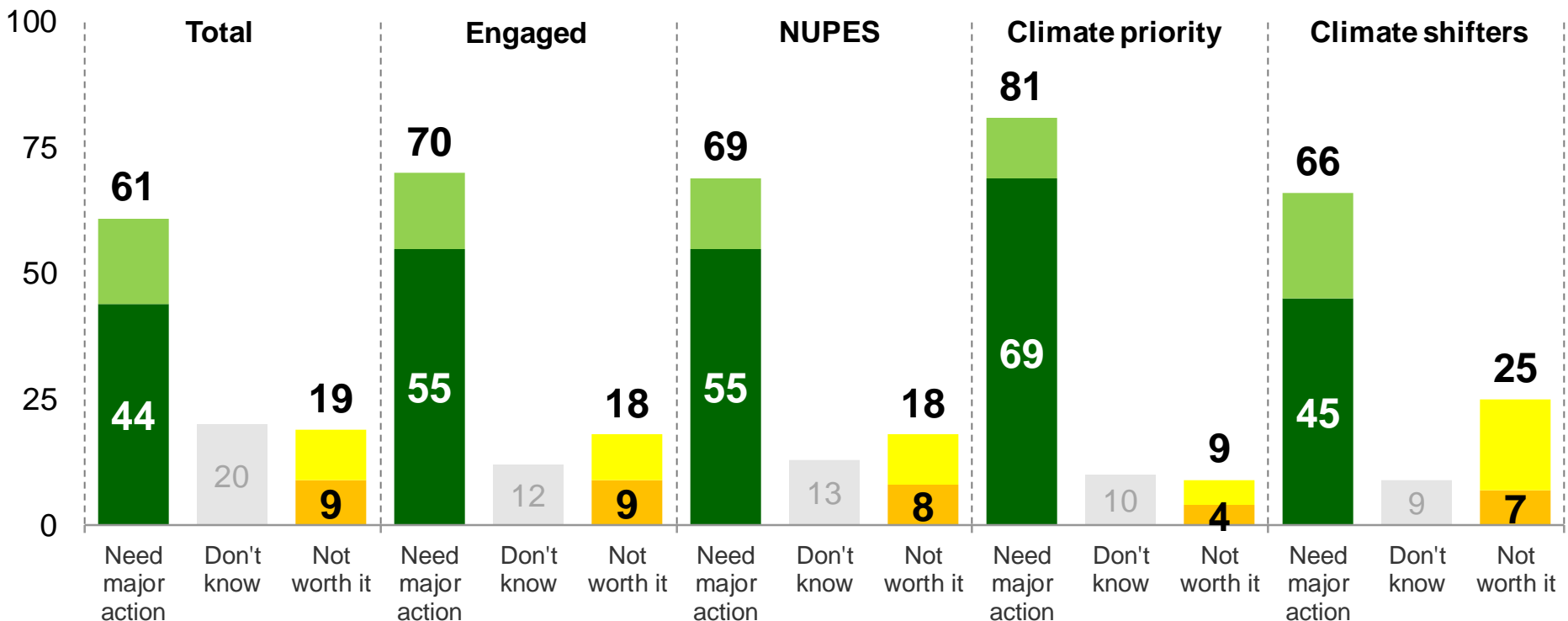
Total sample, n=2,000

Big, intense majorities of all target groups agree climate change is a threat and major action is needed

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

2) The threat of climate change is exaggerated and the high cost of fixing it may not be worth it.

■ Statement 1, much closer ■ Statement 1, somewhat ■ Statement 2, much closer ■ Statement 2, somewhat ■ Don't know



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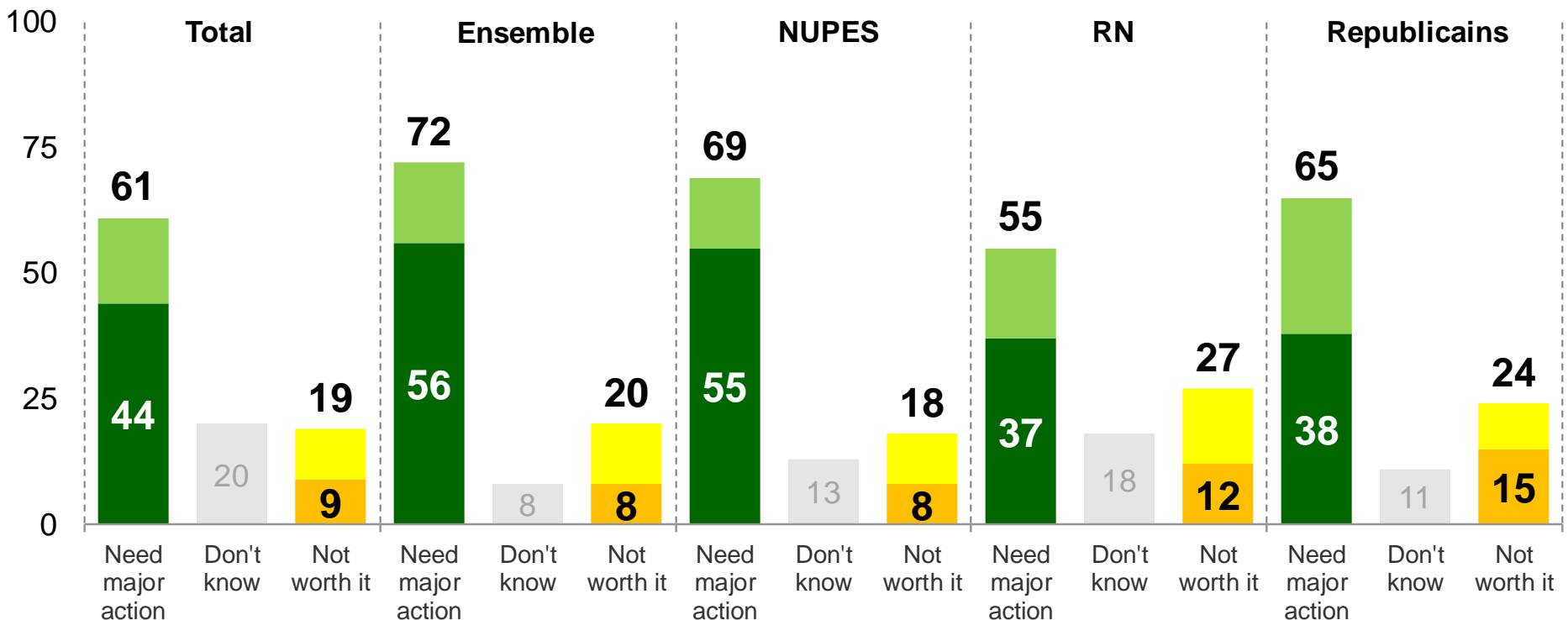
Total sample, n=2,000; Engaged, n=853; NUPES, n=532; Climate priority, n=692; Climate shifters, n=129

Voters across all parties think climate change is a real threat, particularly Ensemble and NUPES voters

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

2) The threat of climate change is exaggerated and the high cost of fixing it may not be worth it.

■ Statement 1, much closer ■ Statement 1, somewhat ■ Statement 2, much closer ■ Statement 2, somewhat ■ Don't know

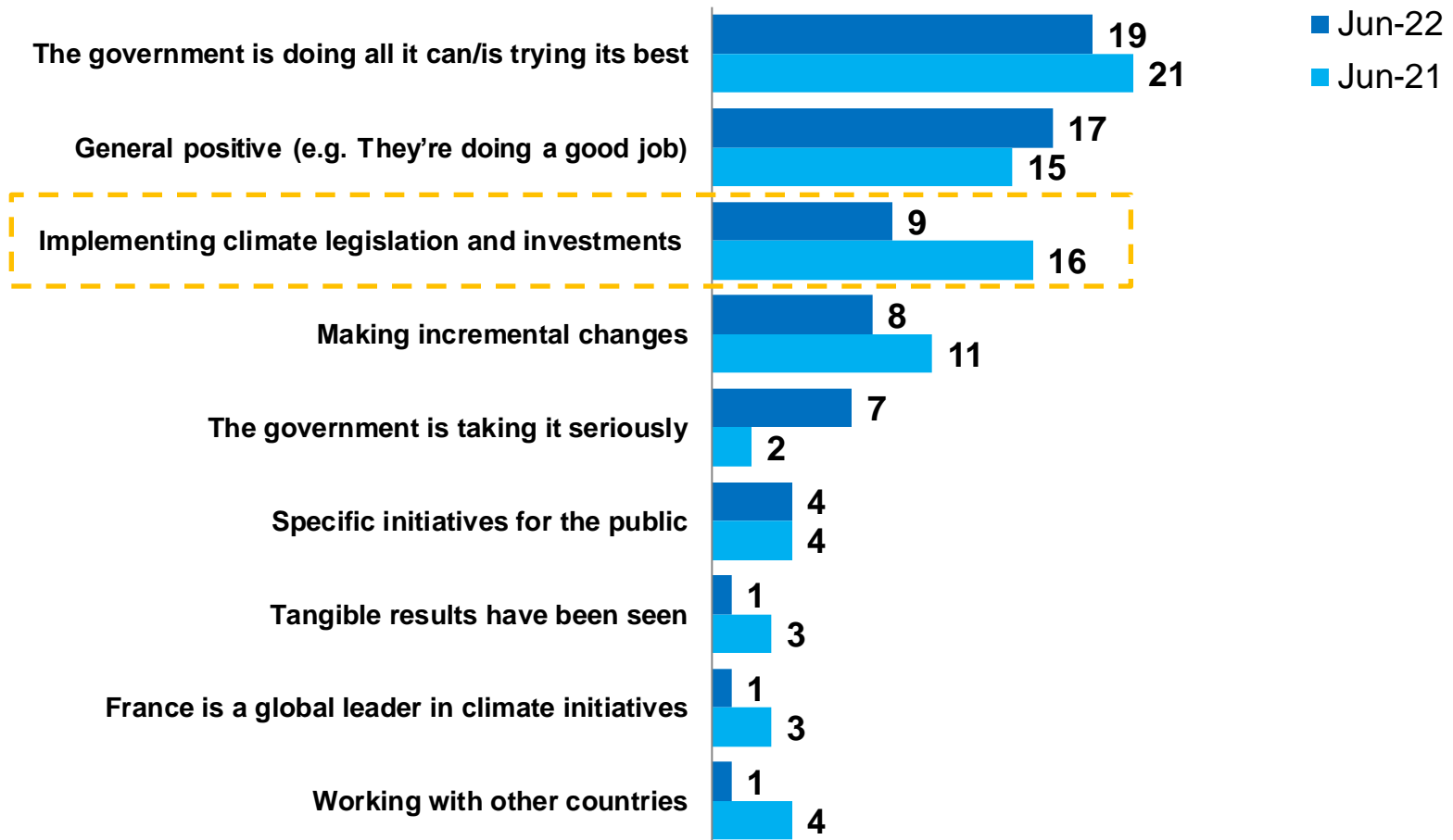


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Those who approve say the government is trying; but big drop in those who see actual implementation

