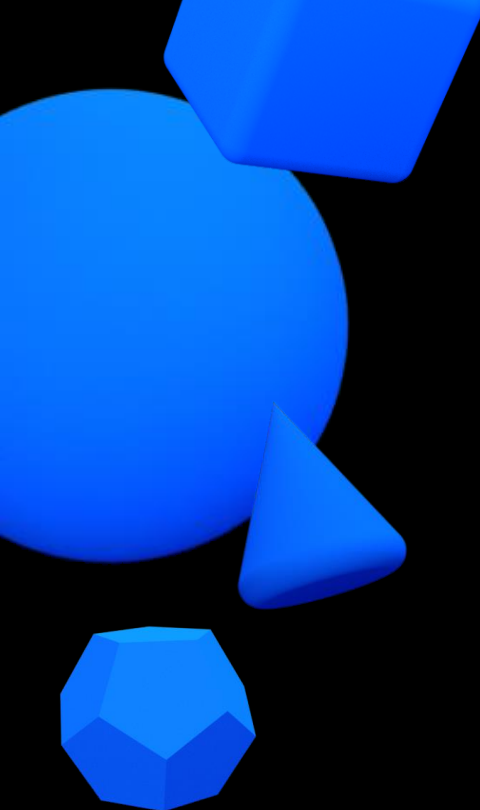




Differing perceptions of the energy transition across European countries



Your contacts in the CSA's Society Division:

Julie Gaillot – julie.gaillot@csa.eu

Elise Souci – elise.souci@csa.eu

Lydia Rousset – lydia.rousset@csa.eu

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Methodology

TARGET SURVEY

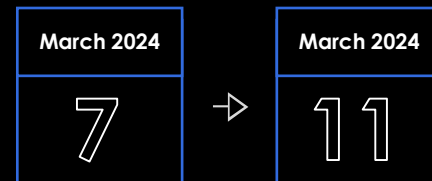
Sample of **10,000 individuals, aged 18 and over**, from 10 European countries:

									
France	Germany	Italy	Spain	Portugal	United Kingdom	Poland	Netherlands	Belgium	Romania
1.006	1.003	1.004	1.002	1.003	1.005	1.005	1.004	1.005	1.006

Nationally representative sample of the population aged 18 and over in each of the countries tested.

The overall results for the 10 countries have been adjusted to reflect the weight of each country within the European territory as a whole.

FIELD DATES

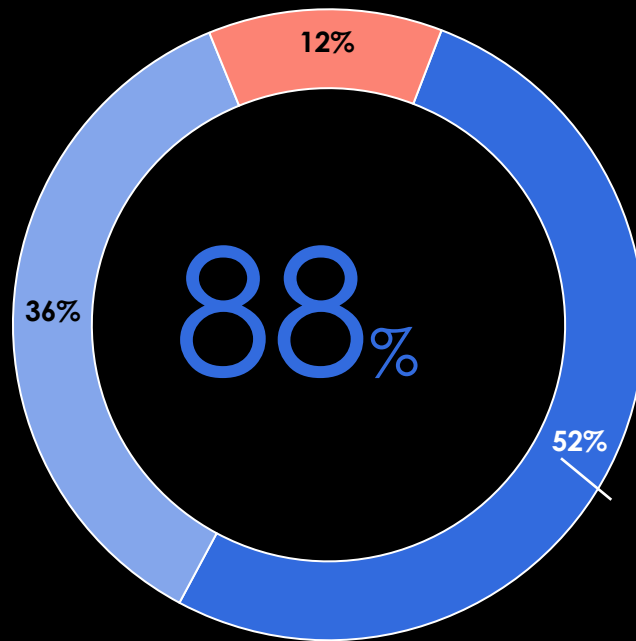


COLLECTION MODE

Online self-administered panel questionnaire, lasting 5 minutes

**The energy transition:
very different levels of
familiarity depending
on countries**

The energy transition, a familiar concept to the general public



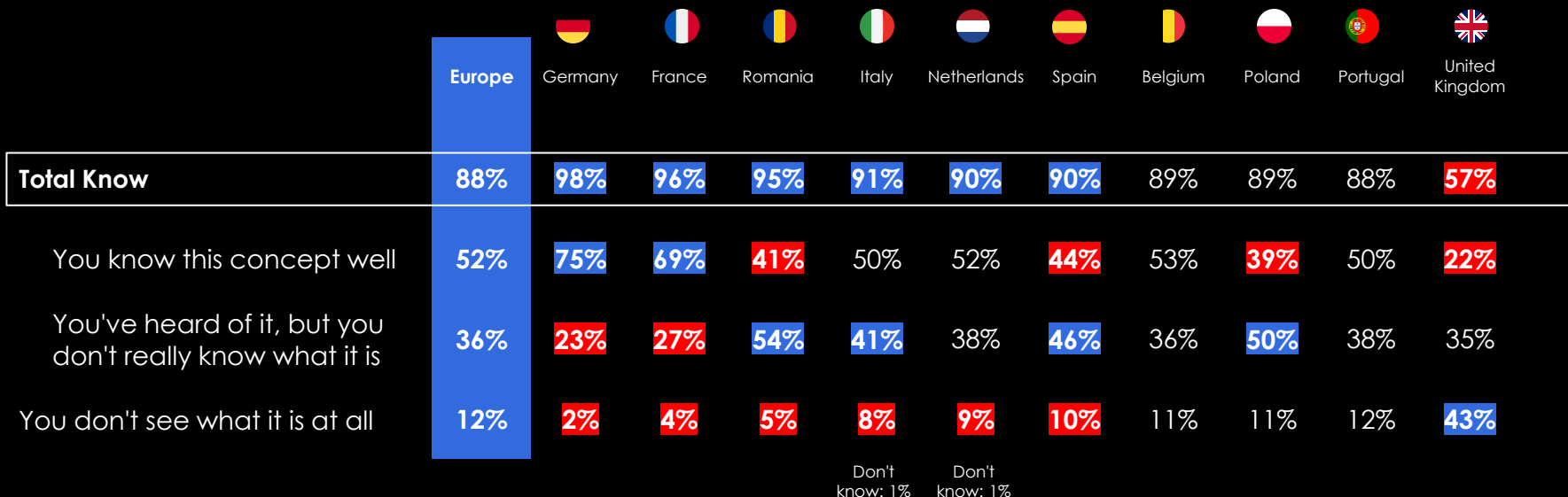
Know the energy transition

Men: 91% / Women: 84%
50-year-olds and over: 89% / 18-34 and 35-49-year-olds: 86%

