

Fifth edition — 2022-2023

THE EIB CLIMATE SURVEY

**GOVERNMENT ACTION,
PERSONAL CHOICES AND
THE GREEN TRANSITION**

EUROPEAN INVESTMENT BANK

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PERSONAL CHOICES
AND THE GREEN TRANSITION**



**European
Investment Bank**

The EIB Climate Survey

Government action, personal choices and the green transition

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FOREWORD

Alarming confluence of events

By Vice-President Ambroise Fayolle

The string of tragic events in 2022 helped us realise that energy security and the green transition are closely intertwined. First Russia invaded Ukraine, then came the energy crisis and rising inflation. Next, we saw a summer of weather disasters, heatwaves and droughts.

Our latest climate survey demonstrates that people are able to draw sensible conclusions from this alarming confluence of events. A large majority of people surveyed agree that the war in Ukraine should accelerate the green transition. Among Europeans, 66% are in favour of stronger government measures to tackle the climate emergency. Almost 85% of Europeans predict a global disaster if we don't drastically reduce our consumption of energy and goods.

This is our fifth annual survey. More than 28 000 people from 30 countries responded to our questions in August 2022. This climate project is an important way for the European Investment Bank to listen to people around the world. We believe these surveys enrich the global climate debate, which is why we publish the full results here.

Over the past few years, the Bank has been a bulwark against a series of crises. We have worked hard to support an economic recovery, invest in new vaccines and better healthcare during the pandemic, and keep pushing the green transition in the right direction. In 2022, we supported €36.5 billion in green investment, exceeding our commitment to devote at least half of our financing to climate action and environmental sustainability. Our support for the new REPowerEU initiative will provide €30 billion in loans for energy projects over the next five years, with the aim of rapidly reducing Europe's dependence on Russian fossil fuels. Now we are trying to help Ukraine keep its economy afloat amid the war, and finance the energy projects that will help end this dependence. We have disbursed €1.7 billion to Ukraine under difficult circumstances and have another €540 million still to disburse. We recognise that there can be no safe world without strong economies, good healthcare for all, and a decisive shift to a green society. The green transition is, quite literally, the most important underpinning of our future security.



“ Among Europeans, 66% are in favour of stronger government measures to tackle the climate emergency. Almost 85% of Europeans predict a global disaster if we don’t drastically reduce our consumption of energy and goods. ”

We must do more

We do this work because the climate is always the big picture for us. We are the EU climate bank and one of the biggest climate financiers in the world.

Our aims certainly match the desires of the people we surveyed. Our 2022 survey shows that the current energy crisis is an opportunity to accelerate the transformation to a low-carbon and climate-resilient future. In 2022, our clean energy financing reached a record high of €19.4 billion. We are increasing support for innovative clean energy investments, advanced wind farms and solar panels, batteries for electric vehicles, and green hydrogen technology. We will back these advances with our full range of financial and advisory instruments.

Our survey proves that people are ready for the green transition. Now it’s time to make it happen.

Ambroise Fayolle is the European Investment Bank vice-president responsible for climate action and environmental sustainability

How we conducted the survey



Survey conducted online (computer, tablet or mobile) by the BVA Group consulting firm between **8 and 31 August 2022** in all **27 EU countries**, the **United Kingdom, China** and the **United States**.



Respondents were randomly selected from nationally representative panels and participated via an online survey.

Total sample of **25 722** people composed of **30 representative samples of the population aged 15 and over in each country** (over 15 in Luxembourg).



The **quota method** was used to ensure the accuracy of the survey results. Samples in each country were weighted according to gender, age, occupation and location.