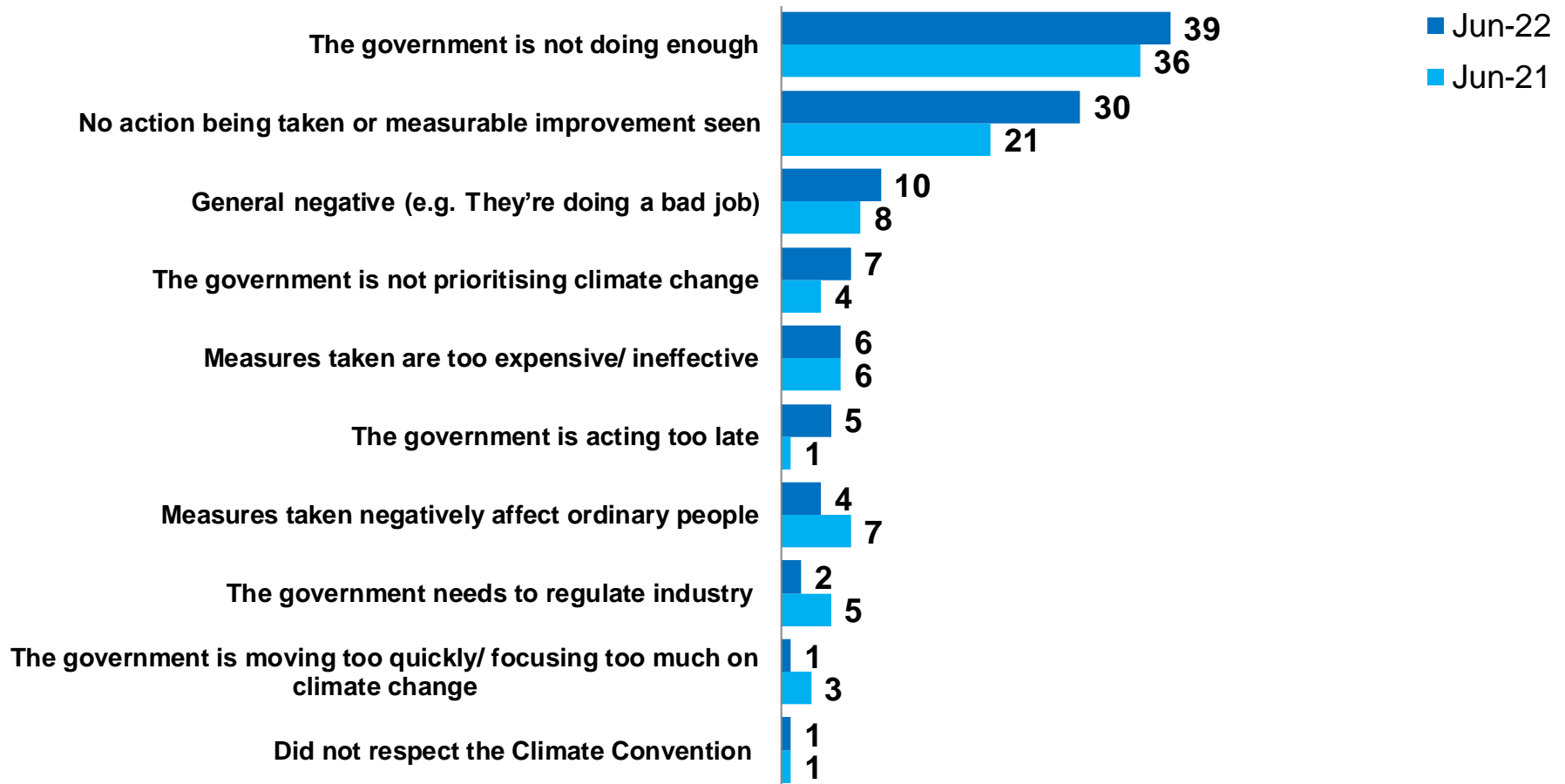
Reasons for approval, those who approve of government handling of climate



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

Biggest reason for disapproval on climate change is government's failure to act

Reasons for disapproval, those who disapprove of government handling of climate



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

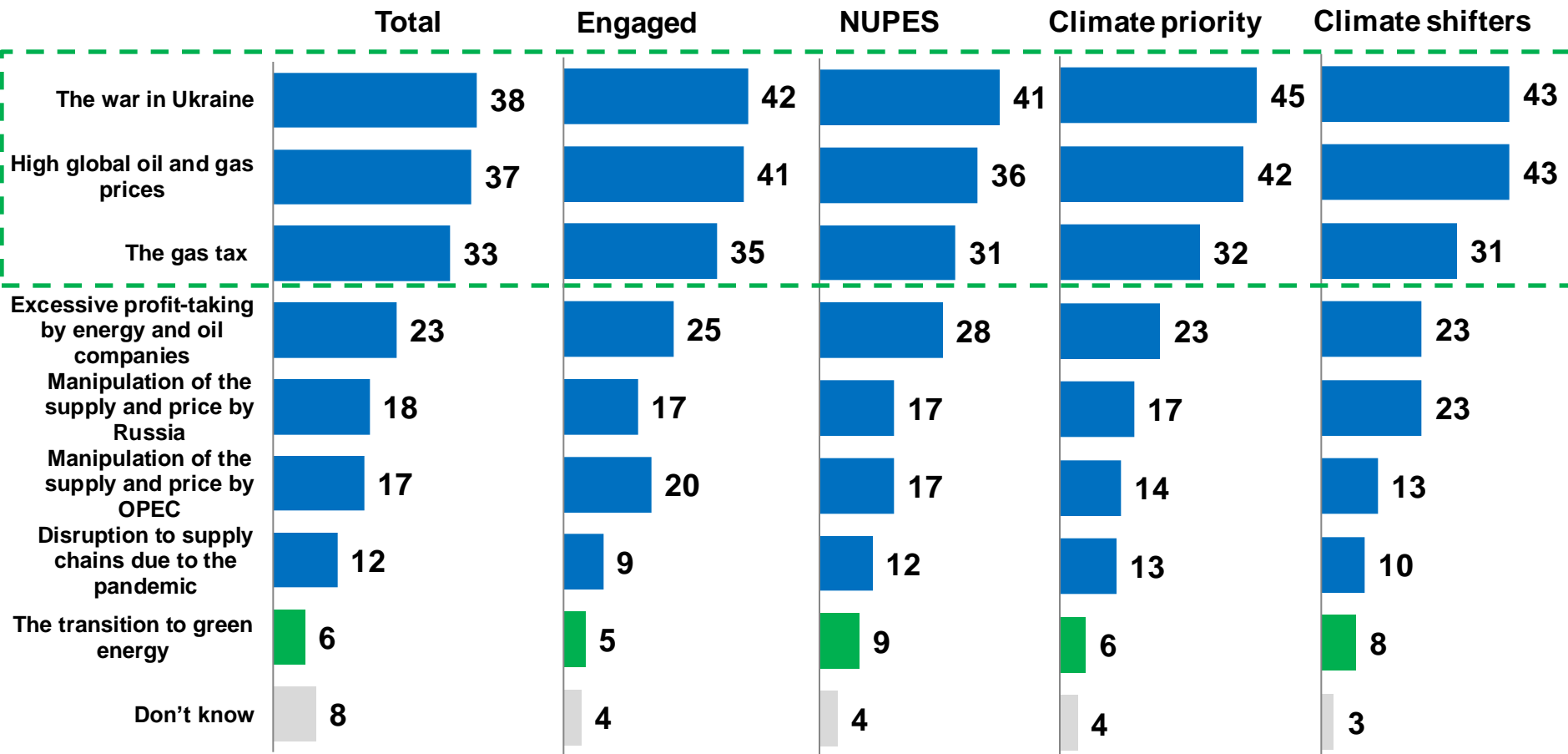
Total sample, n=1,147

Climate and energy policy



People blame war in Ukraine, high global fuel prices and tax for the cost of energy; corporate profits also relevant, but green transition not to blame

Reasons for increased cost of living, by target

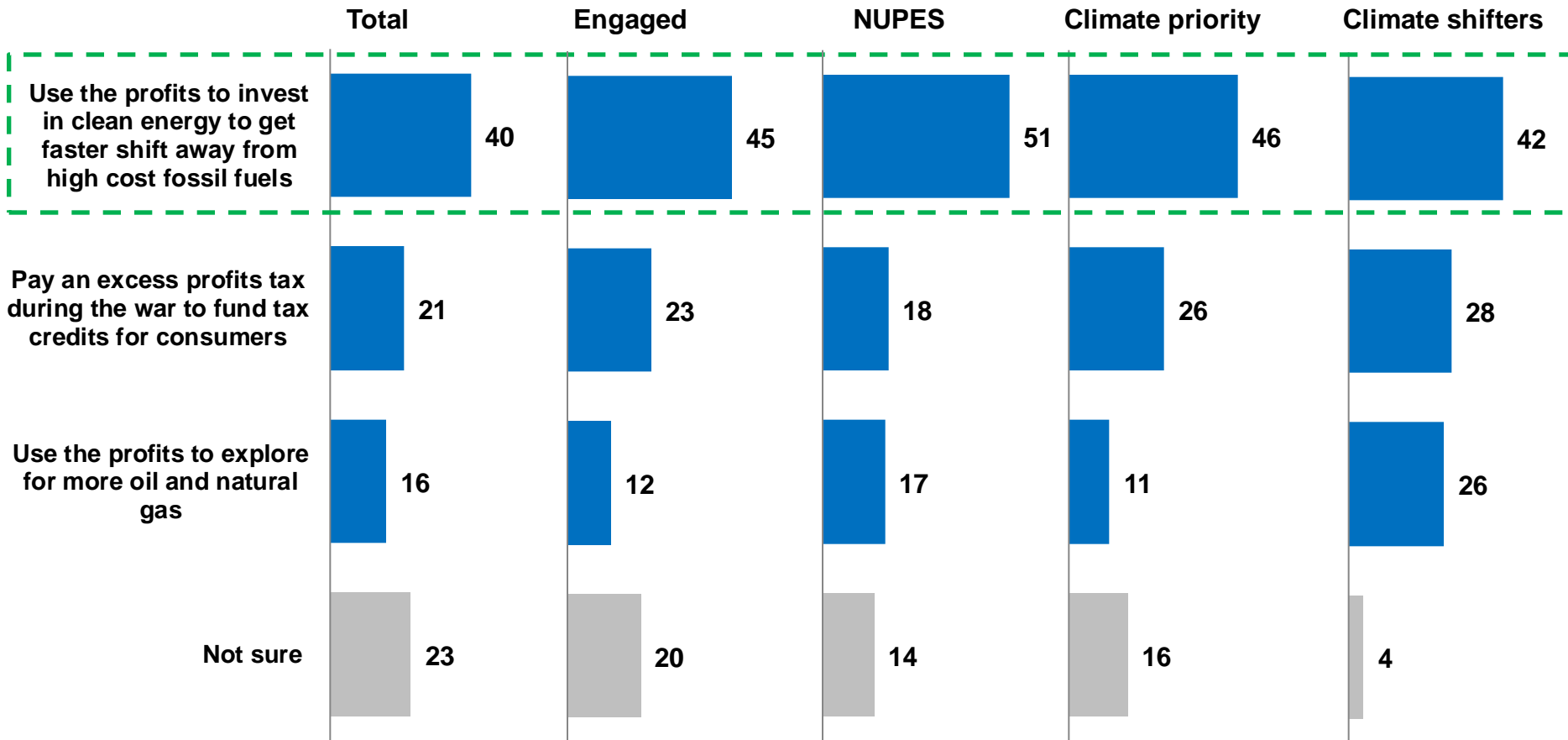


You may have noticed increased prices recently, particularly for energy and food. Why do you think energy prices are high today? Please select the TWO most important reasons from the list below.