65-year-olds and over: 59% / 18-24-year-olds: 43%

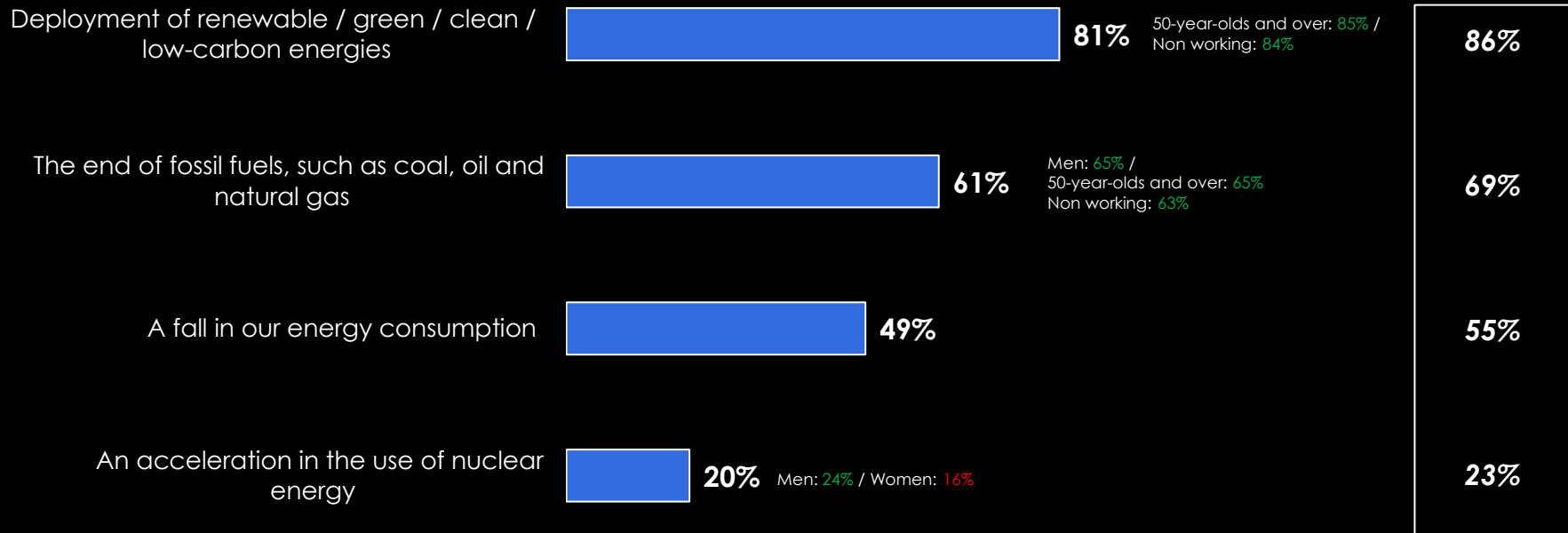
- You know this concept well
- You've heard of it, but you don't really know what it is
- You don't see what it is at all

But maturity levels vary, with Germany and France ahead and the UK lagging far behind

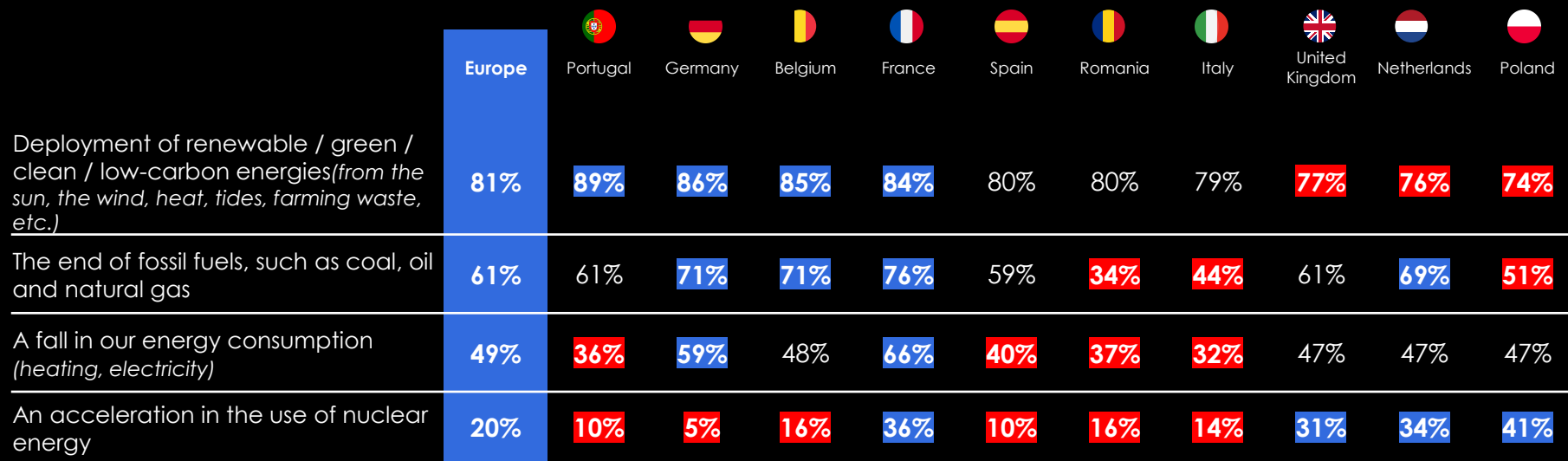


The energy transition, essentially involves the deployment of renewable energies and the end of fossil fuels

Among those who say they are familiar with the energy transition

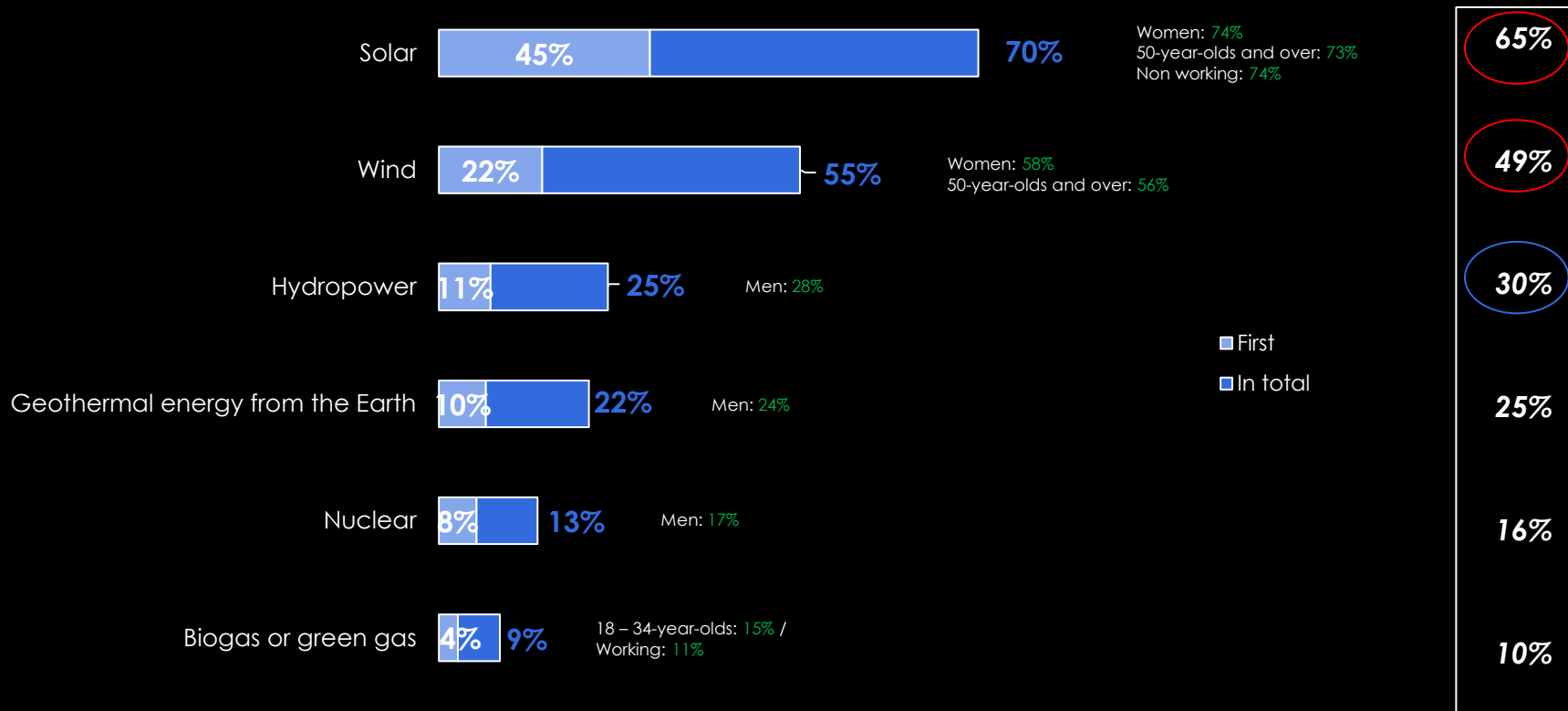


Again, France and Germany have a broader vision of the energy transition, contrary to Italy, Romania and Spain



