



Climate Impact Research

May 2024

FINN
PARTNERS

Objectives & Methodology

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The survey aims to **understand perceptions and attitudes** across Europe **towards climate change** and **environmental sustainability**, identifying perceived threats and evaluating concerns about its severity and impacts. It also explores **environmental concerns, behavioural patterns, and lifestyle choices** related to conservation and sustainable practices, investigating intergenerational worries and geographical mobility influenced by extreme weather events. Additionally, it examines public perceptions of **government actions** on climate issues and **personal responsibility** for climate action. By doing this, we can ascertain which countries across the continent are most concerned about climate change, and understand how this is affecting their daily behaviour and life choices.

This survey was carried out by Mortar Research taken by a total of **11,726 respondents** on both mobile and desktop devices. The study ran on **10th-16th May 2024**.

Respondents were aged 18+ and based in Europe. Nationally representative quotas were in place for **Germany, Sweden, Italy, France, and Poland**.

Quotas in the remaining European countries were in line with nationally representative quotas on age and gender, but not with a significant sample size. Apart from the following countries, where we sampled respondents in Malta, Cyprus and Luxembourg without any quota requirements.*

*Due to a mixture of sampling requirements, reporting and conclusions being made from the research need to consider the sample size differences in between countries.

Key takeaways

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- **Climate change, crime, and economic stability** are perceived as the biggest threats to people's way of life over the next 10 years.
- **Italians** are most likely across EU countries to believe that **climate change is a threat to their way of life**.
- A substantial majority (79%) of respondents believe that **man-made climate change is happening**, with Italians exhibiting the highest acceptance (85%; ranking in the top three across EU countries).
- Concerns about **plastic pollution/microplastics, climate change, deforestation, water pollution, air pollution, extreme weather events** (e.g., heavy rain/flooding or violent storms), and **disappearing animal species rank high** among respondents' environmental worries. Spain has the highest levels of concerns across key markets and ranks third across Europe.
- **Avoiding food waste** and **saving energy at home** are commonly practiced behaviours by respondents; with Italy and France being among the top EU countries to show the highest commitment to environmentally friendly behaviours.
- Most respondents express **concern about how climate change will affect future generations**, with Italy and Spain being among the most concerned about the impact of climate change on the next generation.
- **Extreme weather events** such as heatwaves, droughts, and floods are expected to **influence where people choose to live in the next 20 years**; increased temperatures/heatwaves being their top worry followed by drought/water scarcity concerns.
- Respondents have **mixed views on political bodies' performance on environmental/climate issues** across Europe, with Spain having the most negative perception across key markets.
- Anticipated changes due to extreme weather include **increased temperatures in summer** and **less snow in winter**.

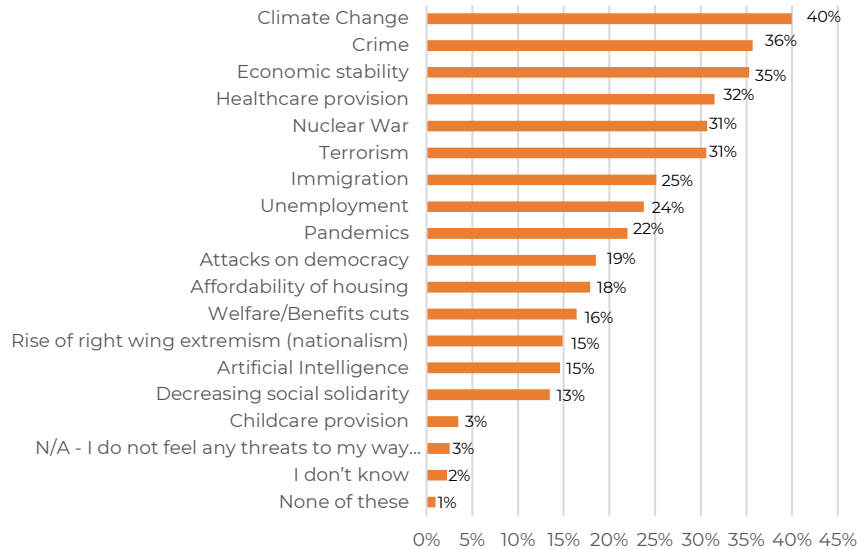
Survey deep dive

Italians are the most concerned about climate change in Europe

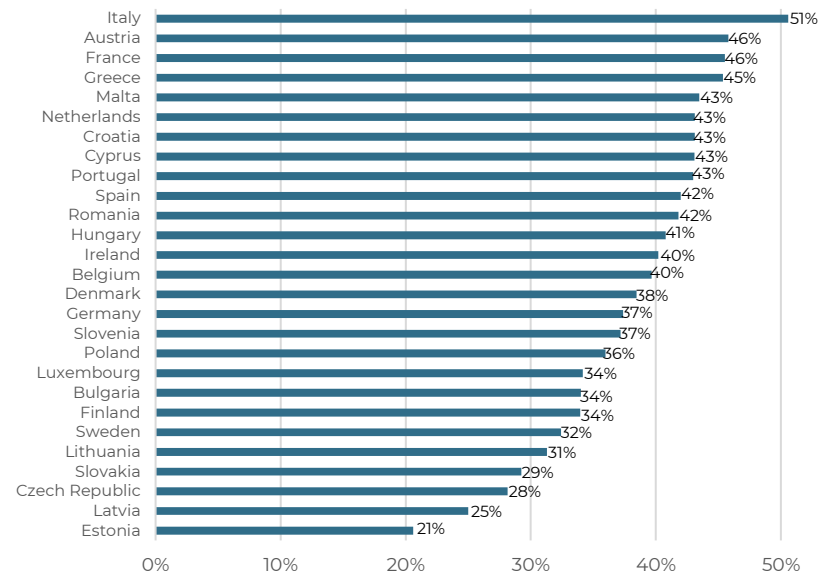
Climate change, crime, and economic stability are perceived as the three biggest threats to people's way of life over the next 10 years, with 40%, 36% and 35% of respondents identifying them respectively. Healthcare provision, nuclear war, and terrorism are also significant concerns, (32%, 31% and 31% respectively). Other notable threats include immigration and unemployment each noted by around a quarter of respondents. Notably, concerns about pandemics, despite recent global events, rank lower at 22%. Fewer respondents perceive issues such as the rise of right-wing extremism, artificial intelligence, and decreasing social solidarity as major threats.

