ENERGY TRANSITION BAROMETER 2026

Views on:

- Affordability
- Security
- Reliability
- Climate Resiliency
- Investment
- Conservation Actions
- Electricity Generation Sources

Detailed Global Report
July 2026

© Ipsos | Energy Transition Barometer 2026

Introduction

We define the energy transition as the evolving global energy landscape—marked by electrification, oil supply constraints, and ongoing clean energy investment.

Today, we see energy anxiety deepening on multiple fronts and all at once. Affordability, security, and reliability are converging to reshape public expectations of policy makers and the (geo)politics of the energy transition. The energy transition is no longer based on climate urgency alone, it is driven by cost of living, economic security, and risk.

On affordability, three in four people globally (76%) say they are worried about rising energy costs while half have cut other spending to cover rising energy costs (49%). Countries that are especially exposed to rising energy costs including Thailand, Chile, India, and Singapore are seeing all four measures rise sharply at once.

Foreign energy dependency anxiety rose 7 points to 70% between February and May 2026 — a shift driven by the Iran conflict making energy vulnerability feel concrete and immediate. The sharpest shifts: Australia (+16pts), Singapore (+13 points), India (+13pts), and Great Britain (+12pts). Support for energy independence, even at higher cost, rose to 60% globally. At the same time, 53% want low prices even if emissions rise — a direct tension with climate goals which has increasingly been taking a back seat in the minds of the public.

Confidence in grid reliability is uneven and falling on the metrics that matter most. While 46% are confident their region will meet future electricity demand, only 35% believe grids are ready for the energy needs of AI data centres — the lowest score of any reliability measure. Emerging markets dominate AI grid optimism; advanced economies are notably sceptical, raising questions about the political readiness for the infrastructure investment needed.

On the energy transition itself, public support for investment remains solid but selective. Two in three (67%) support renewable energy and storage investment, and 58% back heat pump incentives. Support for small nuclear reactors stands at 47% — with South Africa, India, and Poland leading — while fossil fuel pipeline investment attracts just 43% and faces net opposition in some European markets.

The willingness to act on the energy transition today is solid. With the consumer and economic costs of traditional fuel sources so high, the transition to a carbon neutral energy base will only happen much faster.

This study, the 2026 Energy Transition Barometer surveyed 23,704 adults across 31 countries in January and February 2026, with follow-up fieldwork in April and May capturing the early effects of the Iran conflict on public attitudes. The result is a rare before-and-after view of how a geopolitical shock reshapes public attitudes toward energy cost and security, and the transition itself.

Martin Hrobsky

Ipsos Global Public Affairs

Energy and Environment Global Lead

Key Findings

70%

are concerned that their country **relies too much on foreign energy sources** for energy needs given what is happening in the world today.

(across 31 countries)

52%

say it has become **hard to pay household energy bills** in the past 12 months

35%

are confident that their region **has enough electricity** to meet the rising energy needs of artificial intelligence **(AI) data centres.**

67%

support **investment in renewable energy** and energy storage facilities for more electricity generation

36%

say they are doing all that they can do to **conserve energy.**

© Ipsos | Energy Transition Barometer 2026

Summary

Affordability Worries Loom

Energy affordability concern keeps climbing, although they were already high prior to the Iran conflict.

Three in four people globally (76% on average across 31 countries) say they're worried about rising energy costs, up two points since February and now the highest of all four measures. Worry is highest in Great Britain (87%), Chile (86%), and South Africa (85%). Just over half (52%) say it's become harder to pay energy bills in the past year, and 59% say their household limits heating/cooling to save money. Nearly half (49%) have cut spending on other items to cover energy costs. Thailand, Chile, India, and Singapore are seeing the sharpest rises across multiple measures at once since the Iran conflict began.

Energy Security is Crucial

Energy security has surged to the top of the public agenda.

Across 31 countries, 70% now agree their country relies too much on foreign energy sources — up 7 points from 63% in February, with the sharpest rises in Australia (+16pts), Singapore (+13pts), and India (+13pts). A strong 60% say their country should prioritize energy independence even at higher cost, up 5 points. At the same time, 53% want government to prioritize low energy prices even if emissions rise, up 3 points — a genuine tension between cost and climate.

Reliability Anxiety

There's anxiety about both short- and long-term energy supply.

Just under two in five (39% on average globally) are concerned their region will have an unplanned power outage in the next 12 months, with fear running highest in Peru (62%), India (61%), and Argentina (61%). Less than half (46% on average) are confident their region will have enough electricity to meet future demand. Confidence is lowest of all on AI readiness: only 35% agree their region has enough electricity to meet the rising needs of AI data centres, with emerging markets far more optimistic than advanced economies. Slightly less than half (45%) are confident renewables alone can meet future demand.

Climate Adds to the Concern

Climate exposure is a fourth pressure point on an already strained public. The past 11 years have been the warmest on record, according to the World Meteorological Organization, and people feel it. Almost two-thirds are worried about heatwaves (63%) and damaging storms/heavy rainfall/flooding (63%) in the next 12 months, with majorities also stressed about drought/water scarcity (60%), smog/poor air quality (59%), and wildfires (55%). Tellingly, many of the most climate-exposed countries — Mexico, Indonesia, Türkiye — are also among the most price-sensitive, meaning the households feeling the threat most acutely are often least able to absorb the cost of addressing it.

Summary

Conservation Opportunity

A strong majority are engaged in energy conservation, though there's room to do more. Just over a third (36%) say they're doing all they can to conserve energy, while 41% are taking action but acknowledge they could do more. Just 7% report taking no steps at all — together, 77% of adults are engaged in some form of conservation. Brazil (53%), France (49%), South Africa (49%) and India (49%) lead on "doing all they can," while Japan (9%) and South Korea (14%) sit at the bottom, despite their technological capacity for efficiency.

Support for Renewables

There's a clear appetite for renewables. About three-quarters of respondents support increased development of solar power (77%), hydroelectricity/water power (72%), and wind power (70%) in their country. Support drops for natural gas (54%), nuclear power (41%), and coal (29%) — the only source where opposition (35%) outweighs support. Solar has the most support and majority backing in every country except Japan (45%). Coal has the least support and most opposition, with majority backing in only South Africa (60%) and India (52%).

Solar Power Leads the Way

Solar power stands in terms of public support as it leads in overall support (77%) and is widely perceived as environmentally friendly (80%), reliable (72%), and affordable (69%) — ranking highest of any energy source across all three attributes, a breadth of confidence unmatched elsewhere. Support is strongest in South Africa (90%), Thailand (87%), and Türkiye (86%), with majority backing in every country surveyed except Japan (45%), which also brings up the rear on solar's perceived reliability and affordability.

Nuclear Divides Opinion

Support for increased nuclear development sits at four in ten (41%) globally, well behind renewables, with opinion split between supporters and a vocal 25% in opposition. While nearly half see nuclear as reliable (46%) and four in ten as affordable (39%), only about a third view it as environmentally friendly (35%) — matched almost exactly by those who disagree (35%). Poland (62%) and Sweden (54%) are the strongest advocates, while New Zealand (26%) and several Latin American countries are firmly opposed. Support rises for newer approaches, with 47% backing investment in small modular nuclear reactor technology.

CONTENTS

1 Energy Transition Barometer

2 Affordability

3 Security

4 Reliability

5 Climate Impact

6 Energy Transition Investment

7 Energy Conservation Actions

8 Energy Sources

9 Methodology

© Ipsos | Energy Transition Barometer 2026

Energy Transition Barometer

© Ipsos | Energy Transition Barometer 2026

Energy Transition Barometer

Introducing the Ipsos Energy Transition Barometer

To help make sense of where countries stand in the energy transition, Ipsos developed the Energy Transition Barometer — a composite measure drawn from the *Energy Transition Barometer Survey*, a global survey conducted across 31 countries. The Index captures the degree to which populations are experiencing and feeling the pressures of the energy transition across four critical dimensions:

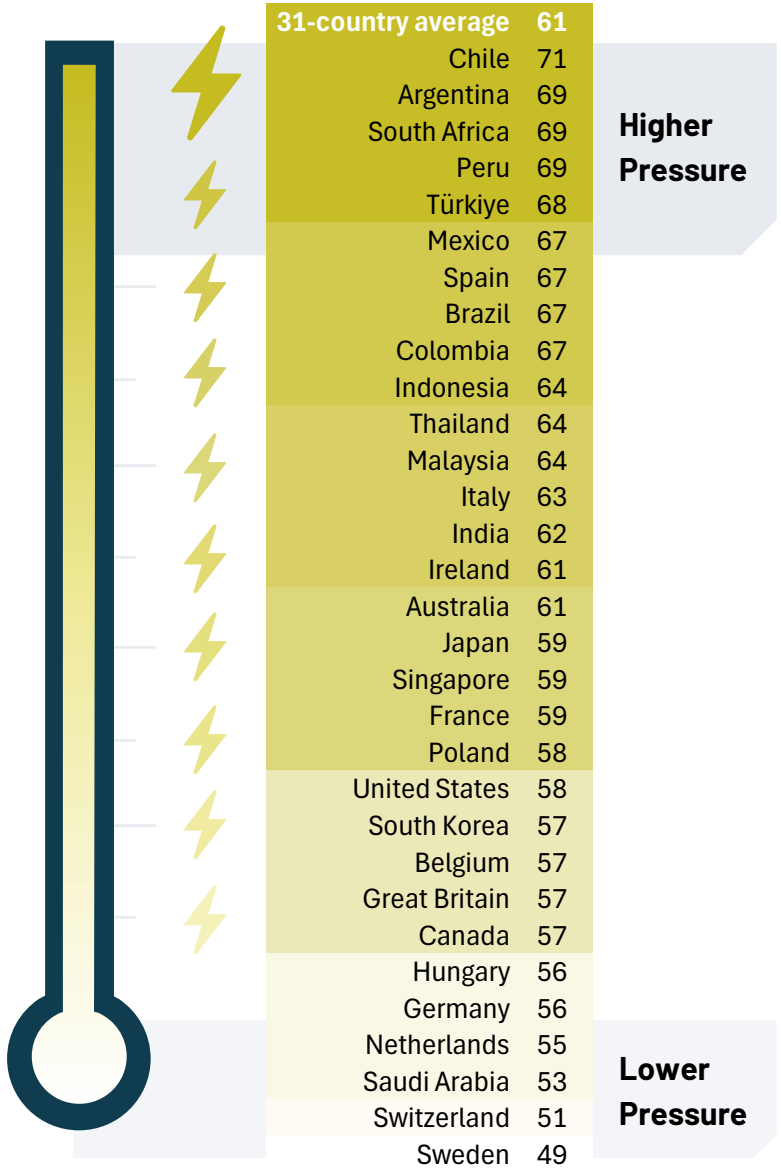
Affordability, **Security**, **Reliability**, and **Climate Impact**.

Each dimension is represented by a dedicated sub-index, constructed from survey questions that measure real concerns and lived experiences — not just stated preferences.

Countries with higher scores face greater pressure in that domain, reflecting a public more acutely affected by rising costs, supply vulnerabilities, grid strains, or climate-related threats.

The overall Energy Transition Barometer is the average of these four sub-indices, scored on a scale from 1 to 100, providing a single integrated measure of where the energy transition is felt most urgently.

Globally, the 31-country average overall score stands at **61**, with clear variation across regions. Countries in Latin America and parts of Africa — Chile (71), Argentina (69), South Africa (69), and Peru (69) — rank among the most impacted, reflecting high sensitivity across multiple dimensions. At the other end of the spectrum, wealthier European nations such as Sweden (49), Switzerland (51), and the Netherlands (55) score lower, suggesting their populations feel relatively less immediate pressure from the energy transition.



Energy Transition Barometer Indices

The **Affordability** sub-index (global average: 68) scores highest of the four, underscoring that energy costs remain the most widely felt pressure — with three in four people across the 31 countries concerned about rising energy costs. **Security** follows closely (average: 72), driven by widespread anxiety about dependence on foreign energy sources. **Reliability** (average: 47) and **Climate Impact** (average: 58) are lower on average but reveal distinct geographic patterns: reliability concerns are most acute in emerging markets, while climate anxiety shows particular strength in countries facing direct environmental exposure.

Impact Barometer (scale, 1-100): • Higher Pressure

Affordability		Security		Reliability		Climate Impact	
31-country Avg.	68	31-country Avg.	72	31-country Avg.	47	31-country Avg.	58
Chile	79	Chile	79	Argentina	59	Türkiye	74
South Africa	75	Peru	76	South Africa	57	Indonesia	74
Argentina	75	Thailand	76	Peru	55	Chile	73
Thailand	75	Mexico	76	Mexico	53	Brazil	72
Colombia	74	Italy	75	Spain	53	Peru	70
Peru	74	India	75	Chile	53	Mexico	70
Brazil	74	South Africa	75	Türkiye	52	Argentina	69
Ireland	73	Türkiye	75	Colombia	52	Spain	69
Spain	71	Argentina	75	Brazil	51	Colombia	69
Italy	70	Indonesia	75	Ireland	51	South Africa	68
France	70	Spain	75	Netherlands	50	Malaysia	68
Türkiye	70	Netherlands	74	Australia	49	Thailand	65
Mexico	69	Great Britain	74	United States	48	India	63
Great Britain	69	Colombia	73	Poland	48	Italy	62
United States	69	Australia	72	Malaysia	48	Japan	57
Australia	68	Ireland	72	New Zealand	48	South Korea	57
Malaysia	68	Brazil	71	Japan	46	France	56
India	67	Sweden	71	Belgium	46	Singapore	56
Canada	67	France	71	Canada	45	Hungary	56
Singapore	67	Singapore	71	Germany	45	Australia	54
Japan	66	Germany	71	South Korea	45	Poland	51
Belgium	65	Poland	70	Great Britain	44	United States	51
Indonesia	65	Malaysia	70	Sweden	44	Ireland	49
Germany	64	Belgium	69	Italy	44	Belgium	47
Poland	63	Canada	69	India	44	New Zealand	47
Saudi Arabia	61	Japan	68	Hungary	43	Switzerland	47
Hungary	60	South Korea	67	Indonesia	43	Canada	46
South Korea	60	United States	66	Singapore	42	Germany	46
Switzerland	57	Hungary	65	Thailand	42	Netherlands	40
Netherlands	56	Switzerland	64	France	39	Great Britain	40
Sweden	50	Saudi Arabia	63	Switzerland	38	Sweden	32

The higher the country score, the greater importance that energy affordability /security/reliability/climate impact has in the country.

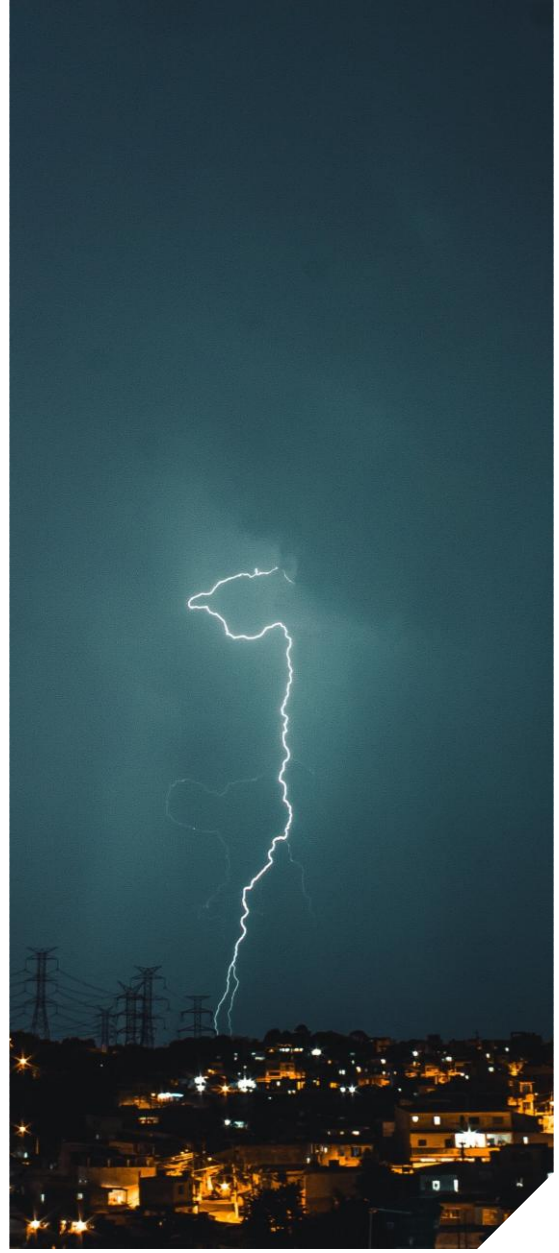
Where pressure concentrates on the Energy Transition Barometer — and why.

The clearest pattern in the data is structural: emerging markets and lower-income economies dominate the top of the barometer. Chile, Argentina, South Africa, Peru, and Türkiye all score well above the 31-country average, while wealthier European countries — Sweden, Switzerland, the Netherlands — sit at the bottom. Countries with less diversified energy infrastructure, greater import dependence, and less fiscal capacity to cushion households from price shocks feel global energy stress more acutely and more immediately.

But development stage isn't the whole story. Italy scores above average despite its wealth, reflecting energy import dependence among the highest of any major European economy, which leaves it more exposed to global price and supply shocks regardless of overall income. Security pressure follows a similar logic in Canada and Great Britain: both are advanced economies, yet their Security sub-indices sit close to or above the 31-country average, driven less by structural disadvantage than by how sharply concern about foreign energy dependence rose in both markets following the Iran conflict.

On Reliability specifically, the pattern partly inverts: several emerging markets report *more* confidence in future electricity supply than advanced economies like Japan, South Korea, and Great Britain — likely reflecting newer infrastructure build-out versus the lingering effects of recent energy crises in parts of Western Europe. The barometer is multidimensional, and a country's overall position is rarely driven by one factor alone.

Finally, across nearly every market, people want *both* energy independence and low prices, even though the report notes these aren't always compatible — meaning a country's barometer score also partly reflects unresolved tension in public expectations, not just structural circumstances. High-pressure countries are often the ones where this contradiction is sharpest, because affordability and security stress are compounding at the same time.



Affordability

© Ipsos | Energy Transition Barometer 2026

Key Findings: Affordability

76%

across 31 countries say they are concerned about the rising cost of energy. Worry is highest in Great Britain (87%).

52%

say it has become more difficult to pay household energy bills in the past 12 months. This rises to 72% in Chile.

49%

say they have reduced spending on other items to pay energy bills.

59%

say their household limits heating or cooling our home to a comfortable level to save money.

68 /100

Energy Affordability Barometer Score

The higher the score, the greater pressure that energy affordability has for individuals.

© Ipsos | Energy Transition Barometer 2026

Affordability

Energy affordability is a near-universal concern: broad, persistent, and still deepening in several markets.

Three in four people globally (76%) say they are worried about rising energy costs, which was the highest of all four measures and up two points from February 2026. Concern is remarkably consistent across a diversity of countries: Great Britain (87%), Chile (86%), South Africa (85%), France, Ireland and Singapore (all 84%) lead, while even the lowest-scoring markets - Saudi Arabia (54%), Sweden (63%), Switzerland (64%) - sit above the majority threshold. The sharpest rises since February came in India (+17pts to 74%), Singapore (+12pts to 84%), and Thailand (+10pts to 81%), suggesting anxiety is intensifying fastest in markets that had previously felt more insulated prior to the war in the Middle East.

Concern is translating into real household-level change. Globally, 59% say they limit heating or cooling to save money; stable from February but still a majority. France (73%), Spain (71%), Chile and Thailand (both 69%), and Ireland (68%) lead.

Over half (52%) report it has become harder to pay energy bills in the past year. Chile (72%), Argentina (68%), Thailand (66%), and Ireland (65%) are most affected; the Netherlands (31%), Indonesia (34%), and South Korea (35%) are least. The steepest deteriorations: Thailand (+18pts to 66%), Chile (+8pts to 72%), and Italy (+8pts to 60%).

The financial squeeze extends beyond energy bills. Nearly half (49%) say they have cut spending on other items to meet energy costs. Thailand (76%), Chile (68%), South Africa (64%), and Colombia and Peru (both 62%) are most affected. At the other end, the Netherlands (29%), Sweden (30%), and South Korea and Switzerland (both 34%) show lower rates, though even these figures are not trivial. Movers since February: Thailand (+12pts), Chile (+11pts), Singapore and Netherlands (both +7pts).

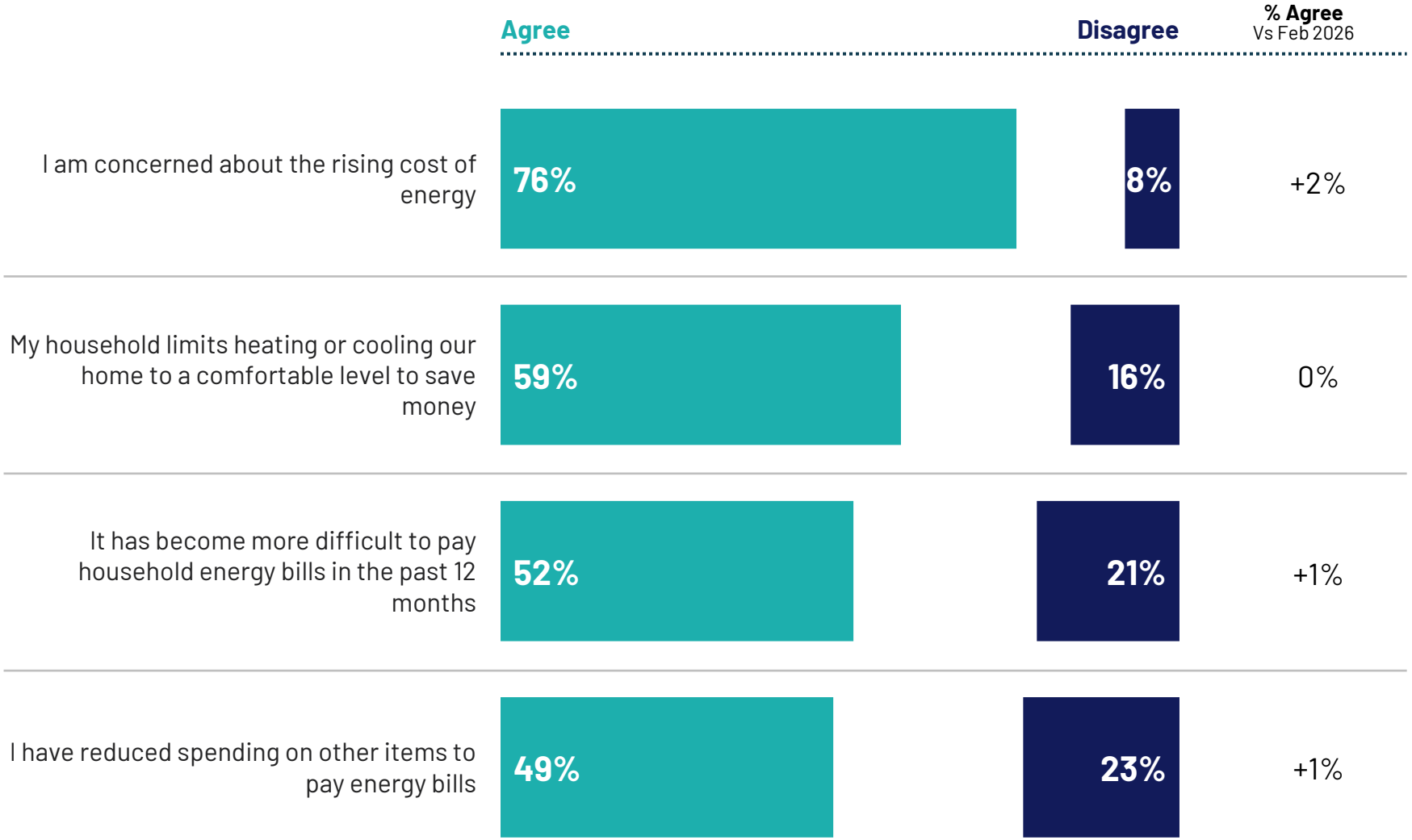
Since the war in Iran began in March, global averages on the metrics have moved modestly, while the country-level changes tell a more urgent story. Thailand, Chile, India, and Singapore are seeing multiple measures shift sharply upward simultaneously, pointing to compounding pressure in those markets. The data connects directly to the following Security section: cost-pressured households are the same ones driving demand for government intervention on prices, even at the expense of climate goals. One question is whether concern will abate with the war in Iran seemingly settled for the time being.

Gregory Jack

Public Affairs, Canada

To what extent do you agree or disagree with the following?

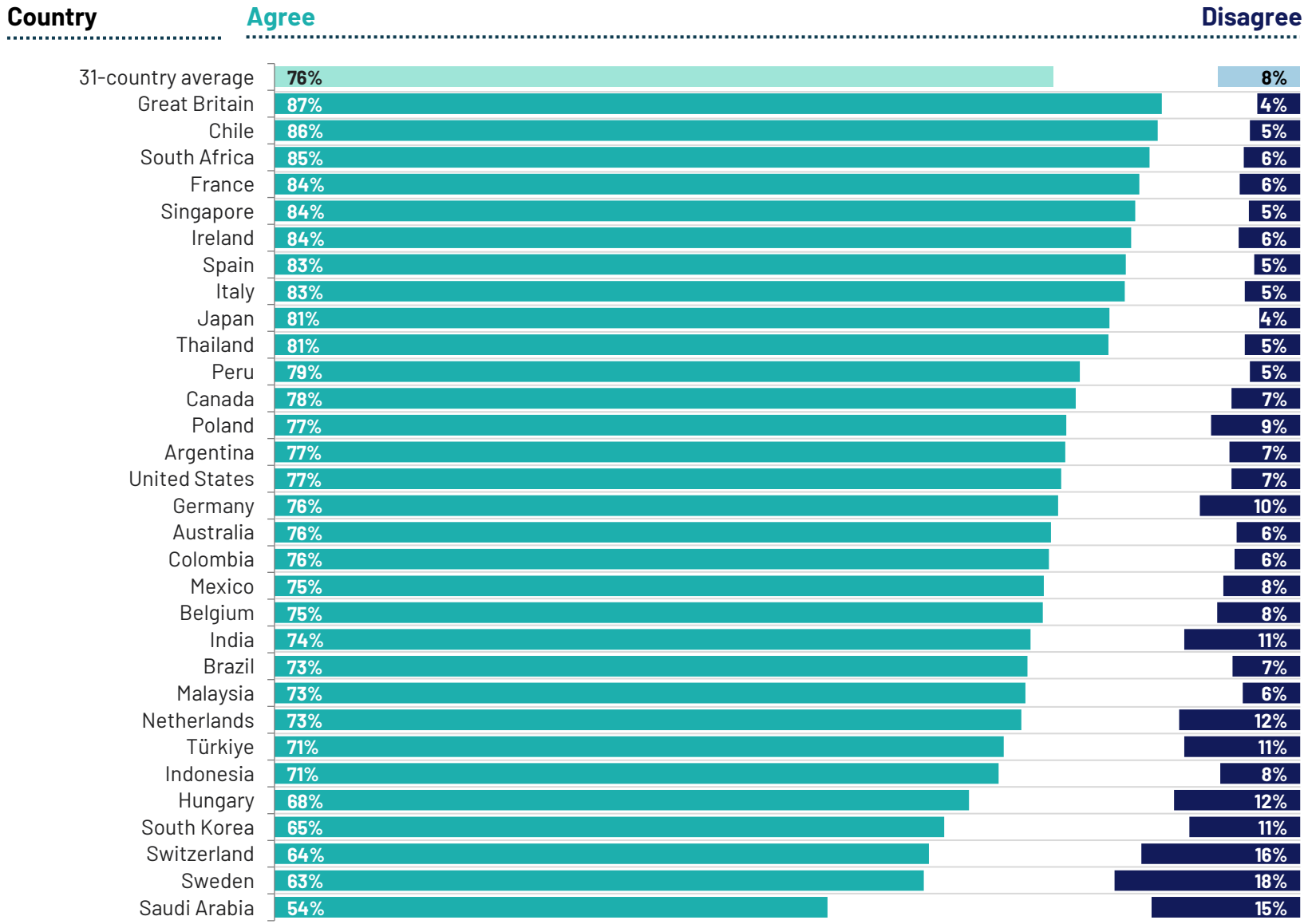
31-country average %



Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

To what extent do you agree or disagree with the following?

I am concerned about the rising cost of energy



Base: 23,704 adults under the age of 75 across 31 countries between April 24 and May 8, 2026.

To what extent do you agree or disagree with the following?