Total sample, n=2,000; Engaged, n=853; NUPES, n=532; Climate priority, n=692; Climate shifters, n=129

For all targets, using profits to invest in clean energy is the best approach to energy companies during the crisis

Approach to oil and energy companies, by target

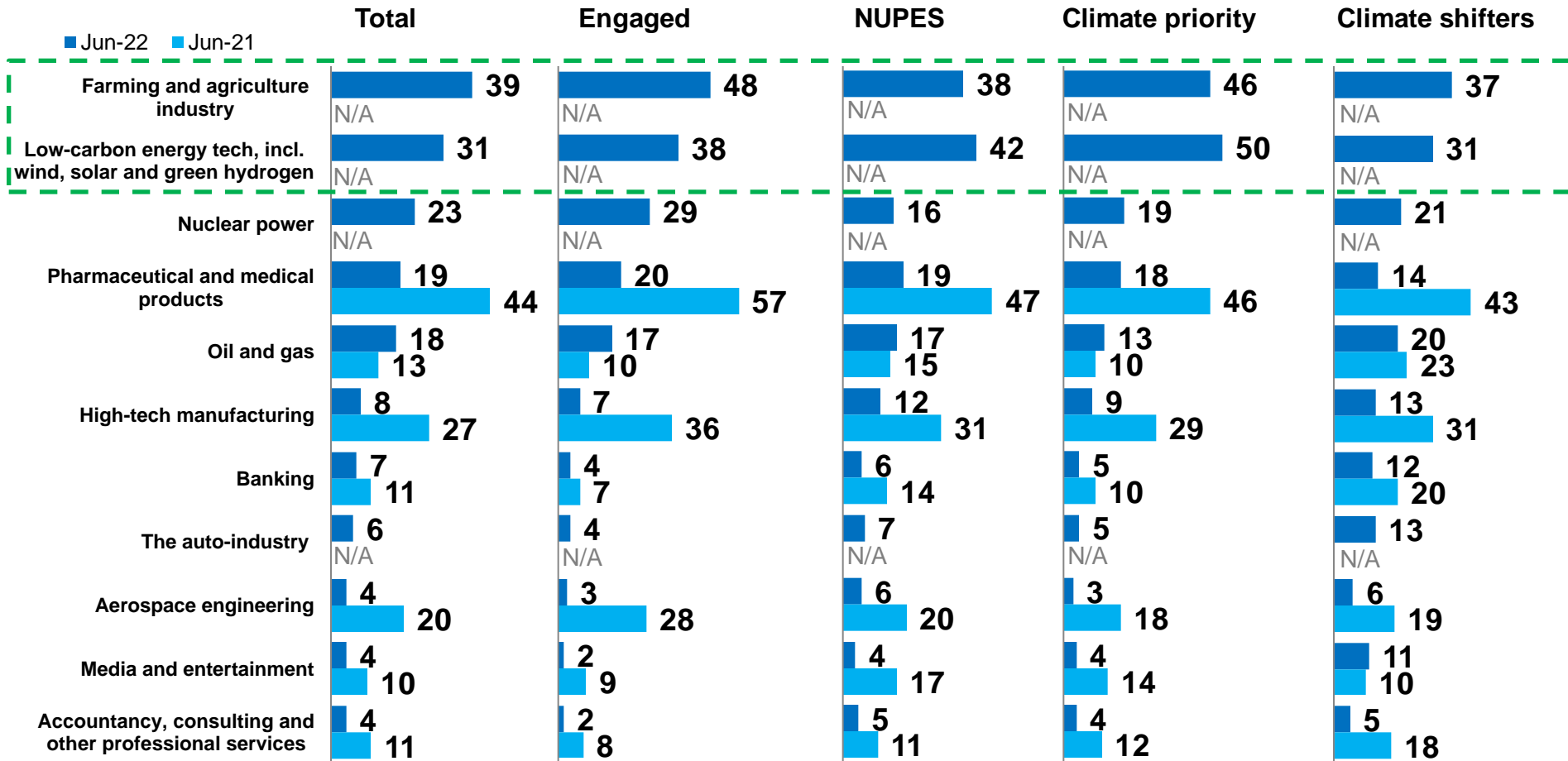


Which ONE is the right approach to oil and energy companies during the energy crisis?

Asked to 1/2-sample: Total, n=1,000; Engaged, n=439; NUPES, n=256; Climate priority, n=346; Climate shifters, n=70

Voters' second highest priority for industrial policy is low-carbon tech – and it's top for NUPES bloc

Industries that government should support, by target



Which TWO of these industries would you MOST want the government to support and champion?

Total sample, n=2,000; Engaged, n=853; NUPES, n=532; Climate priority, n=692; Climate shifters, n=129

A majority think the transition can be achieved without raising their bills, or would be comfortable with an increase – although confidence in no rise has fallen

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

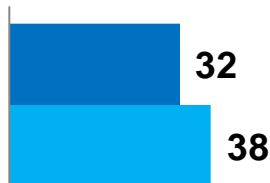
■ Jun-22
■ Jun-21

Bills up 5%

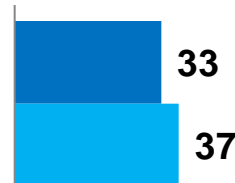
Bills up 10%

Bills up 15%

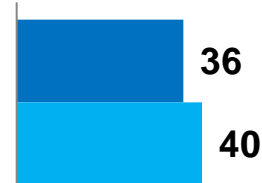
Most changes can be done with renewables and tech that do not require big increases in the cost of energy



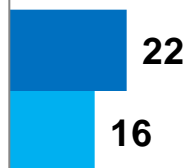
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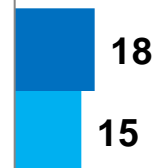
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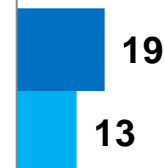
These changes to address climate change could raise energy bills by 5 percent and that would be ok



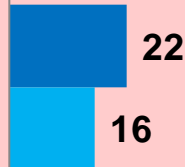
These changes to address climate change could raise energy bills by 10 percent and that would be ok



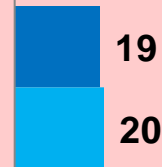
These changes to address climate change could raise energy bills by 15 percent and that would be ok



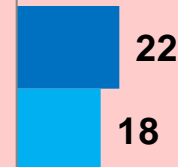
These changes will raise energy costs, and I am against that



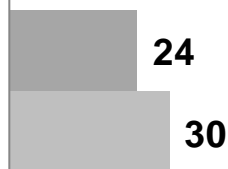
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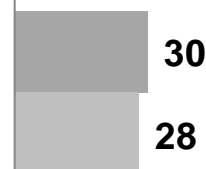
These changes will raise energy costs, and I am against that



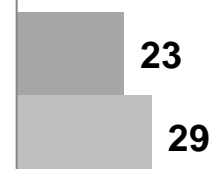
Not sure



Not sure



Not sure



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

In 2021 a plurality preferred to cut out nuclear in favor of renewables, but this has flipped: more now want to maintain or increase nuclear

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

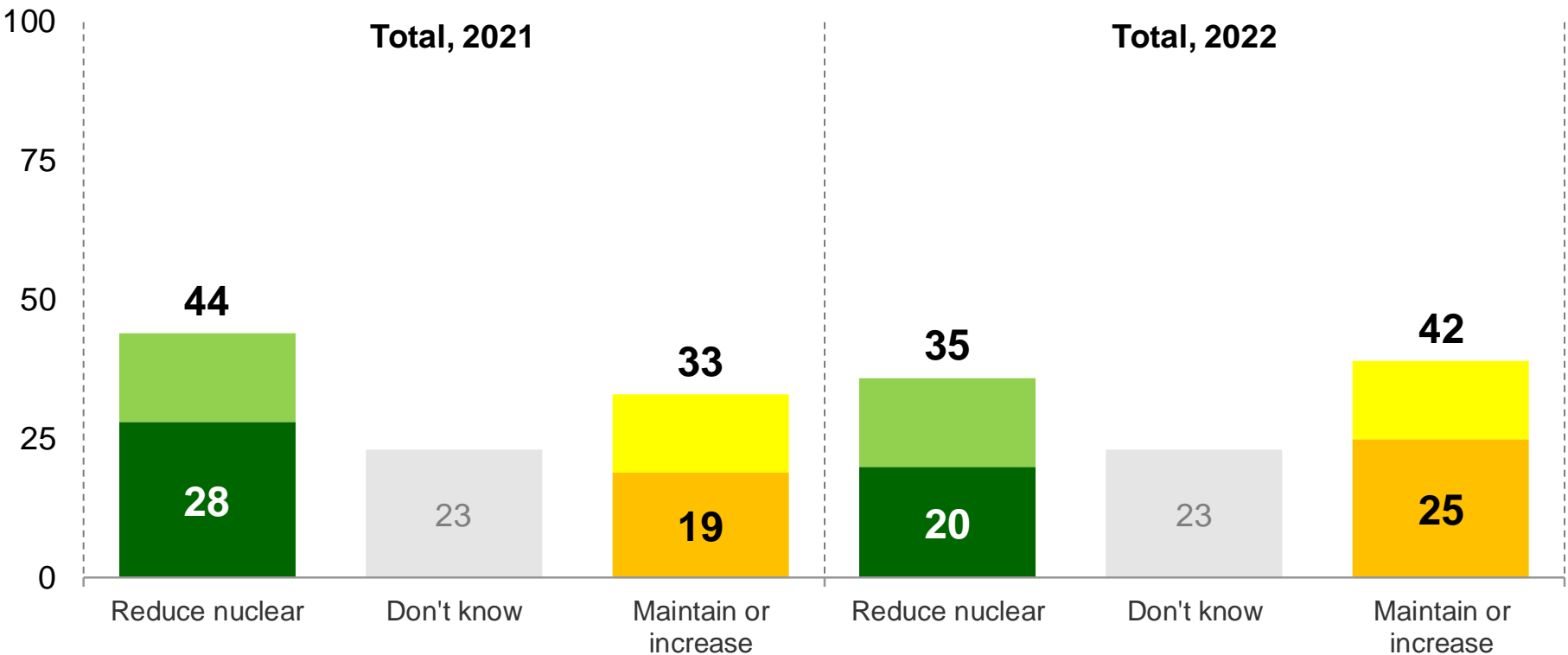
2) France should maintain or increase its use of nuclear power for electricity.