Samples

Size of the representative panel per country

COUNTRY	SAMPLE SIZE	LANGUAGE USED
 United States	1 000	English
 China	1 000	Simplified Chinese
 United Kingdom	1 000	English
 Austria	1 000	German
 Belgium	1 000	French, Flemish
 Bulgaria	1 007	Bulgarian
 Croatia	1 003	Croatian
 Cyprus	500	Greek
 Czech Republic	1 000	Czech
 Denmark	1 006	Danish
 Estonia	500	Estonian
 Finland	1 000	Finnish
 France	1 000	French
 Germany	1 000	German
 Greece	1 003	Greek
 Hungary	1 000	Hungarian
 Ireland	1 001	English
 Italy	1 000	Italian
 Latvia	500	Latvian
 Lithuania	500	Lithuanian
 Luxembourg	501	French, German, Luxembourgish
 Malta	201	English
 Netherlands	1 000	Dutch
 Poland	1 000	Polish
 Portugal	1 000	Portuguese
 Romania	1 000	Romanian
 Slovakia	500	Slovak
 Slovenia	500	Slovenian
 Spain	1 000	Spanish
 Sweden	1 000	Swedish

Margin of error

All surveys are subject to a margin of error. The table below shows the margins of error (at the 95% level of confidence) according to the result obtained in this survey and the sample sizes.

SAMPLE SIZE	95% CONFIDENCE INTERVAL BY SCORE					
	5% or 95%	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
100	4.4	6.0	8.0	9.2	9.8	10.0
200	3.1	4.2	5.7	6.5	6.9	7.1
300	2.5	3.5	4.6	5.3	5.7	5.8
400	2.2	3.0	4.0	4.6	4.9	5.0
500	1.9	2.7	3.6	4.1	4.4	4.5
600	1.8	2.4	3.3	3.7	4.0	4.1
700	1.6	2.3	3.0	3.5	3.7	3.8
800	1.5	2.1	2.8	3.2	3.5	3.5
900	1.4	2.0	2.6	3.0	3.2	3.3
1 000	1.4	1.8	2.5	2.8	3.0	3.1
2 000	1.0	1.3	1.8	2.1	2.2	2.2
3 000	0.8	1.1	1.4	1.6	1.8	1.8
6 000	0.6	0.8	1.1	1.3	1.4	1.4
10 000	0.4	0.6	0.8	0.9	0.9	1.0