I am concerned about the rising cost of energy

Top 6 Countries with the Largest Increases

India **+17pts**

Rises to **74%** agree

Singapore **+12pts**

Rises to **84%** agree

Thailand **+10pts**

Rises to **81%** agree

Netherlands **+9pts**

Rises to **73%** agree

Italy **+8pts**

Rises to **83%** agree

Canada **+7pts**

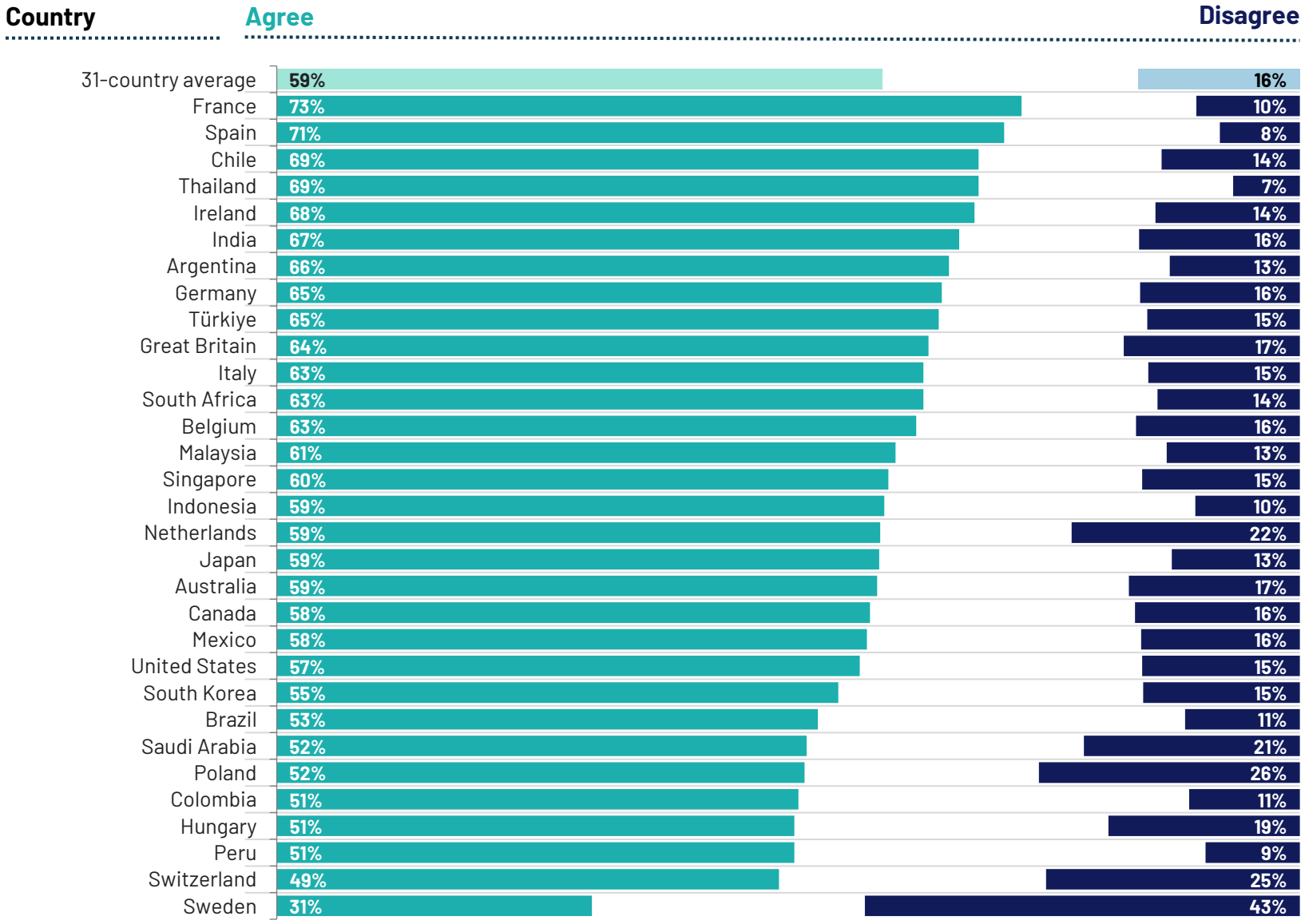
Rises to **78%** agree

Base: 23,704 adults under the age of 75 across 31 countries between 23 January and 6 February 2026, and April 24 and May 8, 2026.

To what extent do you agree or disagree with the following?

My household limits heating or cooling our home to a comfortable level to save money

Base: 23,704 adults under the age of 75 across 31 countries between April 24 and May 8, 2026.



To what extent do you agree or disagree with the following?

My household limits heating or cooling our home to a comfortable level to save money

Top 6 Countries with the Largest Increases

Base: 23,704 adults under the age of 75 across 31 countries between 23 January and 6 February 2026, and April 24 and May 8, 2026.

India **+12pts**

Rises to **67%** agree

Chile **+10pts**

Rises to **69%** agree

Ireland **+7pts**

Rises to **68%** agree

Argentina **+5pts**

Rises to **66%** agree

Italy **+4pts**

Rises to **63%** agree

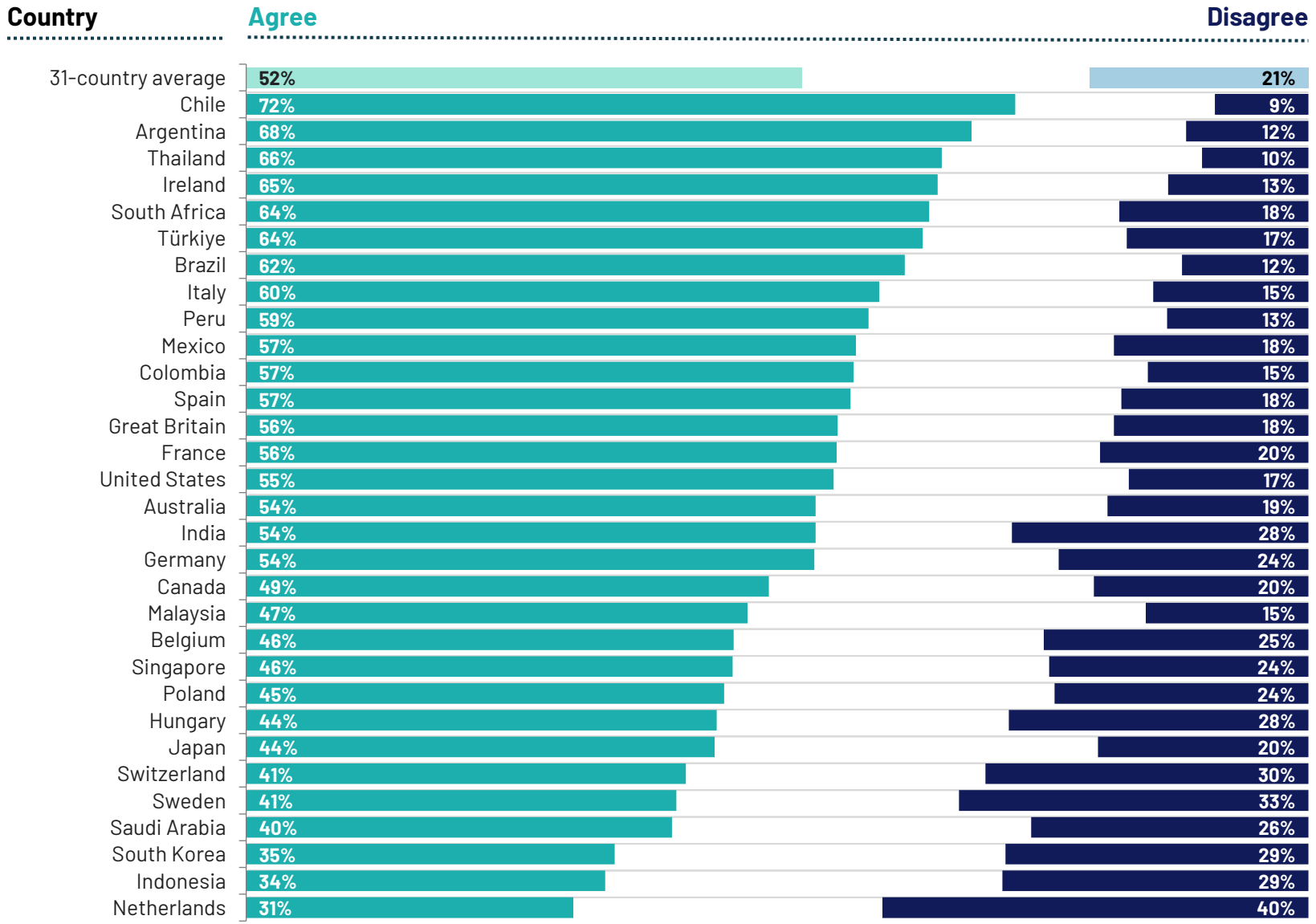
Singapore **+4pts**

Rises to **60%** agree

To what extent do you agree or disagree with the following?

It has become more difficult to pay household energy bills in the past 12 months

Base: 23,704 adults under the age of 75 across 31 countries between April 24 and May 8, 2026.



To what extent do you agree or disagree with the following?

It has become more difficult to pay household energy bills in the past 12 months

Top 6 Countries with the Largest Increases

Base: 23,704 adults under the age of 75 across 31 countries between 23 January and 6 February 2026, and April 24 and May 8, 2026.

Thailand **+18pts**

Rises to **66%** agree

Netherlands **+8pts**

Rises to **31%** agree

Italy **+8pts**

Rises to **60%** agree

Chile **+8pts**

Rises to **72%** agree

Mexico **+7pts**

Rises to **57%** agree

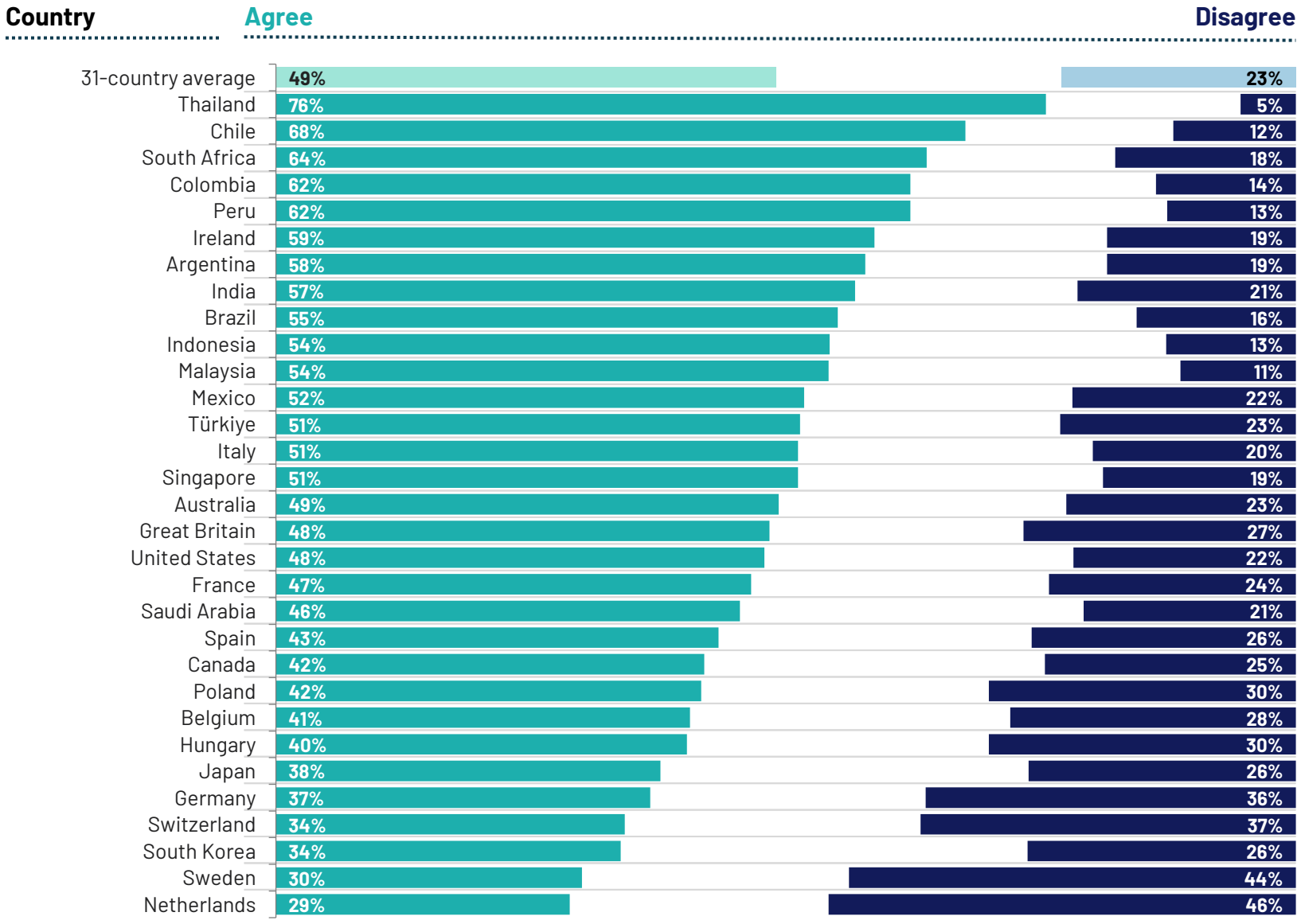
Sweden **+6pts**

Rises to **41%** agree

To what extent do you agree or disagree with the following?

I have reduced spending on other items to pay energy bills

Base: 23,704 adults under the age of 75 across 31 countries between April 24 and May 8, 2026.



To what extent do you agree or disagree with the following?

I have reduced spending on other items to pay energy bills

Top 6 Countries with the Largest Increases

Base: 23,704 adults under the age of 75 across 31 countries between 23 January and 6 February 2026, and April 24 and May 8, 2026.

Thailand **+12pts**

Rises to **76%** agree

Chile **+11pts**

Rises to **68%** agree

Singapore **+7pts**

Rises to **51%** agree

Netherlands **+7pts**

Rises to **29%** agree

Italy **+6pts**

Rises to **51%** agree

Canada **+5pts**

Rises to **42%** agree

Security

© Ipsos | Energy Transition Barometer 2026

Security

Energy security concerns have surged to the top of the public agenda as a result of military and geopolitical conflict. Across 31 countries, 70% now agree their country relies too much on foreign energy sources — up 7 points from 63% in February 2026. The increase is striking both in its scale and its breadth: not a single country sits below 56%, and in Thailand (82%), the Netherlands and Great Britain (both 81%), and Chile (79%), the concern is near-universal. The sharpest rises have come in markets where geopolitical exposure has become more pronounced: The sharpest rises: Australia (+16pts to 70%), Singapore (+13pts to 71%), India (+13pts to 73%), Great Britain (+12pts to 81%), and Canada (+11pts to 62%).

A strong majority are prepared to pay a price for independence. Globally, 60% agree their country should prioritise energy independence even at higher cost — up 5 points from 55% in February. India (74%), Chile (70%), Türkiye and Thailand (both 69%) lead, while the US (47%) and Saudi Arabia (45%) sit at the bottom. The largest increase is in India, which rose 15 points, while most of the other markets with the largest increases are notable as being European markets where energy self-sufficiency has become a political priority: Great Britain +13 points, and Australia, Italy, Belgium, and Germany each +10 points — suggesting the public increasingly treats energy as a strategic rather than purely economic concern.

At the same time, 53% want government to prioritise low energy prices even if emissions rise — up 3 points. South Africa (70%), India (67%), and Thailand (64%) lead; Hungary (33%) and South Korea (35%) are the least supportive. The steepest rises: Chile (+11pts to 59%), Ireland (+9pts to 63%), and South Africa (+9pts to 70%). The same public backing independence also wants low prices — a genuine tension for policymakers.

Taken together, the three measures point to a public in a heightened state of energy anxiety — one that has intensified markedly since the start of 2026. The direction of travel is consistent across all three questions: more concern, more willingness to act, and more pressure on governments to respond. The challenge is that the public's desired solutions — independence, low prices, reduced foreign exposure — are not always mutually compatible.

Katriina Lepanjuuri

Public Affairs, UK

Key Findings: Security

70%

across 31 countries are concerned that their country relies too much on foreign energy sources for energy needs given what is happening in the world today.

53%

say their country's government should prioritize keeping energy prices low, even if greenhouse gas emissions increase.

60%

say their country should prioritize its own energy independence, even if it means higher costs.

72 /100

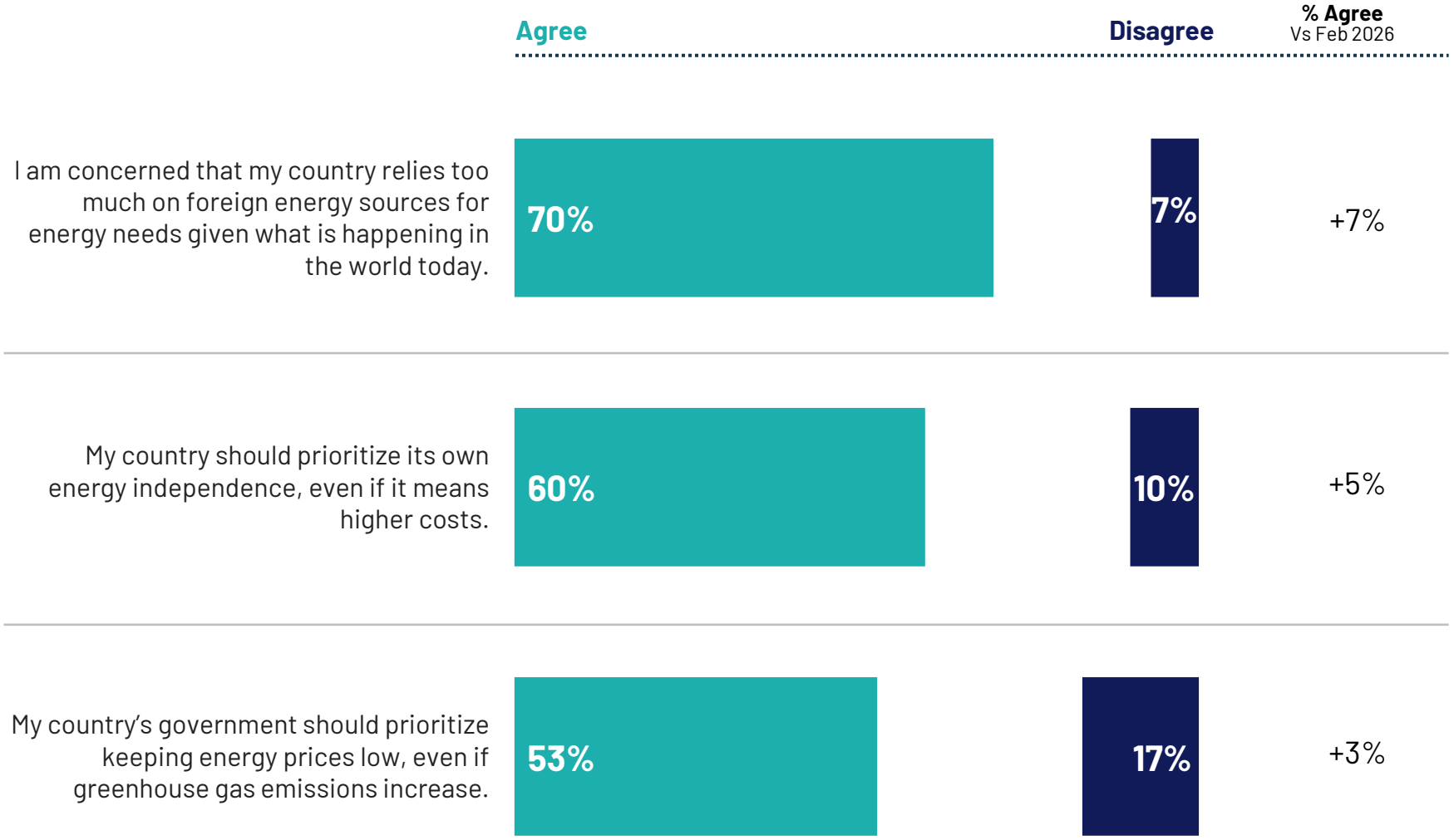
Energy Security Barometer Score

The higher the score, the greater pressure that energy security has for individuals.

© Ipsos | Energy Transition Barometer 2026

To what extent do you agree or disagree with the following?

31-country average

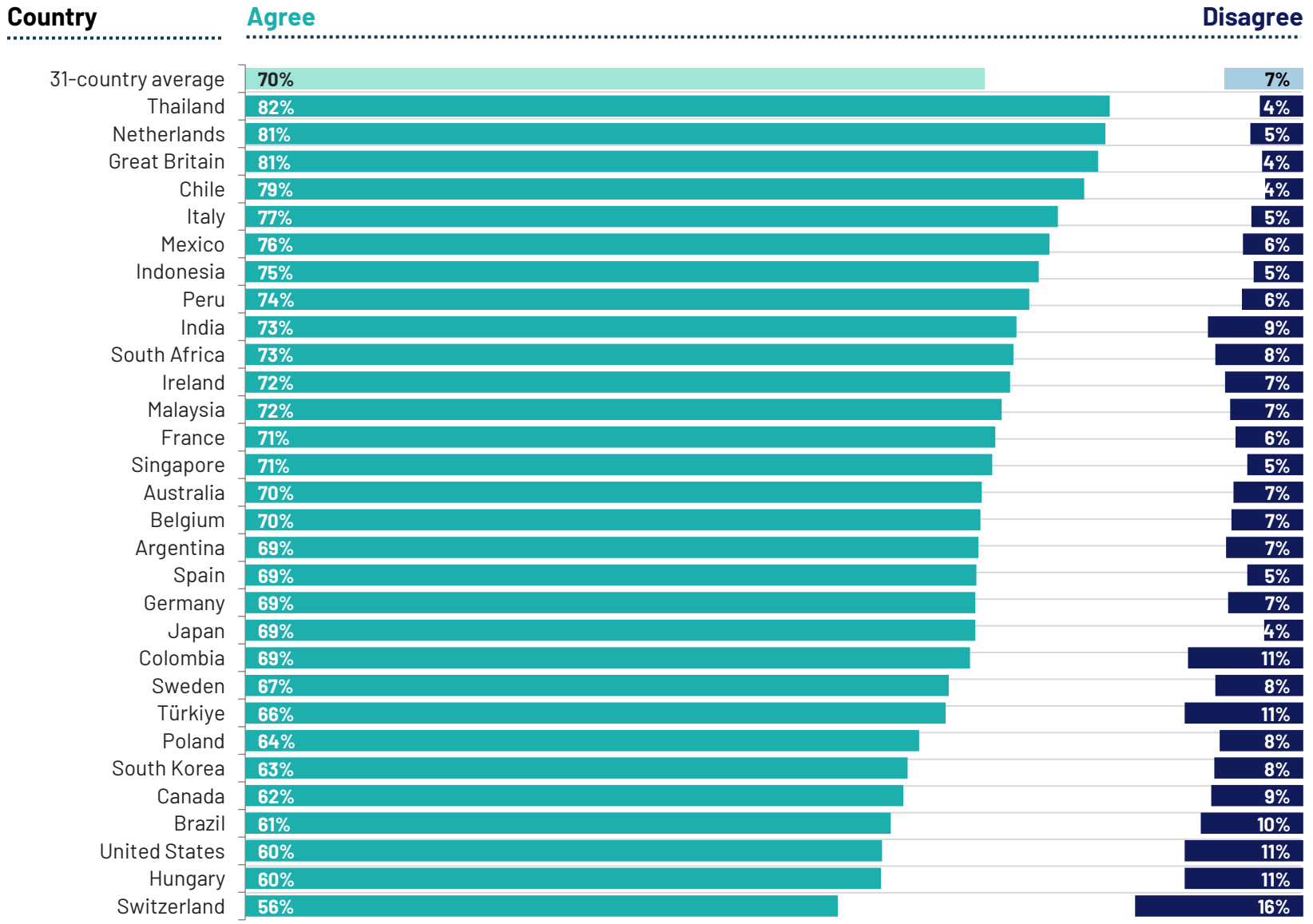


Base: 23,704 adults under the age of 75 across 31 countries between 23 January and 6 February 2026, and April 24 and May 8, 2026.

To what extent do you agree or disagree with the following?

I am concerned that my country relies too much on foreign energy sources for energy needs given what is happening in the world today

Base: 23,704 adults under the age of 75 across 31 countries between April 24 and May 8, 2026



To what extent do you agree or disagree with the following?

I am concerned that my country relies too much on foreign energy sources for energy needs given what is happening in the world today

Top 6 Countries with the Largest Increases

Base: 23,704 adults under the age of 75 across 31 countries between 23 January and 6 February 2026, and April 24 and May 8, 2026.

Australia **+16pts**

Rises to **70%** agree

Singapore **+13pts**

Rises to **71%** agree

India **+13pts**

Rises to **73%** agree

Great Britain **+12pts**

Rises to **81%** agree

Canada **+11pts**

Rises to **62%** agree

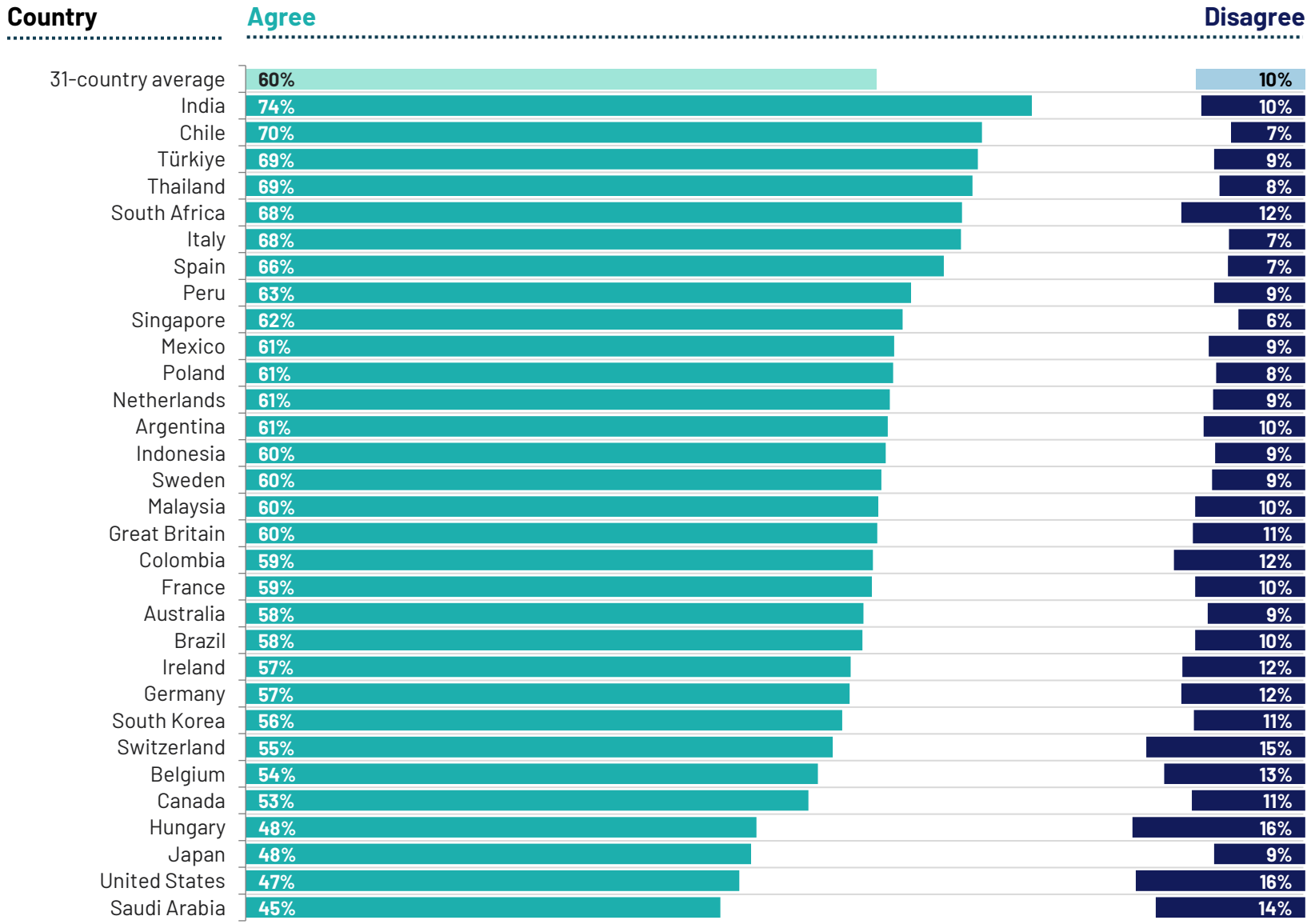
Japan **+10pts**

Rises to **69%** agree

To what extent do you agree or disagree with the following?

My country should prioritize its own energy independence, even if it means higher costs

Base: 23,704 adults under the age of 75 across 31 countries between April 24 and May 8, 2026.



To what extent do you agree or disagree with the following?

My country should prioritize its own energy independence, even if it means higher costs

Top 6 Countries with the Largest Increases

Base: 23,704 adults under the age of 75 across 31 countries between 23 January and 6 February 2026, and April 24 and May 8, 2026.