■ Statement 1, much closer

■ Statement 1, somewhat

■ Statement 2, much closer

■ Statement 2, somewhat



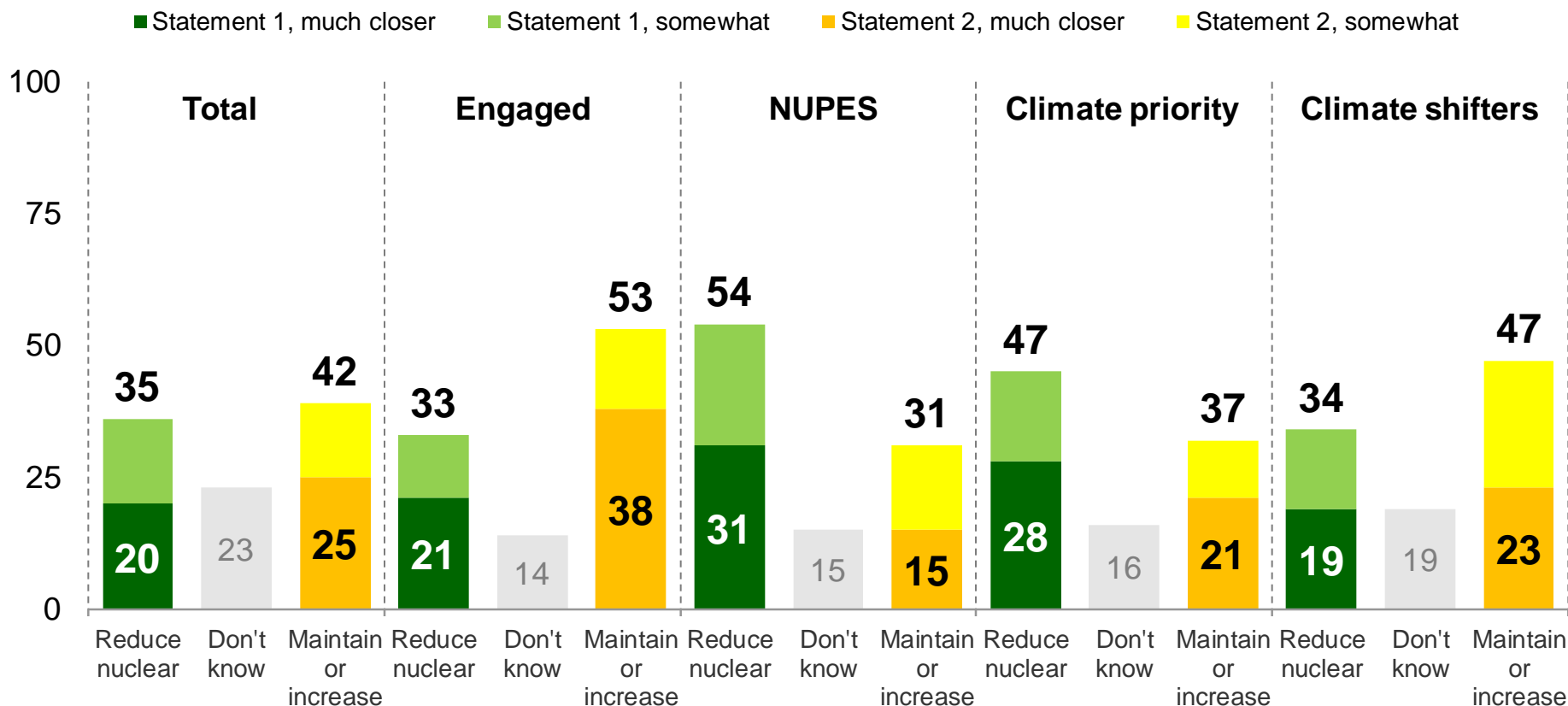
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Total sample, n=2,000

Engaged and climate shifters want France to maintain/increase use of nuclear power; other targets favor using more renewable energy – and one in four aren't sure

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

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



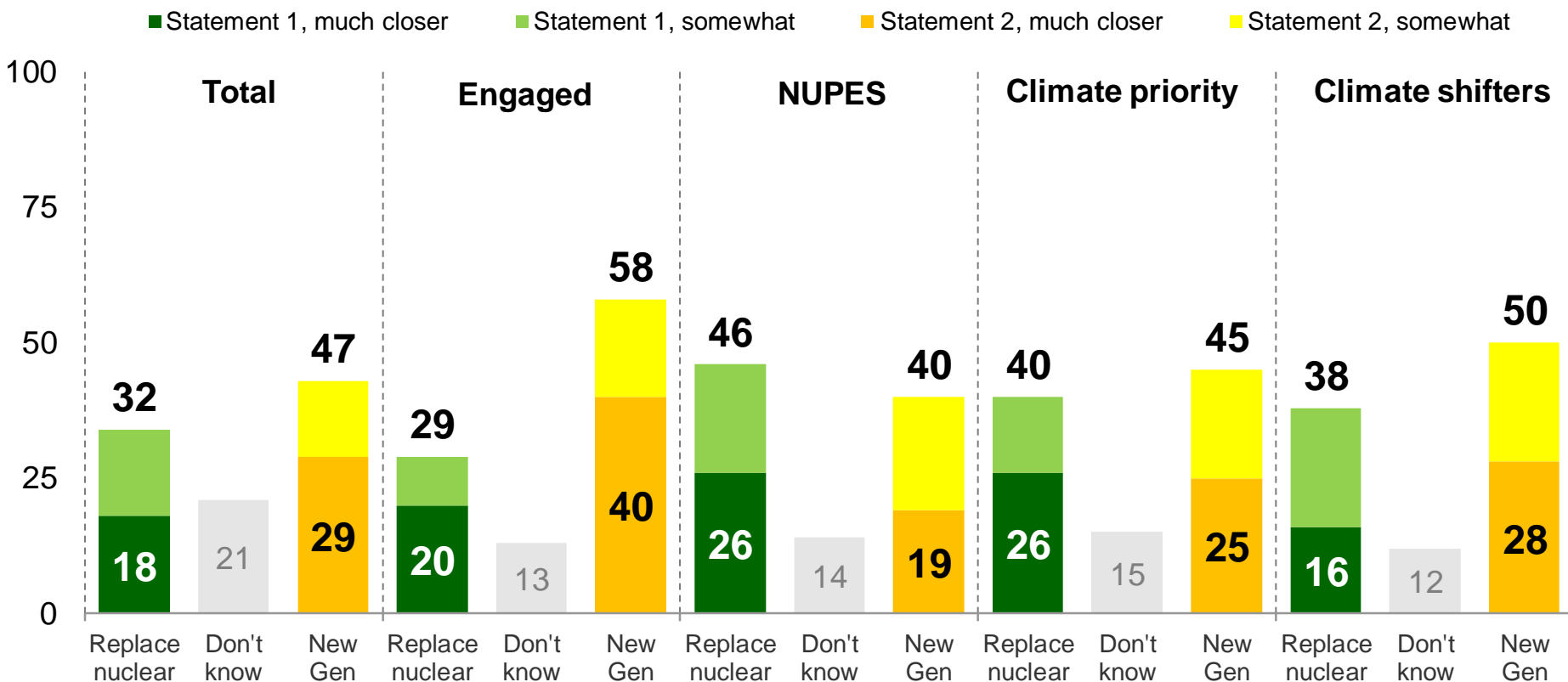
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There is now a strong plurality for extending nuclear with new generation reactors. Climate advocates split on new generation

1) Many of France's nuclear reactors are reaching the end of their lifespan. Now is the time to replace nuclear with renewable energy.

2) Many of France's nuclear reactors are reaching the end of their lifespan. We should develop our renewable energy sources, but also invest in a new generation of nuclear reactors.



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A photograph of a gas control room. The image shows a long, perspective view of rows of industrial valves and pipes. The valves are blue with red handwheels, and the pipes are yellow. The background is slightly blurred, showing more of the same equipment. The text "Ukraine war and end of Russian energy" is overlaid in white, with a green horizontal line underneath it.

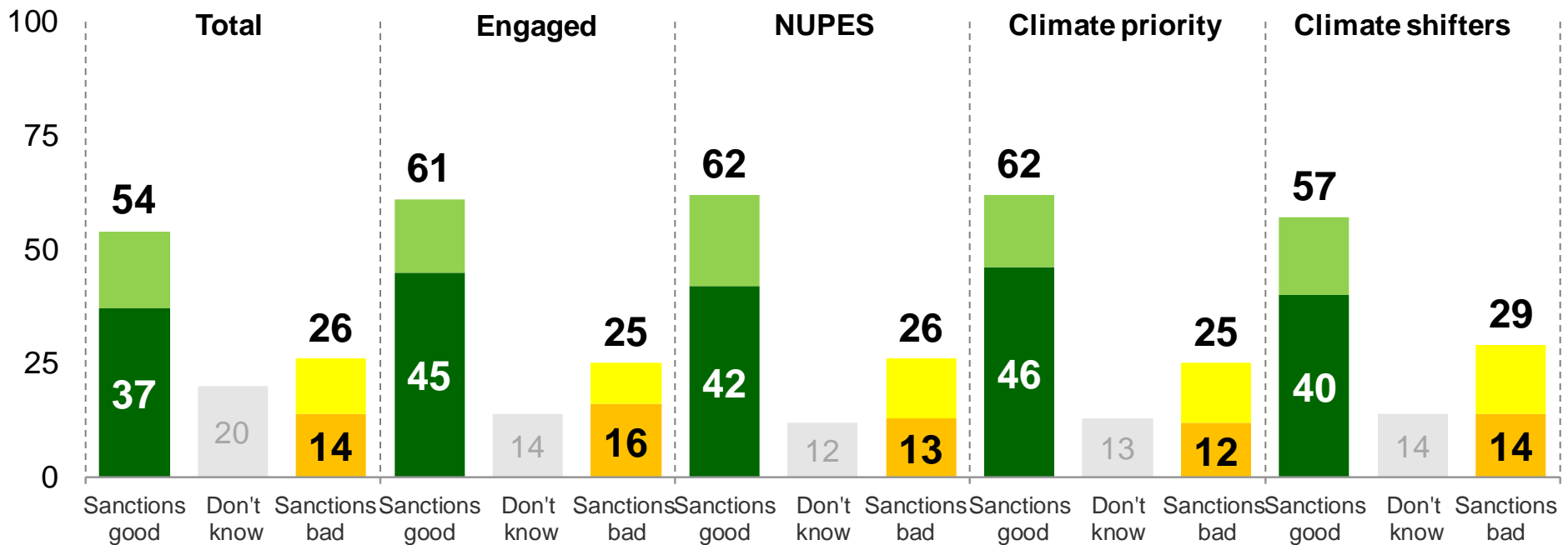
Ukraine war and end of Russian energy

Clear and strong support for Europe's sanctions on Russia, despite economic risk

1) Europe's sanctions on Russia are a good thing because they show we do not tolerate wars of aggression.

2) Europe's sanctions on Russia are a bad thing because they jeopardise energy suppliers, increase costs and put the whole economy at risk.