Solar – the cleanest energy there is

Among those who say they are familiar with the energy transition



France and wind power – a lack of trust

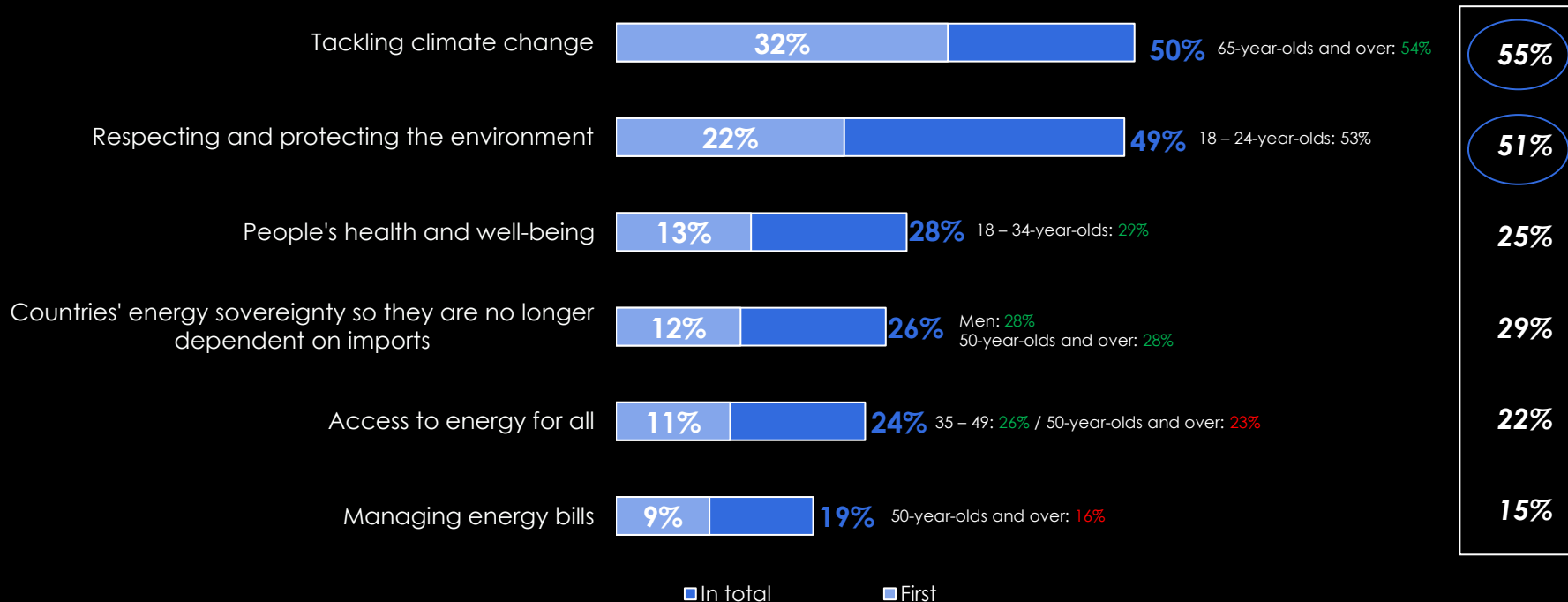


Q8. Of the following energies, which you think are the "cleanest"? The cleanest of all? The second cleanest?

Base: All – Two possible answers – Cleanest, second cleanest

The primary challenge posed by the energy transition: climate and the environment

Among those who say they are familiar with the energy transition

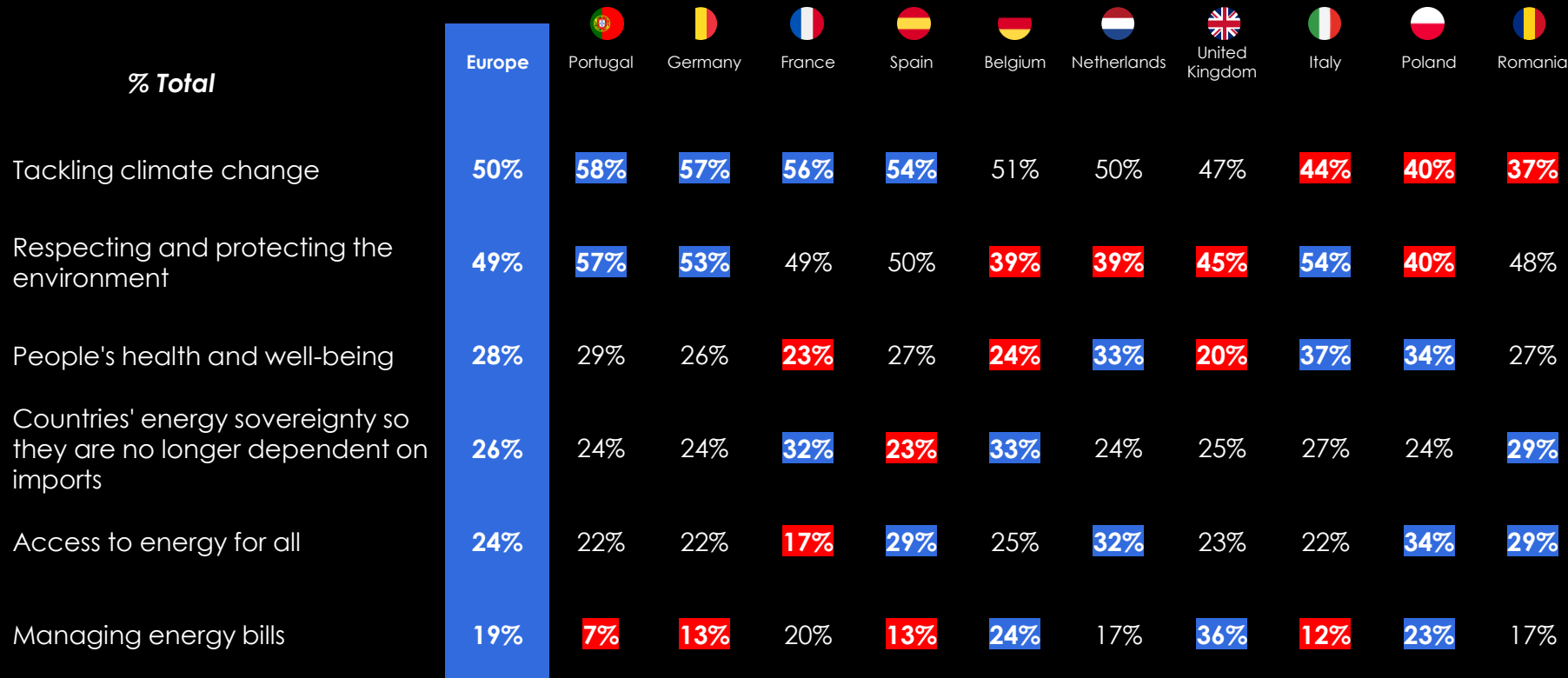


LEVELLING UP: The energy transition is the switch from carbon-based forms of energy, such as oil and coal, to cleaner forms of energy – renewable energies, such as solar, wind or green gas

Q3. In your opinion, what is the primary aim of the energy transition? The most important aim? The second most important aim?