India **+15pts**

Rises to **74%** agree

Great Britain **+13pts**

Rises to **60%** agree

Australia **+10pts**

Rises to **58%** agree

Italy **+10pts**

Rises to **68%** agree

Belgium **+10pts**

Rises to **54%** agree

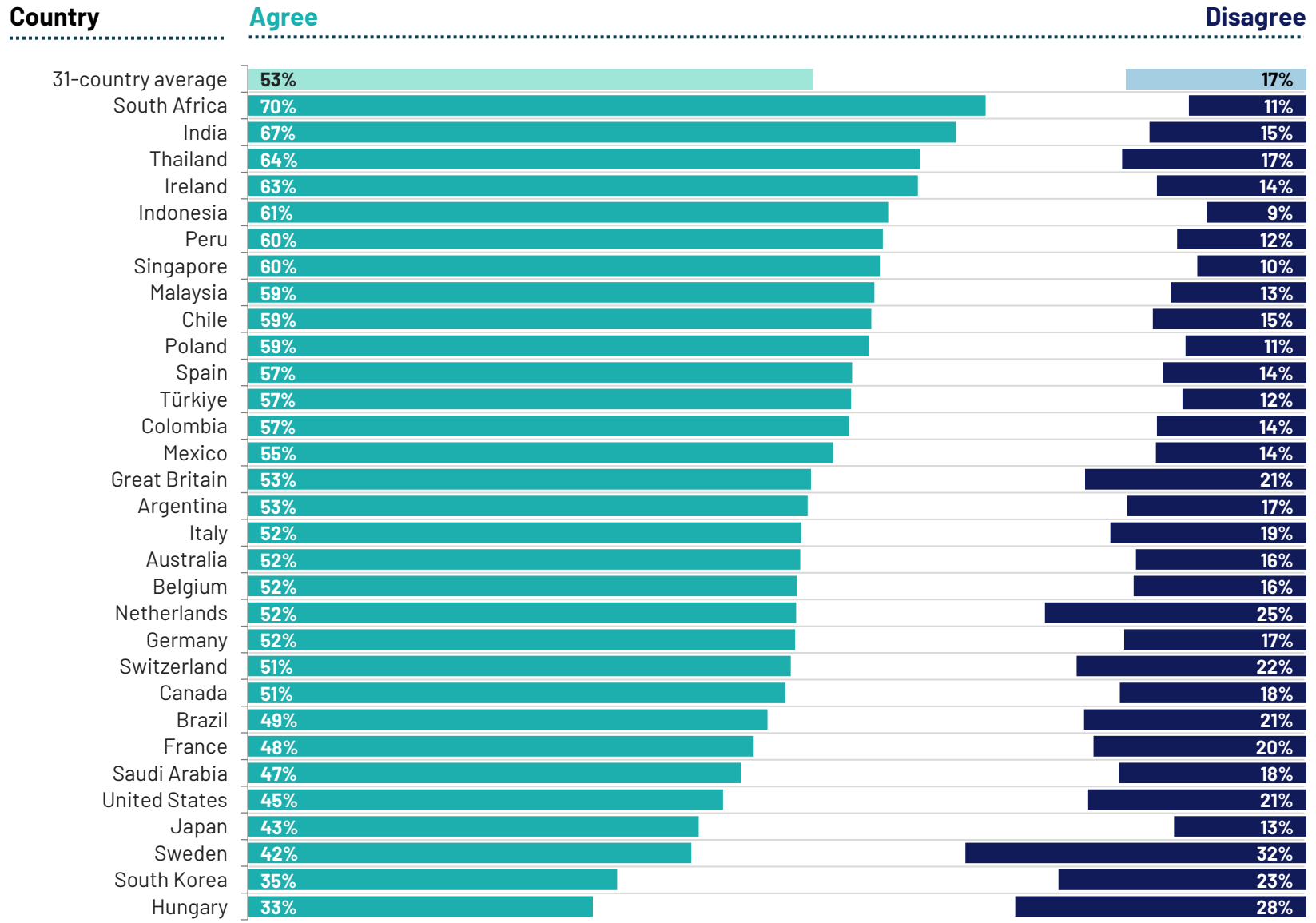
Germany **+10pts**

Rises to **57%** agree

To what extent do you agree or disagree with the following?

My country's government should prioritize keeping energy prices low, even if greenhouse gas emissions increase

Base: 23,704 adults under the age of 75 across 31 countries between April 24 and May 8, 2026.



To what extent do you agree or disagree with the following?

My country's government should prioritize keeping energy prices low, even if greenhouse gas emissions increase

Top 6 Countries with the Largest Increases

Base: 23,704 adults under the age of 75 across 31 countries between 23 January and 6 February 2026, and April 24 and May 8, 2026.

Chile **+11pts**

Rises to **59%** agree

Ireland **+9pts**

Rises to **63%** agree

South Africa **+9pts**

Rises to **70%** agree

Switzerland **+9pts**

Rises to **51%** agree

Belgium **+7pts**

Rises to **52%** agree

Columbia **+7pts**

Rises to **57%** agree

Reliability

© Ipsos | Energy Transition Barometer 2026

Key Findings: Reliability

46%

across 31 countries are confident that their region will have enough electricity to meet future demand.

39%

are concerned that their region will have an unplanned power outage in the next 12 months.

45%

are confident that their region can meet all of their future electricity demand by investing more in renewable energy alone.

35%

are confident that their region has enough electricity to meet the rising energy needs of artificial intelligence (AI) data centres.

47 /100

Energy Reliability Barometer Score

The higher the score, the greater pressure that energy reliability has for individuals.

© Ipsos | Energy Transition Barometer 2026

Reliability

Emerging markets express far greater confidence in their region's future electricity supply than developed economies. India (77%), Indonesia (71%), Thailand (69%), and Singapore (59%) lead on reliability confidence, while Japan (27%) and Belgium (33%) sit at the bottom. Western Europe is mixed – Switzerland (55%) sits above average, while Germany (44%), France (45%), and Great Britain (40%) fall below, likely reflecting the lingering impact of recent energy crises.

Most Western European markets fall below the global average for confidence in future supply – Germany, Spain (both 44%), Great Britain (40%), Italy (37%), Sweden (37%), Netherlands (36%), and Belgium (33%). Yet outage anxiety remains low – France (19%), Germany (31%), Sweden (30%) – a notable contrast with the Affordability section, where European price concerns rank highest. Europeans trust their grids to stay on, even while doubting long-term capacity.

Outage concerns run high in Peru (62%), Argentina and India (both 61%), South Africa (59%), Mexico (58%), and Chile (57%) – all well above the 39% global average. Historical instability, infrastructure gaps, rapid urbanisation, and climate vulnerability – particularly for hydro-dependent systems – could drive this anxiety. Supply confidence is also modest in these markets, with Argentina (39%) and South Africa (38%) among the least confident globally. High outage fear combined with tempered supply confidence points to a public acutely aware of the fragility of their grids.

AI grid confidence is the lowest of all four measures at 35% globally – 11 points below general supply confidence – and 23% actively disagree their grid is ready for AI data centres. Public awareness of AI's energy intensity is growing faster than confidence that grids can keep pace. The contrast is sharp: India (73%) and Thailand (64%) are the most optimistic, while Great Britain (21%), Belgium (21%), New Zealand (20%) and Japan (19%) are the least – raising questions about whether emerging market optimism reflects informed planning or early enthusiasm.

Jennifer Brook

Public Affairs, Australia

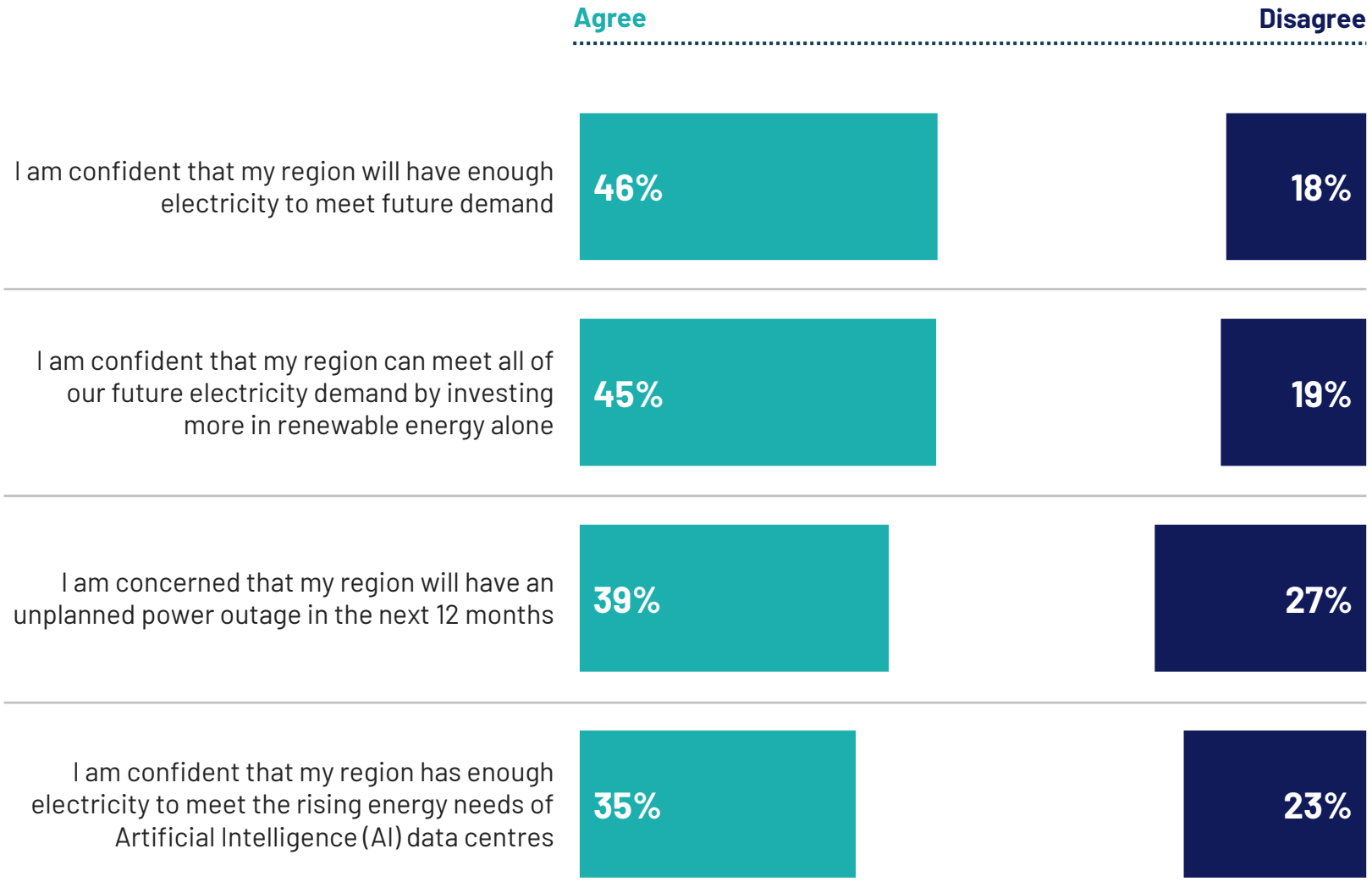
Stuart Clark

Public Affairs, Australia

© Ipsos | Energy Transition Barometer 2026

To what extent do you agree or disagree with the following?

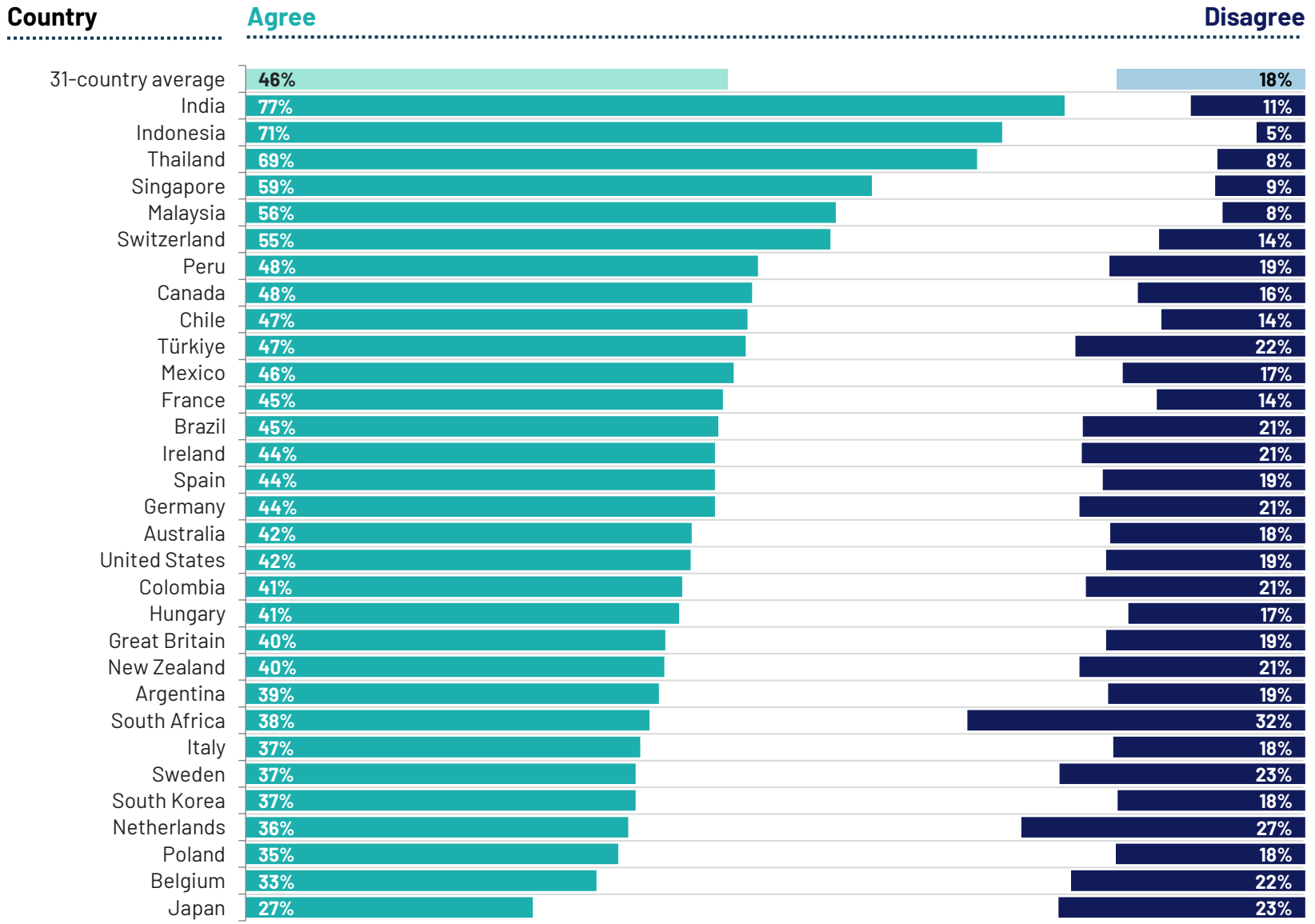
31-country average



Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

To what extent do you agree or disagree with the following?

I am confident that my region will have enough electricity to meet future demand

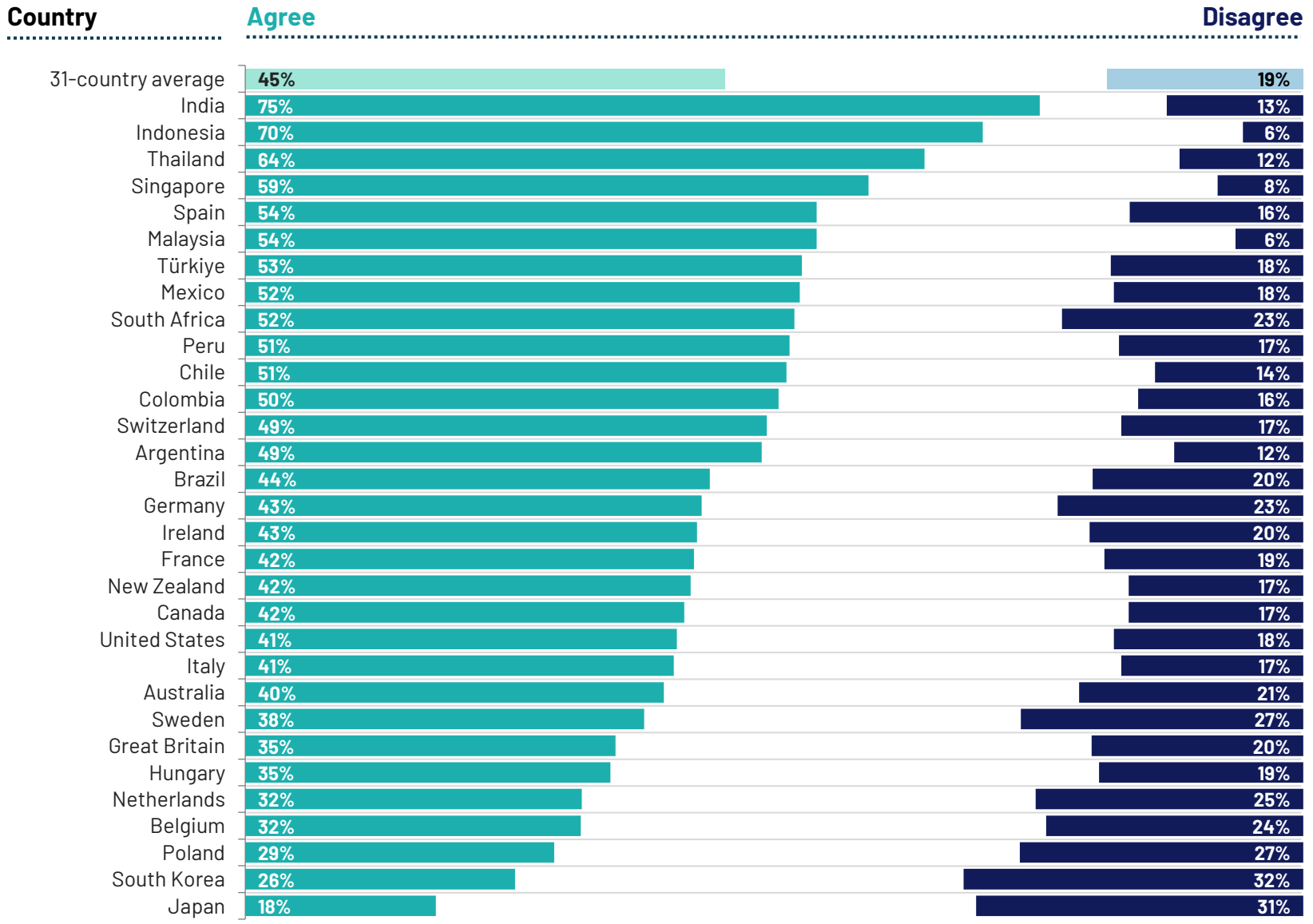


Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

To what extent do you agree or disagree with the following?

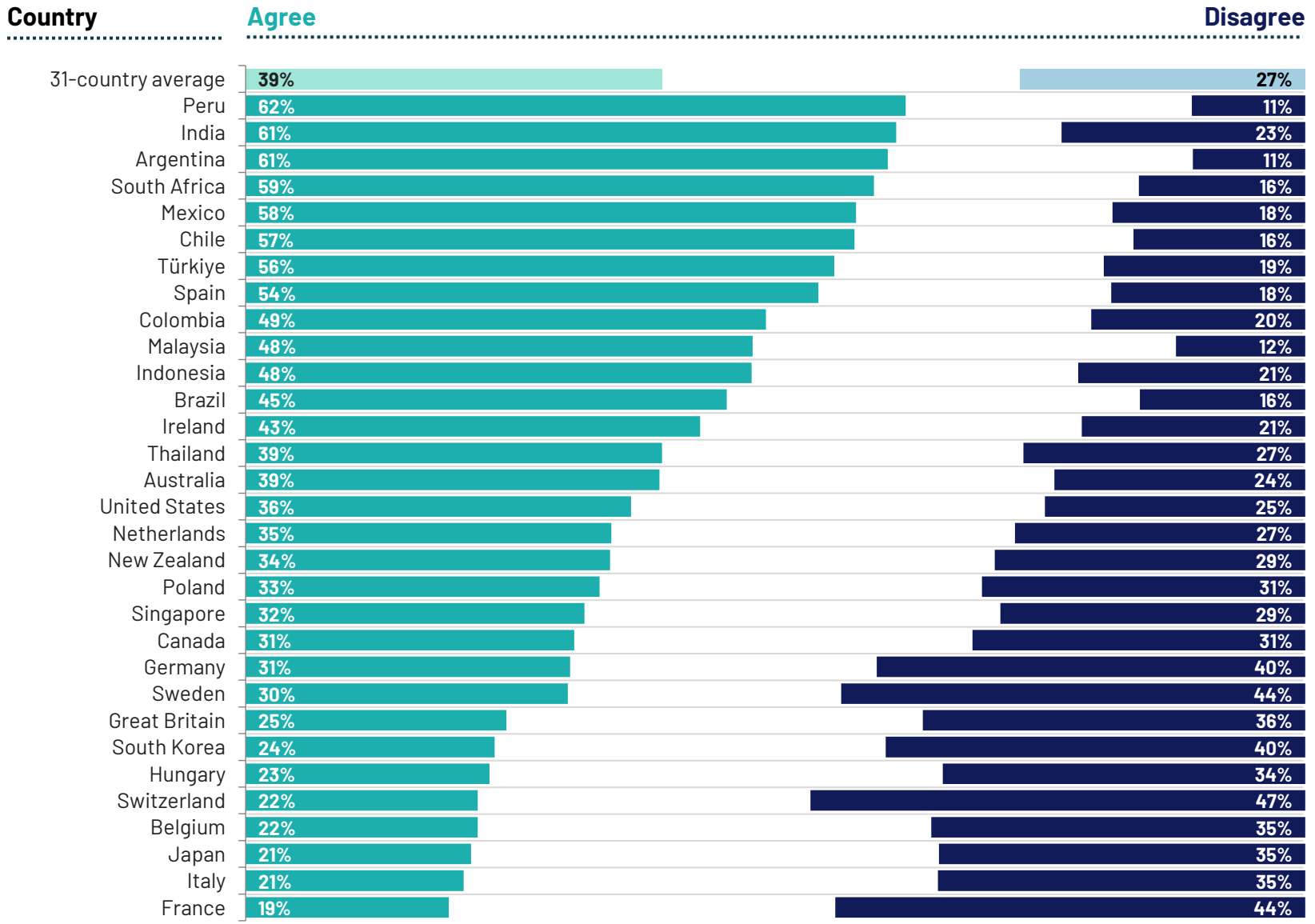
I am confident that my region can meet all of our future electricity demand by investing more in renewable energy alone

Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.



To what extent do you agree or disagree with the following?

I am concerned that my region will have an unplanned power outage in the next 12 months

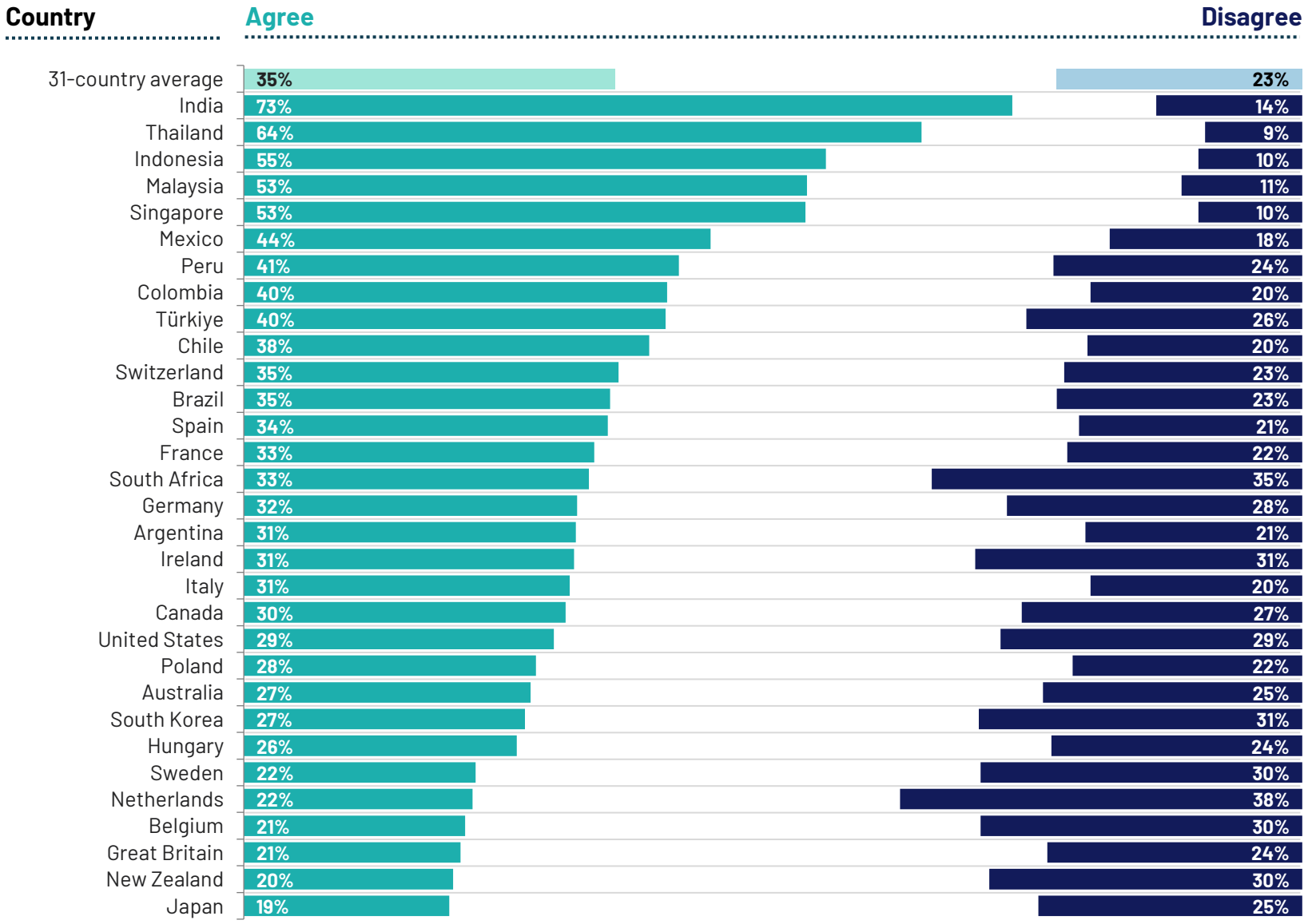


Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

To what extent do you agree or disagree with the following?

I am confident that my region has enough electricity to meet the rising energy needs of artificial intelligence (AI) data centres

Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.



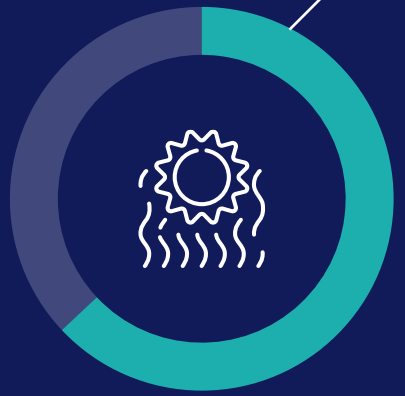
Climate Impact

© Ipsos | Energy Transition Barometer 2026

Key Findings: Climate Impact

63%

across 31 countries are worried about damaging storms/heavy rainfall/ flooding occurring over the next 12 months in their region.



63%

are also concerned about heatwaves hitting their region in the next year.

60%

are worried about drought/water scarcity.

59%

are worried about smog or poor air quality due to excessive pollution.

58 /100

Energy Climate Index Barometer Score

The higher the score, the greater pressure that climate insecurity has for individuals.

© Ipsos | Energy Transition Barometer 2026

Climate Impact

The findings underscore the resonance of extreme weather events among citizens around the globe. Majorities across 31 countries express worry about heat waves (63%), damaging storms (63%), and drought (60%) over the next 12 months. Impacts are often personal and immediate, and concern is broadly distributed across geographies and income levels.

Direct experiences with extreme weather can serve as an entry point into broader climate and policy conversations, especially among audiences that may otherwise be skeptical of climate action. Personal exposure makes climate more intuitive. In high-concern markets like Mexico and Indonesia, 70–85% express worry across nearly every hazard tested.

The findings also reinforce the importance of understanding country- and region-specific risk profiles. They show how certain countries – like Mexico and Indonesia – face compounding concerns across storms, drought, smog, and wildfire simultaneously. A one-size-fits-all framing around climate risk is therefore insufficient. Tailored approaches that speak to a country's specific hazard mix will be more resonant and actionable for local audiences.