■ Statement 1, much closer ■ Statement 1, somewhat ■ Statement 2, much closer ■ Statement 2, somewhat ■ Don't know



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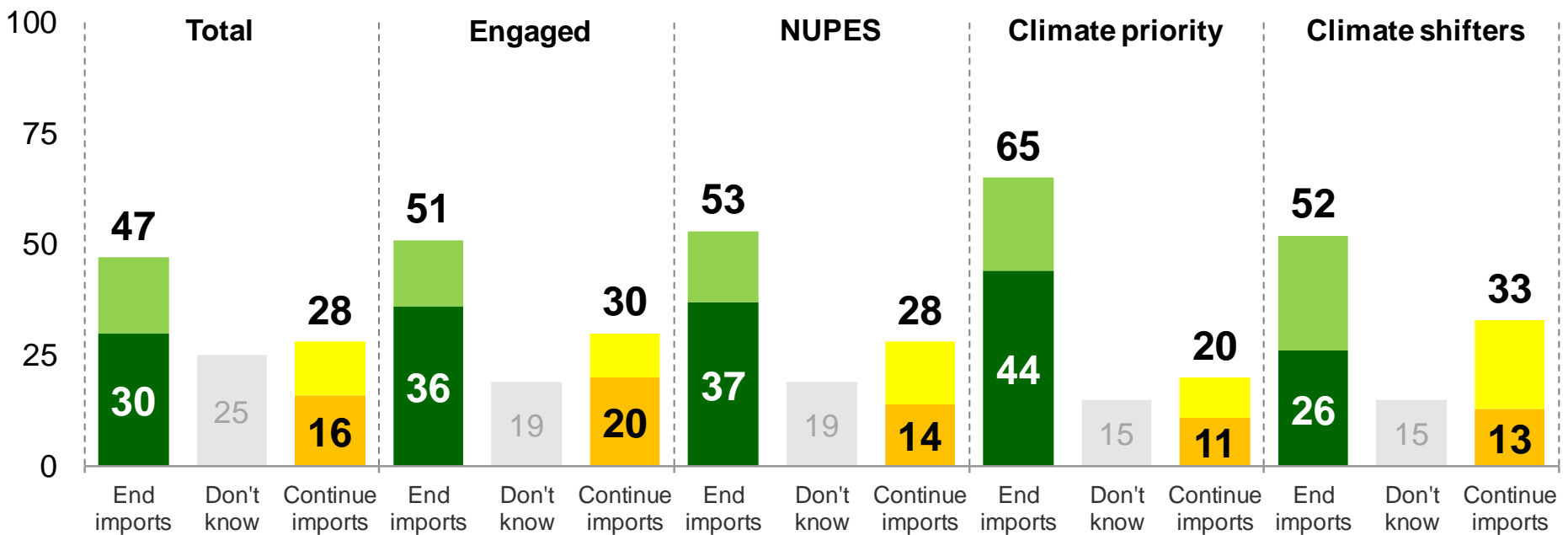
Total sample, n=2,000; Engaged, n=853; NUPES, n=532; Climate priority, n=692; Climate shifters, n=129

Across all targets, people want Europe to end imports of oil and gas from Russia despite higher energy prices

1) Europe should end all imports of oil and gas from Russia, even if it means higher energy prices for consumers.

2) Europe should continue imports of oil and gas from Russia, to keep energy costs to consumers down.

■ Statement 1, much closer ■ Statement 1, somewhat ■ Statement 2, much closer ■ Statement 2, somewhat ■ Don't know



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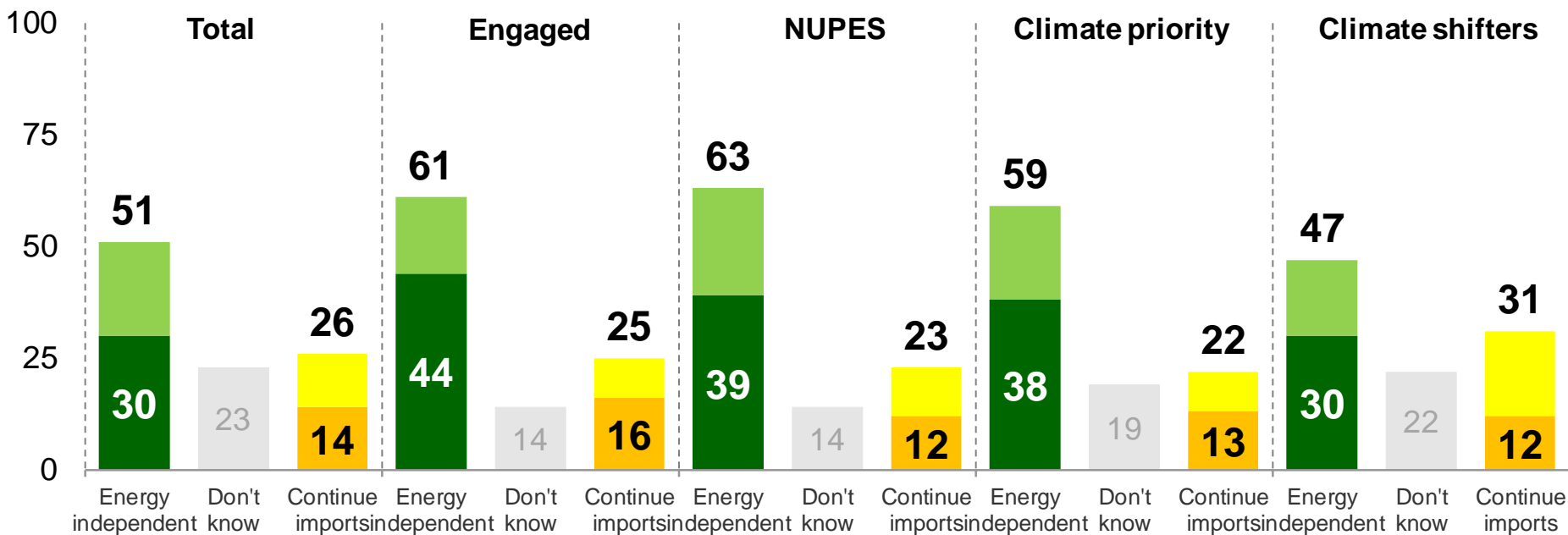
Total sample, n=2,000; Engaged, n=853; NUPES, n=532; Climate priority, n=692; Climate shifters, n=129

Adding decarbonization to reach energy independence increases support for cutting Russian imports, though many aren't sure

1) Europe should accelerate the decarbonization of its economy to achieve energy independence from Russia, even if it means higher energy prices.

2) Europe should continue importing oil and gas from Russia, to keep energy costs to consumers down.

■ Statement 1, much closer ■ Statement 1, somewhat ■ Statement 2, much closer ■ Statement 2, somewhat ■ Don't know



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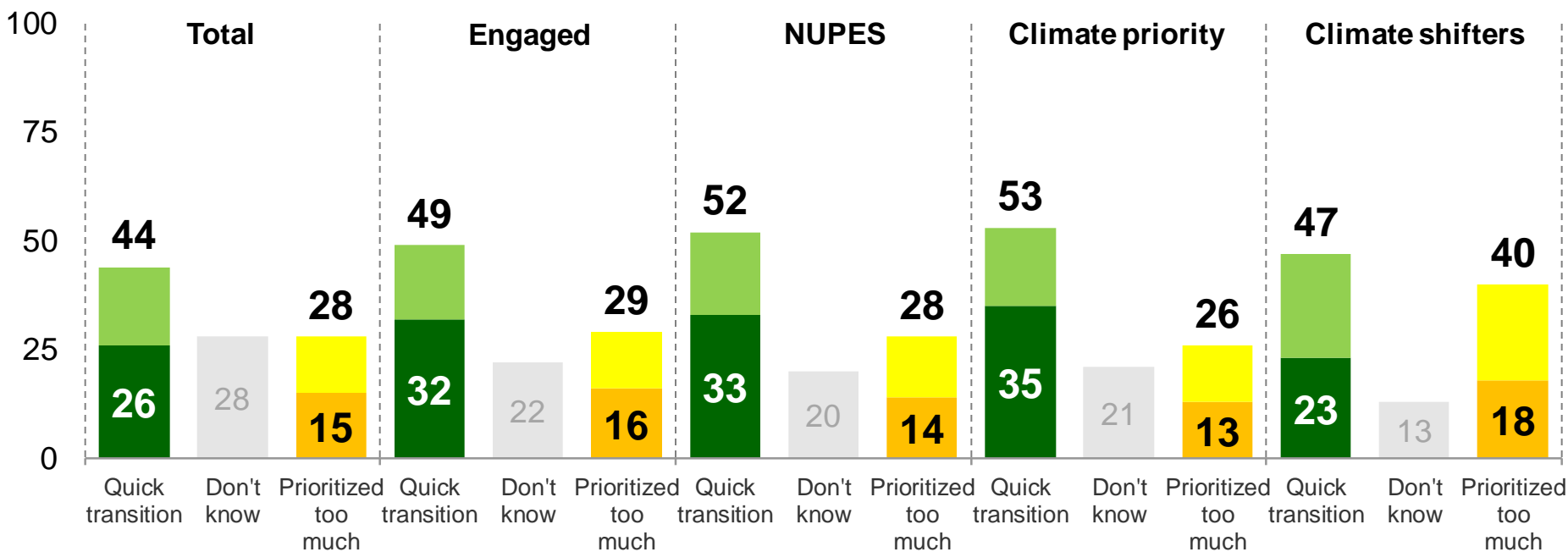
Total sample, n=2,000; Engaged, n=853; NUPES, n=532; Climate priority, n=692; Climate shifters, n=129

Public tend to think the war shows solidarity of western democracies and value of transitioning to renewable; few think prioritized renewables too much

1) The Russian invasion of Ukraine will mean western democracies working to get energy security and independence from Russia. It also showed the value of transitioning as quickly as possible to clean, renewable energy.

2) The Russian invasion of Ukraine will mean the western democracies working together to get energy security and independence from Russia. It also showed we prioritized renewable energy too much.