Base: All (n=10,043) – Two possible answers – The most important, the second most important

A highly green-focused perception shared by all European countries, even among those most familiar with the energy transition



LEVELLING UP: The energy transition is the switch from carbon-based forms of energy, such as oil and coal, to cleaner forms of energy – renewable energies, such as solar, wind or green gas

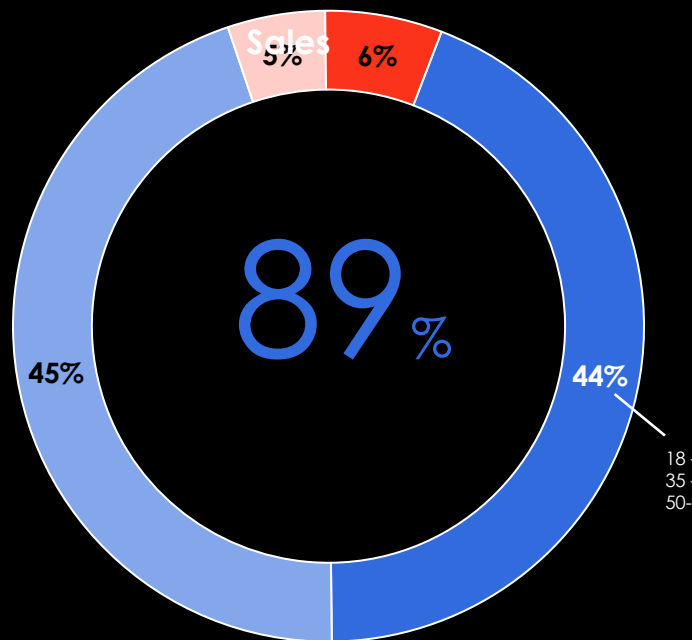
Q3. In your opinion, what is the primary aim of the energy transition? The most important aim? The second most important aim?

Base: All – Two possible answers – The most important aim, the second most important aim?

An ongoing, yet fragile
dynamic



Going further, but cautiously...



- Go further
- Continue with our efforts, but cautiously
- Things are fine as they are
- Go back

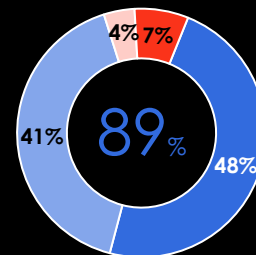
Want the energy transition to progress

18 – 34-year-olds: 91% / 35–49-year-olds: 88% / 50-year-olds and over: 89%

18 – 34-year-olds: 46%
35 – 49-year-olds: 44%
50-year-olds and over: 43%



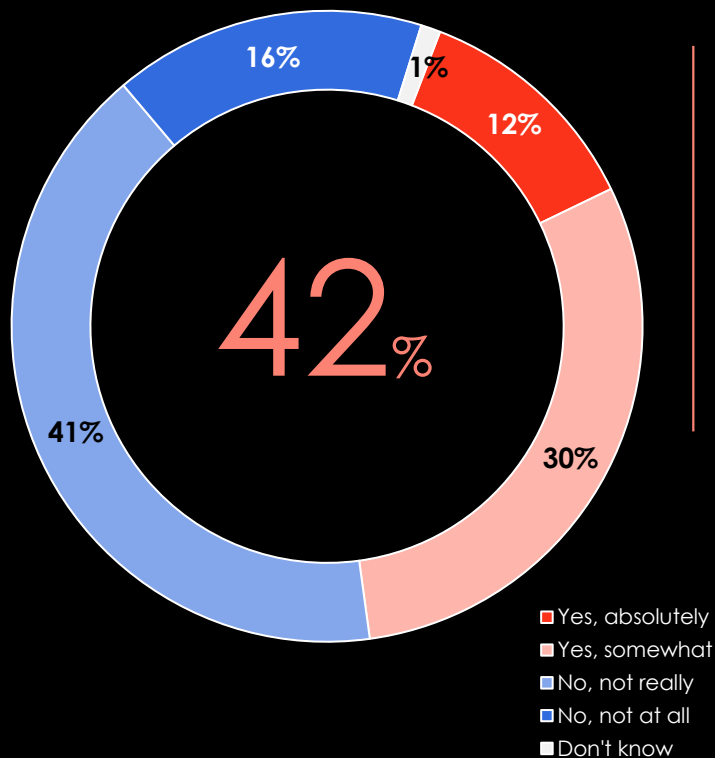
Among those who say they are familiar with the energy transition



Germans are far more hesitant, 15% are even reluctant

	Europe	 Portugal	 Spain	 United Kingdom	 Italy	 Poland	 France	 Romania	 Belgium	 Netherlands	 Germany
ST Progress	89%	98%	95%	93%	93%	93%	91%	90%	86%	81%	79%
Go further	44%	49%	51%	54%	46%	43%	47%	41%	28%	31%	33%
Continue with our efforts, but cautiously	45%	49%	44%	39%	47%	50%	44%	49%	58%	50%	46%
Things are going well as they are	5%	1%	2%	3%	5%	4%	6%	8%	7%	12%	6%
Go back	6%	1%	3%	4%	2%	3%	3%	1%	7%	7%	15%
								Don't know: 1%			

An ongoing yet fragile movement



A movement that can stop

18 to 34-year-olds: 52%

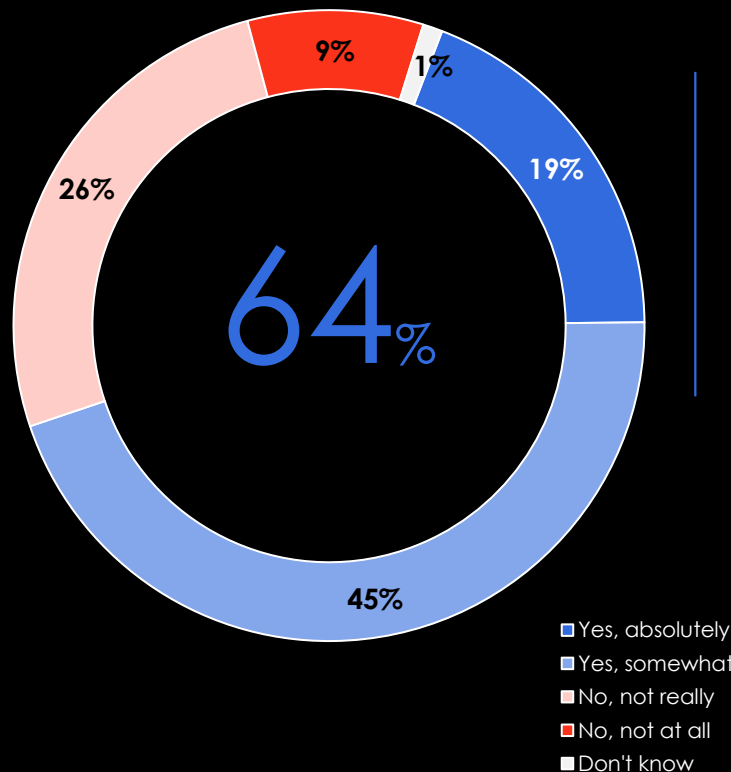
Working: 45%

Among those who say they are familiar with
the energy transition: 41%

The Netherlands, Italy and Spain highlight how fragile the movement is, contrary to France, Romania and Portugal

	Europe	 Netherlands	 Italy	 Spain	 Belgium	 Germany	 United Kingdom	 Poland	 France	 Romania	 Portugal
A movement that can stop	42%	55%	49%	48%	43%	42%	40%	39%	35%	25%	24%
Yes, absolutely	12%	12%	17%	14%	7%	11%	9%	11%	10%	9%	10%
Yes, somewhat	30%	43%	32%	34%	36%	31%	31%	28%	25%	16%	14%
A movement that cannot stop	57%	44%	49%	51%	56%	57%	59%	60%	64%	74%	75%
No, not really	41%	34%	26%	35%	41%	48%	46%	50%	40%	51%	49%
No, not at all	16%	10%	23%	16%	15%	9%	13%	10%	24%	23%	26%
(I don't know)	1%	1%	2%	1%	1%	1%	1%	1%	1%	1%	1%