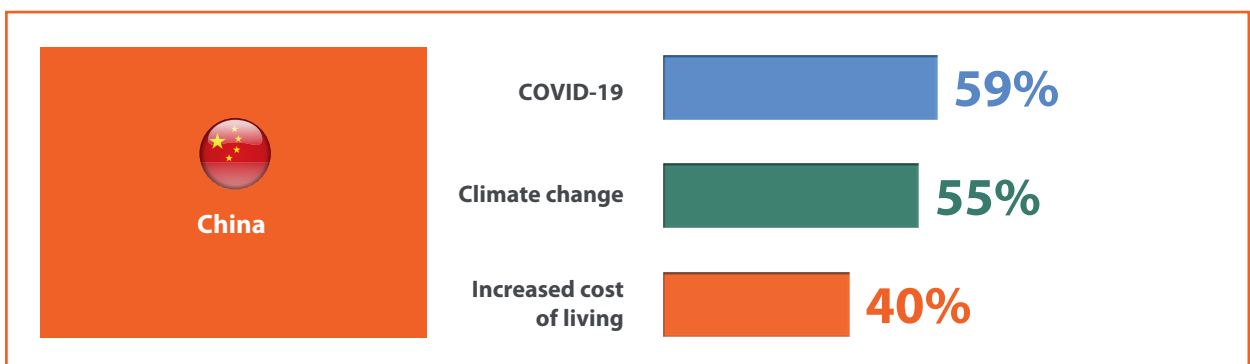
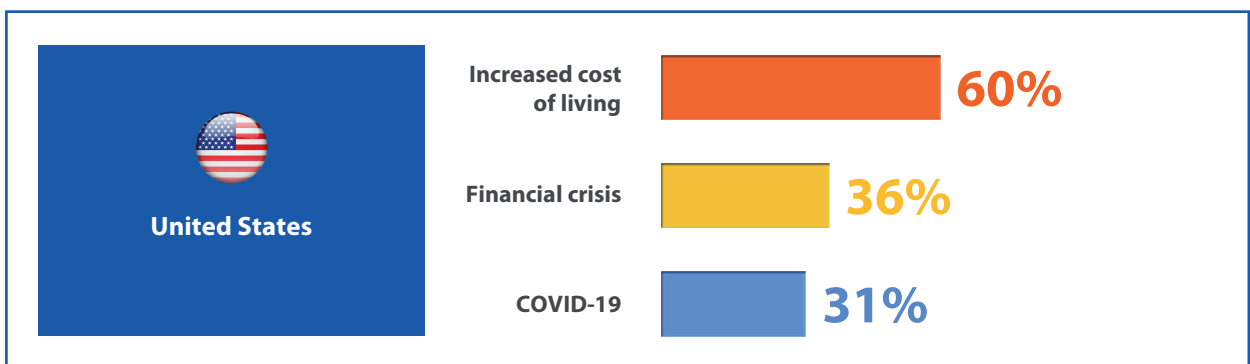
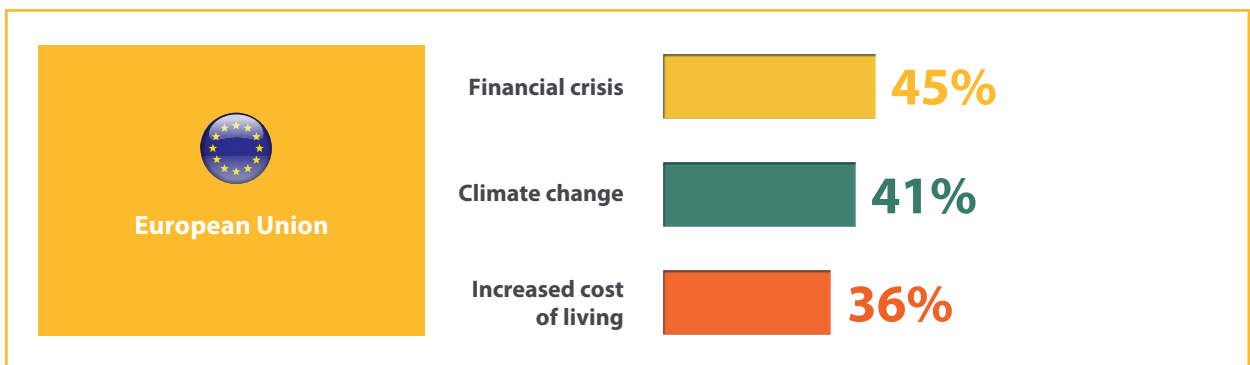
Example: For a sample of 1 000 respondents, for a survey percentage of 20%, the margin of error is 2.5. The percentage therefore has a 95% chance of being between 17.5% and 22.5%.

1

**HOW HAS THE WAR
IN UKRAINE INFLUENCED
PEOPLE'S VIEWS
ON GOVERNMENT
CLIMATE ACTION,
AND WHAT WERE
PEOPLE'S EXPECTATIONS
BEFORE COP27?**

While COVID-19 was considered the number one challenge facing Europeans and Americans in 2021, economic issues now dominate their concerns

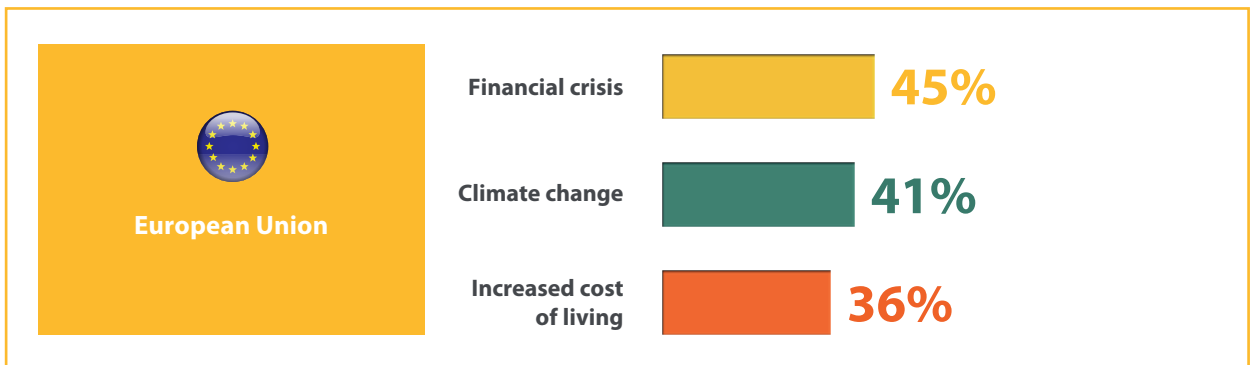
What are the three biggest challenges that people in your country are currently facing?