Concern about climate change is significantly higher in Italy (51%) compared to Sweden (32%) and Germany (37%). Notably, Sweden expresses significantly higher concern about crime (49%) and terrorism (36%) than climate change (32%), while Poland expresses higher concern about nuclear war (38%) than climate change (36%).

Biggest threats to the way of life in next 10 years



Deep dive into climate change concern across countries

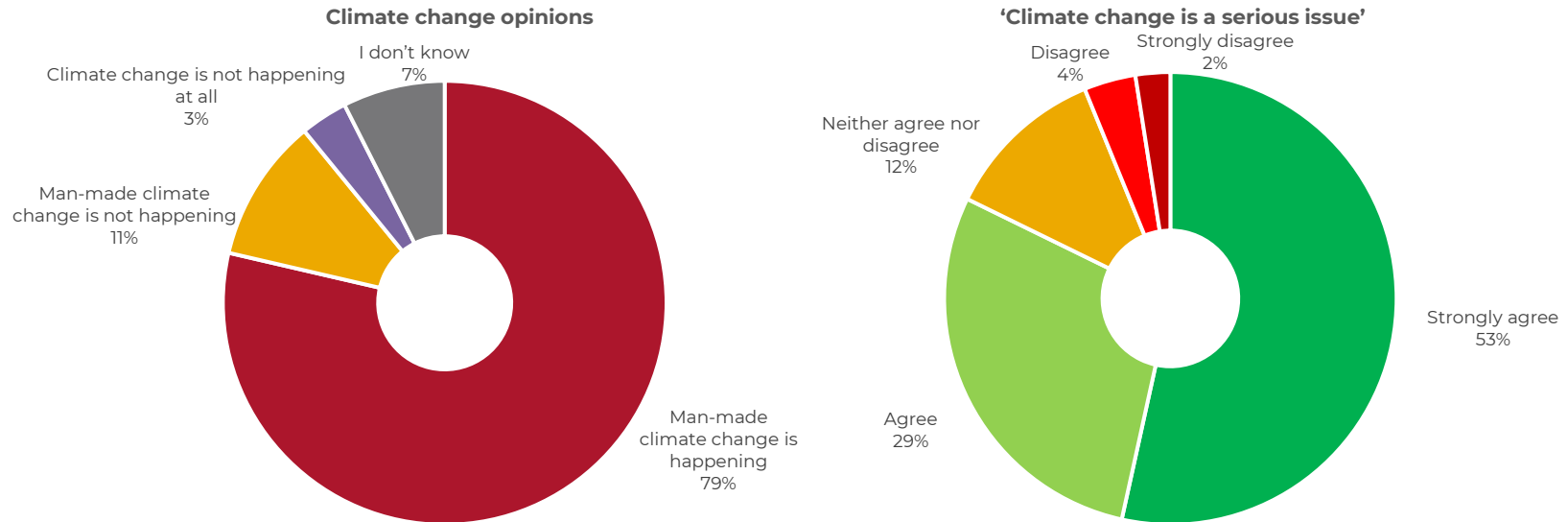


Q1. Which of these, if any, are the biggest threats to your way of life in the next 10 years? (Select up to a maximum of 5)

Italians are in the top three most likely in Europe to believe in man-made climate change and its seriousness

A substantial majority (79%) of the respondents believe that man-made climate change is happening. Only a small fraction (3%) believe that climate change is not happening at all, while 11% do not believe in man-made climate change specifically. Italians exhibit the highest acceptance of man-made climate change (85%) across key markets and rank 3rd across the 27 EU markets surveyed (following Portugal (89%) and Luxembourg (88%)), while Germans exhibit the lowest (71%) across key markets and rank 24th out of the 27 EU countries surveyed.

Similarly, a significant majority (82%) agree or strongly agree that climate change is a serious issue. In line with the above, Italians are the most likely to agree that 'climate change is a serious issue' followed by those in France and Spain when focusing on key markets, (88%, 86% and 86% combined agree and strongly agree; ranking 7th, 10th and 13th out of the 27 EU countries surveyed), while those in Germany and Sweden are the least likely out of the key markets to agree (77% and 80% combined agree and strongly agree; ranking 22nd and 17th out of the 27 EU countries surveyed).



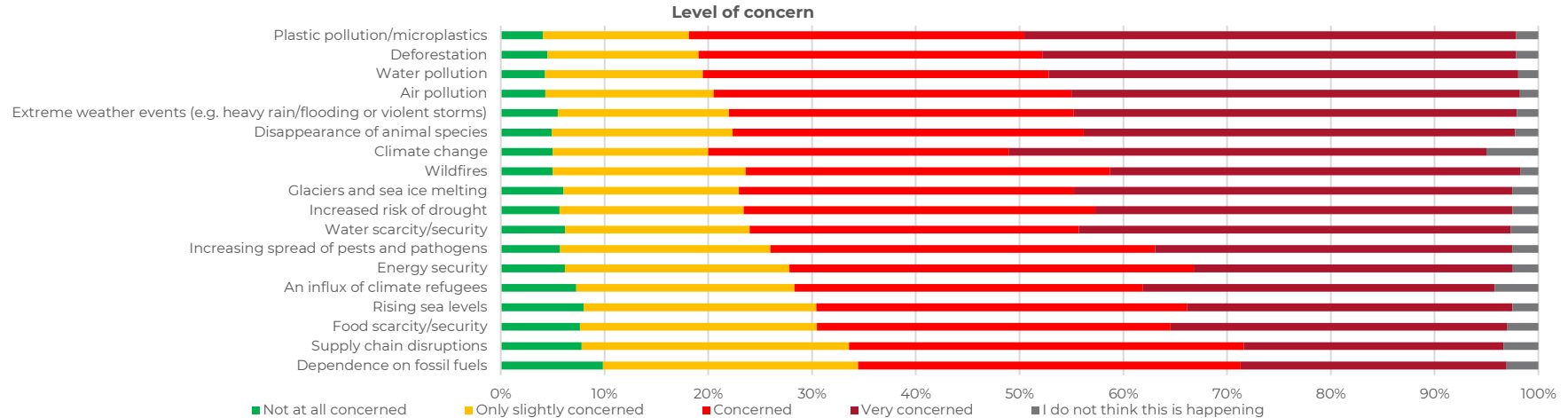
Q2. Which of the following, if any, best describes your opinion?