A revolution in the making confirmed by concrete actions, with people quite committed to the energy transition



Actions implemented

18 to 34-year-olds: 67%

Men: 66%

Working population: 65%

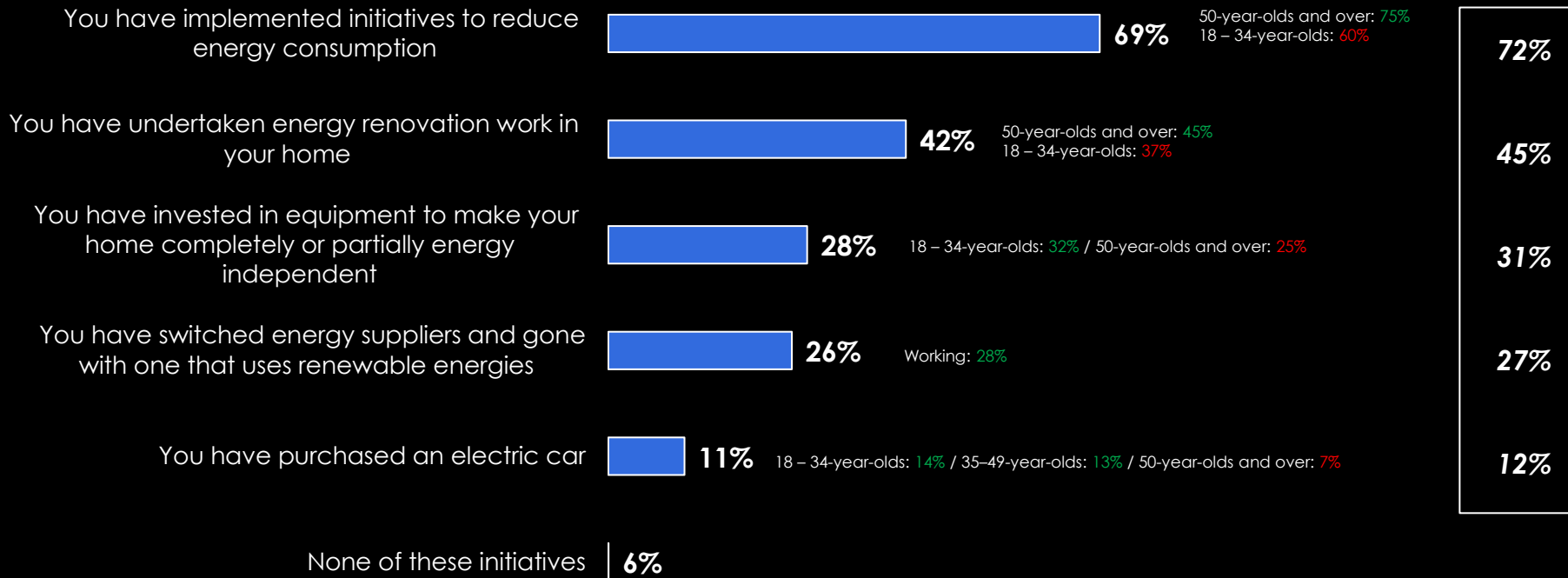
Among those who say they are familiar with the energy transition: 75%

The French and the Italians seem to be more involved

	Europe	 France	 Italy	 Spain	 Germany	 Romania	 Belgium	 Netherlands	 United Kingdom	 Poland	 Portugal
YES %	64%	75%	68%	65%	64%	62%	61%	59%	52%	57%	55%
Yes, absolutely	19%	24%	26%	14%	17%	21%	16%	18%	13%	17%	20%
Yes, somewhat	45%	51%	42%	51%	47%	41%	45%	41%	39%	40%	35%
NO %	35%	24%	30%	33%	34%	37%	38%	40%	47%	42%	43%
No, not really	26%	17%	18%	25%	26%	31%	29%	29%	34%	34%	39%
No, not at all	9%	7%	12%	8%	8%	6%	9%	11%	14%	8%	4%
(I don't know)	1%	1%	2%	2%	2%	1%	1%	1%	-	1%	2%