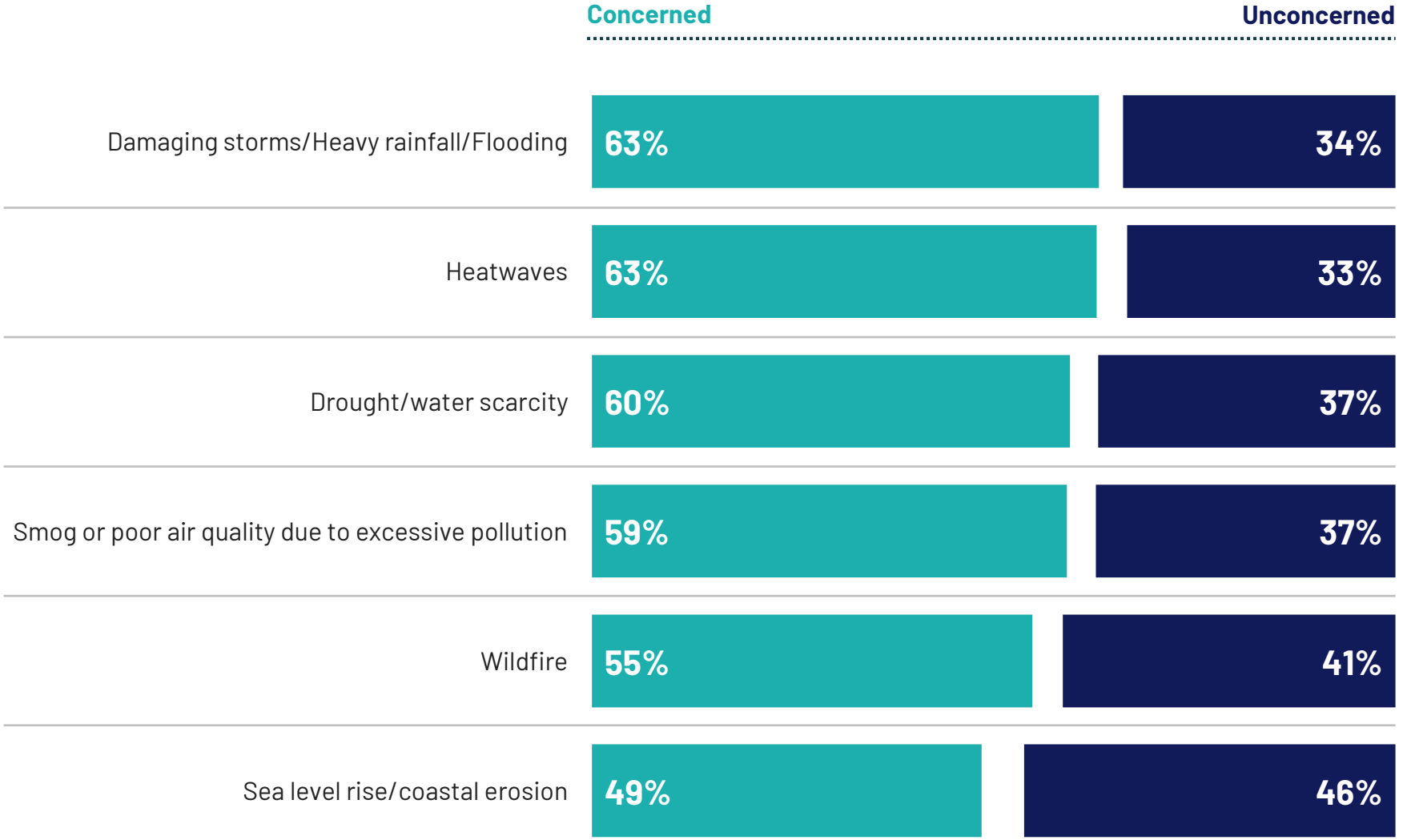
Finally, one issue to watch globally is water scarcity. On average, 60% currently express worry about this issue — more than either wildfire (55%) or sea level rise (49%) — with the potential for it to play a larger role in global politics in the years ahead. Unlike storms or wildfires — which tend to register as acute events — water scarcity is a slow-moving crisis that can undermine agriculture, energy production, and social stability simultaneously. Its emergence as a widely-felt concern in this survey suggests public awareness is beginning to track the issue's long-term significance, even before it reaches crisis levels in many regions.

Alec Tyson

Public Affairs, USA

Thinking about where you live, how concerned are you about each of the following occurring over the next 12 months in your region?

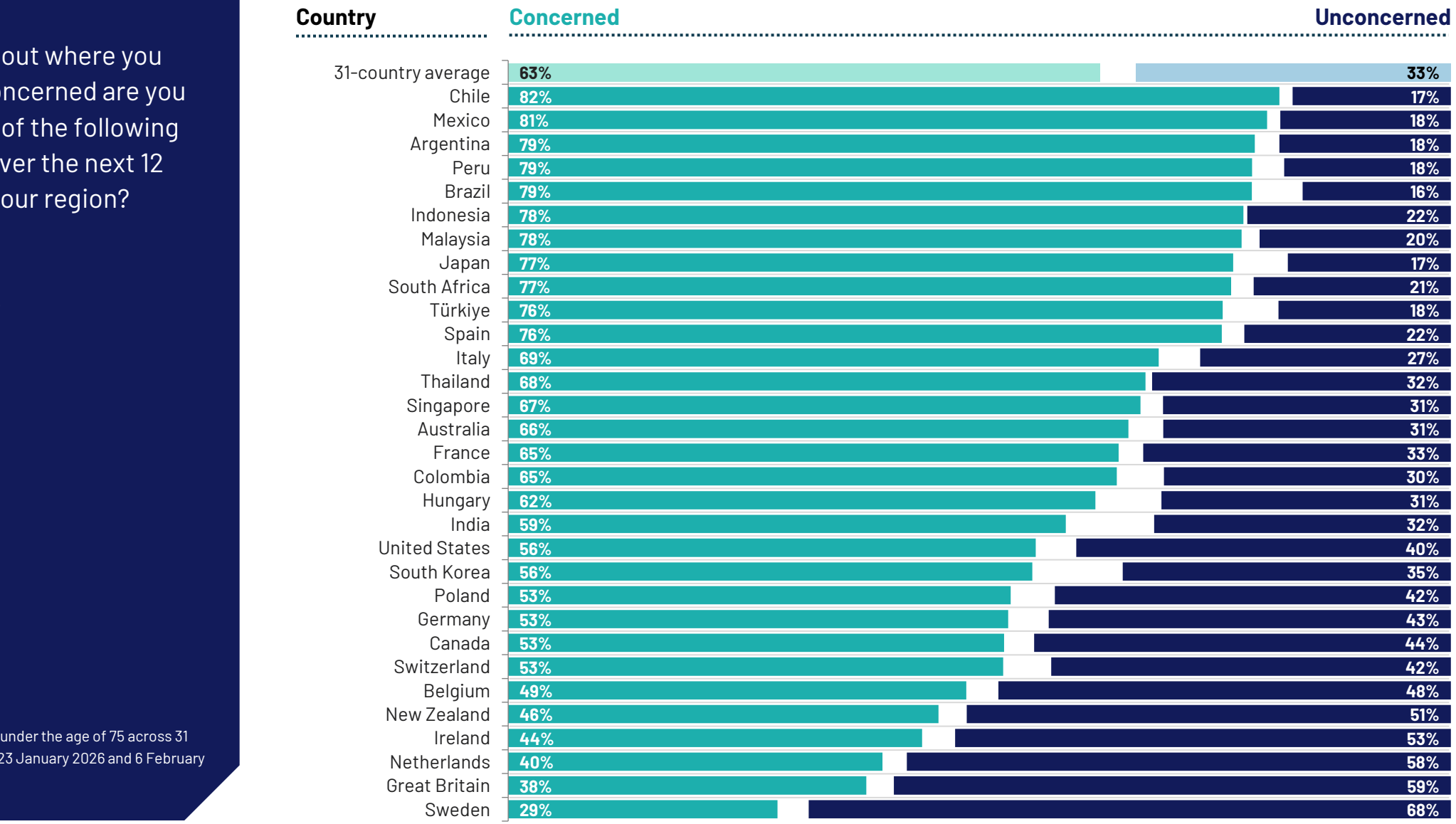
31-country average



Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

Thinking about where you live, how concerned are you about each of the following occurring over the next 12 months in your region?

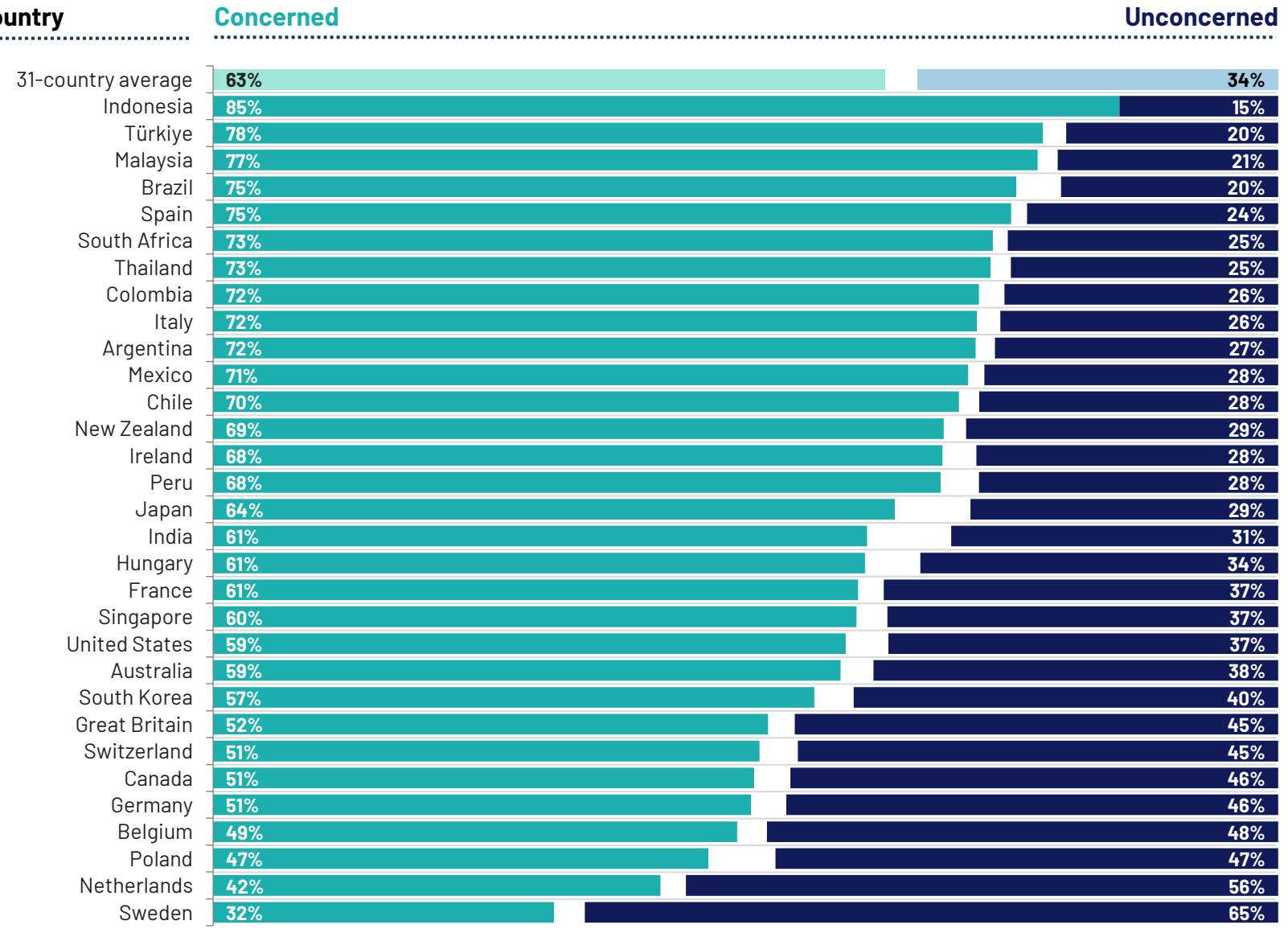
Heatwaves



Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

Thinking about where you live, how concerned are you about each of the following occurring over the next 12 months in your region?

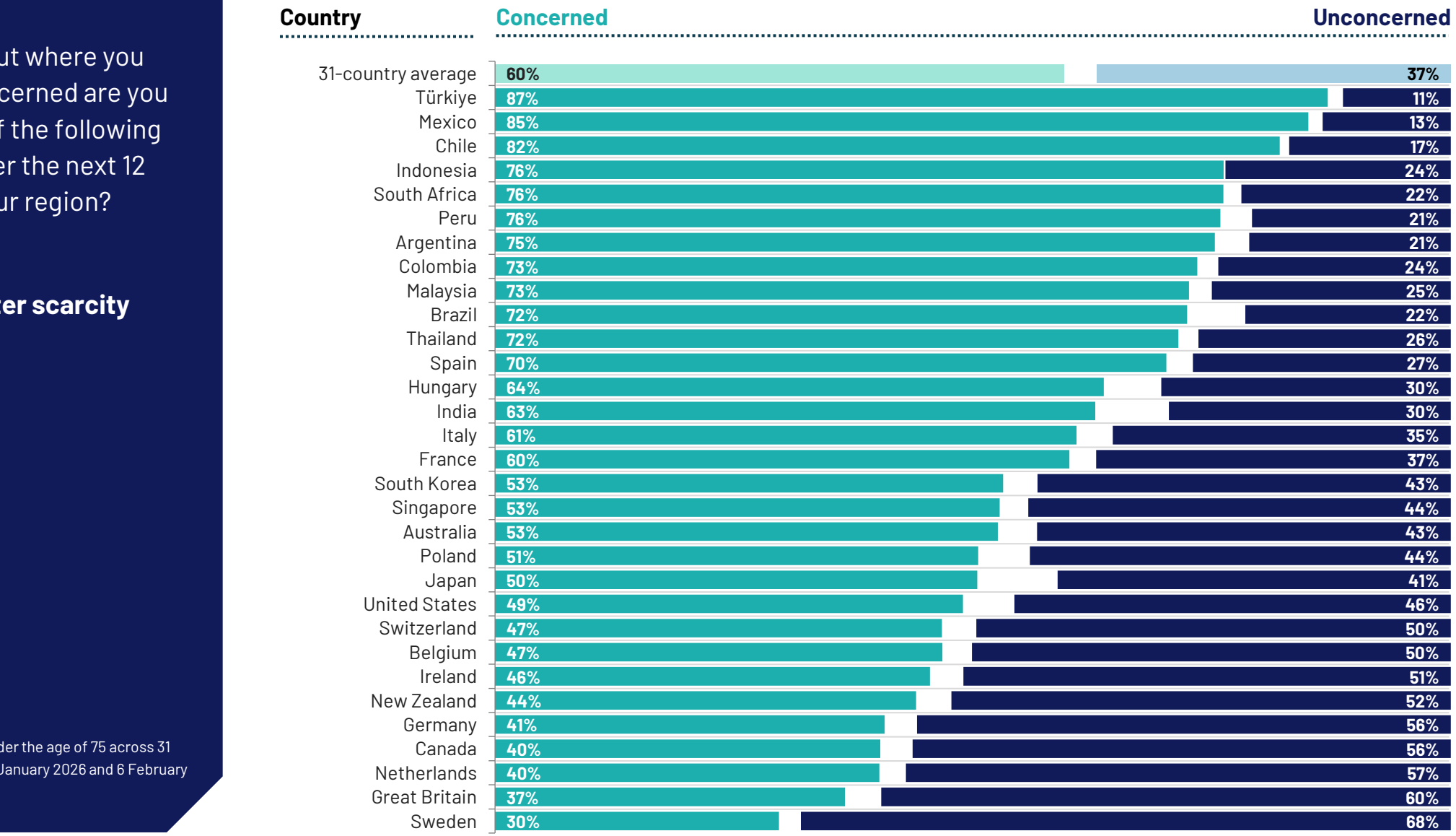
Damaging storms/heavy rainfall/flooding



Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

Thinking about where you live, how concerned are you about each of the following occurring over the next 12 months in your region?

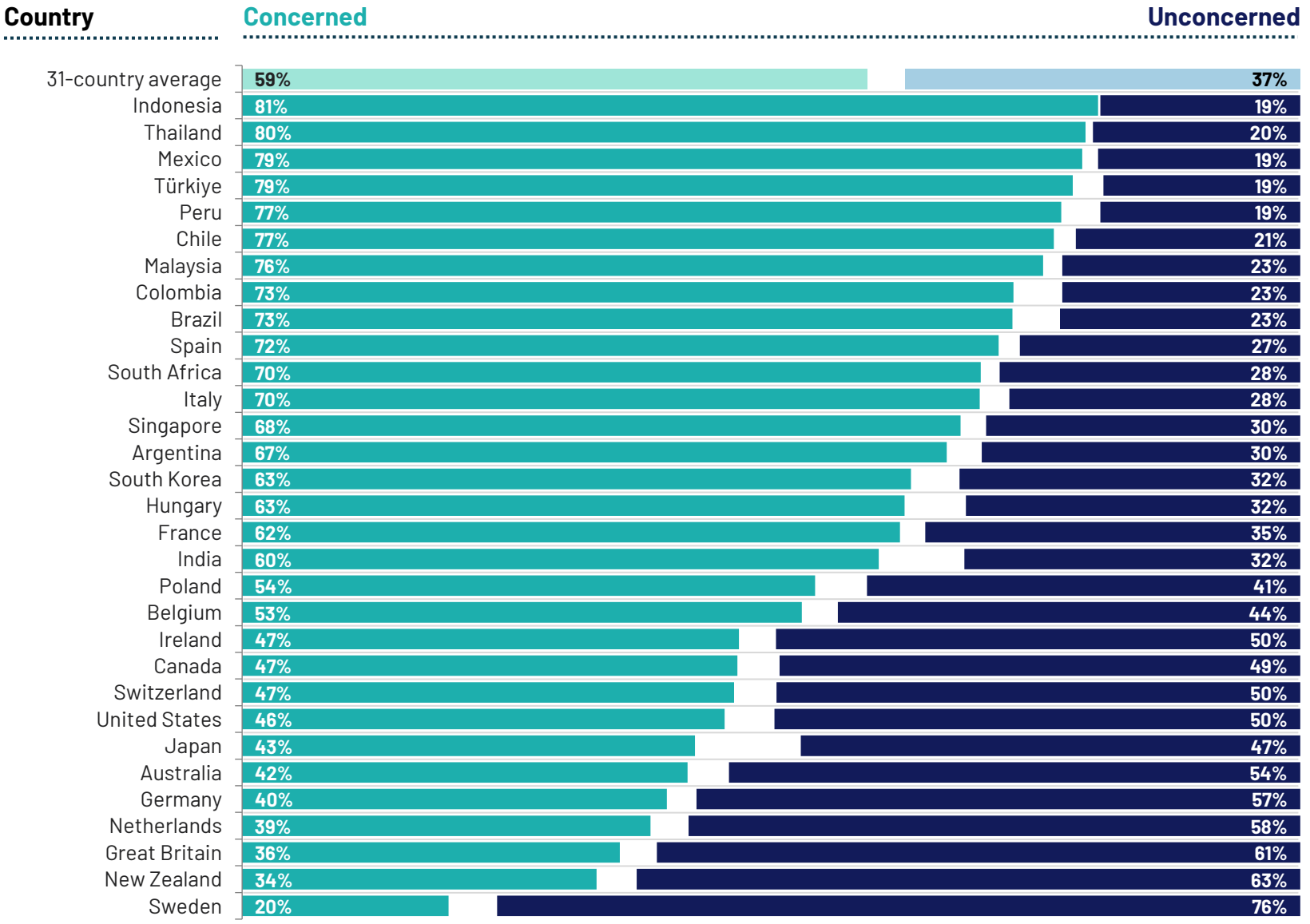
Drought/water scarcity



Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

Thinking about where you live, how concerned are you about each of the following occurring over the next 12 months in your region?

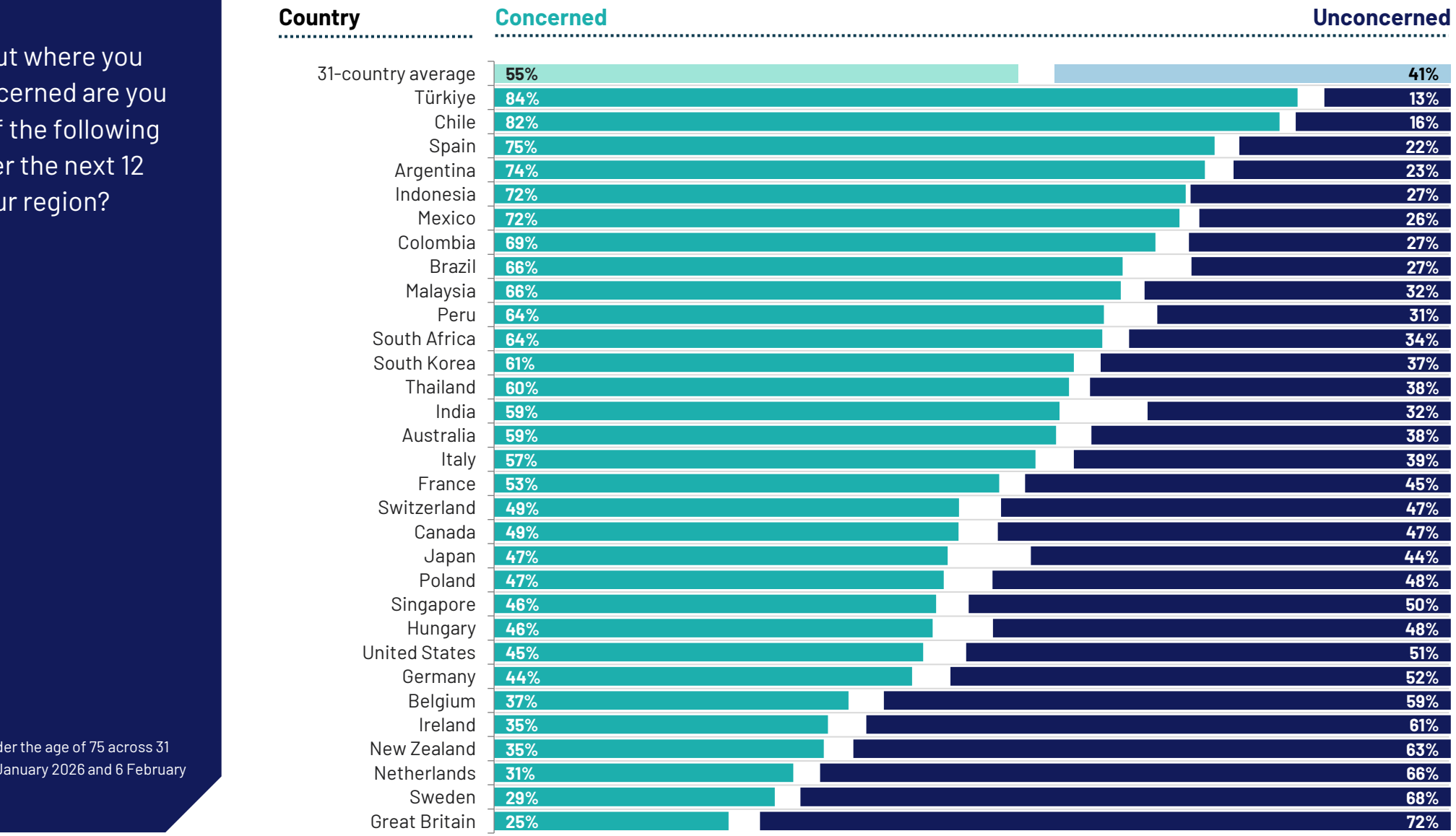
Smog or poor air quality due to excessive pollution



Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

Thinking about where you live, how concerned are you about each of the following occurring over the next 12 months in your region?

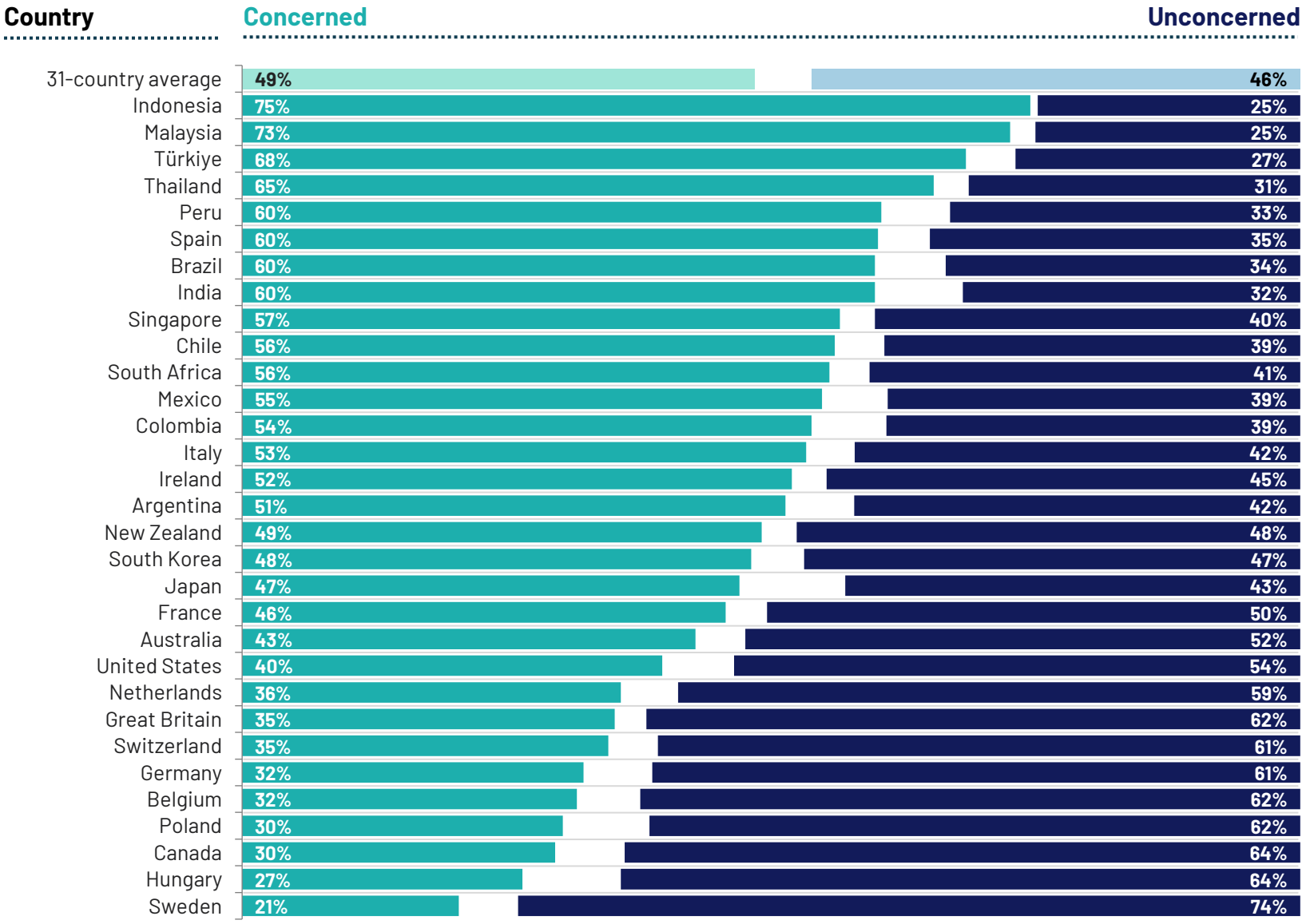
Wildfire



Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

Thinking about where you live, how concerned are you about each of the following occurring over the next 12 months in your region?

Sea level rise/coastal erosion



Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

Energy Transition Investment

© Ipsos | Energy Transition Barometer 2026

Key Findings: Energy Transition Actions

67%

support investment in renewable energy and energy storage facilities for more electricity generation.

47%

support investment in new small modular nuclear reactor technology for more electricity generation.

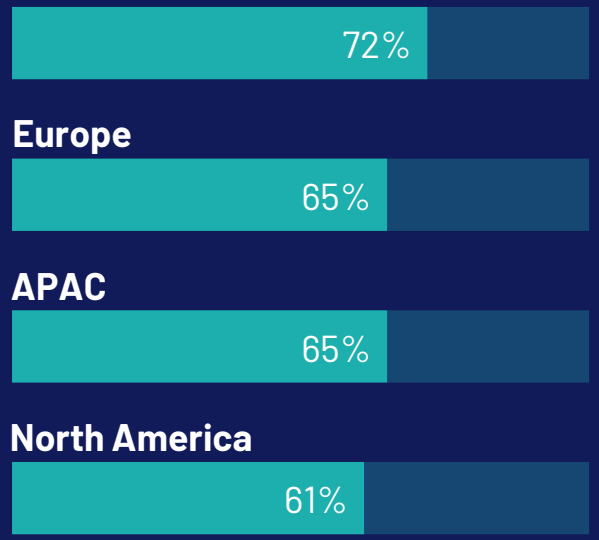
58%

support government funding for significant financial incentives for households to switch to heat pump heating and cooling technology which uses less energy.

43%

support investment in oil or natural gas pipelines to enhance the import and export of fossil fuels.

Investment in renewable energy and energy storage facilities for more electricity generation. % support



© Ipsos | Energy Transition Barometer 2026

Energy Transition Actions

For all energy transition actions tested, supporters outnumber opponents. This points to a broadly permissive public mood toward energy transition, even where enthusiasm varies by country.

Two in three people globally (67%; 31-country average) support renewable energy and storage investments, while a majority (58%) back government incentives for household heat pump adoption. Support drops for small nuclear reactors (47%) and fossil fuel pipeline investment (43%). Japan stands out as a consistent laggard, appearing in the bottom three across all four measures.

Renewable energy attracts the strongest backing in South Africa (80%), Indonesia (77%), and Türkiye (75%) — markets where energy access and development goals align with energy transition as a way to leverage those goals. Support is weakest among top-20 economies: South Korea, Switzerland, Germany, the US, and Japan.

Heat pump incentives follow a broadly similar pattern. Türkiye (71%), South Africa (70%), and New Zealand (68%) show majority support — with New Zealand's high ranking notable given its temperate climate and existing clean energy base. Japan again ranks lowest at 35%, consistent with its position across all measures in this study.

Small nuclear reactors show the widest spread of any measure — from 32% in Japan to 67% in South Africa. Strong support in India (58%), Poland (57%), and Singapore (56%) likely reflects energy security priorities and active policy interest in nuclear. Germany (39%) and New Zealand (36%) rank near the bottom, consistent with historically anti-nuclear political cultures in both countries, while Hungary (35%) is second last. Support in Japan is the lowest, suggesting entrenched scepticism that may reflect energy security concerns and the legacy of Fukushima.