Q3. How much do you agree or disagree with the following statement? "Climate change is a serious issue".

Spain has the highest levels of concerns on environmental and societal issues across key markets and ranks third across Europe

The most concerning issue for Europeans is plastic pollution/microplastics (80% combined concerned and very concerned). Deforestation, water pollution and air pollution also generate significant worry (79%, 79% and 78% are combined concerned and very concerned). Outside of those, extreme weather events (e.g., heavy rain/flooding or violent storms), the disappearance of animal species and climate change also evoke concern among respondents (76%, 75% and 75% are combined concerned and very concerned).

Interestingly, overall Spain has the highest levels of concern across most categories compared to other key markets (82% combined concerned and very concerned; ranking 3rd across the 27 EU markets surveyed), while Sweden has the lowest compared to other key markets (58%; ranking 24th). When it comes to extreme weather events the most concerned EU countries are Greece, Portugal, Austria, France, and Ireland (91%-84%). In terms of climate change the most concerned EU countries are Malta, Portugal, Croatia, Hungary and France (91%-83%). Lastly, when it comes to wildfires the most concerned EU countries are Portugal, Spain, Greece, France and Romania (93%-83% combined concerned and very concerned).



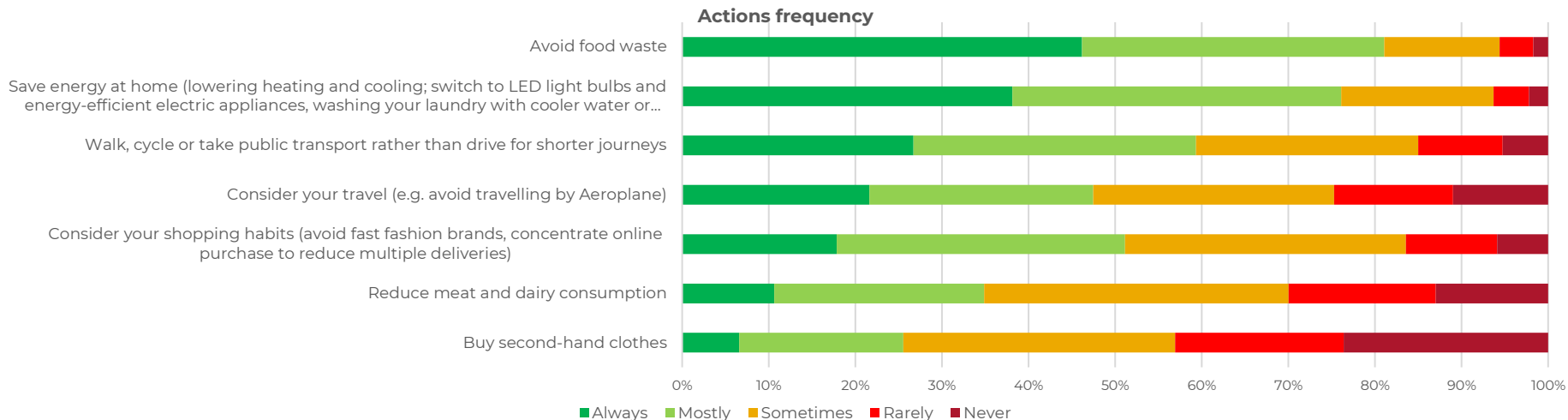
Q4. Generally speaking, how concerned are you, if at all, by the following?

Italy and France are among the top EU countries to show the highest commitment to environmentally friendly behaviours

Avoiding food waste and saving energy at home are two of the most consistently practiced behaviours, with a large majority saying they always or mostly do so (81% and 76% respectively). Using public transport or non-motorized transport for short journeys also show significant adherence, although the proportion of respondents who 'never' do this is higher compared to food waste avoidance and home energy savings (5%).

Those in Italy and France show the highest commitment to sustainable habits overall across key markets (ranking 2nd and 3rd across the 27 EU countries surveyed, following Hungary in 1st place), such as always saving energy at home (45% in both Italy and France) and avoiding food waste (56% in Italy and 53% in France), while those in Germany and Sweden indicate the least commitment to sustainable habits overall compared to other key markets (ranking 14th and 17th out of the 27 EU markets surveyed respectively).

Women tend to engage more consistently in behaviours like always reducing meat and dairy consumption or buying second-hand clothes (30% and 20% of men vs 39% and 30% of women always do so).



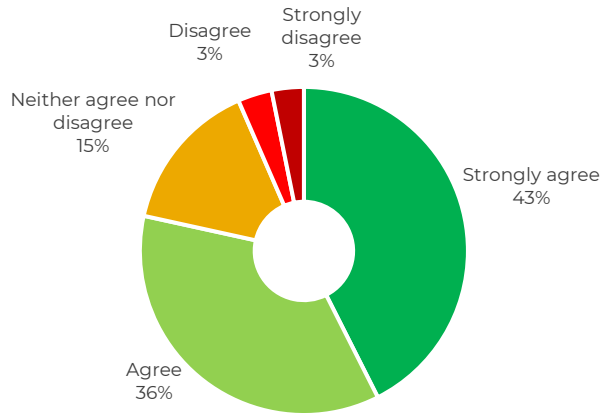
Q5. How often, if ever, do you do the following yourself?