Concretely, the main action implemented is reducing energy consumption

Among those who say they are familiar with the energy transition



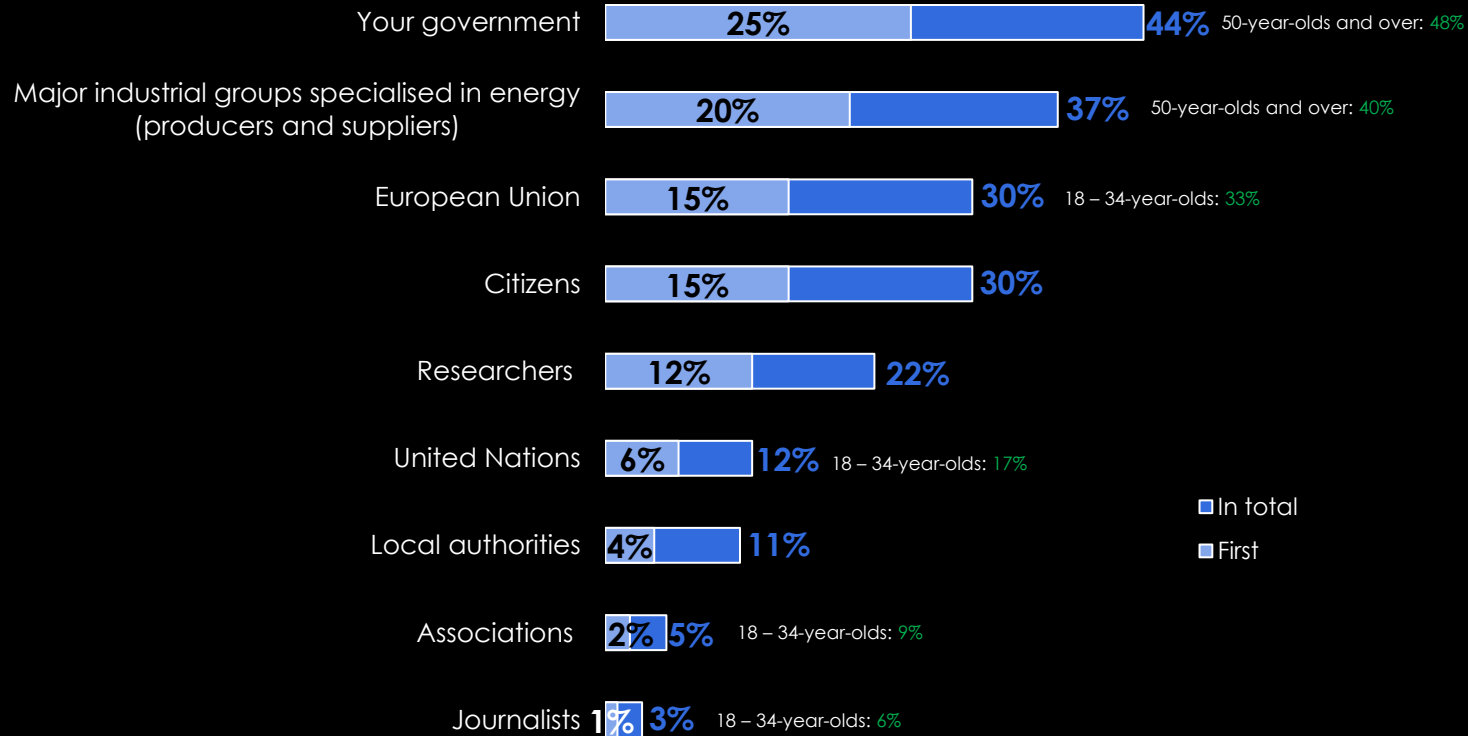
A measure shared by all countries

	Europe	 United Kingdom	 Germany	 Spain	 Belgium	 Netherlands	 Poland	 France	 Romania	 Italy	 Portugal
You have implemented initiatives to reduce energy consumption	69%	74%	74%	71%	70%	69%	68%	68%	65%	60%	53%
You have undertaken energy renovation work in your home	42%	42%	32%	41%	49%	50%	47%	46%	56%	39%	51%
You have invested in equipment to make your home completely or partially energy independent	28%	27%	28%	22%	52%	53%	35%	24%	28%	22%	32%
You have switched energy supplier and gone with one that uses renewable energies	26%	34%	35%	25%	25%	21%	14%	15%	19%	27%	31%
You have purchased an electric car	11%	14%	12%	10%	11%	13%	8%	11%	11%	8%	8%
None of these initiatives	6%	5%	5%	4%	5%	5%	2%	10%	3%	8%	8%

**The energy transition in
an age of mistrust of
politics...**



Major industrial groups strongly eagerly scrutinized on the issue

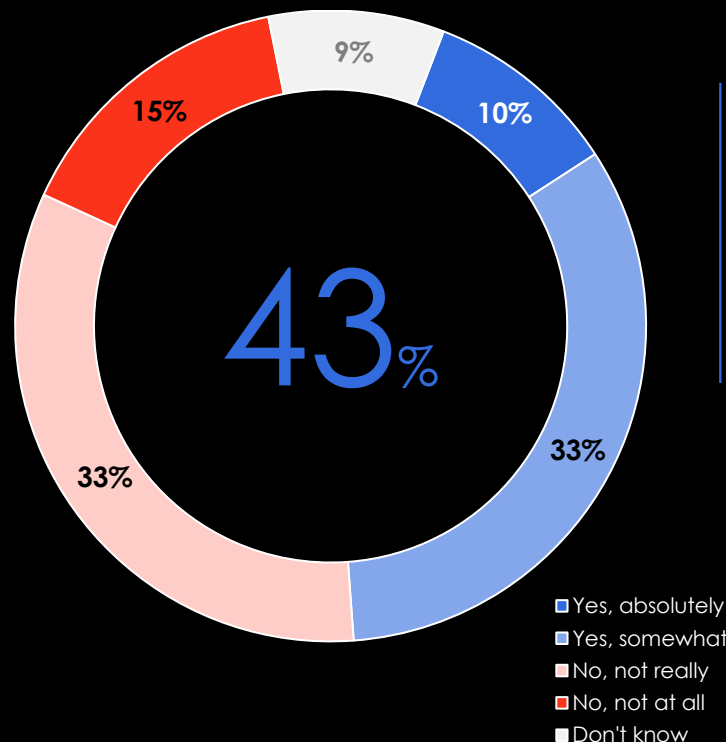


Greater scepticism directed at governments in Belgium, France and Romania

% Total	Europe	 United Kingdom	 Portugal	 Netherlands	 Germany	 Italy	 Poland	 Spain	 Belgium	 France	 Romania
Your government	44%	63%	48%	48%	41%	41%	41%	39%	38%	38%	38%
Major industrial groups specialised in energy (producers and suppliers)	37%	42%	41%	40%	43%	31%	27%	36%	42%	37%	33%
Citizens	30%	22%	26%	29%	39%	26%	27%	29%	25%	35%	27%
European Union	30%	13%	44%	33%	25%	36%	39%	43%	38%	25%	34%
Researchers	22%	16%	12%	18%	25%	23%	25%	22%	28%	25%	20%
United Nations	12%	17%	19%	9%	12%	13%	8%	16%	10%	8%	12%
Local authorities	11%	15%	3%	12%	3%	12%	18%	7%	9%	17%	14%
Associations	5%	4%	2%	4%	4%	6%	5%	4%	3%	8%	5%
Journalists	3%	3%	1%	3%	2%	4%	2%	2%	2%	3%	3%

Q9. Which of the following stakeholders do you consider to be the most legitimate in advancing the energy transition?
The most important aim? The second most important aim? Base: All – Two possible answers – Cleanest, second cleanest

Serious doubts about achieving net zero



Realistic target

18–34 year olds 53% / 50 year olds and over: 37%
Want to turn back the clock on the energy transition: 8%

LEVELLING UP: Achieving net zero requires a 90% reduction in carbon emissions, and the implementation of absorption mechanisms for the percentage that cannot be reduced.

Q10. The European Commission has signed a series of proposals as part of the Green Pact, the aim being to become a climate-neutral continent by 2050. In your opinion, is this aim realistic? Base : all (n=10,043) – Only one answer possible

Stronger doubts in the Netherlands, France, Belgium and especially Germany

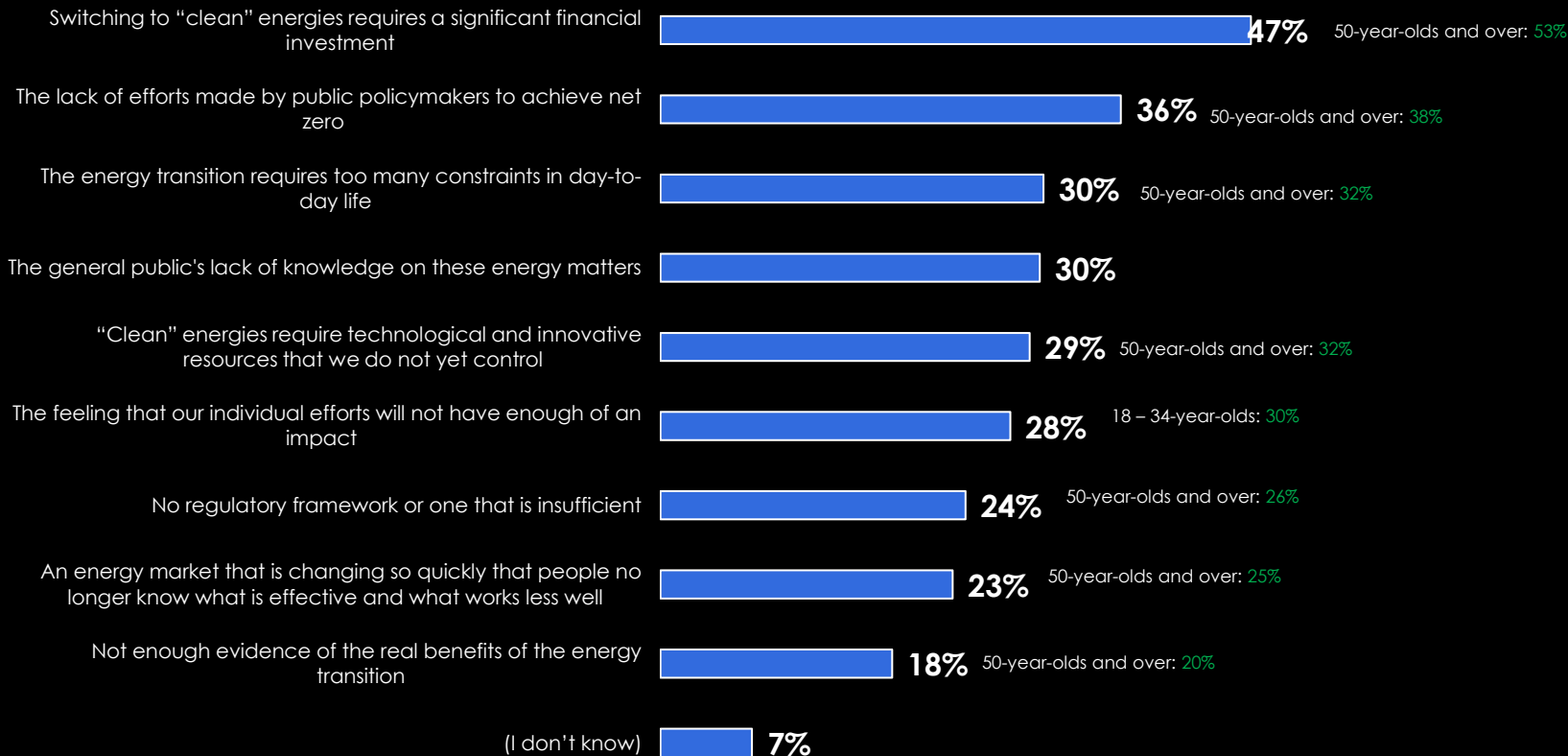
	Europe	 Italy	 Romania	 Spain	 United Kingdom	 Poland	 Portugal	 Netherlands	 France	 Belgium	 Germany
Realistic target	43%	58%	57%	52%	49%	48%	43%	36%	33%	29%	27%
Yes, absolutely	10%	14%	18%	14%	13%	11%	9%	9%	7%	6%	5%
Yes, somewhat	33%	44%	39%	38%	36%	37%	34%	27%	26%	23%	22%
Unrealistic target	49%	32%	34%	42%	41%	43%	42%	54%	55%	62%	68%
No, not really	33%	20%	28%	31%	29%	30%	30%	35%	35%	39%	45%
No, not at all	15%	12%	6%	11%	12%	13%	12%	19%	20%	23%	22%
(I don't know)	9%	10%	9%	6%	10%	9%	15%	10%	12%	9%	6%