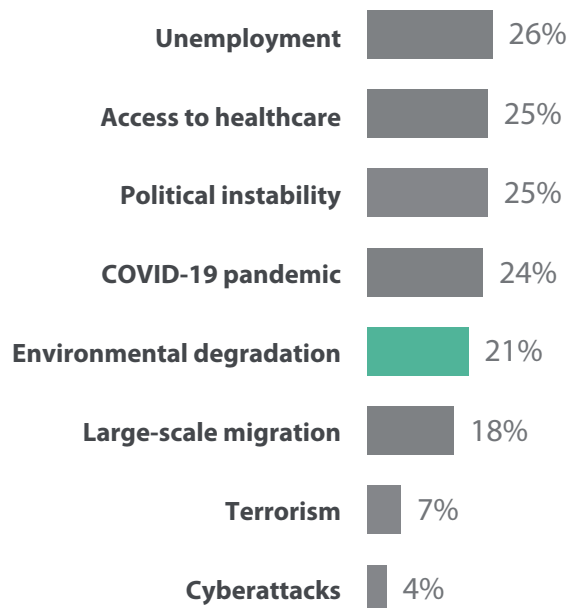
The economic consequences of the war in Ukraine appear to be the main challenges facing Europeans, along with climate change

What are the three biggest challenges that people in your country are currently facing?

% of respondents ranking a given challenge among the top three for their country



Other challenges



In the current context, climate change is seen as a lower priority for Eastern European countries

What are the three biggest challenges that people in your country are currently facing?

% ranking climate change as one of the three biggest challenges



United States
28%



China
55%



United Kingdom
32%

GROUP 1

(More than 44%)

	Germany	57%
	Luxembourg	55%
	France	47%
	Denmark	47%
	Austria	47%

GROUP 2

(Between 34% and 44%)