Italy and Spain are among the most concerned about the impact of climate change on the next generation

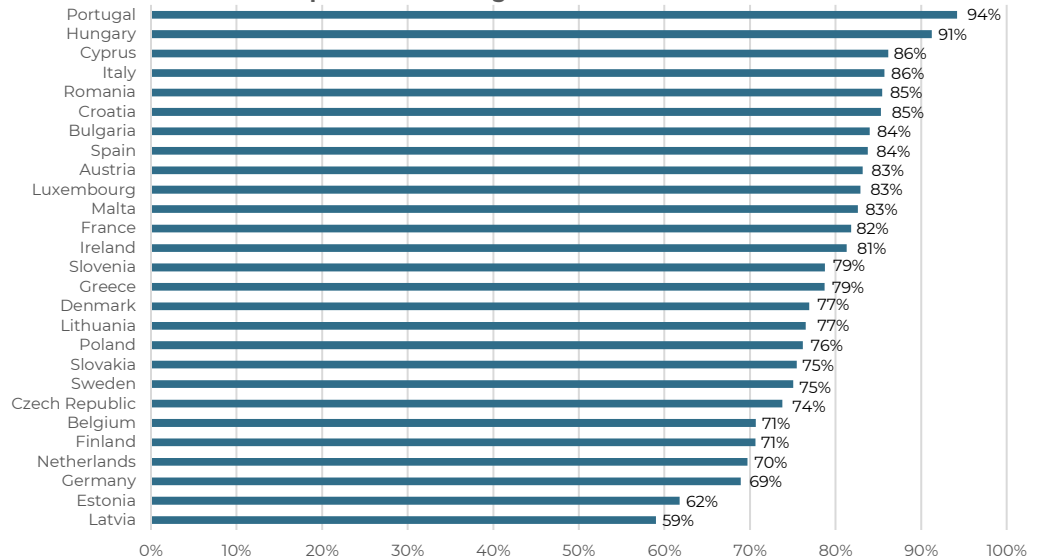
A significant majority of respondents express concern about the impact of climate change on future generations, with 79% of respondents strongly agreeing or agreeing that they are worried about how climate change will affect the lives of the next generation. This suggests a broad consensus on the seriousness of climate change and its long-term implications.

Those in Italy and Spain are the most likely to be worried (86% in Italy and 84% in Spain vs 69% in Germany and 75% in Sweden combined agree and strongly agree with the statement; ranking 4th and 8th vs 25th and 20th across the 27 EU countries surveyed). Women are more likely to be worried compared to (82% vs 75% combined agree and strongly agree).

'I am worried about how climate change will affect the lives of the next generation'



Deep dive into net agreement with statement



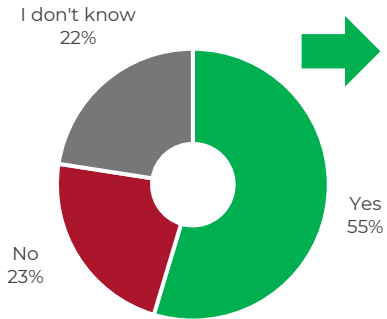
Q6. How much do you agree or disagree with the following statement? "I am worried about how climate change will affect the lives of the next generation".

Significant influence of extreme weather events on future living decisions

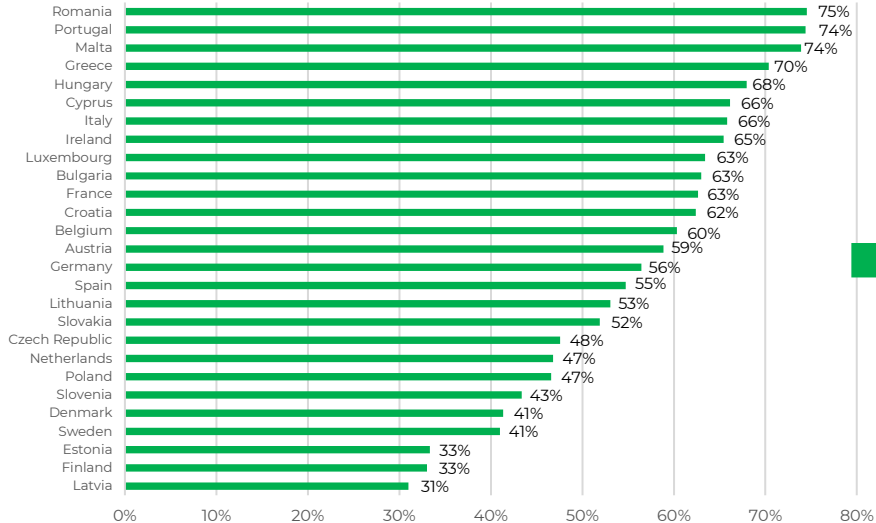
Most respondents (55%) believe that extreme weather events will influence their choice of where to live in the next 20 years. This is the highest across Italian and French respondents (66%, and 63% respectively; ranking 7th and 11th out of the 27 EU countries surveyed) and the lowest for those in Sweden (41%; ranking 24th). The responses overall suggest that concerns about climate change and its manifestations in extreme weather are increasingly influencing personal and potentially significant life decisions.

Those that agreed that extreme weather events will influence their choice of where to live in the next 20 years are most worried about increased temperatures and heatwaves (41%), followed by issues of drought and water scarcity (29%). Those in Germany are the most likely to be worried about increased temperatures and heatwaves, those in Spain about drought and water scarcity, those in France about coastal erosion, and interestingly, those in Sweden are the most likely to be worried about flooding or forest fires, damage or wildfires compared to other key markets.