■ Statement 1, much closer ■ Statement 1, somewhat ■ Statement 2, much closer ■ Statement 2, somewhat ■ Don't know



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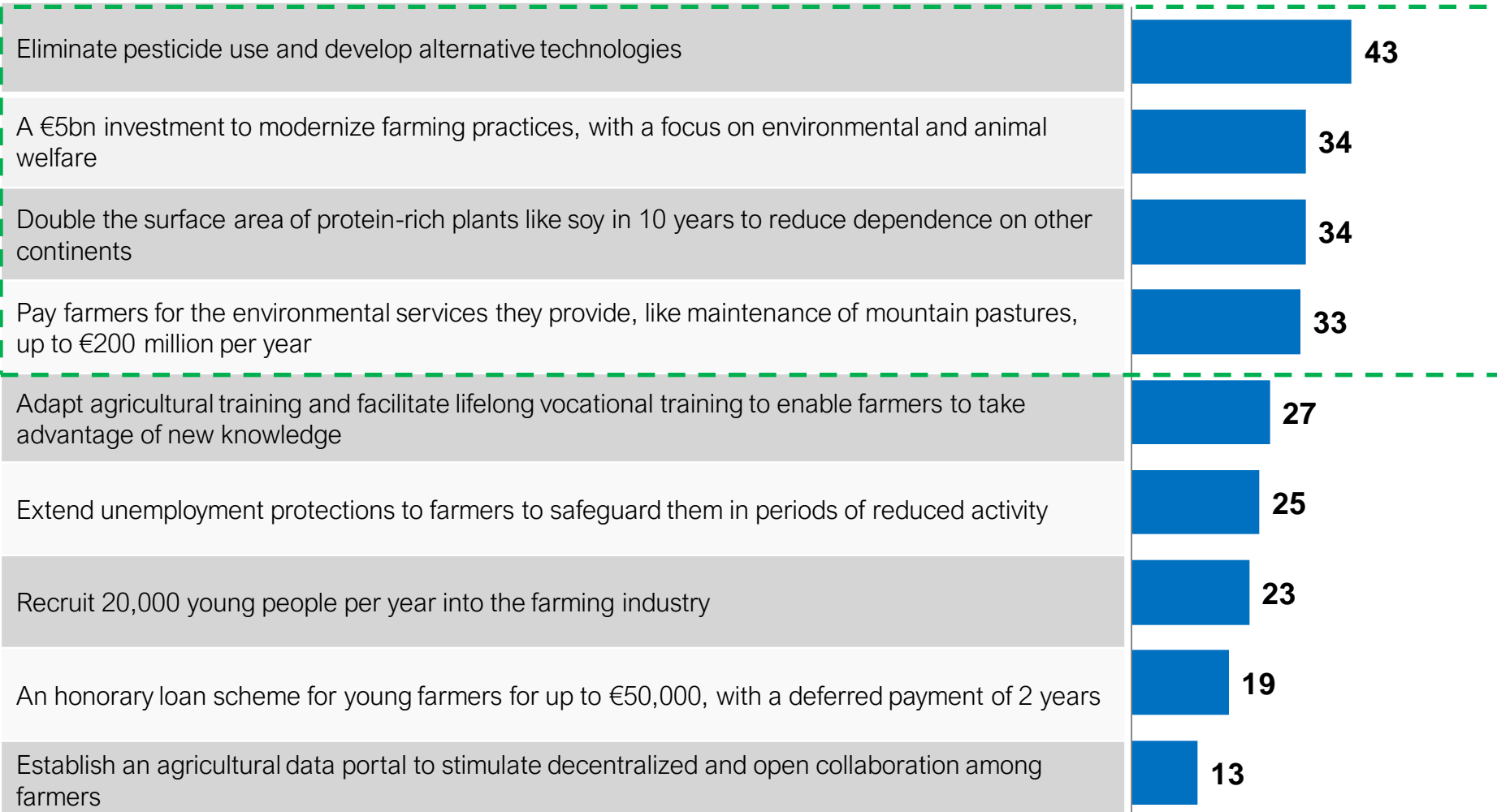
CLIMATE

The Macron government and climate change



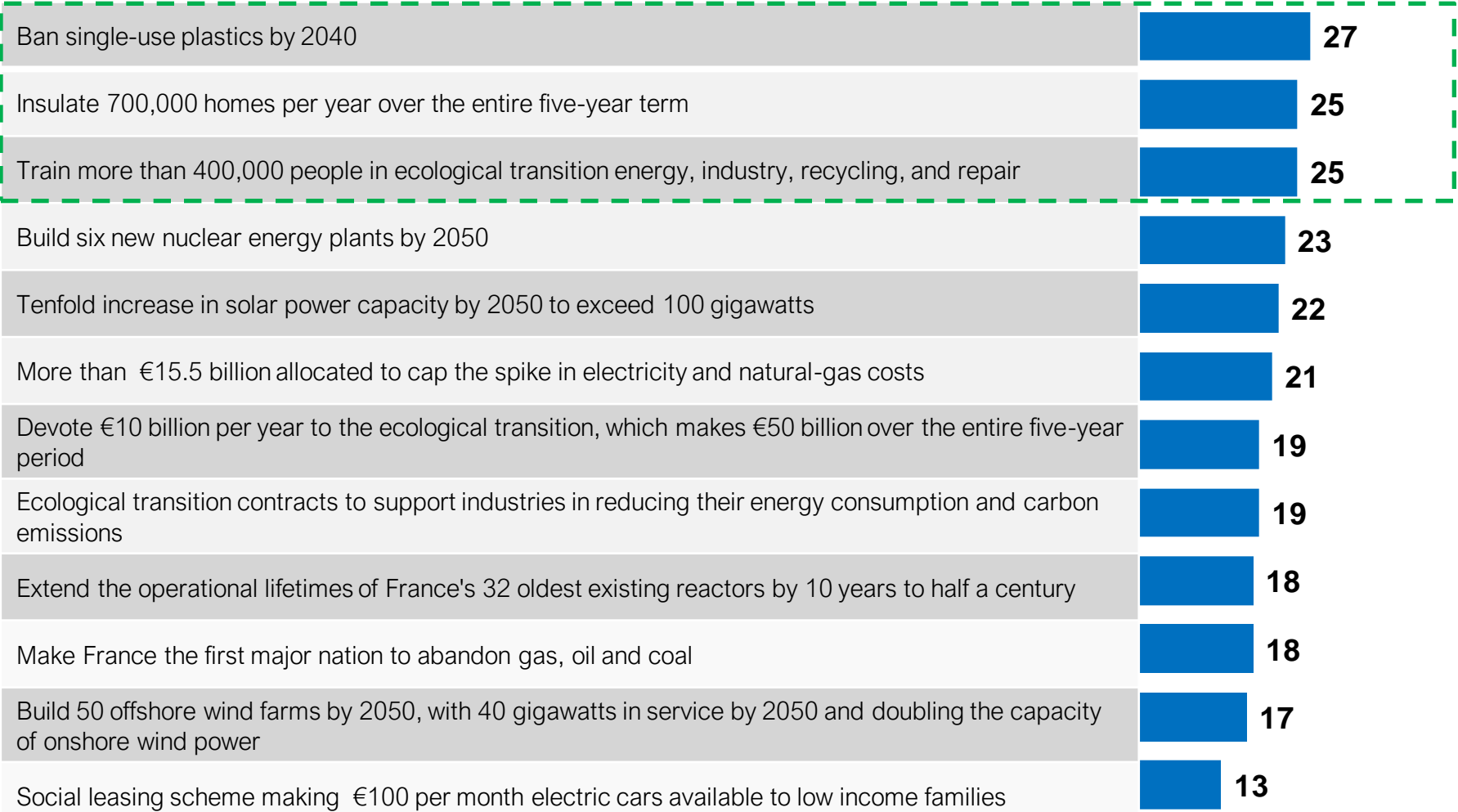
Eliminating pesticide use and developing alternative technologies are the most important agriculture policies

Importance of policies in **government Agriculture Program**, total sample



Climate change policies get flat and minimal response: single-use plastic at top, but nothing pops

Importance of government climate change policies, total sample



Macron political messages: full wording

Food

We need to regain our food independence. The war in Ukraine has destabilized global supply chains and markets. We must reassess our production strategies to defend our food sovereignty. It is our responsibility as Europeans if we want to avoid famines and other tragedies on our borders.

Ukraine

The war has shown us we must move away from fossil fuels more quickly and reduce dependence on Russian energy. We must be more ambitious on the climate front, invest more in renewable and nuclear energies, and protect and support Europeans in the face of price increases.

Choice

France has no choice but to rely on nuclear and renewable energies at the same time. It is the best approach from an ecological point of view, an economic point of view, and the least expensive from a financial point of view.

Plural

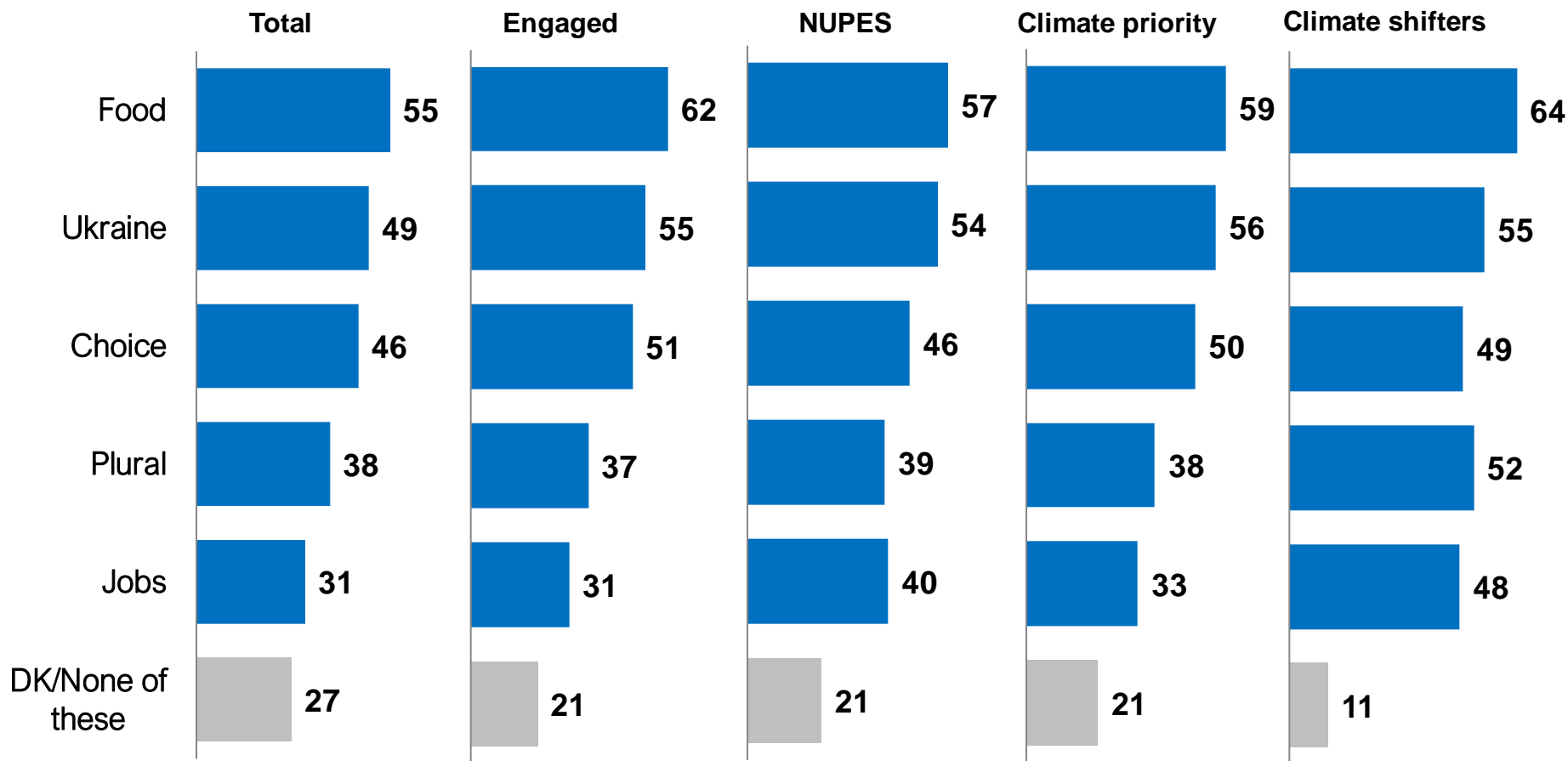
Our production strategy is based on continuing investments to reduce consumption, deploying renewable solar and wind power, and producing nuclear power with a new reactor construction plan. Decarbonized energy production requires renewable energy and nuclear power.