	Belgium	44%
	Netherlands	44%
	Italy	44%
	Spain	39%
	Portugal	37%
	Malta	34%



Total European Union
41%



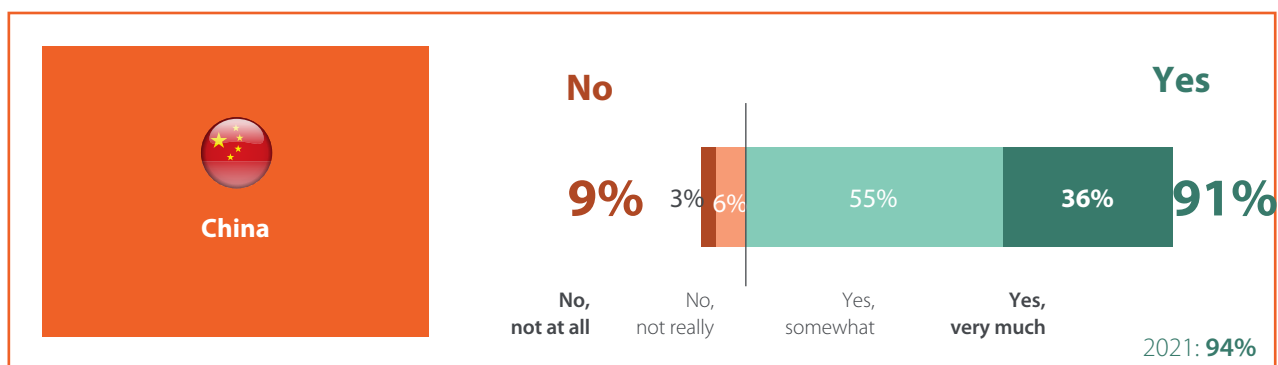
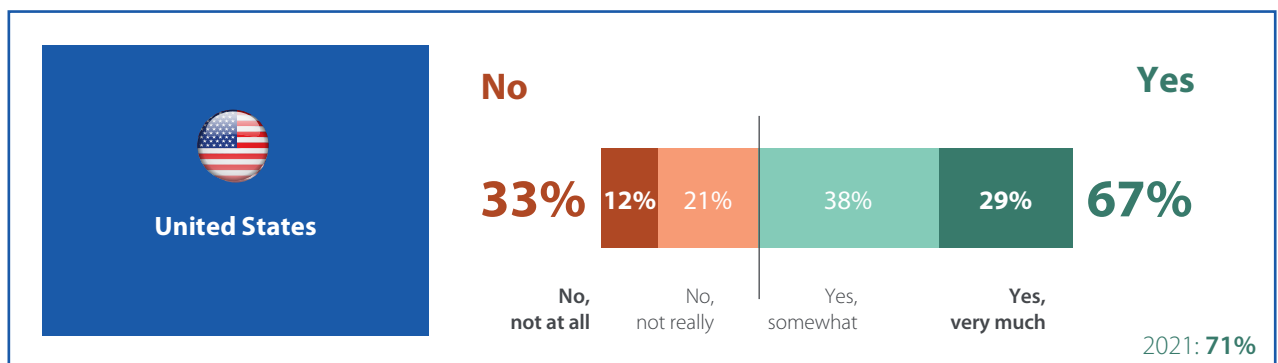
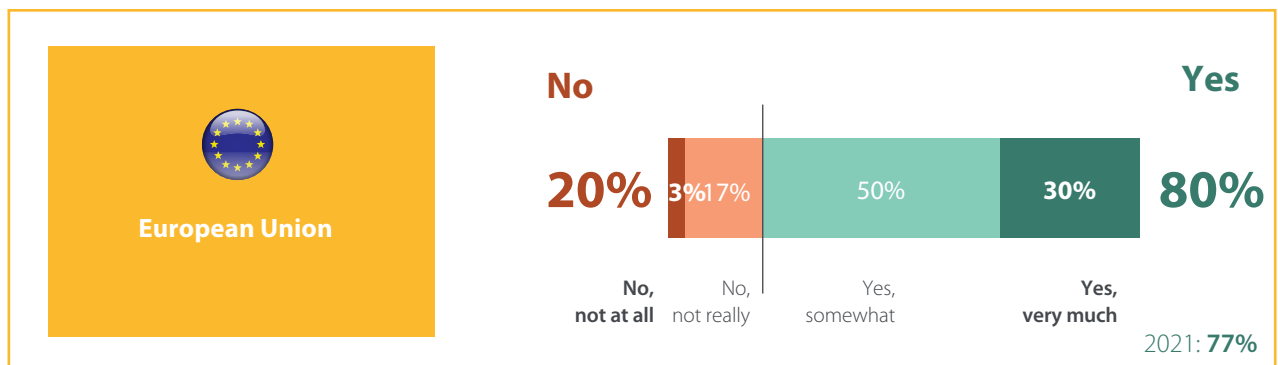
GROUP 3

(Less than 34%)

	Sweden	33%
	Poland	33%
	Slovenia	32%
	Finland	31%
	Cyprus	31%
	Ireland	31%
	Greece	27%
	Romania	27%
	Croatia	24%
	Hungary	23%
	Czech Republic	21%
	Slovakia	18%
	Lithuania	16%
	Estonia	15%
	Bulgaria	9%
	Latvia	8%

Climate change is affecting the everyday lives of at least two-thirds of Europeans, Americans and Chinese people