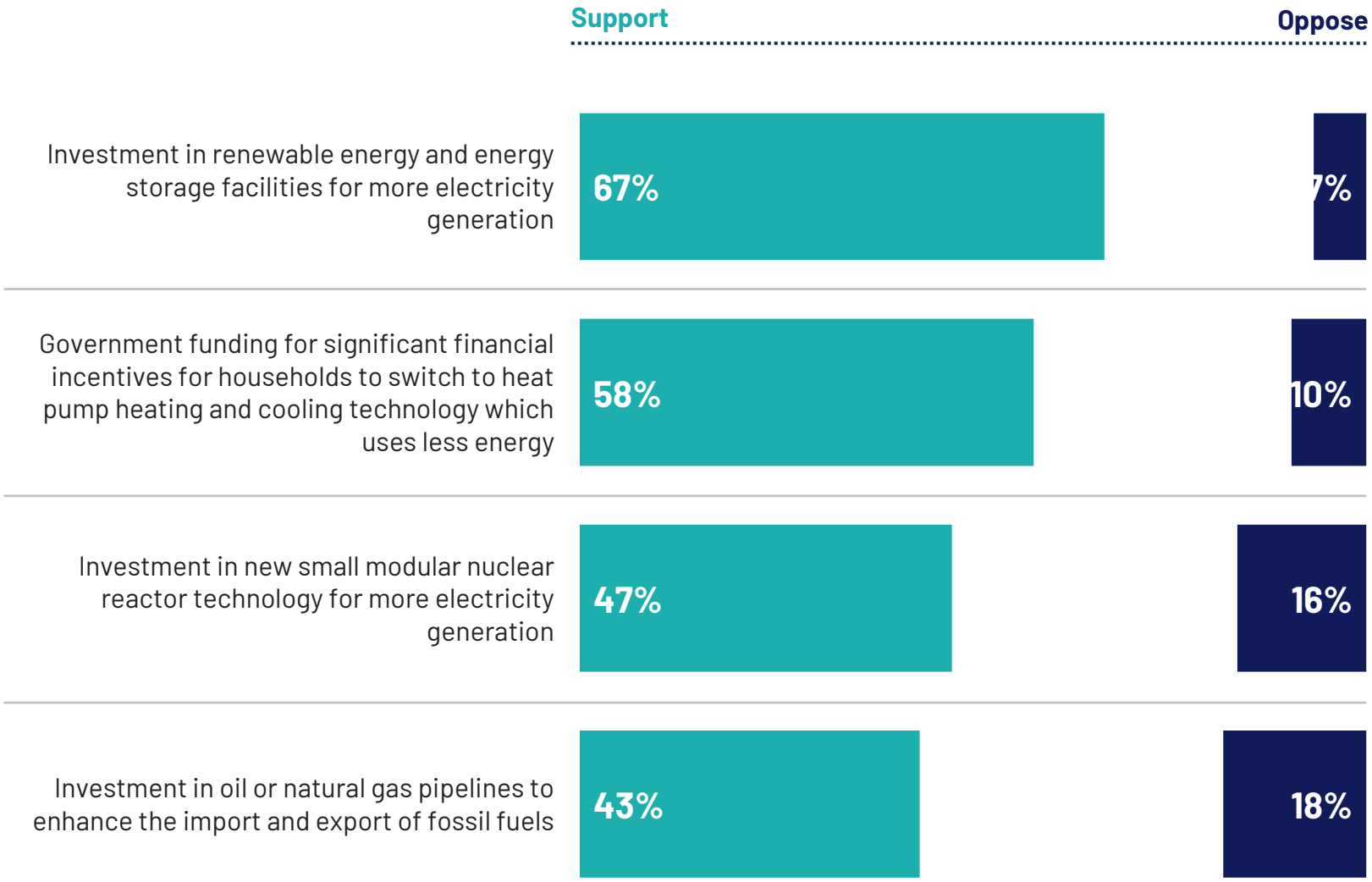
Fossil fuel pipeline investment is the least popular measure overall — and the only one where opposition outpaces support in several markets. South Africa (63%), Peru (60%), and Argentina (60%) are among the more receptive, likely reflecting resource export interests. European nations cluster at the bottom, with Sweden at just 22% — the only country where opponents clearly outnumber supporters, signalling how far public opinion has shifted in some markets.

Melle Conradie

Public Affairs , Netherlands

To what extent do you support or oppose the following in your region?

31-country average %

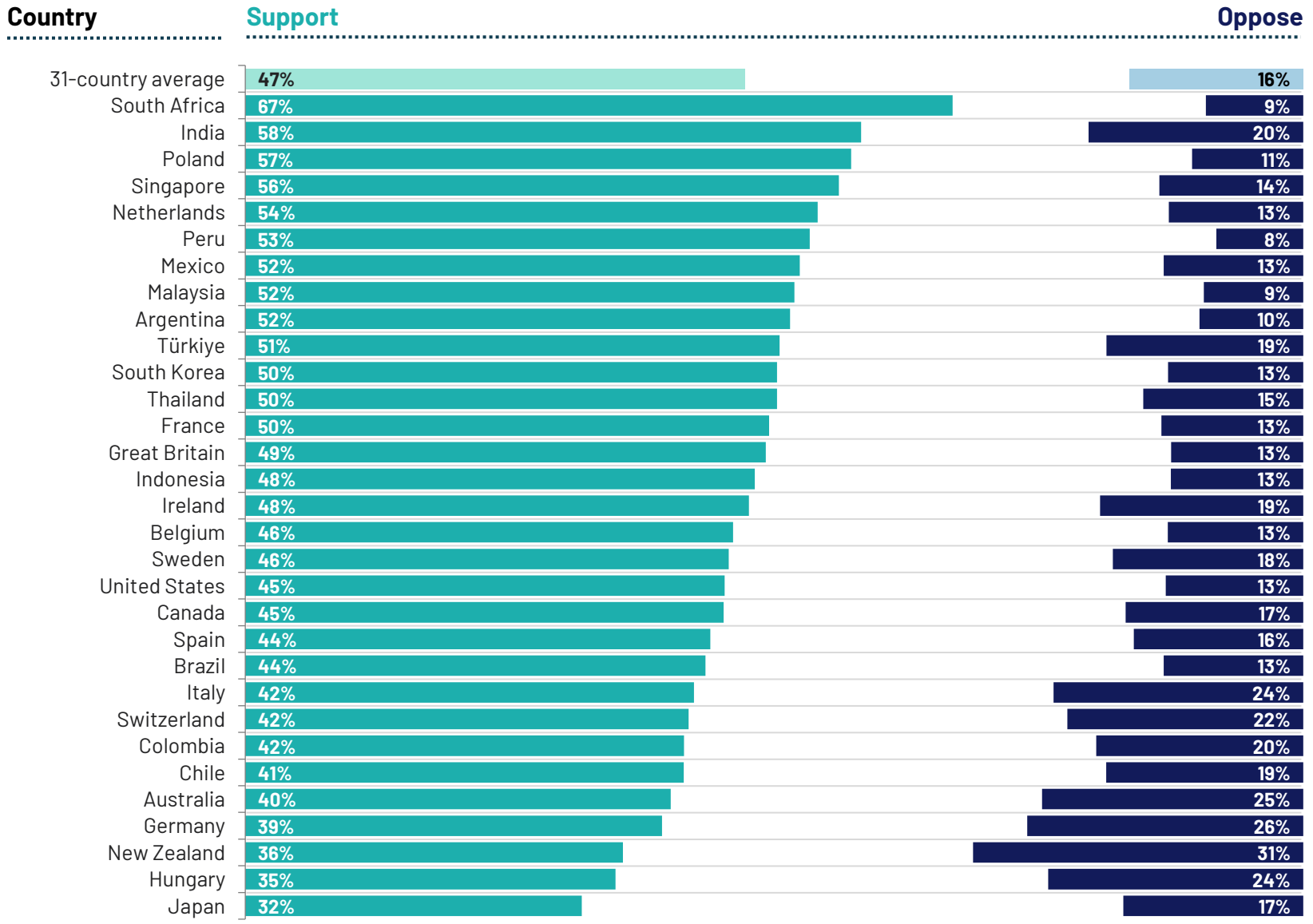


Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

© Ipsos | People and Climate Change 2025

To what extent do you support or oppose the following in your region?

Investment in new small modular nuclear reactor technology for more electricity generation

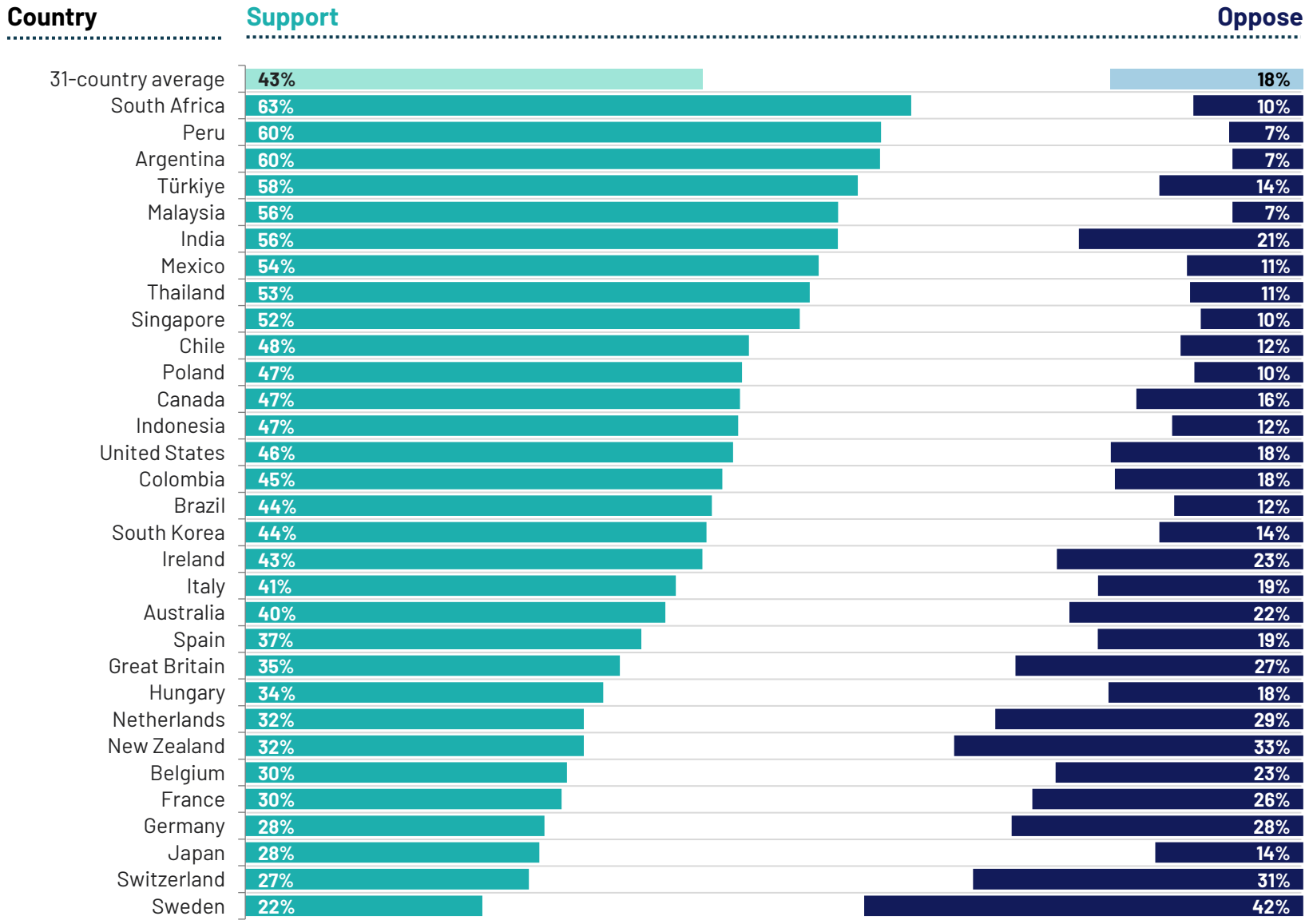


Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

© Ipsos | People and Climate Change 2025

To what extent do you support or oppose the following in your region?

Investment in oil or natural gas pipelines to enhance the import and export of fossil fuels

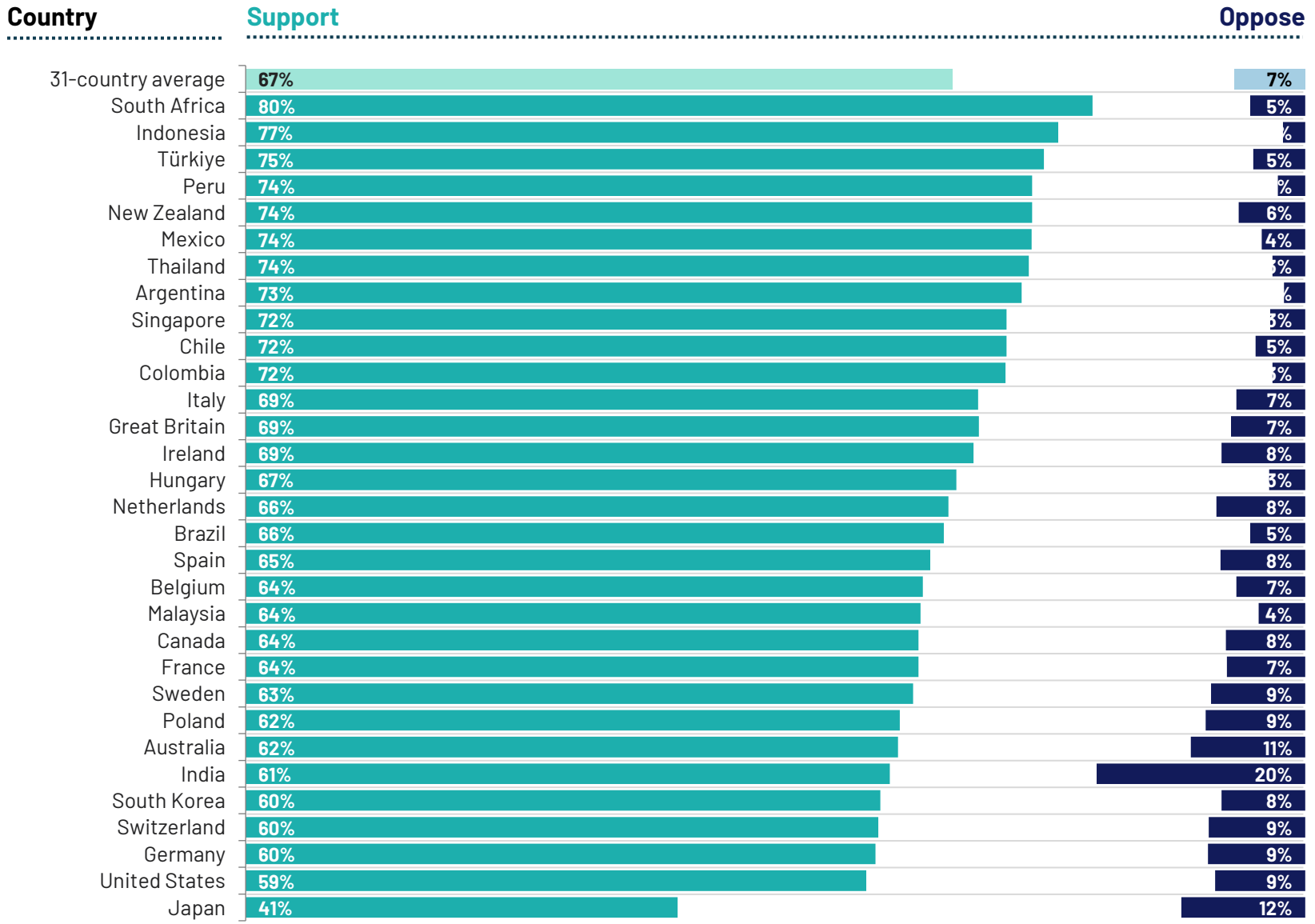


Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

© Ipsos | People and Climate Change 2025

To what extent do you support or oppose the following in your region?

Investment in renewable energy and energy storage facilities for more electricity generation



Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

© Ipsos | People and Climate Change 2025

To what extent do you support or oppose the following in your region?

Government funding for significant financial incentives for households to switch to heat pump heating and cooling technology which uses less energy

Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

© Ipsos | People and Climate Change 2025

Energy Conservation Actions

© Ipsos | Energy Transition Barometer 2026

Key Findings

36%

across 31 countries say they are doing all that they can do to conserve energy.

41%

say they are taking actions to conserve energy, but they could be doing more.

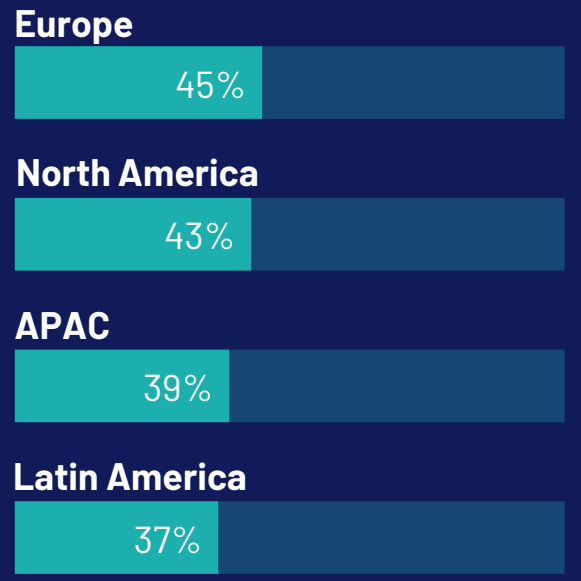
16%

say they are only doing a little to conserve energy, and can do so much more.

7%

say they are not taking any steps to conserve energy.

I am taking actions to conserve energy, but I could be doing more. % agree



© Ipsos | Energy Transition Barometer 2026

Conservation

A strong majority of people globally are taking steps to conserve energy. Across 31 countries, 36% say they are doing all they can, while a further 41% are taking actions but acknowledge they could do more. Just 7% report taking no steps at all. Taken together, 77% of adults are engaged in some form of energy conservation — a notable baseline of public participation, although many can be doing much more.

Many emerging markets lead on urgency. Brazil (53%), India (49%), and South Africa (49%) top the list of countries where people say they are doing all they can. This pattern likely reflects a combination of higher energy costs, greater personal exposure to resource constraints, and stronger day-to-day motivation to reduce consumption. France (49%) is an outlier in terms of leading on conservation actions, perhaps because the country's energy mix is sourced from nuclear power, much more than other European countries, which possibly means people feel less urgency to conserve because of reliability or even environmental reasons.

Most other high-income countries show a different profile: more people acknowledge they could do more, with fewer feeling they are acting at full capacity. Japan (9% doing all they can) and South Korea (14%) sit at the bottom globally — a striking contrast given their technological capacity for energy efficiency. In these markets, the gap between capability and personal action is particularly pronounced.

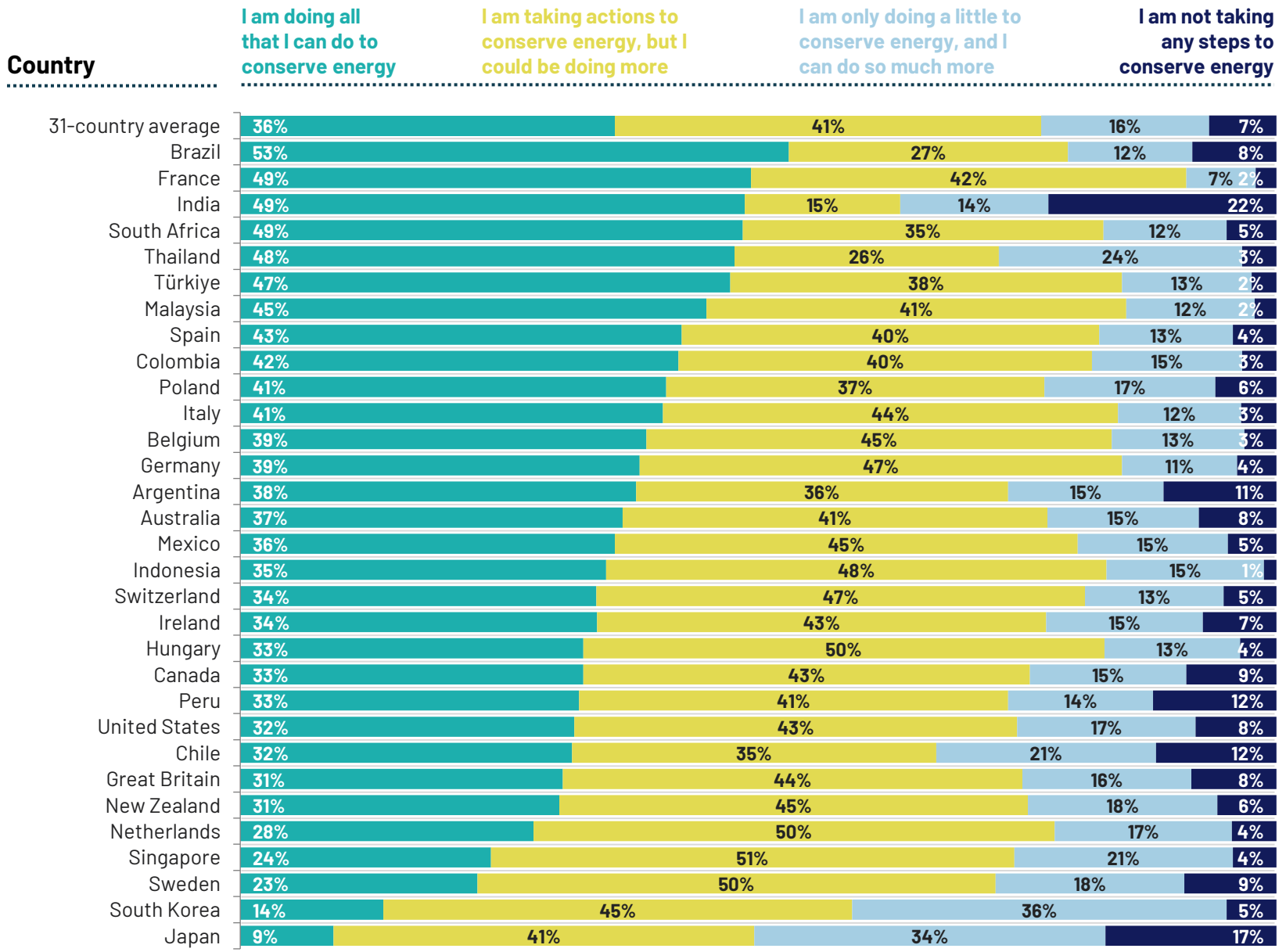
The large "could do more" segment — 41% globally, reaching 50% or above in the Netherlands, Hungary, Sweden, and Singapore — represents a significant reservoir of energy conservation intent. These are people who have already adopted conservation as a value but identify that they have not yet fully translated it into behaviour. Targeted conservation policy, leveraging behavioural science to develop interventions and practical tools, could help convert that intent into action.

Looking at the climate impact barometer rankings, Türkiye is ranked joint first in climate impact (74) and 6th in the energy conservation ranking. In contrast, Indonesia (ranked joint first beside Türkiye in the Climate Impact Barometer) ranks seventeenth in saying they are doing all they can to conserve energy. Differences such as this demonstrate the complex interaction between the threat associated with climate change, leading to practical behaviour change amongst citizens.

Niall McCaffrey

Ipsos B&A Ireland

Which of the following best describes any actions you have undertaken to conserve energy?

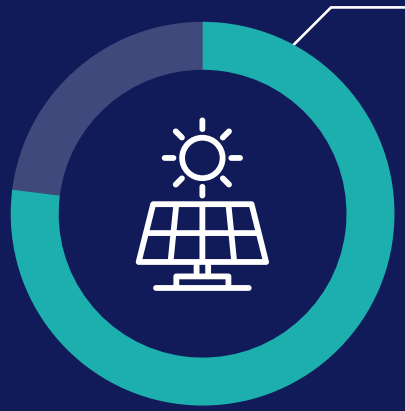


Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

Energy Sources

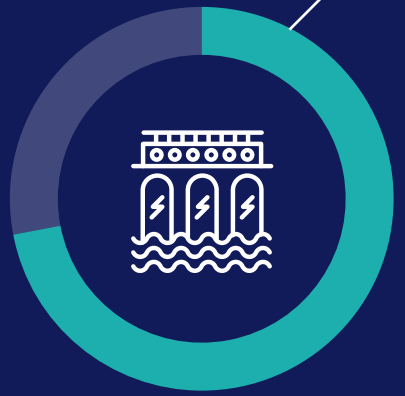
© Ipsos | Energy Transition Barometer 2026

Key Findings



77%

across 31 countries support increased development of solar power in their country.



72%

are in favor of increased development of hydroelectricity/water power in their country.

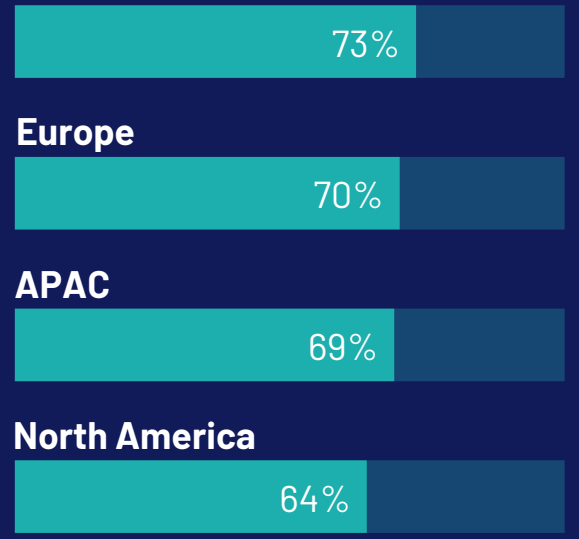
29%

are in favor of increased development of coal in their country, with 35% opposing this.

41%

are in favor of increased development of nuclear power in their country, with 25% opposing this.

Increased development of wind power in their country preferred % support



© Ipsos | Energy Transition Barometer 2026

Energy Sources

The global preference (across the 31-country average) paints a clear picture: Renewable energies are the absolute favorites, while fossil fuels and nuclear power falling behind.

Solar power (77% support / 6% oppose): The undisputed frontrunner. 80% of respondents consider it environmentally friendly. South Africa (90%), Thailand (87%), and Türkiye (86%) lead the pack here. Japan (45%) and India (55%) bring up the rear.

Hydroelectricity / water power (72% support / 5% oppose): Follows closely in second place. Indonesia and Thailand (both at 85%) are the biggest supporters here.

Wind power (70% support / 8% oppose): Also very popular, especially in Thailand (83%) and Türkiye (82%). Along with solar energy, wind energy has been one of the fastest-growing energy sources worldwide over the last 10 years.

Natural gas (54% support / 12% oppose): Sits right in the middle. While 58% consider it reliable, only 45% see it as environmentally friendly. Peru (78%) and Türkiye (74%) want to see the strongest development here.

Nuclear power (41% support / 25% oppose): Opinions are highly divided here. Poland (62%) and Sweden (54%) are the biggest advocates, while New Zealand (26%) and many Latin American countries strongly oppose it.

Coal (29% support / 35% oppose): Coal is the only energy source where global opposition outweighs support. Only 26% consider it environmentally friendly. Still, there are upward outliers like South Africa (60%) and India (52%).

There is a very clear divide in perception between renewable energies on one side and fossil fuels and to some extent nuclear power on the other.
For renewable energies, the main argument is clearly environmental friendliness. However, they also score very well on the other two factors reliability and affordability. With conventional energy sources natural gas, nuclear and coal, the picture flips completely.
They score lower when it comes to environmental friendliness. When they are supported, it is almost exclusively for the reasons of reliability and affordability.

Janina Belz

Public Affairs infas, Germany

Energy Sources – Preference and Opposition in Regions

Europe: Europe stands out for its massive rejection of coal. Countries like Sweden, France, Belgium, Switzerland, the Netherlands, and Germany are at the absolute bottom when it comes to expanding coal, with support rates between 12% and 17%. Natural gas is also viewed much more critically here than in the rest of the world (the Netherlands, Sweden, Germany, and Switzerland have the lowest support globally). When it comes to nuclear power, Europe is split, but it's home to some of the strongest supporters: Poland, Sweden, the Netherlands, and France.

Latin America (LATAM): This region is extremely pro-renewable and anti-nuclear. Chile and Mexico are in the top third for solar and wind support, while Columbia is in the top third for solar. At the same time, they strongly oppose the development of nuclear power (Brazil, Colombia and Chile are close to the bottom of the table, with only New Zealand behind them).

North America (US & Canada): North America takes a more pragmatic approach and often lands in the middle of the pack. The US shows comparatively high support for natural gas (57%) and moderate support for nuclear power (42%). Canada is a big fan of hydroelectricity (74%), which makes sense historically and geographically, particularily in the province of Quebec.

APAC (Asia-Pacific): This region is extremely heterogeneous. On one hand, you have countries like Thailand and Indonesia, which are absolute leaders in supporting almost all renewable energies. On the other hand, India, Thailand and Indonesia (alongside South Africa) show the highest support for coal. Japan shows the lowest global support for renewables and is in the bottom third for support of all other forms of energy.

Nevertheless, the reasons and circumstances behind the current and preferred choice of energy sources depend on a wide range of factors, which vary considerably from country to country.