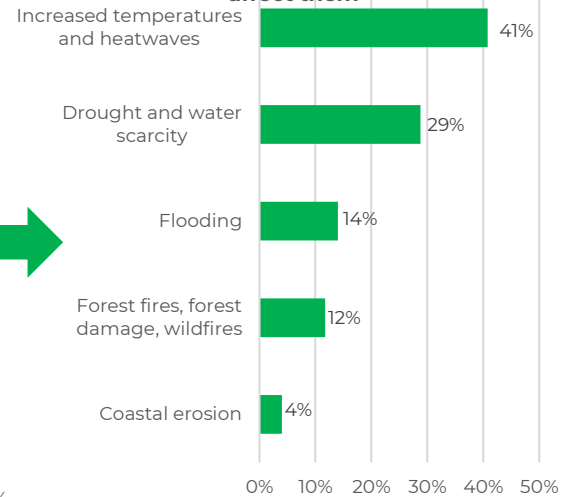
Extreme weather events will affect where I choose to live in the next 20 years



Deep dive into those agreeing on the influence of extreme weather events on future living decisions across EU markets



Aspects causing worries to those who believe extreme weather events will affect them

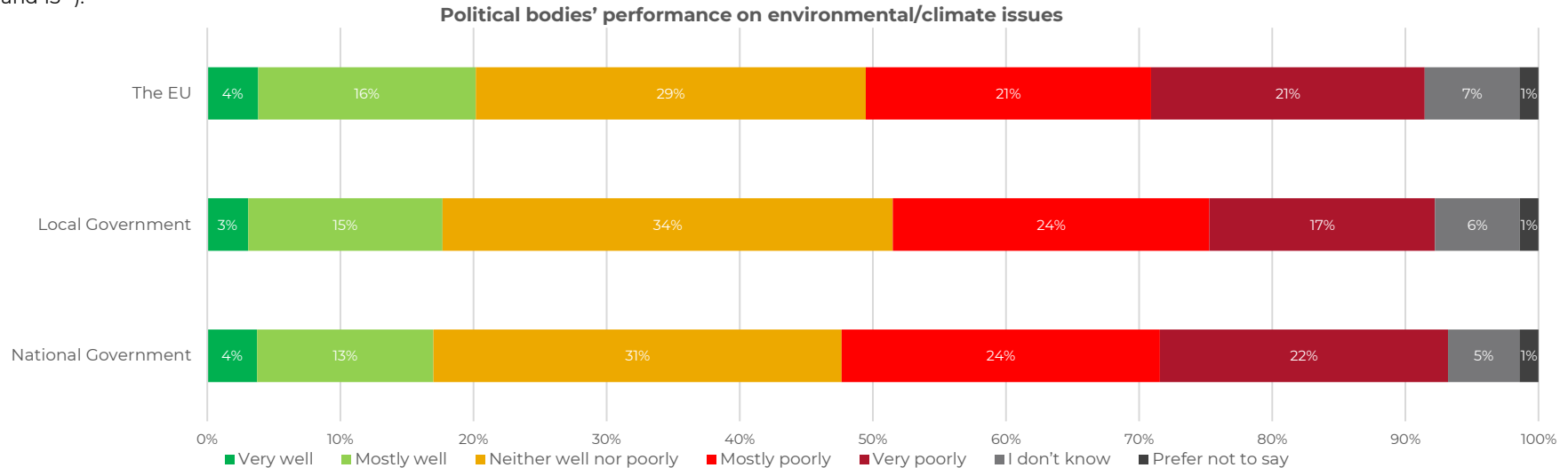


Q7. Do you believe extreme weather events, such as heatwaves, droughts and/or floods, will affect where you choose to live in the next 20 years?
 Q7a. You said extreme weather events may affect where you choose to live in the next 20- years. Which are you most worried about?

Spain holds the most negative perception of political bodies' performance overall compared to other key markets

More than two-fifths (42%) rate the EU as performing "mostly poorly" or "very poorly" in addressing environmental/climate issues, while only one-fifth of believe it is doing "very well" or "mostly well". Similar trends are observed at the local government level, with 18% positive feedback and 41% negative. The perception of national governments is also more negative than positive, with 19% positive responses and 46% negative.

Spain indicates the highest level of dissatisfaction across all levels of governance concerning environmental and climate issues and they are particularly critical of the EU and national government (55% and 51% mostly and very poorly combined respectively; ranking 3rd in average dissatisfaction levels across the different political bodies across the 27 EU countries surveyed). Italy on the other hand, is the most critical of national and local government (49% and 48% mostly and very poorly combined), indicating broader dissatisfaction in Italy with governance related to environmental issues. Conversely, Poland and Sweden tend to hold the least level of dissatisfaction across all levels of government concerning environmental and climate issues across key markets (ranking 19th and 15th).



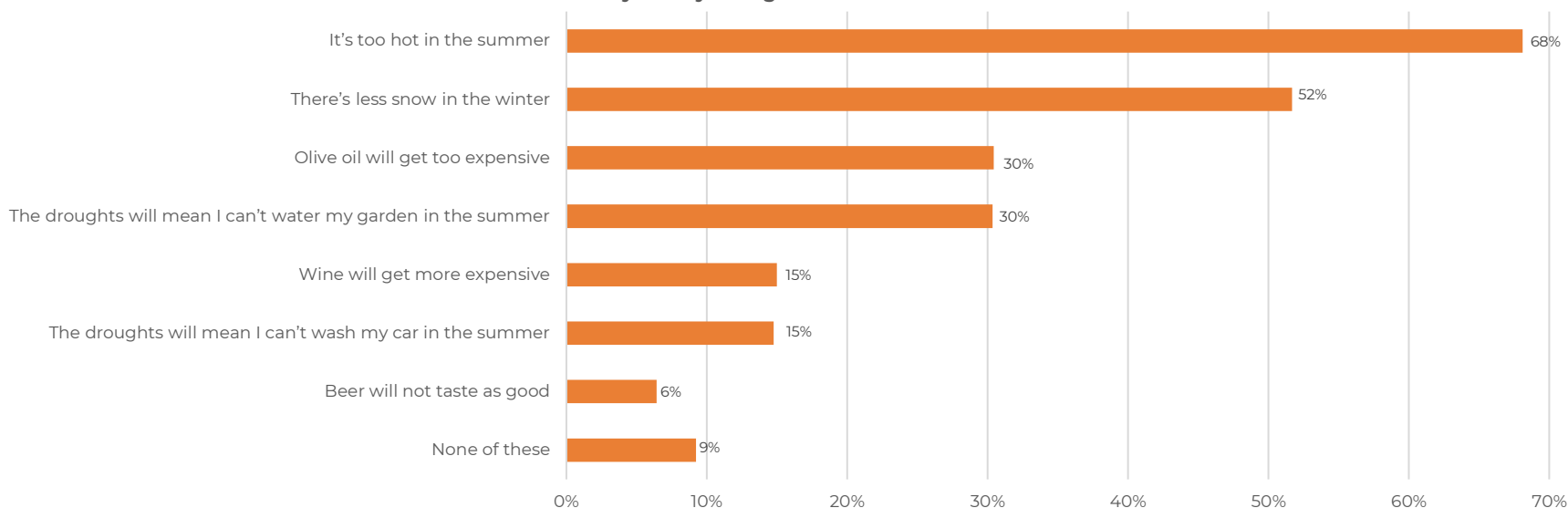
Q8. How well or poorly, if at all, do you believe the following political bodies are performing on environmental/climate issues?