LEVELLING UP: Achieving net zero requires a 90% reduction in carbon emissions, and the implementation of absorption mechanisms for the percentage that cannot be reduced.

Q10. *The European Commission has signed a series of proposals as part of the Green Pact, the aim being to become a climate-neutral continent by 2050. In your opinion, is this aim realistic?* Base: all – Only one answer possible

The primary obstacle to the energy transition: the financial investment involved

Among those who say they
are familiar with the energy
transition



51%

42%

34%

29%

31%

30%

27%

24%

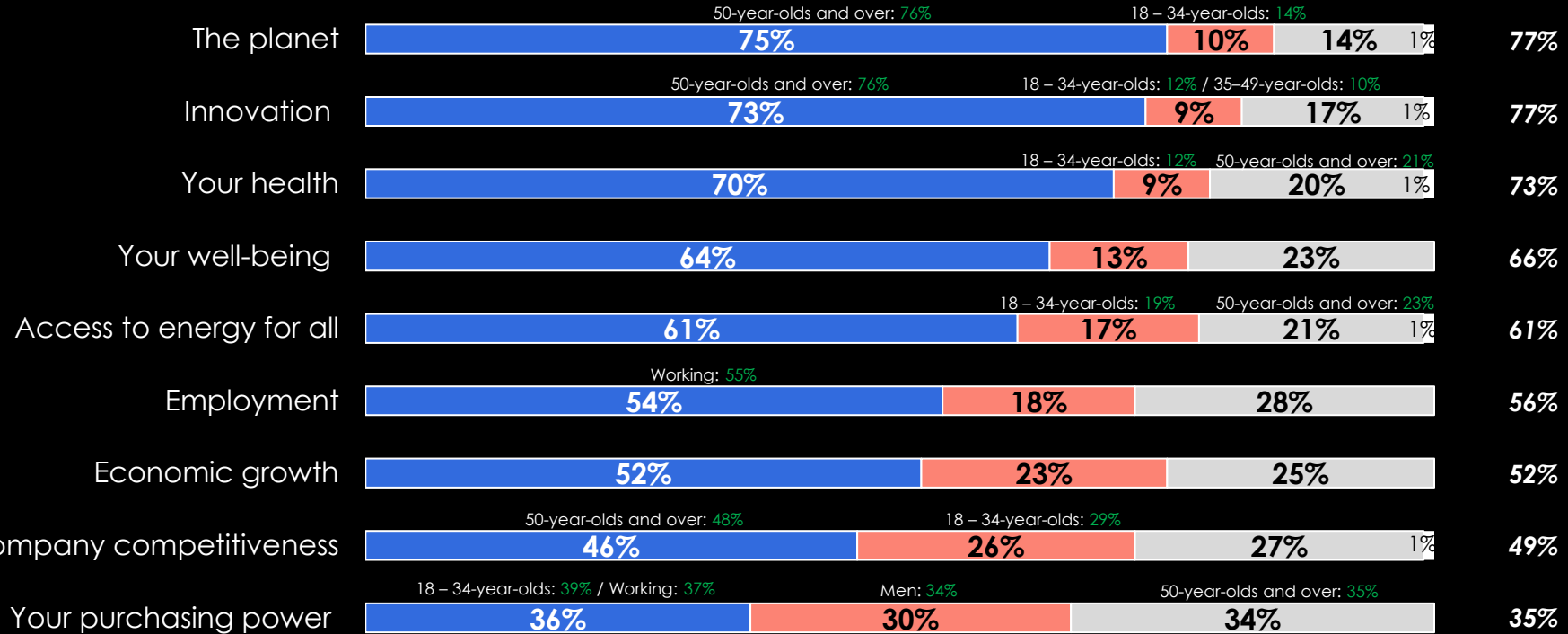
20%

An obstacle identified in all countries except Poland, Romania and the UK which also highlights the general public's lack of knowledge on these issues

	Europe	 Portugal	 Belgium	 Germany	 Poland	 France	 Romania	 Spain	 Italy	 Netherlands	 United Kingdom
Switching to "clean" energies requires a significant financial investment	47%	54%	52%	51%	50%	49%	47%	44%	44%	43%	41%
The lack of efforts made by public policymakers to achieve net zero	36%	59%	42%	37%	25%	42%	38%	44%	32%	29%	31%
The energy transition requires too many constraints in day-to-day life (<i>paying attention to energy consumption, choosing modes of mobility, impact on energy bills, etc.</i>)	30%	23%	32%	36%	31%	34%	27%	26%	25%	23%	32%
The general public's lack of knowledge on these energy matters	30%	42%	28%	28%	35%	24%	41%	34%	26%	25%	33%
"Clean" energies require technological and innovative resources that we do not yet control	29%	19%	24%	33%	30%	25%	32%	27%	29%	21%	32%
The feeling that our individual efforts will not have enough of an impact	28%	28%	27%	29%	22%	34%	19%	26%	22%	27%	33%
No regulatory framework or one that is insufficient	24%	21%	20%	23%	21%	22%	26%	26%	26%	17%	27%
An energy market that is changing so quickly that people no longer know what is effective and what works less well	23%	13%	20%	29%	22%	20%	25%	21%	20%	20%	26%
Not enough evidence of the real benefits of the energy transition	18%	13%	15%	24%	20%	20%	19%	17%	14%	15%	16%
(I don't know)	7%	4%	7%	4%	6%	8%	4%	6%	7%	14%	11%

Overall, the energy transition is seen as an opportunity, but with significant hesitations about purchasing power