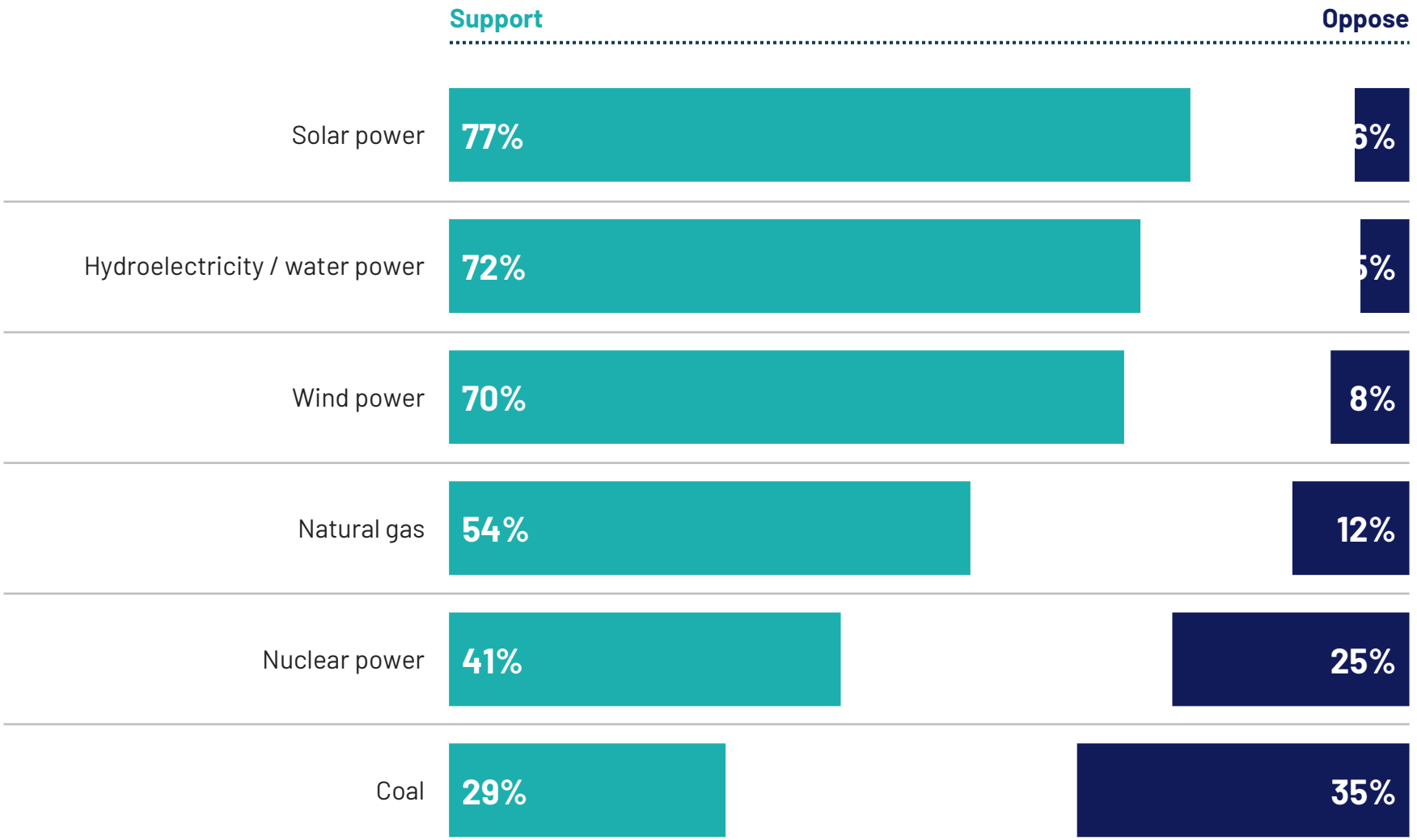
Janina Belz

Public Affairs infas, Germany

© Ipsos | Energy Transition Barometer 2026

Based on what you know, to what extent do you support or oppose increased development of these energy sources in your country?

31-country average %



Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

© Ipsos | People and Climate Change 2025

Based on what you know, to what extent do you support or oppose increased development of these energy sources in your country?

Solar power

Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

Based on what you know, to what extent do you support or oppose increased development of these energy sources in your country?

Hydroelectricity / water power

Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

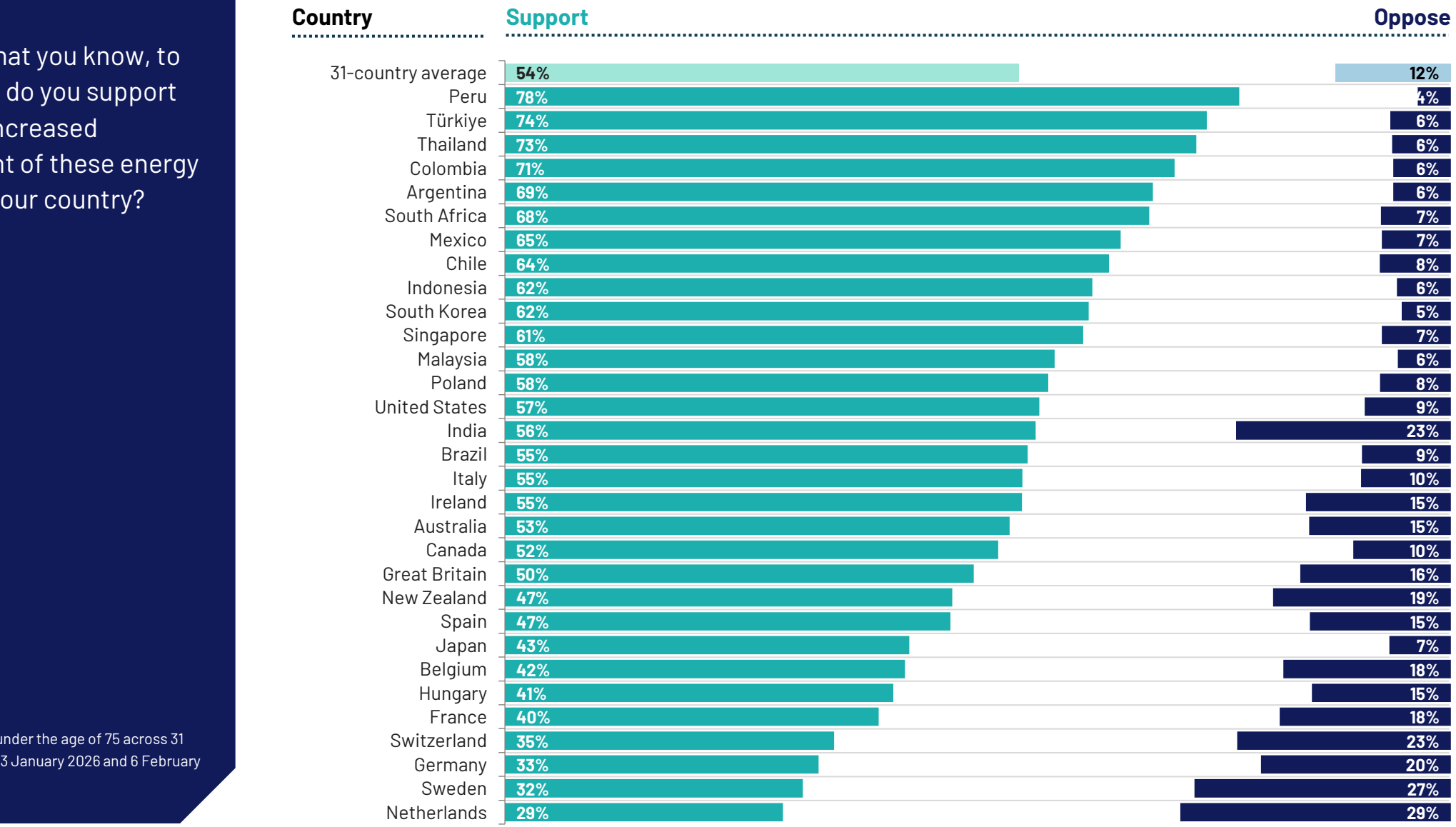
Based on what you know, to what extent do you support or oppose increased development of these energy sources in your country?

Wind power

Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

Based on what you know, to what extent do you support or oppose increased development of these energy sources in your country?

Natural gas



Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

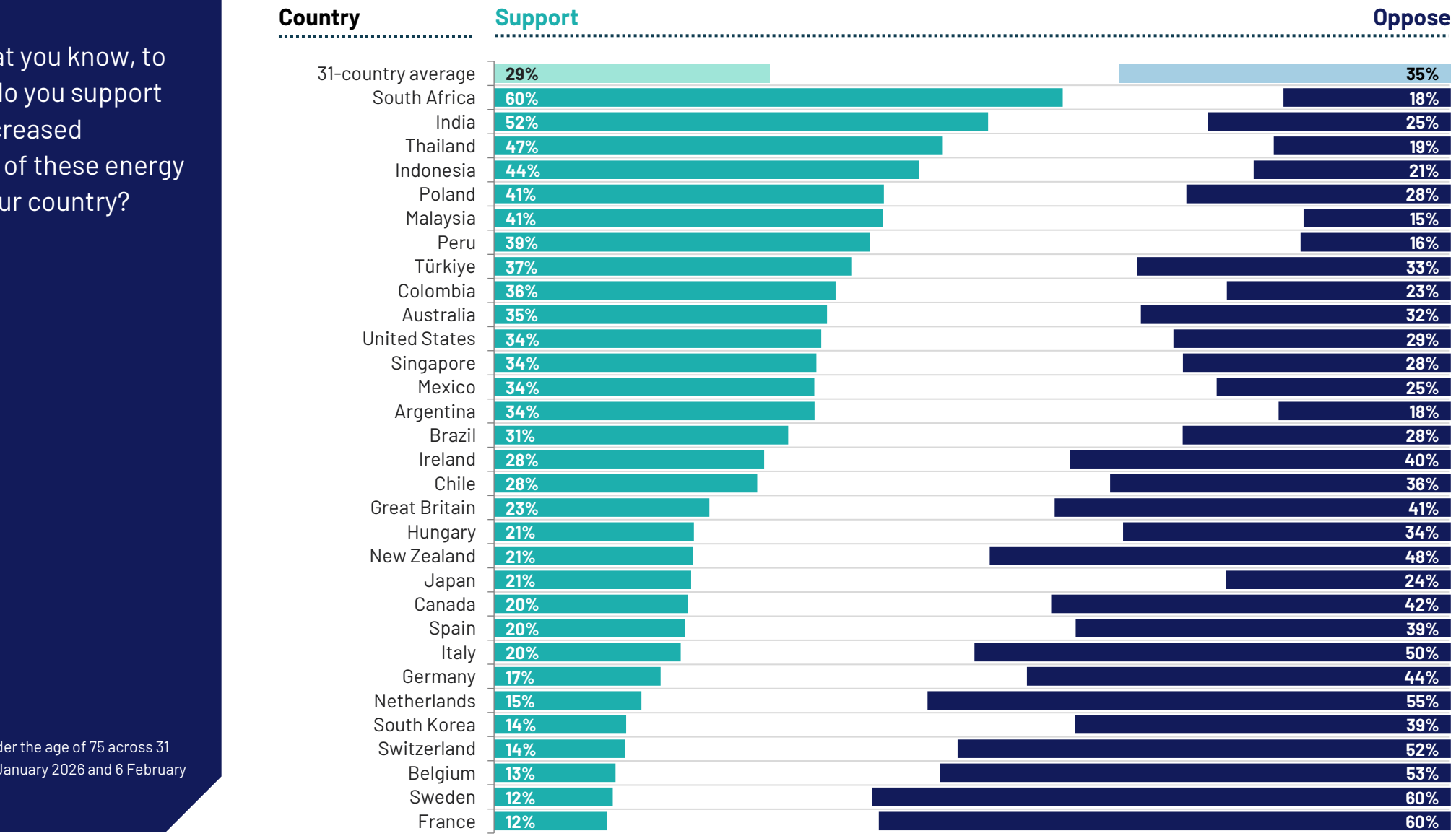
Based on what you know, to what extent do you support or oppose increased development of these energy sources in your country?

Nuclear power

Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

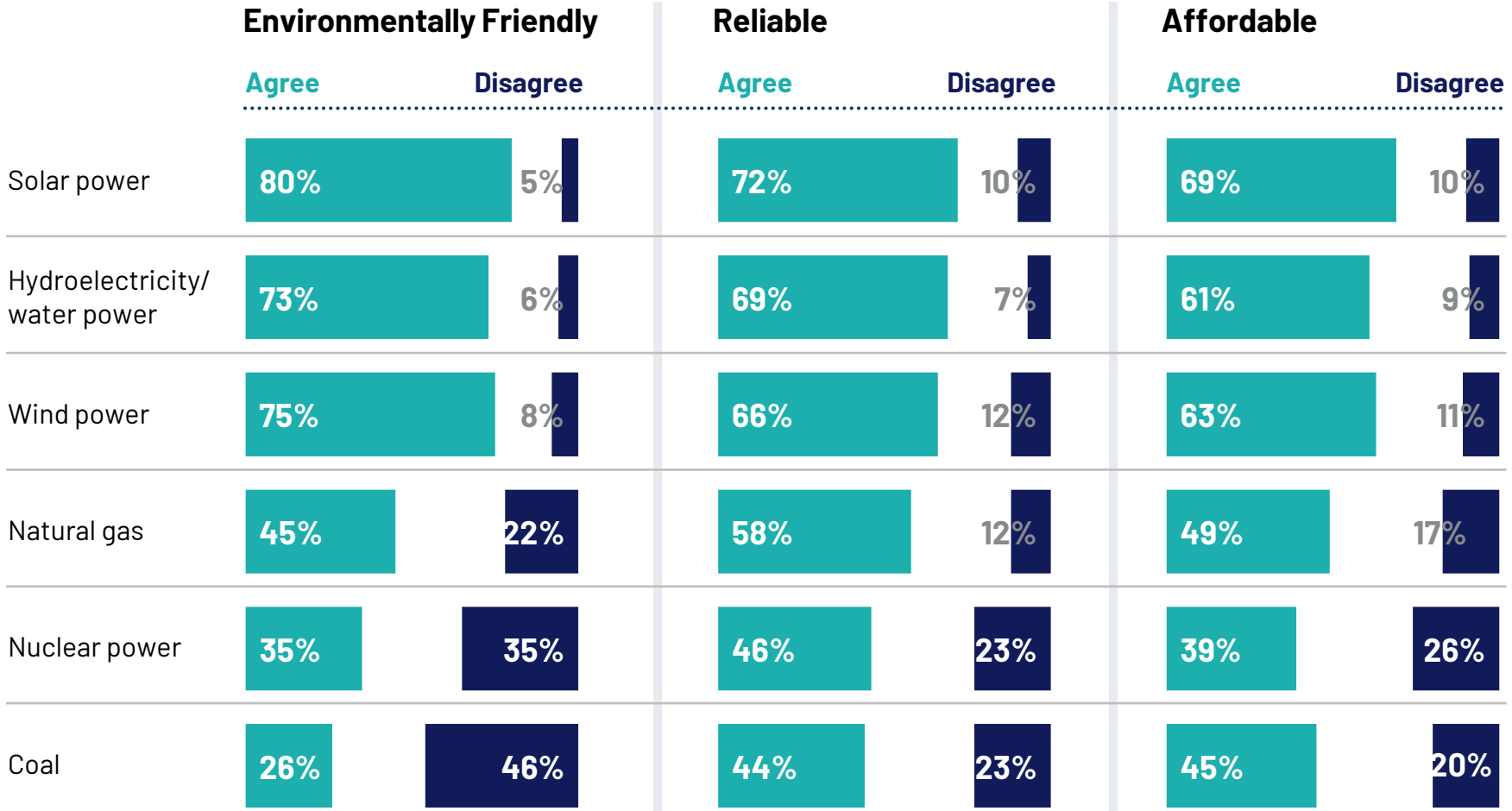
Based on what you know, to what extent do you support or oppose increased development of these energy sources in your country?

Coal



Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

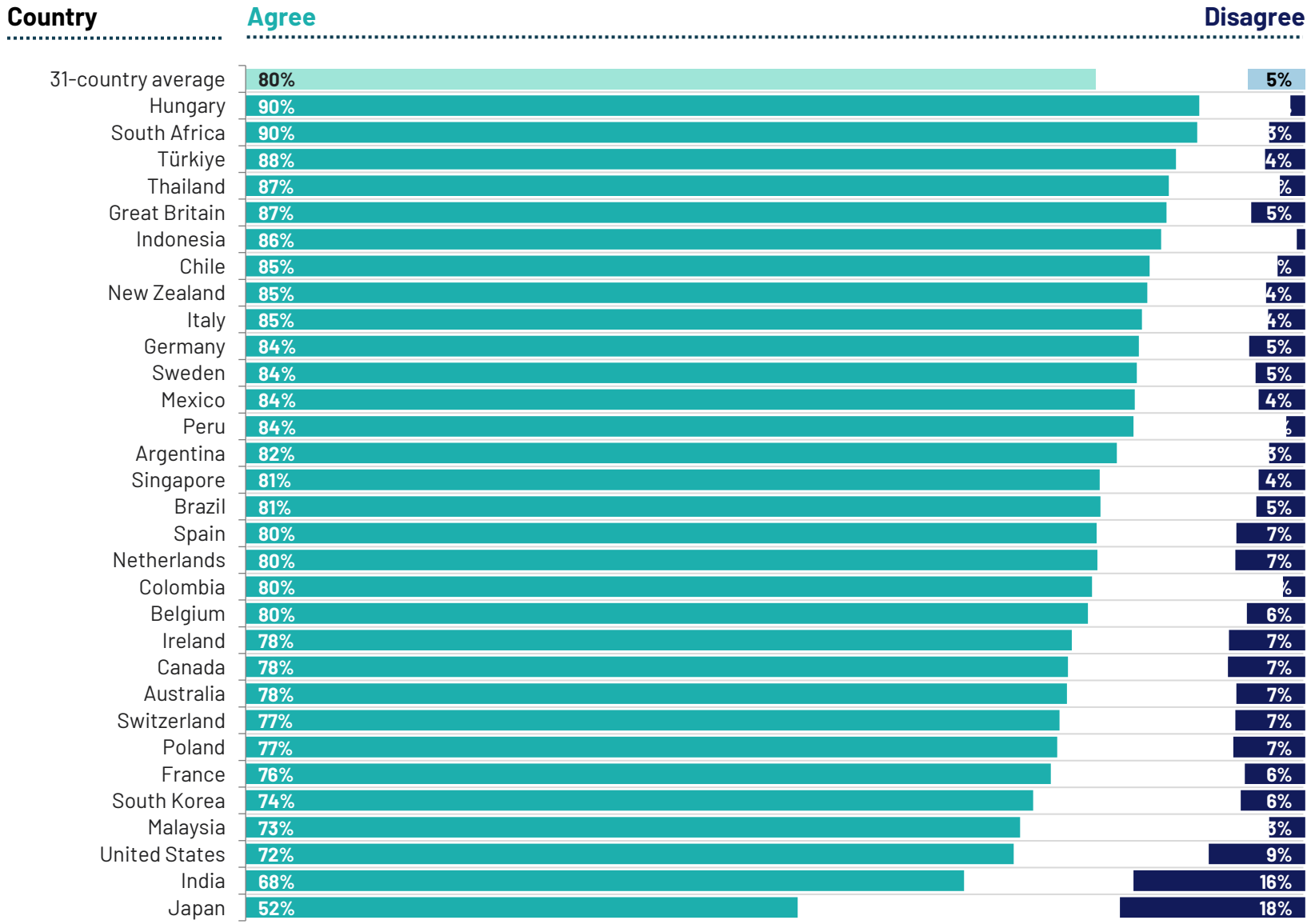
To what extend do you agree or disagree with the following statement? Results for three statements displayed.



Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

To what extent do you agree or disagree with the following statements?

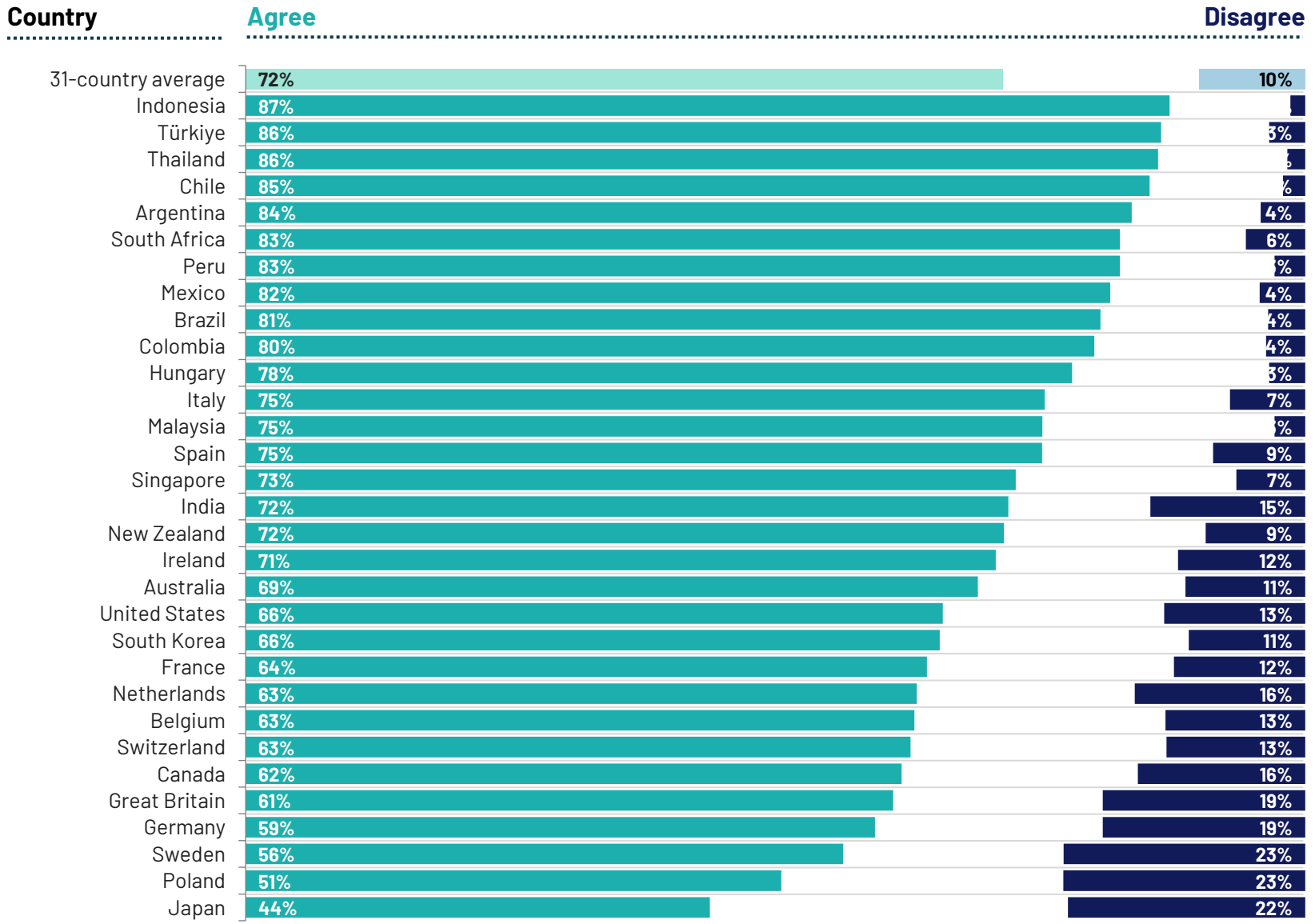
Solar power - is an environmentally friendly source of energy



Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

To what extent do you agree or disagree with the following statements?

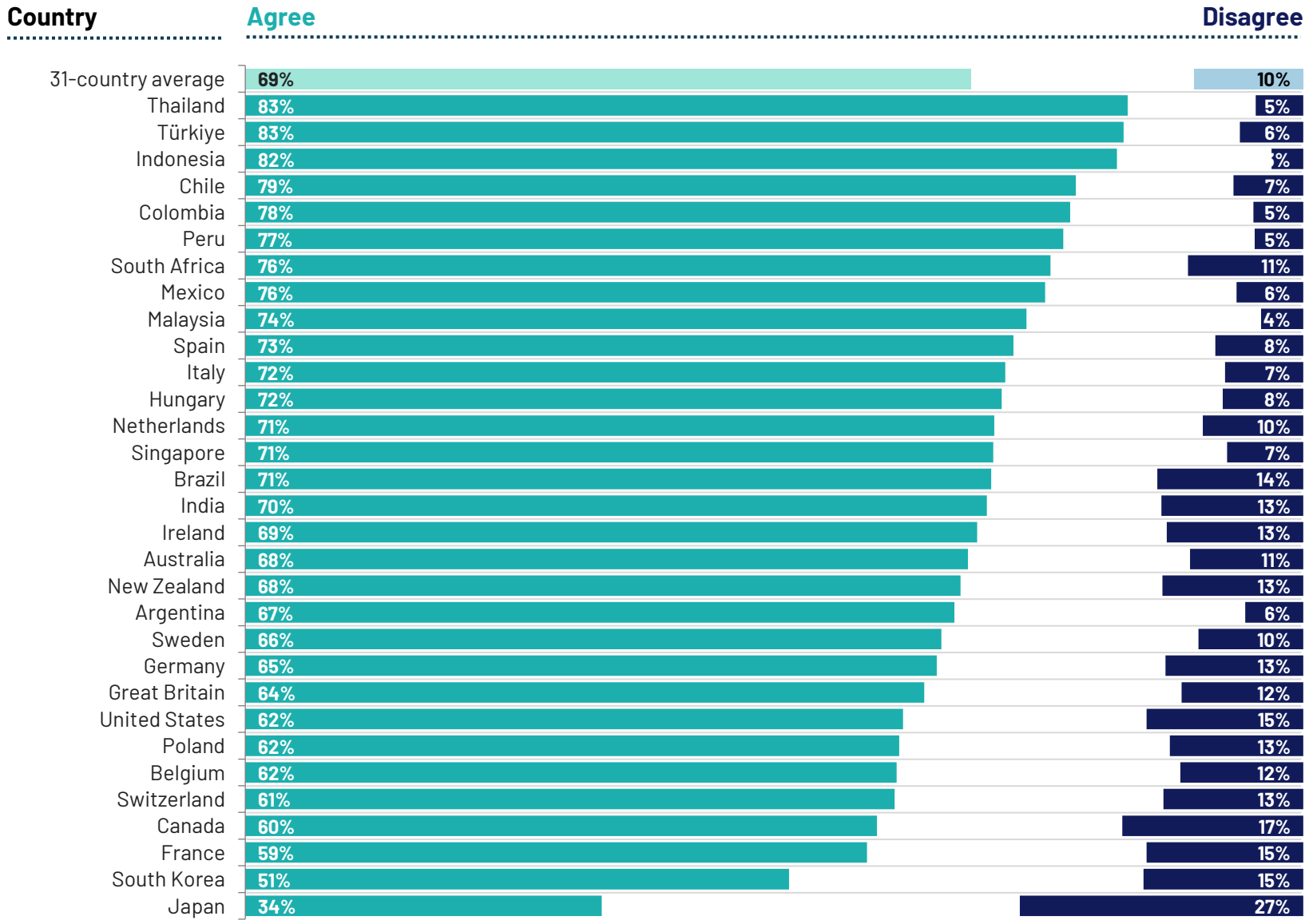
Solar power - is a reliable source of energy



Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

To what extent do you agree or disagree with the following statements?