Europeans anticipate summers will become too hot due to extreme weather

Temperature changes are the most anticipated changes, with a significant 68% of respondents believing it will be too hot in the summer, and 52% expecting less snow in the winter, indicating a broad concern about shifting seasonal temperatures. Concerns about the rising cost of goods due to climate impacts are notable, with 30% anticipating that olive oil will become too expensive and another 30% worried about restrictions on watering gardens due to droughts.

Those in Sweden are the most likely to be concerned about wine becoming more expensive or beer not tasting as good, those in Spain and Italy are the most likely to be concerned about olive oil becoming more expensive, those in Germany are the most likely to be concerned about snow decreasing in the winter, while those in France are the most likely to be concerned about the effect of the droughts compared to other countries.

Small day-to-day changes due to extreme weather



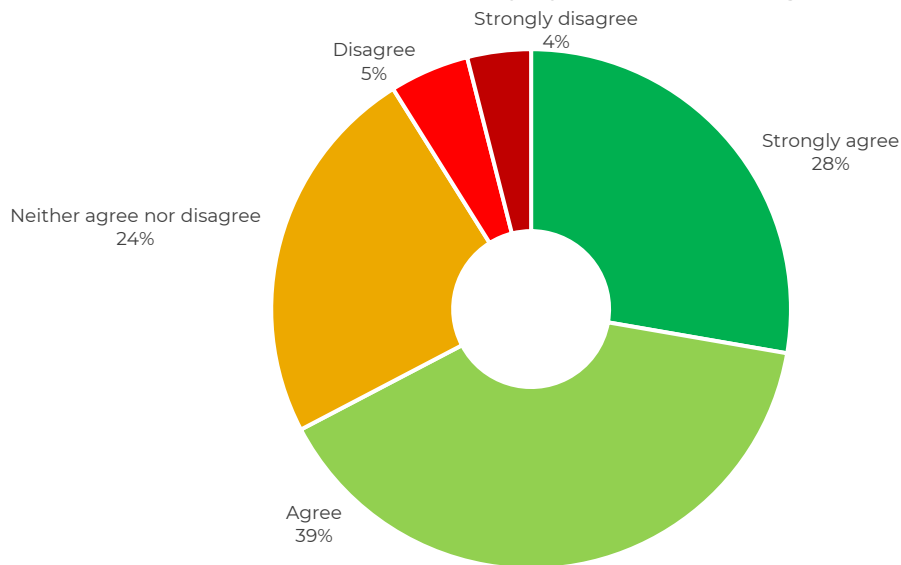
Q9. Which of the following small day-to-day changes, if any, do you believe will happen due to extreme weather?

Respondents feel responsibility to take action against climate change

There is a strong recognition of the role that individual actions play in addressing climate change issues, with the majority of respondents (67%) agreeing or strongly agreeing that they should do more in everyday life to combat climate change. Only a small minority disagree (5%) or strongly disagree (4%) with the notion of increasing their personal efforts against climate change.

When looking at key markets, respondents in Italy and France are the most likely to agree with the statement, followed by those in Spain (74% and 73% combined agree and strongly agree; ranking 7th and 10th out of the 27 EU countries surveyed), whereas those in Sweden and Germany are the most likely to disagree with the statement (only 62% and 63% combined agree and strongly agree; ranking 21st and 20th out of the 27 EU countries surveyed). Women are significantly more likely to feel a responsibility to take action against climate change compared to men (71% vs 65% combined agree and strongly agree).

'As an individual, I should do more in everyday life to take action against climate change'



Q10. How much do you agree or disagree with the following statement? "As an individual, I should do more in everyday life to take action against climate change"