Jobs

We will continue to develop industrial employment strategies so that our investment in offshore wind power is accompanied by job creation everywhere on our territory. Our aim is to develop low-carbon energy and an industrial sector.

For all targets, food independence is strongest message, and it suggests competing goals

Government climate statements, by target



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

Political messages from left wing opposition parties: full wording

Transport

Macron's program does not include any of the structural recommendations in terms of transport, with the development of rail transport completely passed over. It is the same for cycling and public transport. He commits to affordable electric vehicles but gives no details on how to deliver.

Nuclear

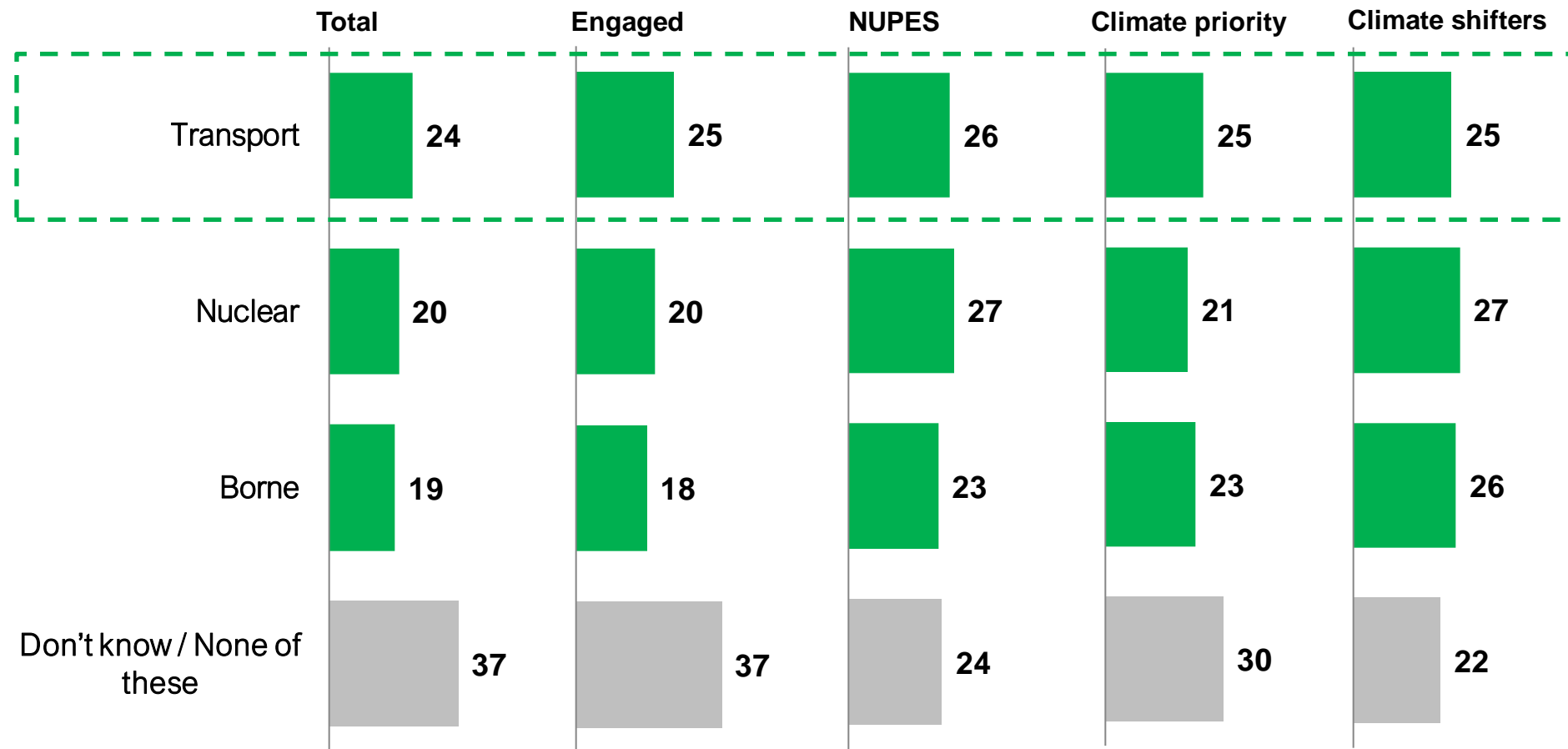
President Macron stubbornly promotes the illusion of nuclear power as a climate solution, despite admitting that no new nuclear power plant will produce electricity before 2040. Polluting, failing, expensive and slow, nuclear energy is neither 'green' nor 'transitional.'

Borne

Elisabeth Borne, as Minister of Ecology or Minister of Transport, failed to put France on the path to fulfill the Paris Agreement. She shares responsibility for these five years, having failed to pass Citizens' Climate Convention measures, or get the transport sector away from its use of fossil fuels.

Opposition messaging is not convincing: more than a third do not sympathize with any message

Left wing opposition party climate statements, by target



Below are some statements from parties and organizations opposing the government's plans on climate change. Which ONE makes you most WORRIED about these plans?

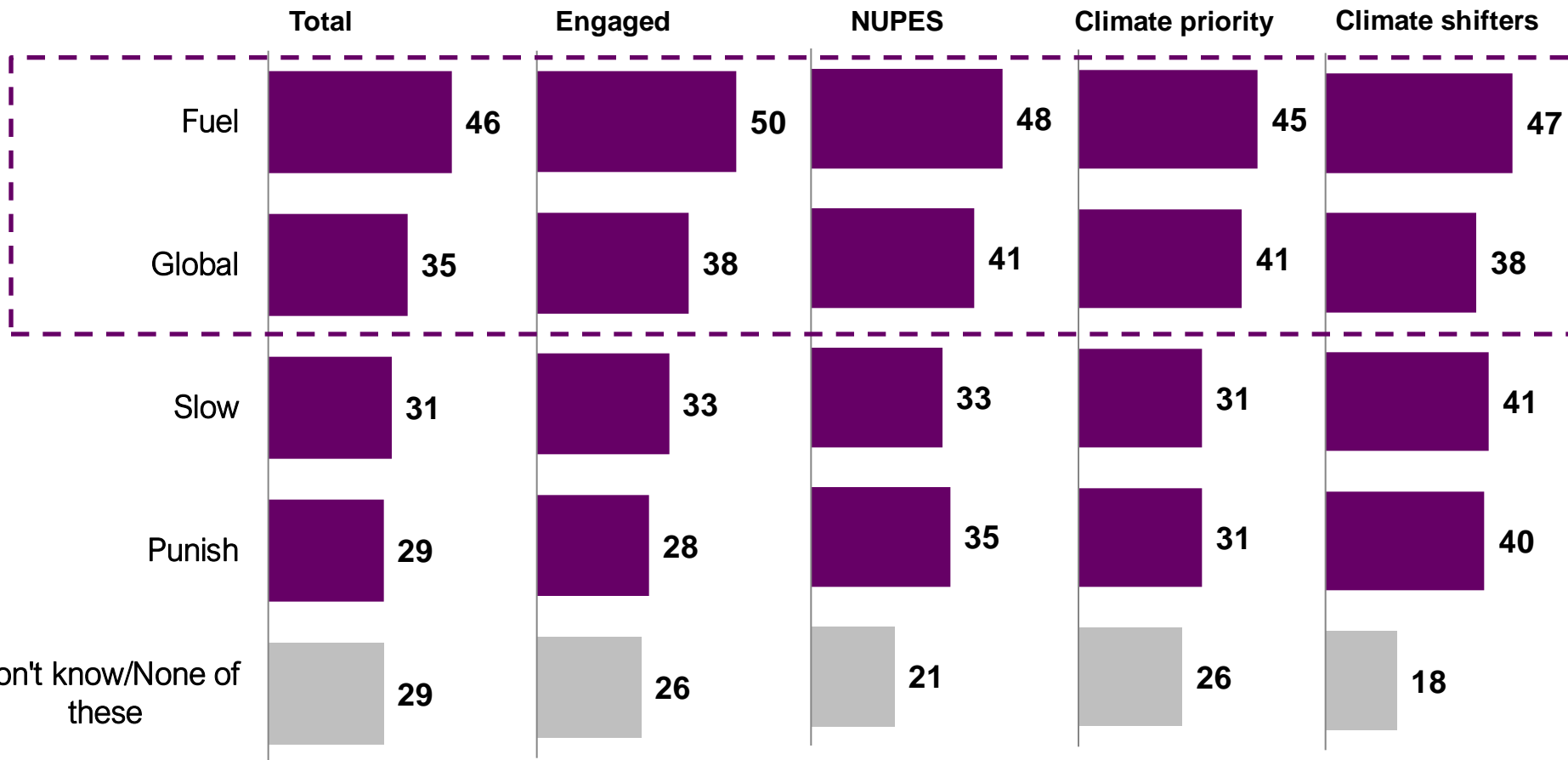
Total sample, n=2,000; Engaged, n=853; NUPES, n=532; Climate priority, n=692; Climate shifters, n=129

Political attacks from the right: full wording

Fuel	Fuel prices are soaring and reaching a historic level, dealing a blow to the purchasing power of families. In 2017 and 2018, Macron heavily increased fuel taxes, which today, represent nearly 60% of the price at the pump.
Global	Successive governments have failed because they use climate to tax the people instead of challenging the practices that contribute to climate change, like globalism and free trade. Real sustainable development can only be achieved with localism, the relocation of industrial and agricultural activities to France, and bold technological choices.
Slow	In 2021, Macron announced a nuclear revival that was never put in place. The timetable for building nuclear reactors will barely allow nuclear to provide 50% of France's electricity. This plan is too little and too slow, and unable to rebuild an efficient industry and provide France with the electricity it needs.
Punish	We want national environmental policies based on localism and a preference for French products. We must turn the page on punitive environmental policies and bad conscience. France is among the five countries with the best record on the environment - why punish the French? It's not up to France to pay for others.