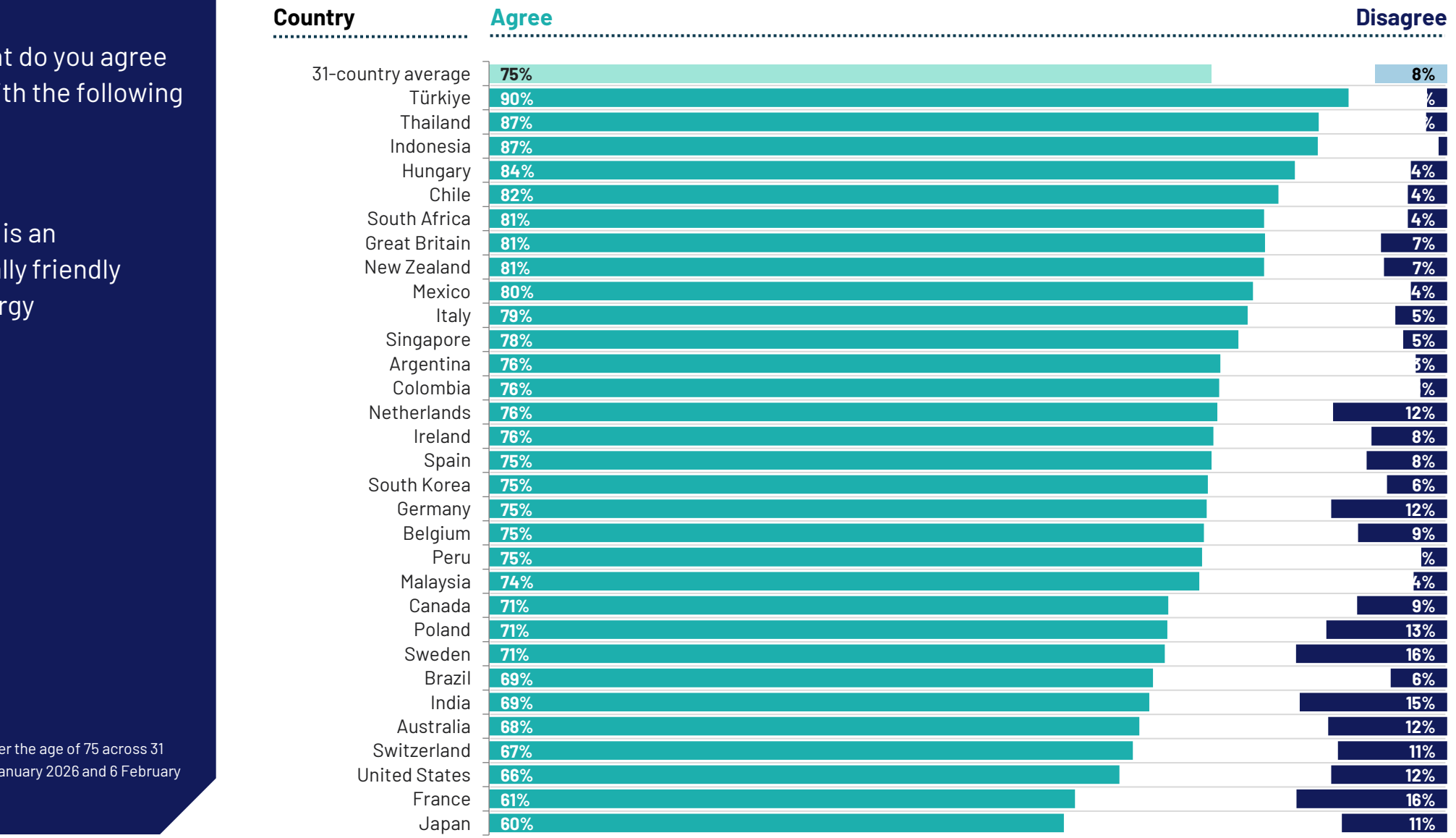
Solar power - is an affordable source of energy



Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

To what extent do you agree or disagree with the following statements?

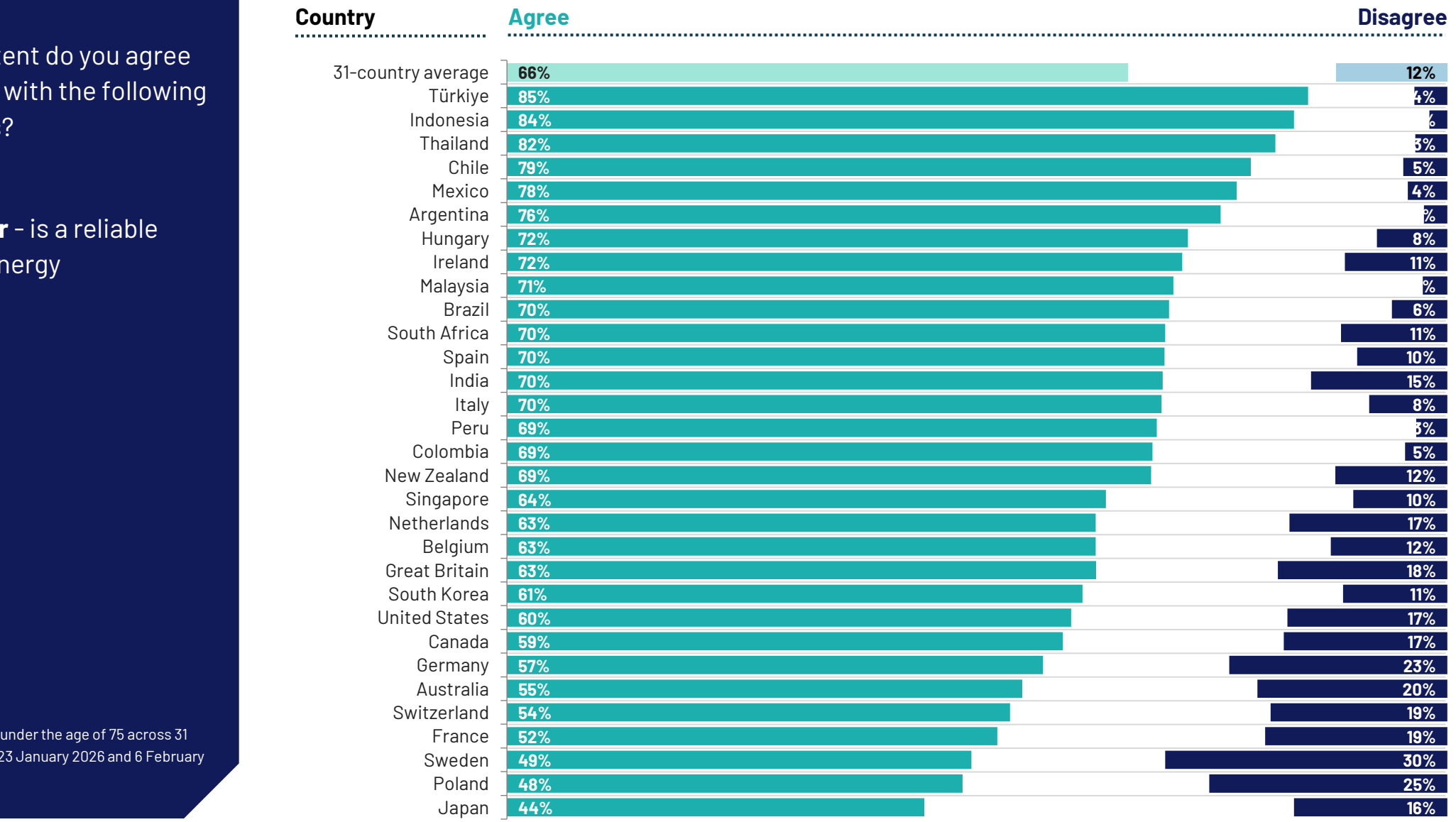
Wind power - is an environmentally friendly source of energy



Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

To what extent do you agree or disagree with the following statements?

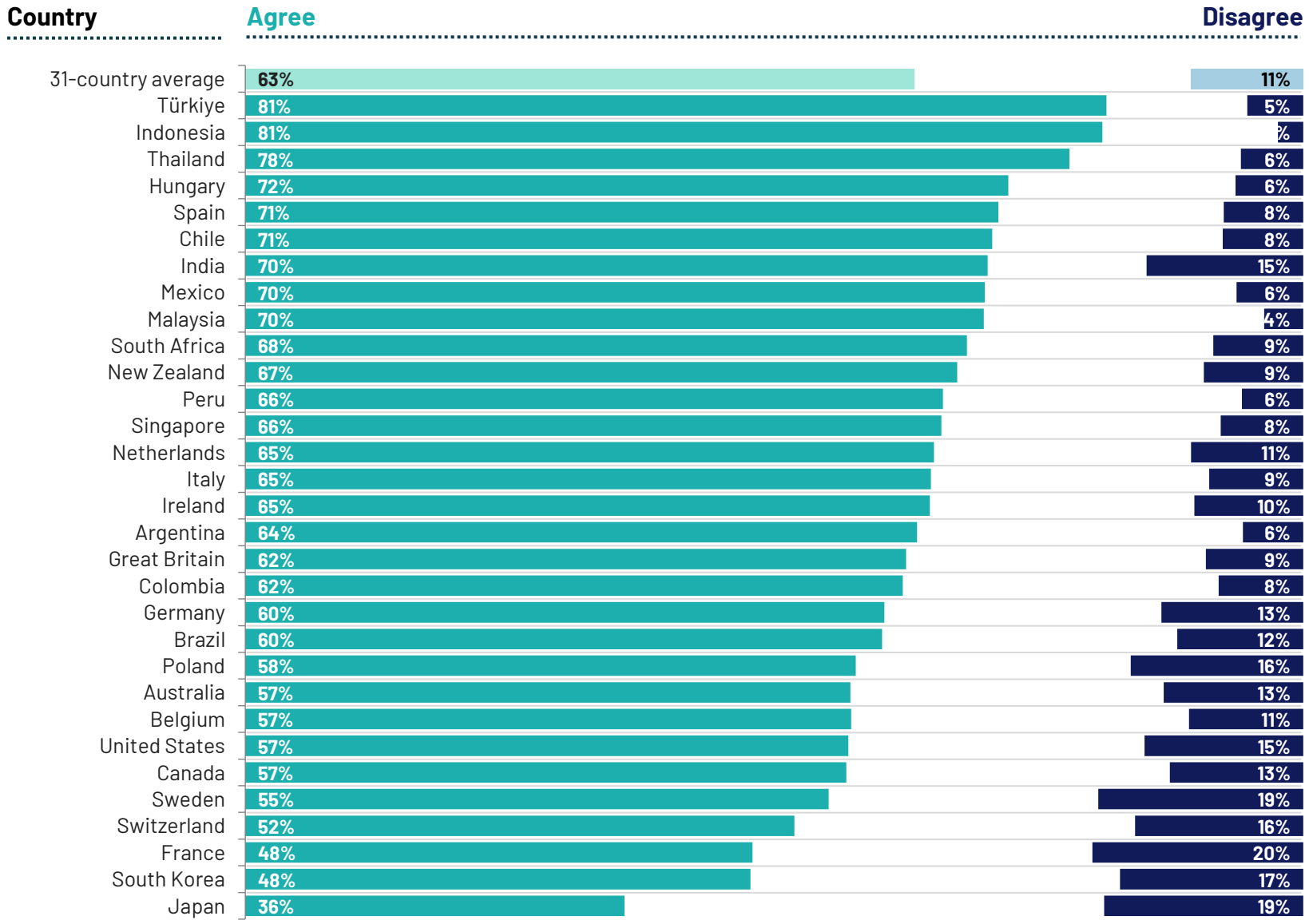
Wind power - is a reliable source of energy



Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

To what extent do you agree or disagree with the following statements?

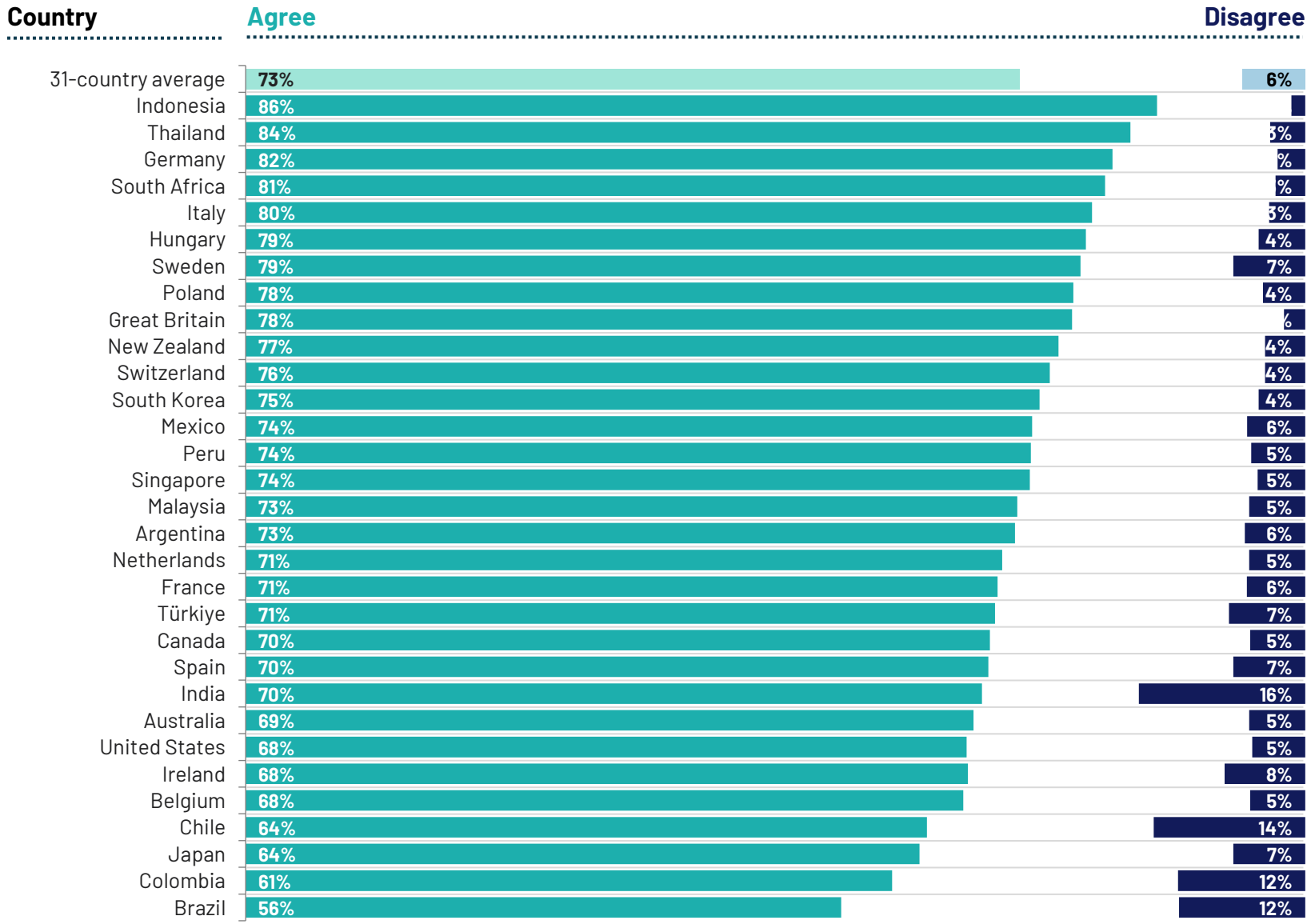
Wind power - is an affordable source of energy



Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

To what extent do you agree or disagree with the following statements?

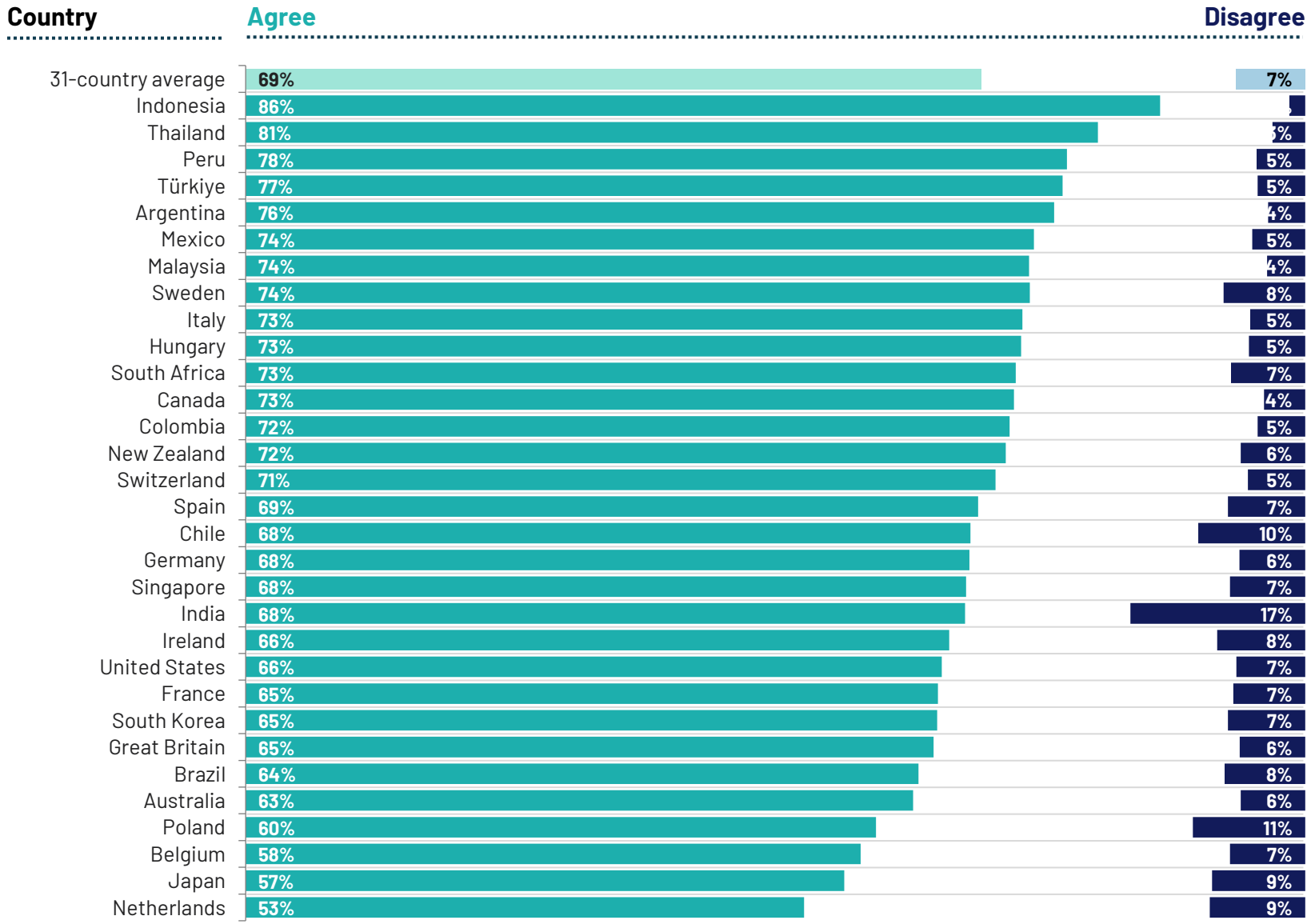
Hydroelectricity/water power - is an environmentally friendly source of energy



Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

To what extent do you agree or disagree with the following statements?

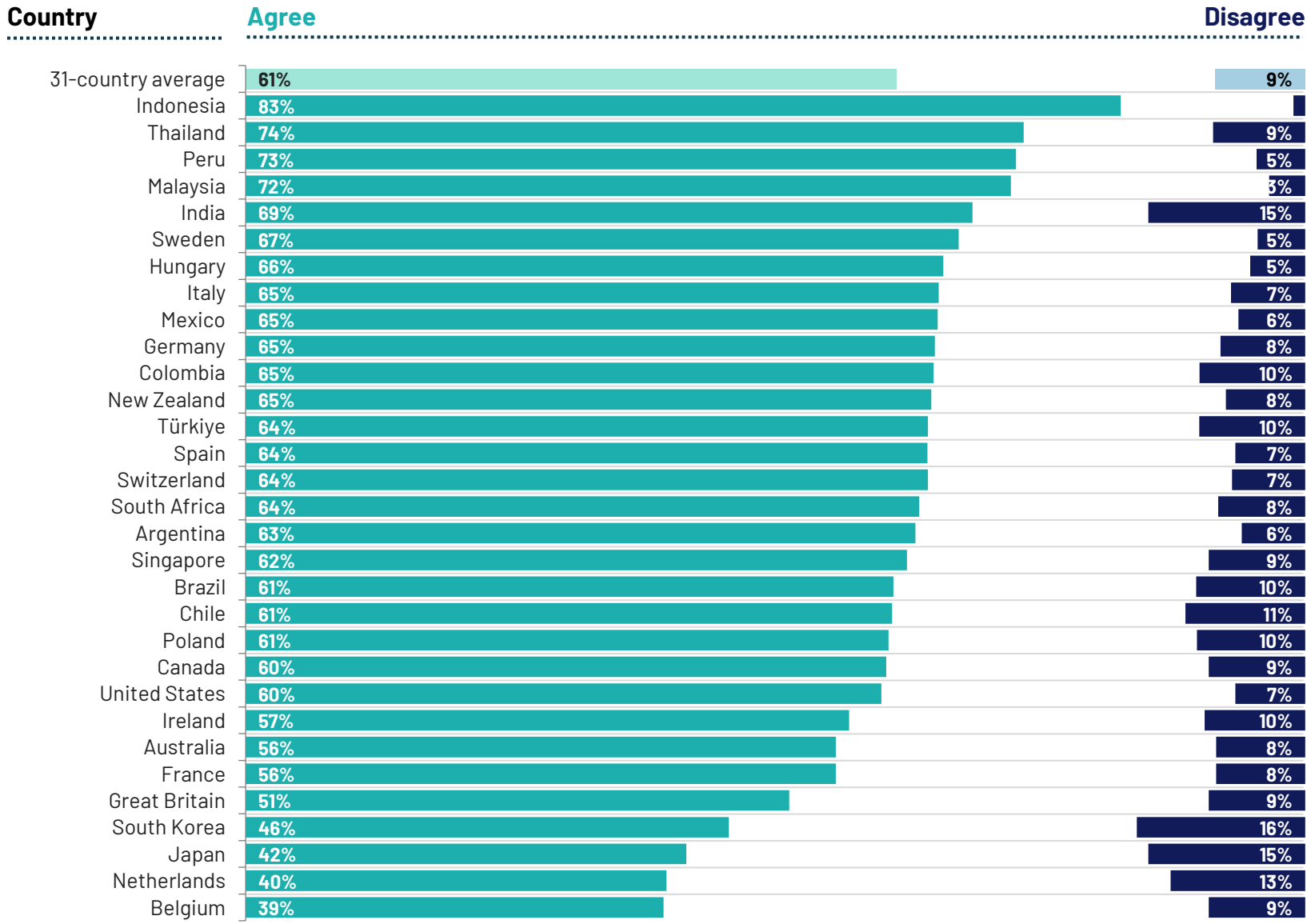
Hydroelectricity/water power - is a reliable source of energy



Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

To what extent do you agree or disagree with the following statements?

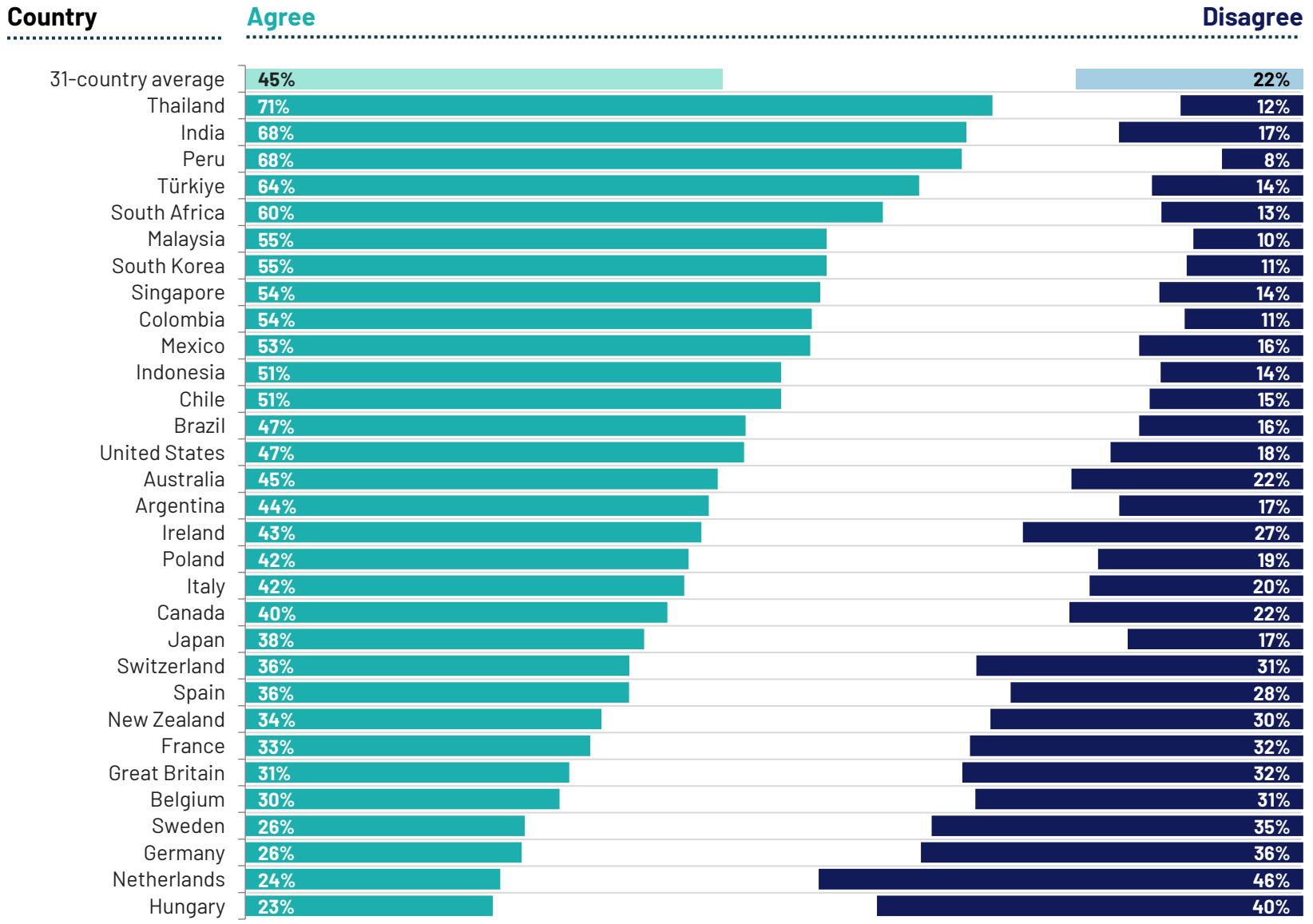
Hydroelectricity/water power - is an affordable source of energy



Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

To what extent do you agree or disagree with the following statements?

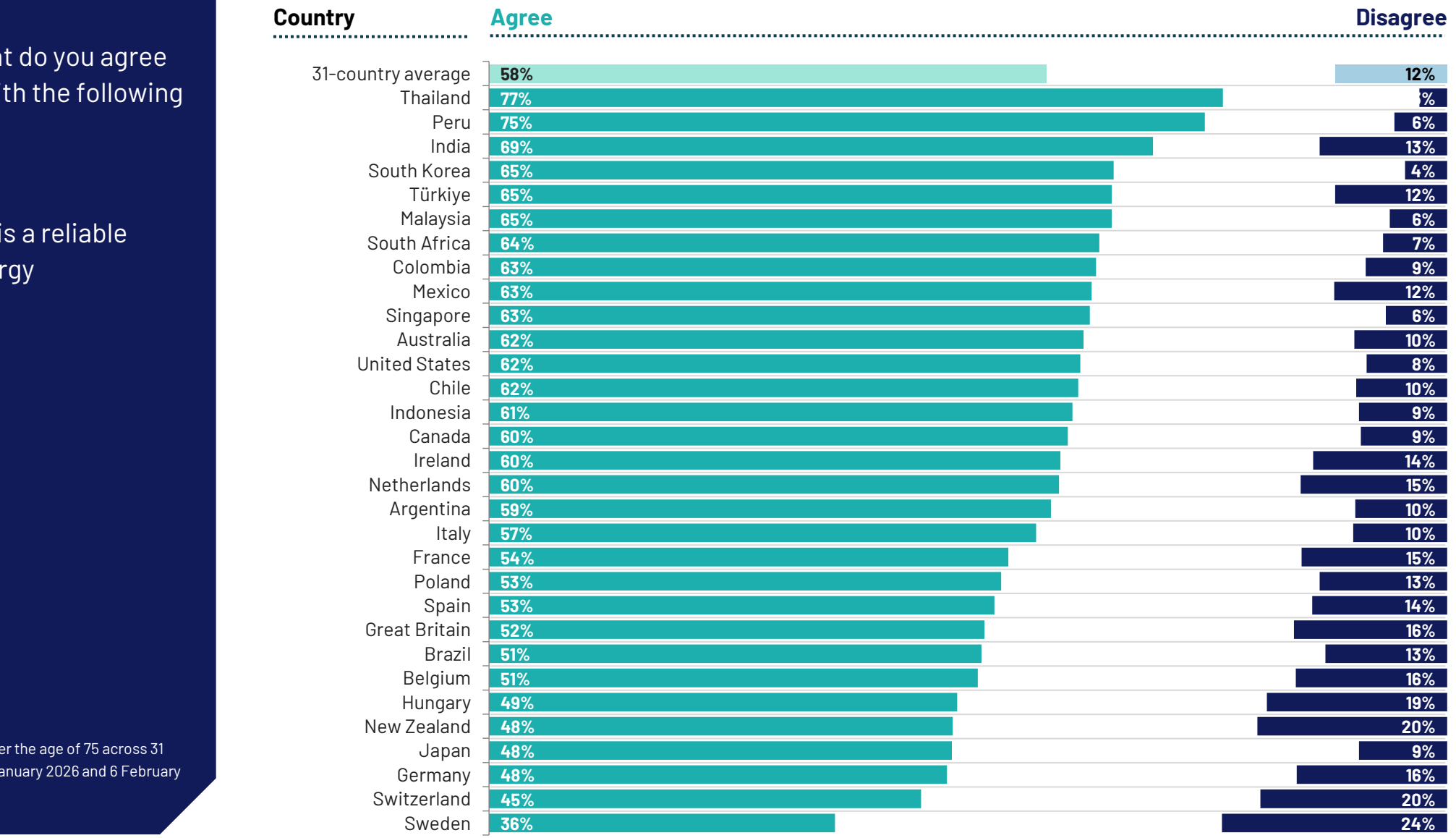
Natural gas - is an environmentally friendly source of energy



Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

To what extent do you agree or disagree with the following statements?