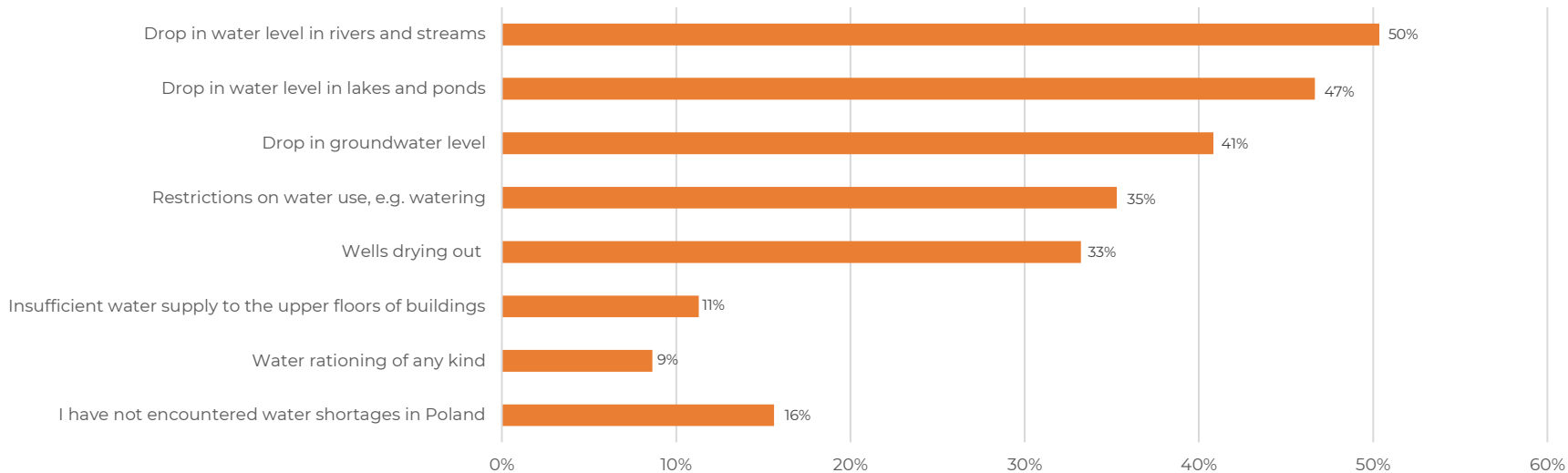


People in Poland have encountered various forms of water shortages

People in Poland have encountered various forms of water shortages, with significant impacts observed across natural water sources and water use regulations, with the drop in water level in rivers and streams being the most reported issue (with 50% of respondents noticing a decrease). Close behind, 47% of respondents have observed lower water levels in lakes and ponds, while 41% of respondents notice a decline in groundwater levels.

More than one-third (35%) of respondents report facing restrictions on water use, such as limitations on watering gardens, with a third (33%) having experienced wells drying out. Less common but still notable issues include insufficient water supply to upper floors of buildings (11%) and water rationing of any kind (9%). Notably, 16% of respondents state they have not encountered any water shortages in Poland, indicating regional variations in water scarcity.

Water shortages in Poland



Poland-specific Q: What water shortages, if any, have you encountered in Poland?

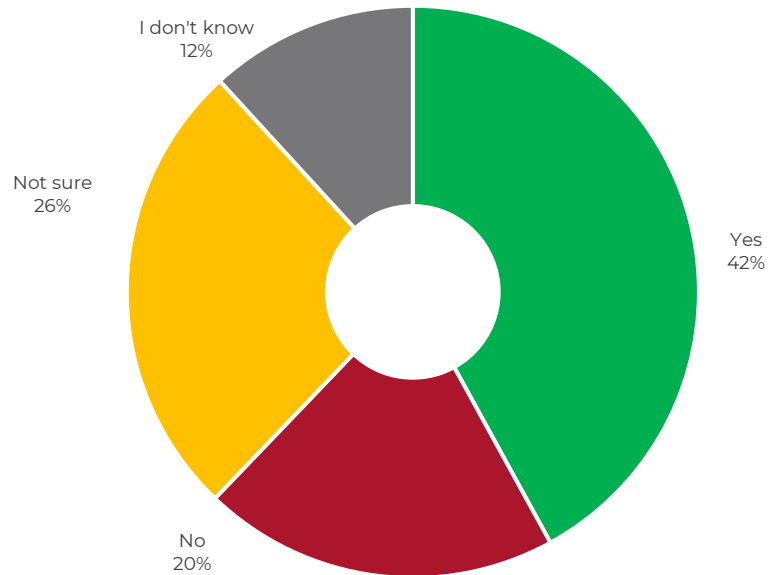
Reindustrializing France and Europe should be a priority for policymakers



Most respondents believe that reindustrializing France and Europe should be a priority for policymakers, especially to compete in the development of green technologies, with more than two-fifths (42%) agreeing that it should be a main priority.

However, one-fifth of respondents disagreed with making it a priority, while a significant proportion of respondents are uncertain, with more than one-fourth (26%) not sure and an additional 12% explicitly stating they don't know. This showcases that while there is an interest in prioritizing reindustrialization within the context of green technology development, there is also considerable uncertainty or lack of opinion on the matter.

'Reindustrialising France & Europe should be a main priority for French & EU policymakers'



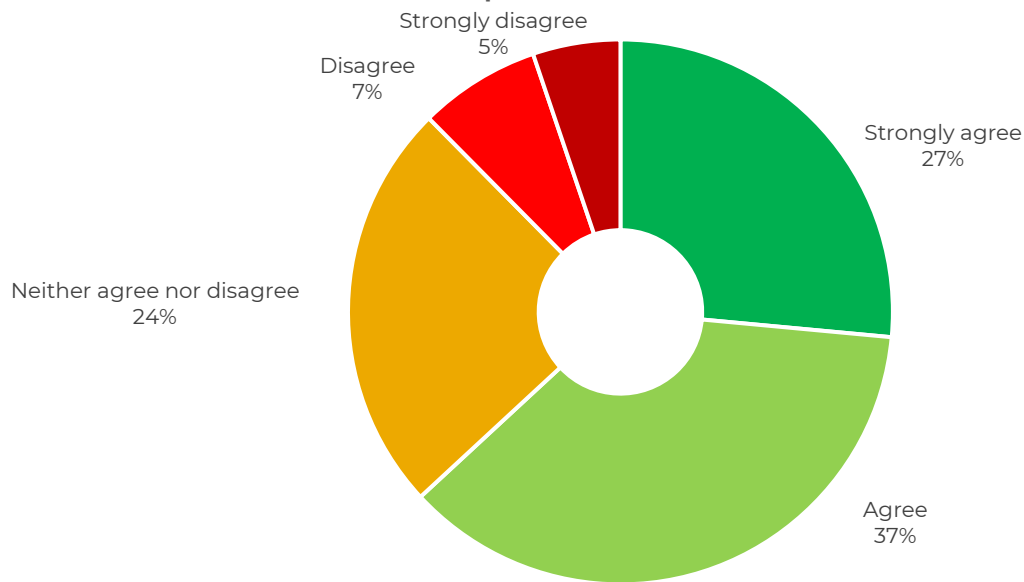
France-specific Q: Do you believe reindustrialising France and Europe, to compete with China and the USA on the development of green technologies (such as heat pumps and electric vehicles), should be a main priority for French and EU policymakers?

Future cost of climate impacts should be prioritised in today's political decisions



A significant majority of Swedish respondents believe that their government or elected representatives should prioritize the future cost of climate impacts in today's political decisions, with 64% of respondents agreeing (37%) or strongly agreeing (27%) that the future cost of climate impacts should be a priority in political decisions. Only 12% disagree (7%) or strongly disagree (5%) with this view. This suggests a strong consensus among the surveyed population for proactive governmental action on climate issues, emphasizing the integration of future climate impact costs into current policy-making.