Right wing opposition messages hit home, especially complaints about fuel prices and fuel tax

Right wing opposition party climate statements, by target

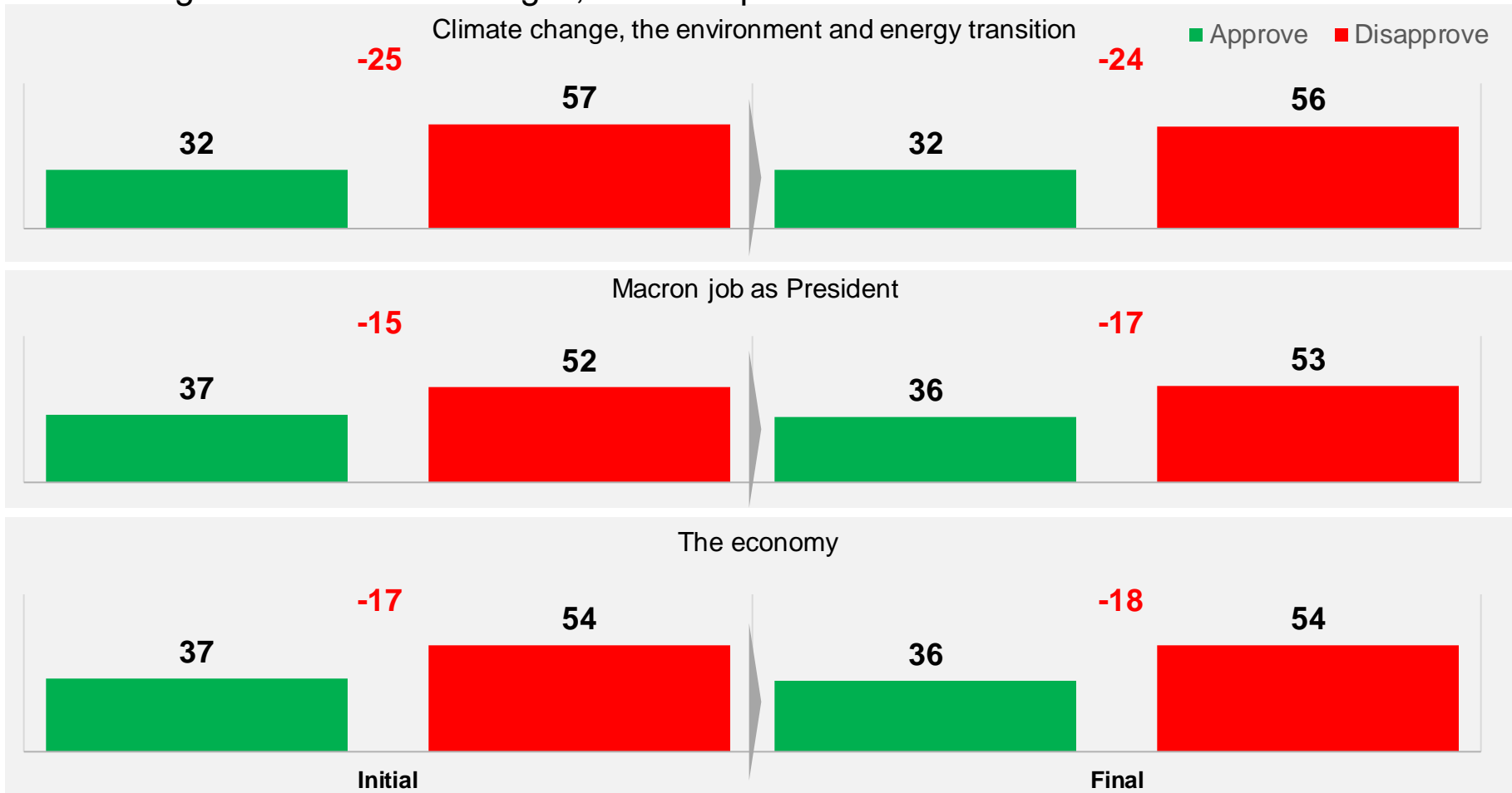


Below are some statements from politicians and organisations opposing the government's plans on climate change. Which TWO make you most WORRIED about these plans?

Total sample, n=2,000; Engaged, n=853; NUPES, n=532; Climate priority, n=692; Climate shifters, n=129

Macron after policies and balanced messaging, not surprisingly, makes no gains on his approval, handling of the economy and climate

How the government is handling..., total sample



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

Total sample, n=2,000

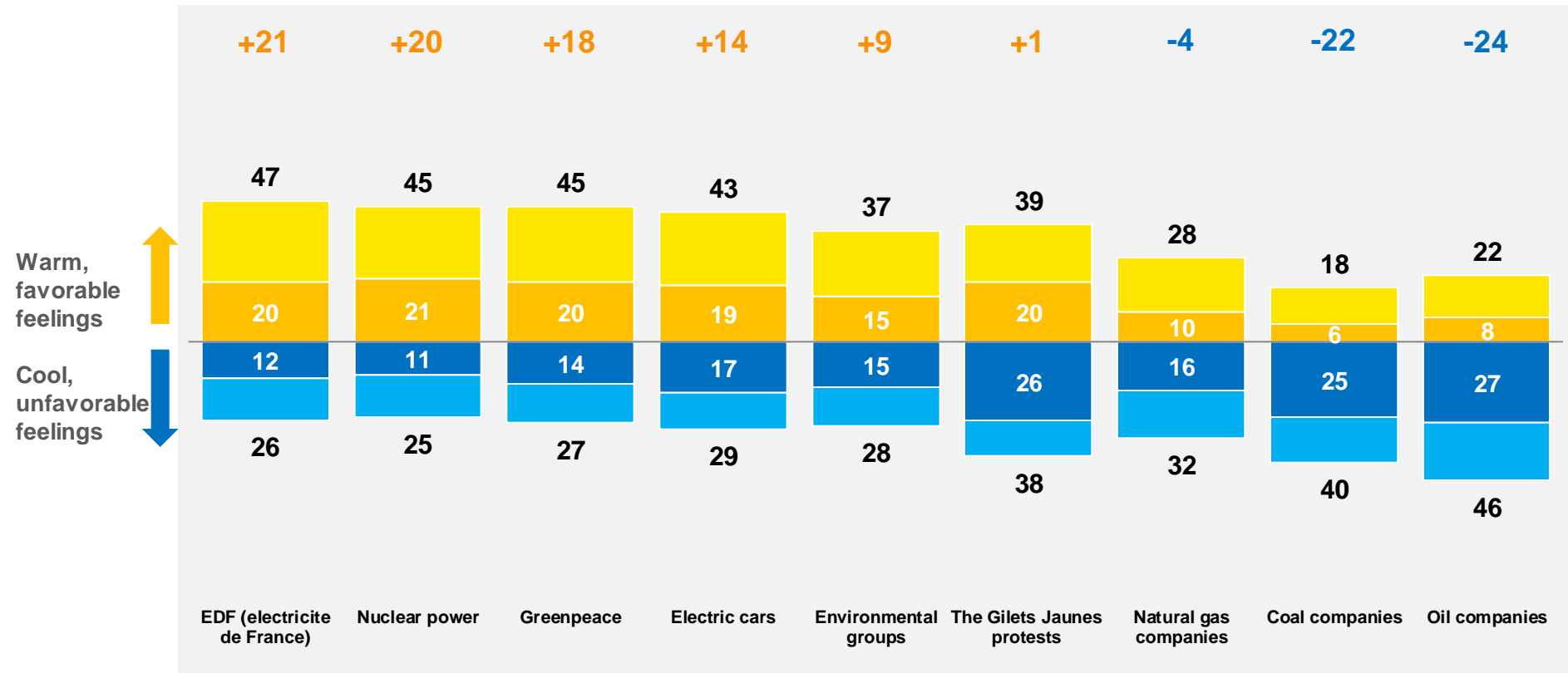
Perceptions of business



EDF and nuclear have highest favorability, ahead of environmental groups; gas not favored, but much stronger than oil or coal

Feelings toward companies and environmental actors, total sample

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



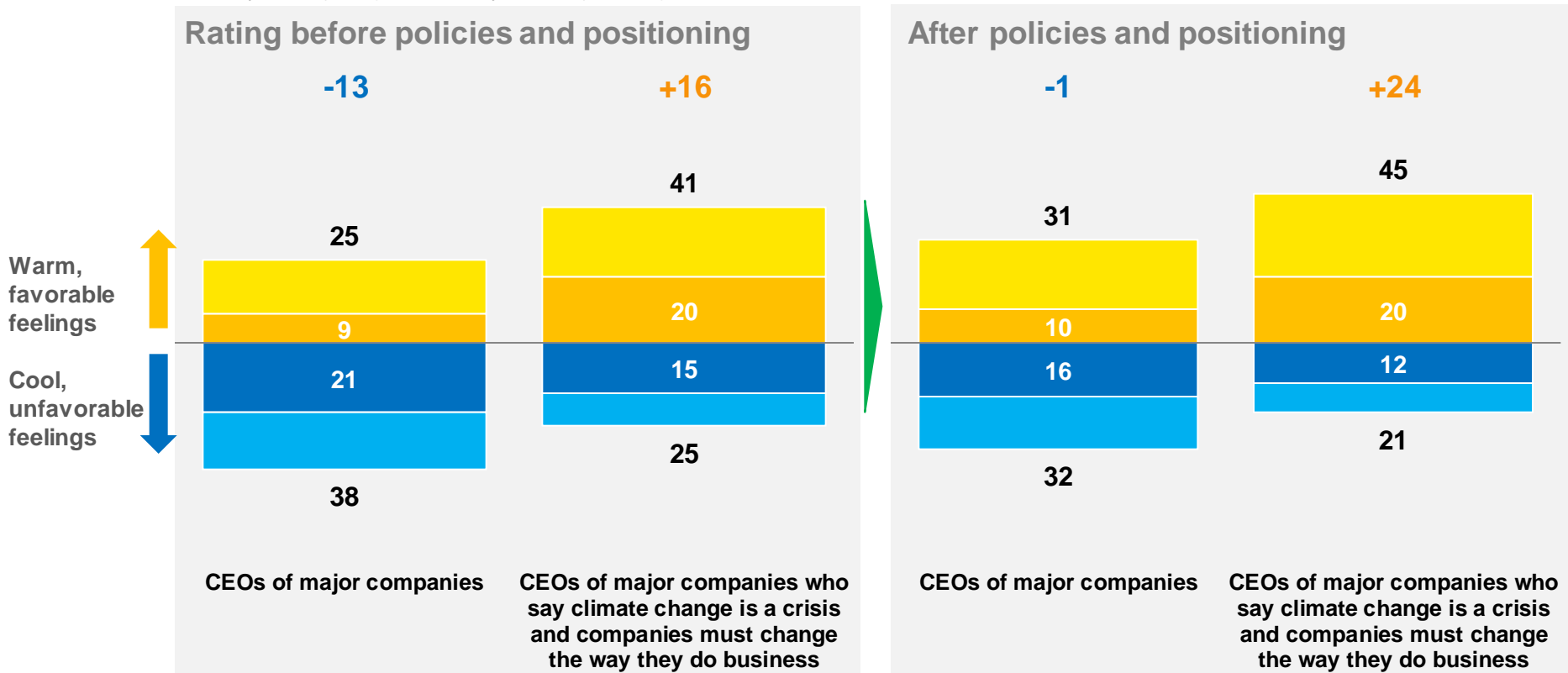
Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVOURABLE feeling; zero meaning a VERY COLD, UNFAVOURABLE feeling; and fifty meaning not particularly warm or cold.

Total sample, n=2,000

Saying “climate change is a crisis and we must change” hugely improves CEO favorability; messages give a further boost

Feelings toward CEOs pre and post policies and positioning, total sample

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



Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVOURABLE feeling; zero meaning a VERY COLD, UNFAVOURABLE feeling; and fifty meaning not particularly warm or cold.

CLIMATE
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Tracking survey, June 2022