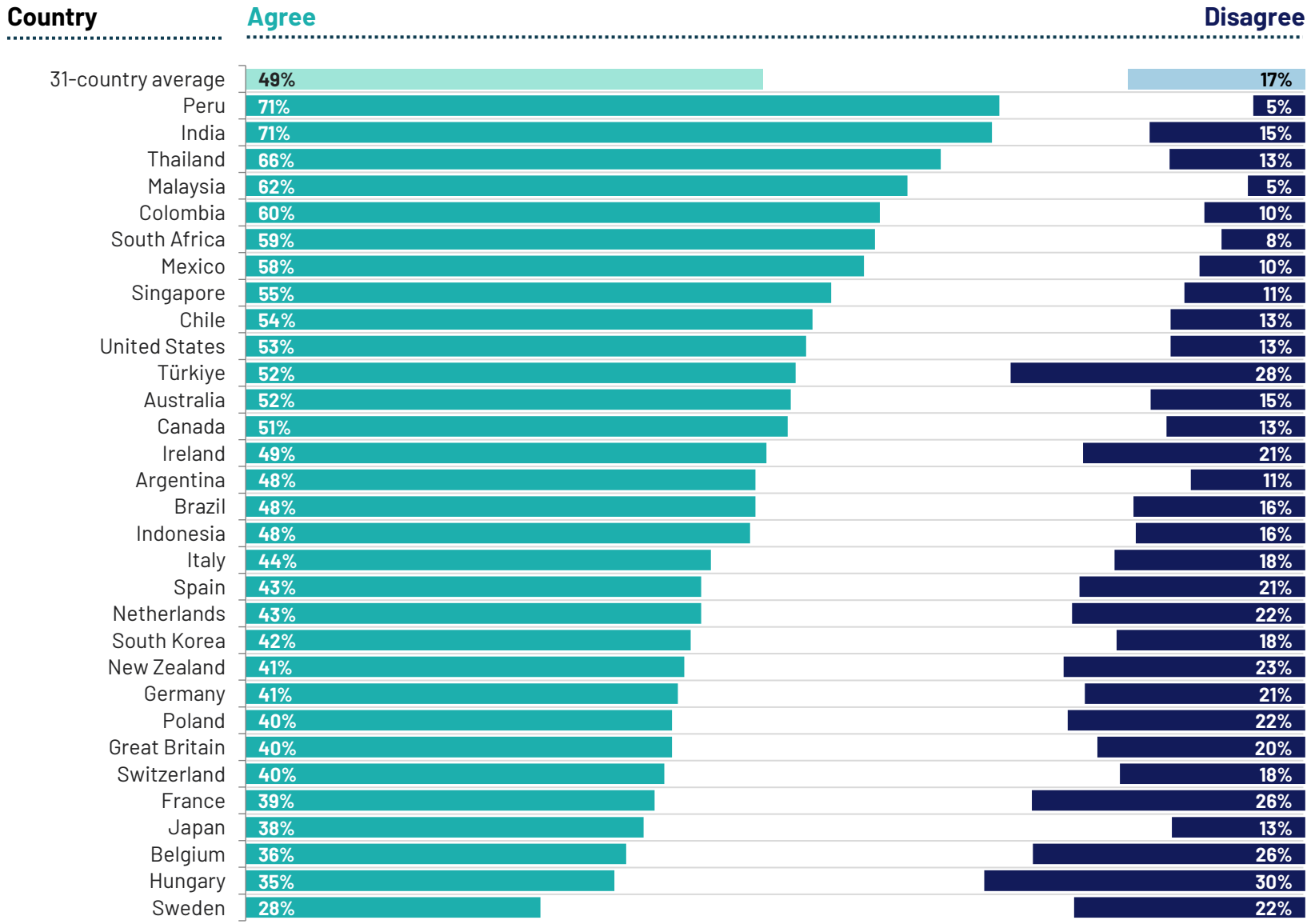
Natural gas - is a reliable source of energy



Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

To what extent do you agree or disagree with the following statements?

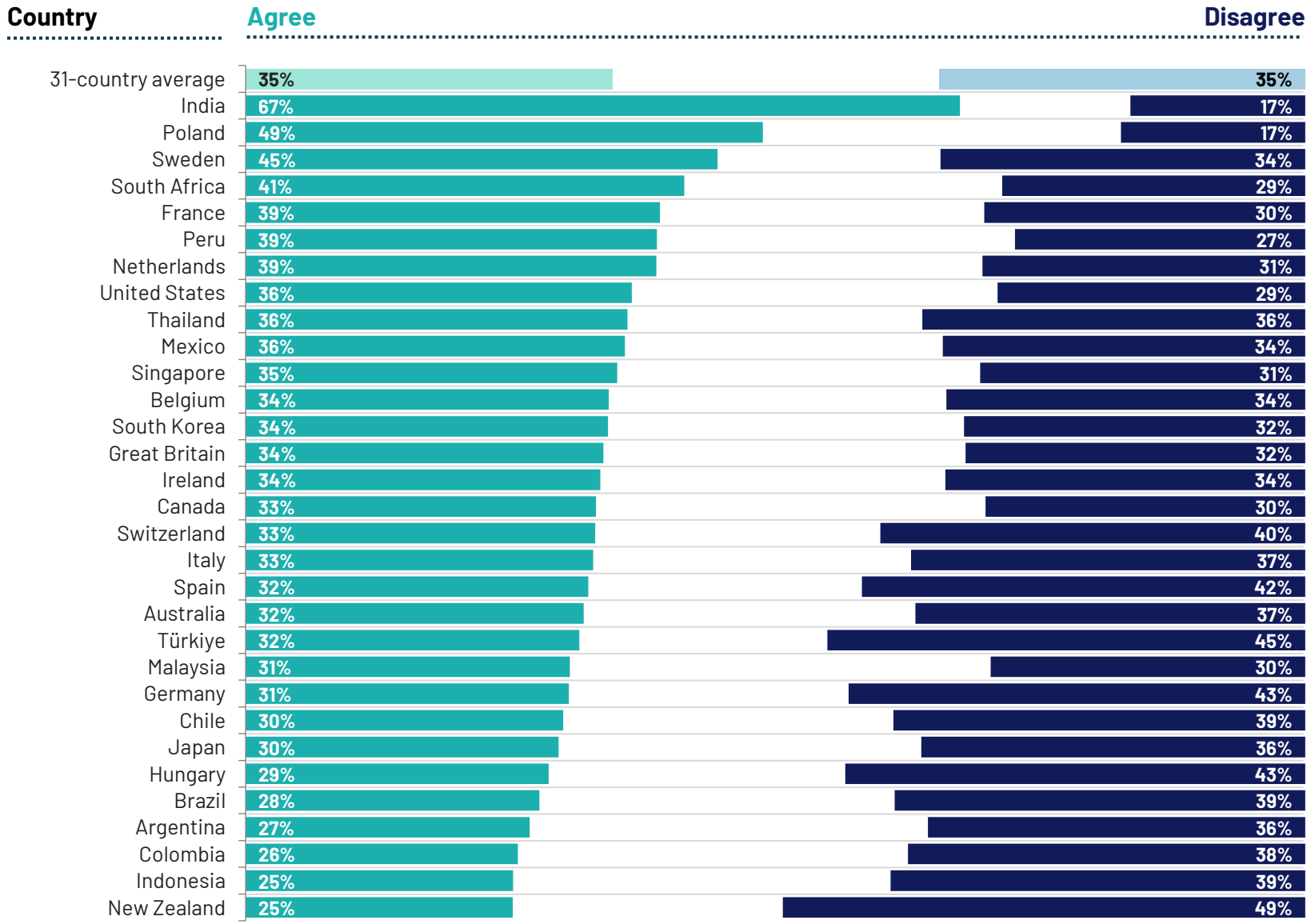
Natural gas - is an affordable source of energy



Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

To what extent do you agree or disagree with the following statements?

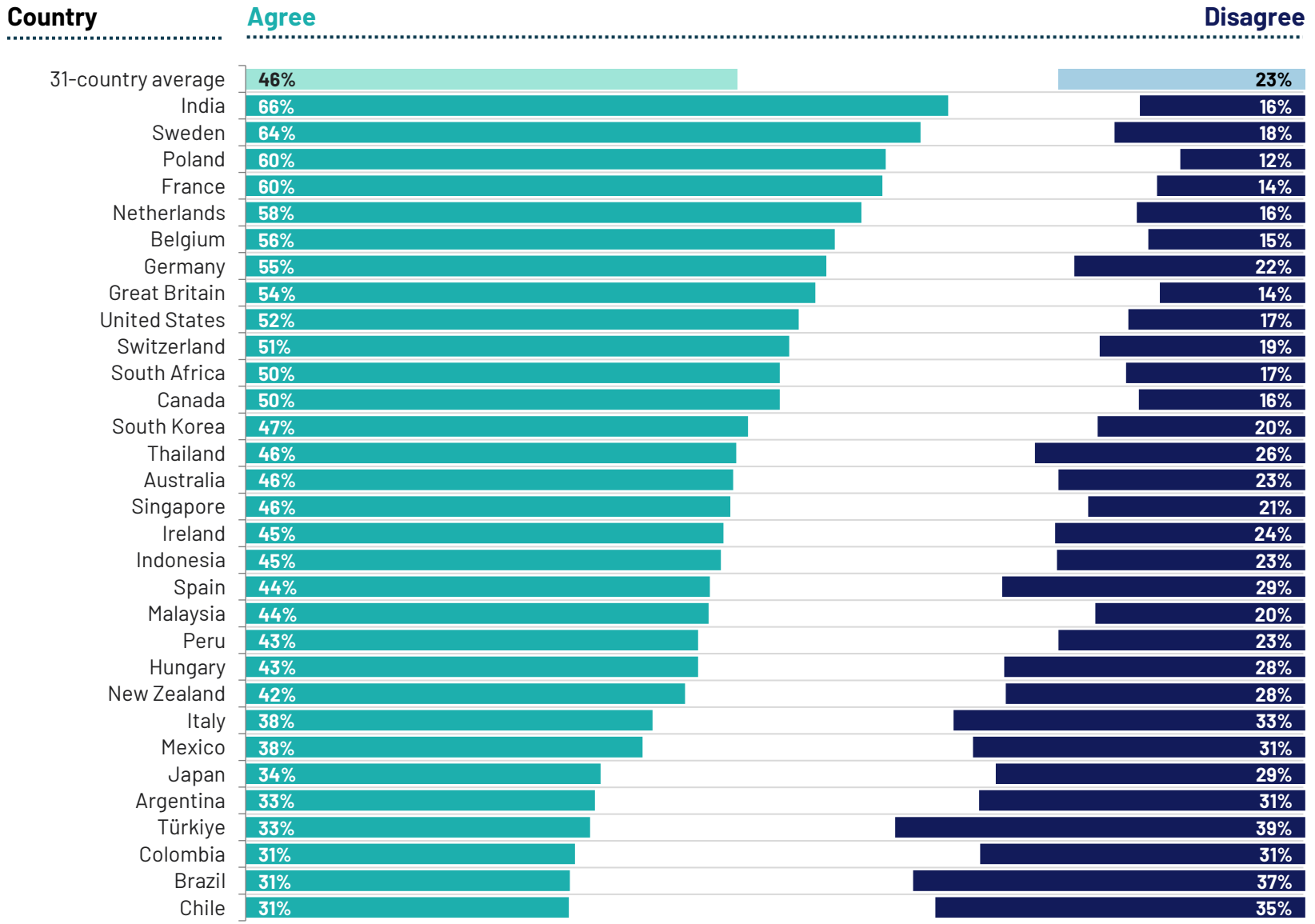
Nuclear power - is an environmentally friendly source of energy



Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

To what extent do you agree or disagree with the following statements?

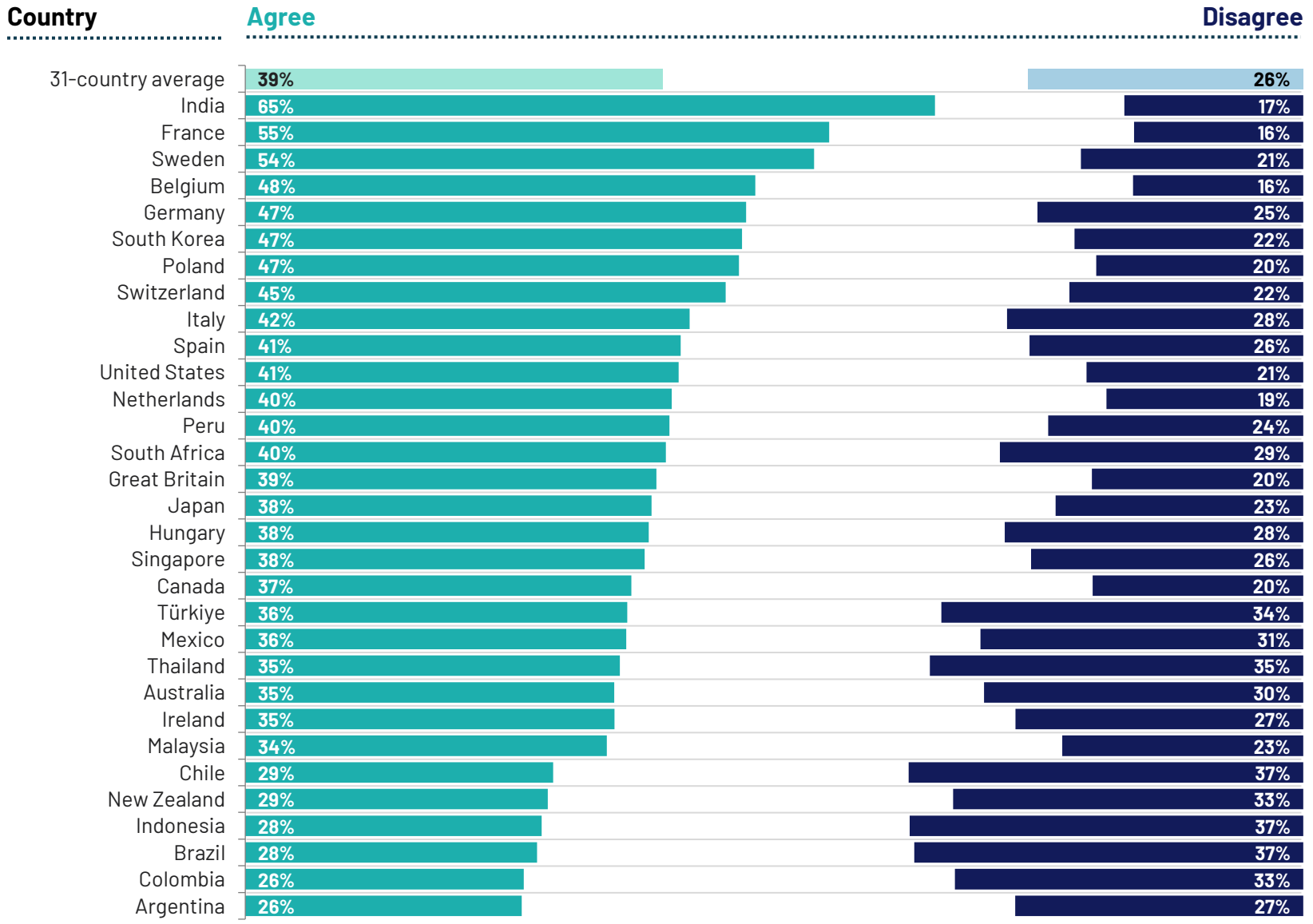
Nuclear power - is a reliable source of energy



Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

To what extent do you agree or disagree with the following statements?

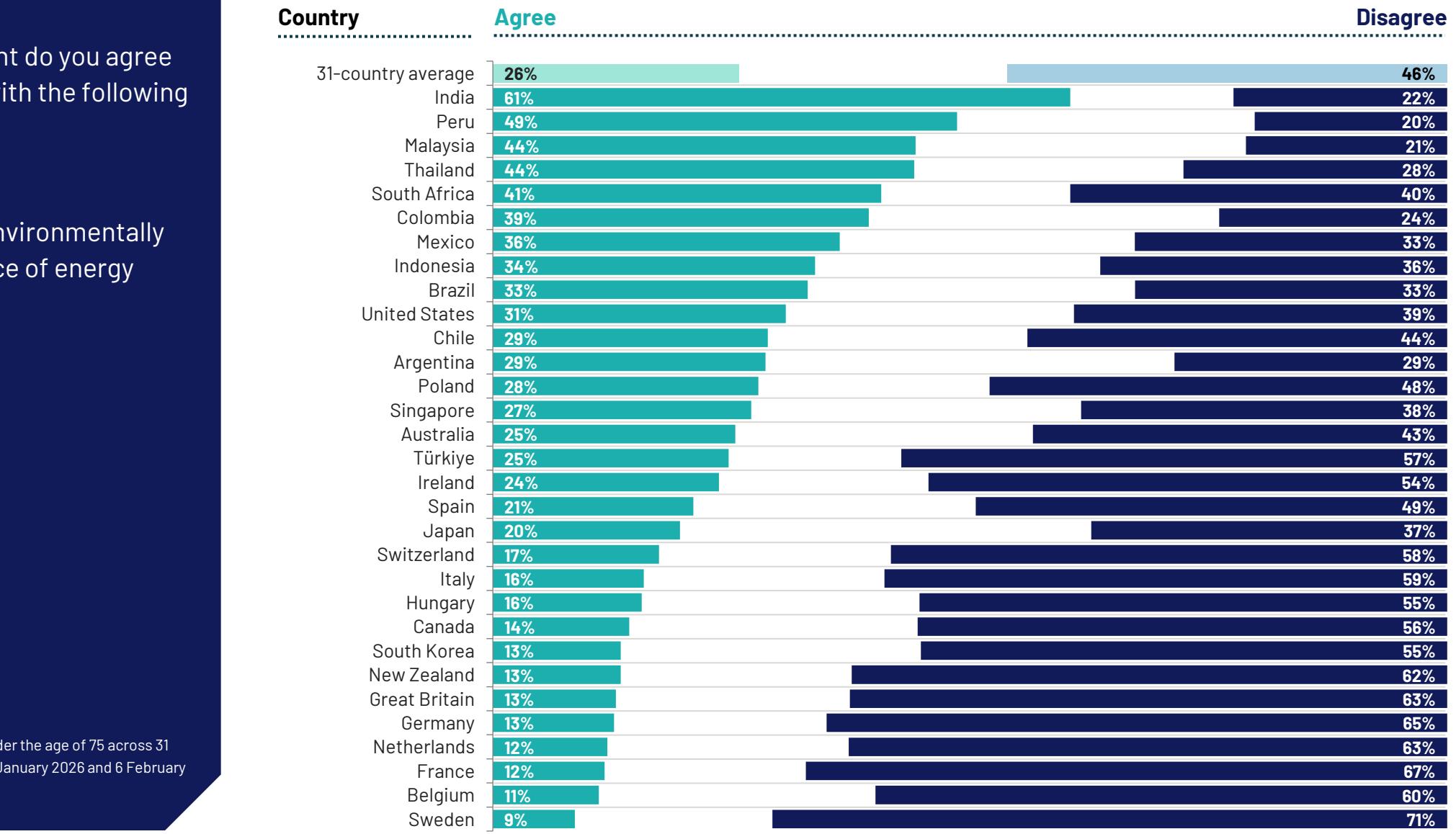
Nuclear power - is an affordable source of energy



Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

To what extent do you agree or disagree with the following statements?

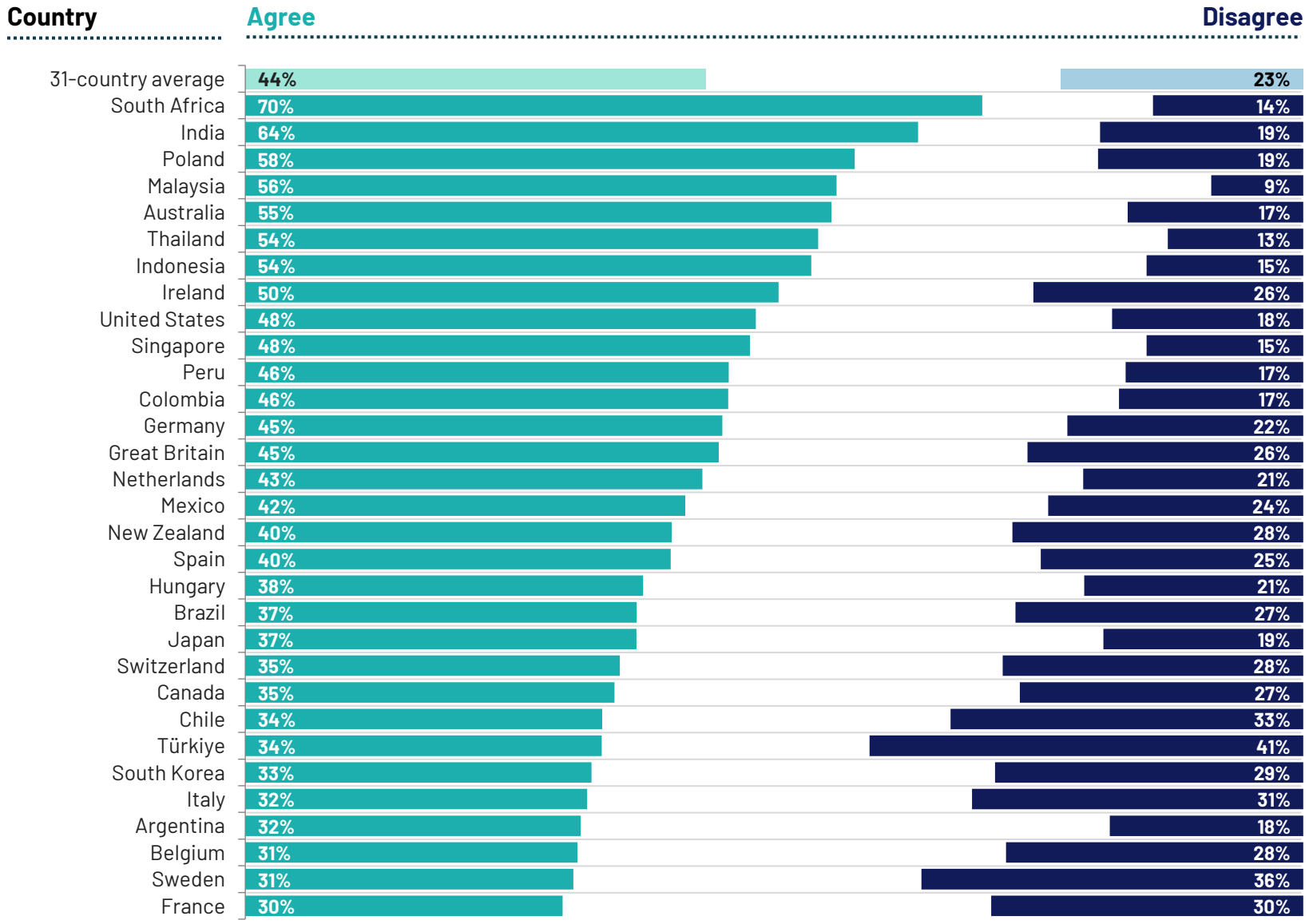
Coal - is an environmentally friendly source of energy



Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

To what extent do you agree or disagree with the following statements?

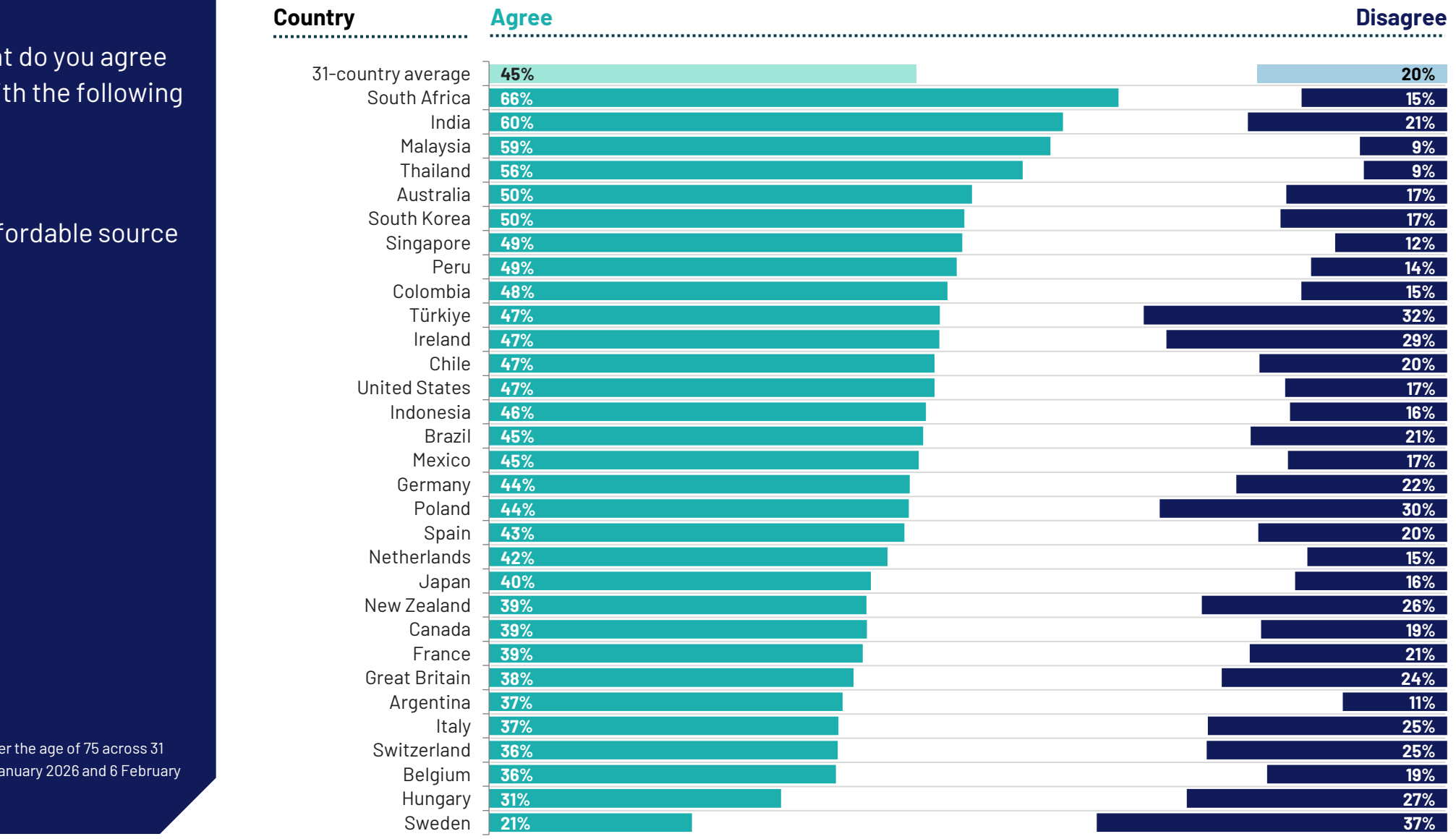
Coal - is a reliable source of energy



Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

To what extent do you agree or disagree with the following statements?

Coal - is an affordable source of energy



Base: 23,704 adults under the age of 75 across 31 countries between 23 January 2026 and 6 February 2026.

METHODOLOGY

© Ipsos | Energy Transition Barometer 2026

METHODOLOGY

These are the results of a 31-country survey conducted by Ipsos on its Global Advisor online platform and, in India, on its IndiaBus platform, between Friday, January 23, and Friday, February 6, 2026 (Wave 1), and between Friday, April 24, and Friday, May 8, 2026 (Wave 2). For this survey, Ipsos interviewed a total of 23,704 (Wave 1) and 23,022 (Wave 2) adults aged 18 years and older in India, 18-74 in Canada, Republic of Ireland, Malaysia, South Africa, Türkiye, and the United States, 20-74 in Thailand, 21-74 in Indonesia and Singapore, and 16-74 in all other countries.

The sample breakout by country is as follows: Australia, Belgium, Brazil, Canada, France, Germany, Great Britain, Italy, Japan, Spain and the United States had approximately 1,000 respondents in both waves while Argentina, Chile, Columbia, Hungary, Ireland, Malaysia, Netherlands, Peru, Poland, Singapore, South Africa, South Korea, Sweden and Thailand had roughly 500 respondents in each. Mexico had approximately 1000 respondents in wave 1, and 500 in wave 2, while Indonesia, Switzerland and Türkiye had around 500 in wave 1 and 1000 in wave 2. Roughly 1000 New Zealanders were interviewed in wave 1, though the country was not included in wave 2, while Saudi Arabia was added for wave 2 with roughly 500 respondents. The sample in India consists of approximately 2,200 individuals in Wave 1, of whom approximately 1,800 were interviewed face-to-face and 400 were interviewed online; in Wave 2, all interviews were conducted online.

Samples in Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, the Netherlands, New Zealand, Poland, South Korea, Spain, Sweden, Switzerland, and the U.S. can be considered representative of their general adult populations under the age of 75 (Wave 1); New Zealand not included in Wave 2. Samples in Brazil, Chile, Colombia, India (Wave 2 only), Indonesia, Ireland, Malaysia, Mexico, Peru, Singapore, Saudi Arabia, South Africa, Thailand, and Türkiye 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 views of 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 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. "31-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 where 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.

For more information contact:

Martin Hrobsky
Global Energy and Environment Lead,
Public Affairs, Ipsos

Martin.Hrobsky@ipsos.com

Contributors for this report include: Janina Belz, Jennifer Brook, Stuart Clark, Melle Conradie, Destiny Diebold, Martin Hrobsky, Gregory Jack, Jenny Lee, Katriina Lepanjuuri, Niall McCaffrey, Jamie Stinson, and Alec Tyson.