'Our government/elected representatives should prioritise the future cost of climate impacts in today's political decisions'



Sweden-specific Q: How much do you agree or disagree with the following statement? "It's important that Sweden is at the forefront internationally in taking action against climate change"

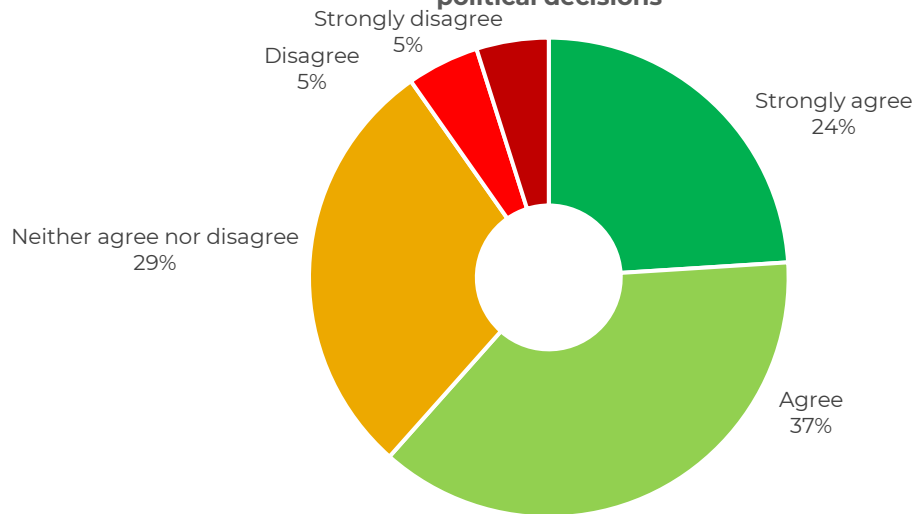
The future costs of climate impacts should be prioritised in political decisions



A majority of respondents in Germany believe that their government or elected representatives should prioritize the future costs of climate impacts in current political decisions, with 61% of respondents either agreeing (37%) or strongly agreeing (24%) that prioritizing the future costs of climate impacts should be an essential focus of today's political decisions. Only a minority of 10% disagree (5%) or strongly disagree (5%) with this statement. There is a significant level of uncertainty or ambivalence regarding this issue, with 29% of respondents neither agreeing nor disagreeing.

This highlights a substantial consensus among Germans for proactive governmental action to address climate change, with a focus on integrating the long-term costs of climate impacts into current policy planning.

'Our government/elected representatives should prioritise the future cost of climate impacts in today's political decisions'



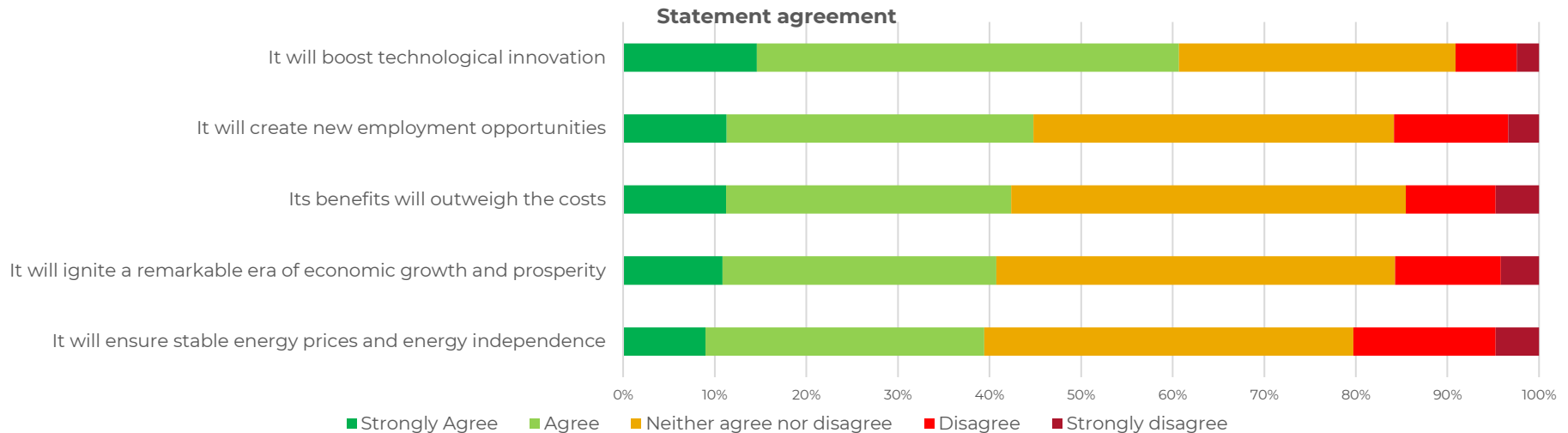
Germany-specific Q: How much do you agree or disagree with the following statement? "Our government/elected representatives should prioritise the future cost of climate impacts in today's political decisions."

Cautiously optimistic view towards energy transition, while recognizing challenges



Overall, there is a cautiously optimistic view towards the energy transition, recognizing both its potential benefits and the challenges or costs associated with it. Most Italian respondents are optimistic about the energy transition boosting technological innovation, with significant agreement (61% combined agree and strongly agree), followed by a notable belief that the energy transition will create new employment opportunities (44% combined agree and strongly agree), although there's a considerable portion of respondents who disagree (15% combined disagree and strongly disagree).

Opinions are divided on whether the benefits of the energy transition will outweigh the costs, showing a balance between agreement and neutrality/disagreement. There is a hopeful outlook regarding the potential for remarkable economic growth and prosperity due to the energy transition (41% combined agree and strongly agree), but scepticism remains (16% combined disagree and strongly disagree). Similarly, the aspect of ensuring stable energy prices and energy independence shows more scepticism, with significant disagreement (21% combined disagree and strongly disagree), reflecting concerns about the volatility of energy markets and dependency issues.



Italy-specific Q: How much do you agree or disagree with the following statements related to energy transition (for example moving from gas cooking to electric or induction)?

Thank you