% opportunity among those who say they are familiar with the energy transition



■ An opportunity ■ A threat ■ Neither one nor the other ■ Don't know

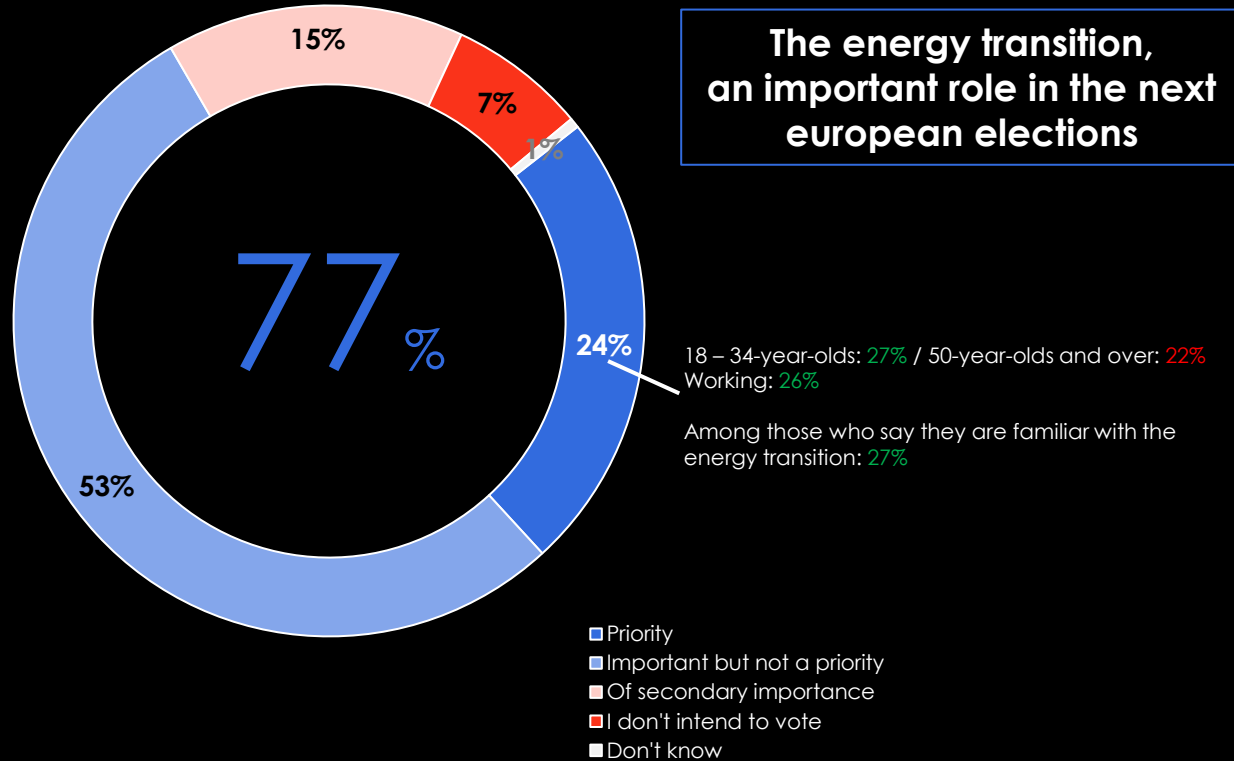
Portugal, Italy, Romania and Spain are far more enthusiastic about the energy transition

% <u>Opportunity</u>											
	Europe	Portugal	Italy	Romania	Spain	United Kingdom	France	Belgium	Germany	Poland	Netherlands
The planet	75%	91%	82%	79%	79%	74%	74%	71%	71%	69%	53%
Innovation	73%	90%	80%	82%	81%	75%	73%	72%	65%	71%	56%
Your health	70%	86%	80%	80%	78%	66%	69%	64%	64%	69%	46%
Your well-being	64%	85%	79%	70%	75%	64%	62%	55%	53%	55%	43%
Access to energy for all	61%	73%	74%	77%	70%	67%	50%	44%	51%	65%	42%
Employment	54%	57%	67%	63%	61%	58%	51%	44%	43%	49%	41%
Economic growth	52%	78%	67%	68%	57%	60%	41%	40%	38%	55%	34%
Company competitiveness	46%	59%	60%	60%	49%	50%	41%	31%	36%	48%	28%
Your purchasing power	36%	42%	49%	54%	44%	39%	24%	19%	26%	42%	17%

The fear of an impact on purchasing power is very present in Belgium, France, Germany and the Netherlands

% <u>Threat</u>	Europe	 Belgium	 France	 Netherlands	 Germany	 Portugal	 Italy	 Poland	 United Kingdom	 Spain	 Romania
Your purchasing power	30%	48%	44%	41%	39%	24%	23%	21%	21%	19%	18%
Company competitiveness	26%	31%	25%	30%	36%	21%	21%	26%	21%	26%	13%
Economic growth	23%	27%	26%	28%	36%	5%	15%	21%	16%	19%	14%
Employment	18%	20%	17%	19%	28%	10%	13%	21%	13%	13%	13%
Access to energy for all	17%	28%	20%	26%	22%	9%	12%	16%	14%	12%	7%
Your well-being	13%	18%	11%	18%	17%	4%	9%	19%	10%	10%	9%
The planet	10%	10%	10%	22%	11%	3%	8%	13%	10%	9%	7%
Your health	9%	10%	9%	16%	10%	3%	8%	12%	10%	7%	6%
Innovation	9%	6%	8%	13%	12%	3%	9%	11%	8%	6%	5%

The energy transition, an important yet not decisive issue in the next European elections



Q13. In the upcoming European Elections in June 2024, will the energy transition be a key factor in deciding which list you're going to vote for?

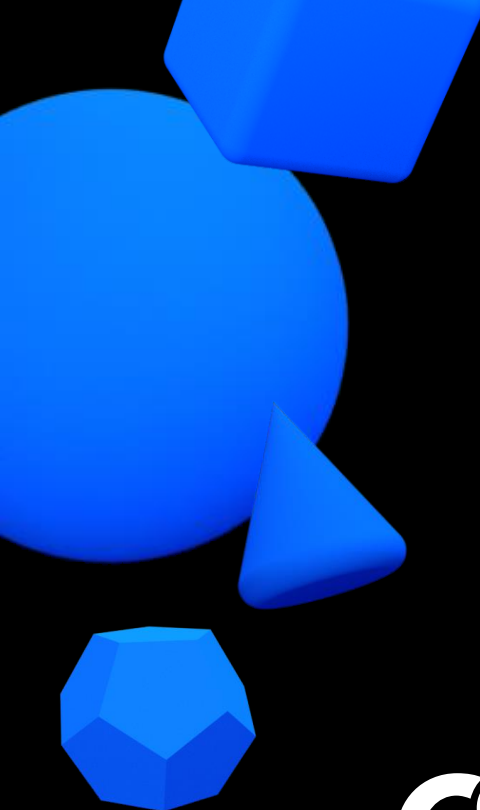
Base: All except UK (n=9,038) – Only one answer possible

A more important argument for Romania, Italy, Portugal and Spain

	Europe	 Italy	 Portugal	 Romania	 Spain	 Poland	 Germany	 France	 Netherlands	 Belgium
ST IMPORTANT %	77%	85%	85%	83%	79%	79%	73%	72%	70%	63%
Priority	24%	32%	27%	34%	26%	23%	18%	22%	16%	13%
Important but not a priority	53%	53%	58%	49%	53%	56%	55%	50%	54%	50%
Of secondary importance	15%	9%	11%	11%	14%	13%	18%	19%	18%	29%
I don't intend to vote	7%	6%	4%	5%	6%	7%	9%	9%	11%	7%
(Don't know)	1%	-	-	1%	1%	1%	-	-	1%	1%

Q13. In the next European Elections in June 2024, will the energy transition play a major role in deciding which list you're going to vote for?

Base: All except UK (n=9,038) – Only one answer possible

A collection of blue 3D geometric shapes including a large sphere, a cube, a cone, and a dodecahedron, arranged in the top-left corner of the slide.

THANK YOU