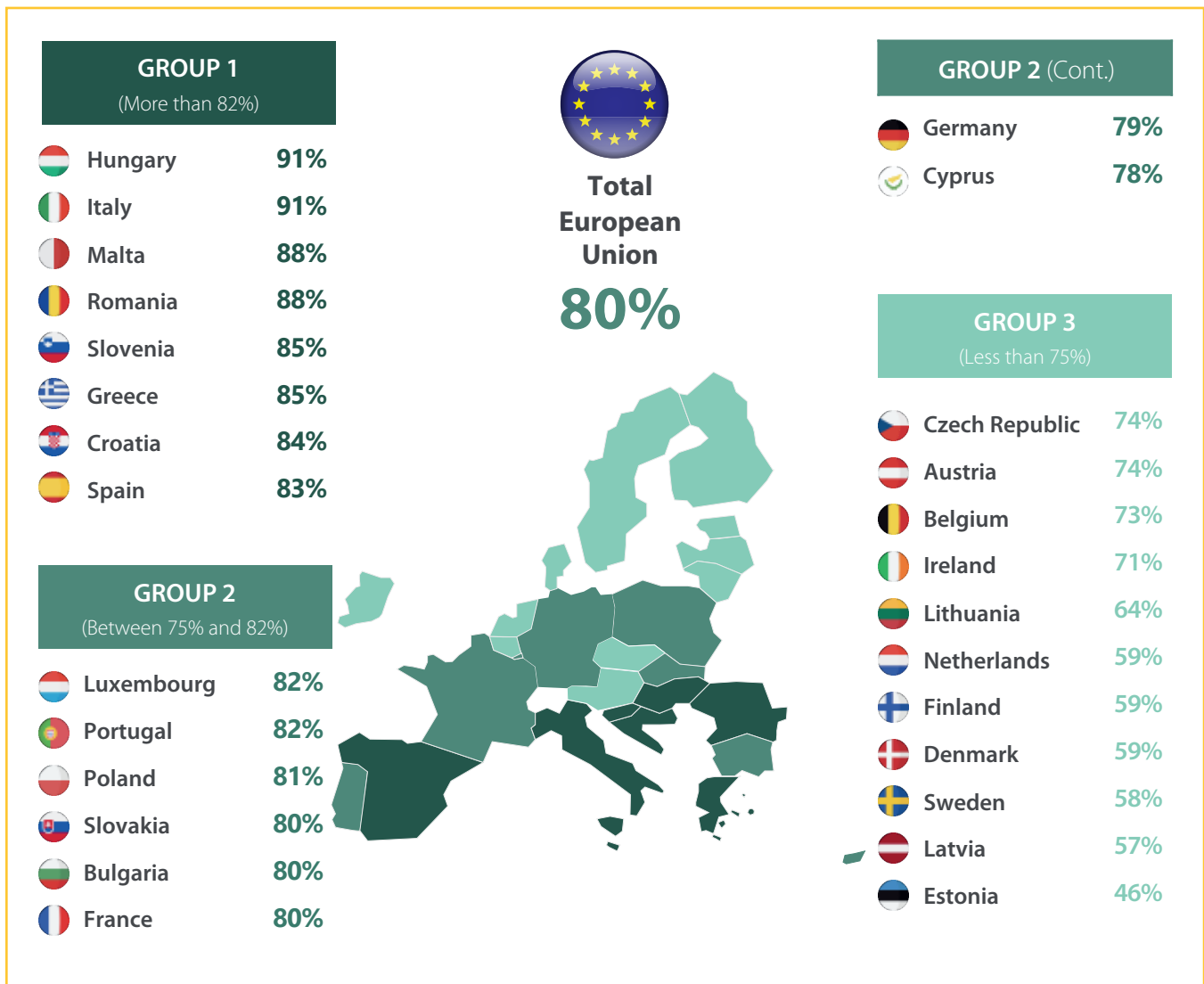
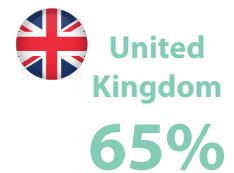
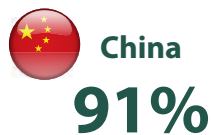
Do you feel that climate change has an impact on your everyday life?



Southern and Southeastern Europeans in particular are feeling the impact of climate change on their everyday lives

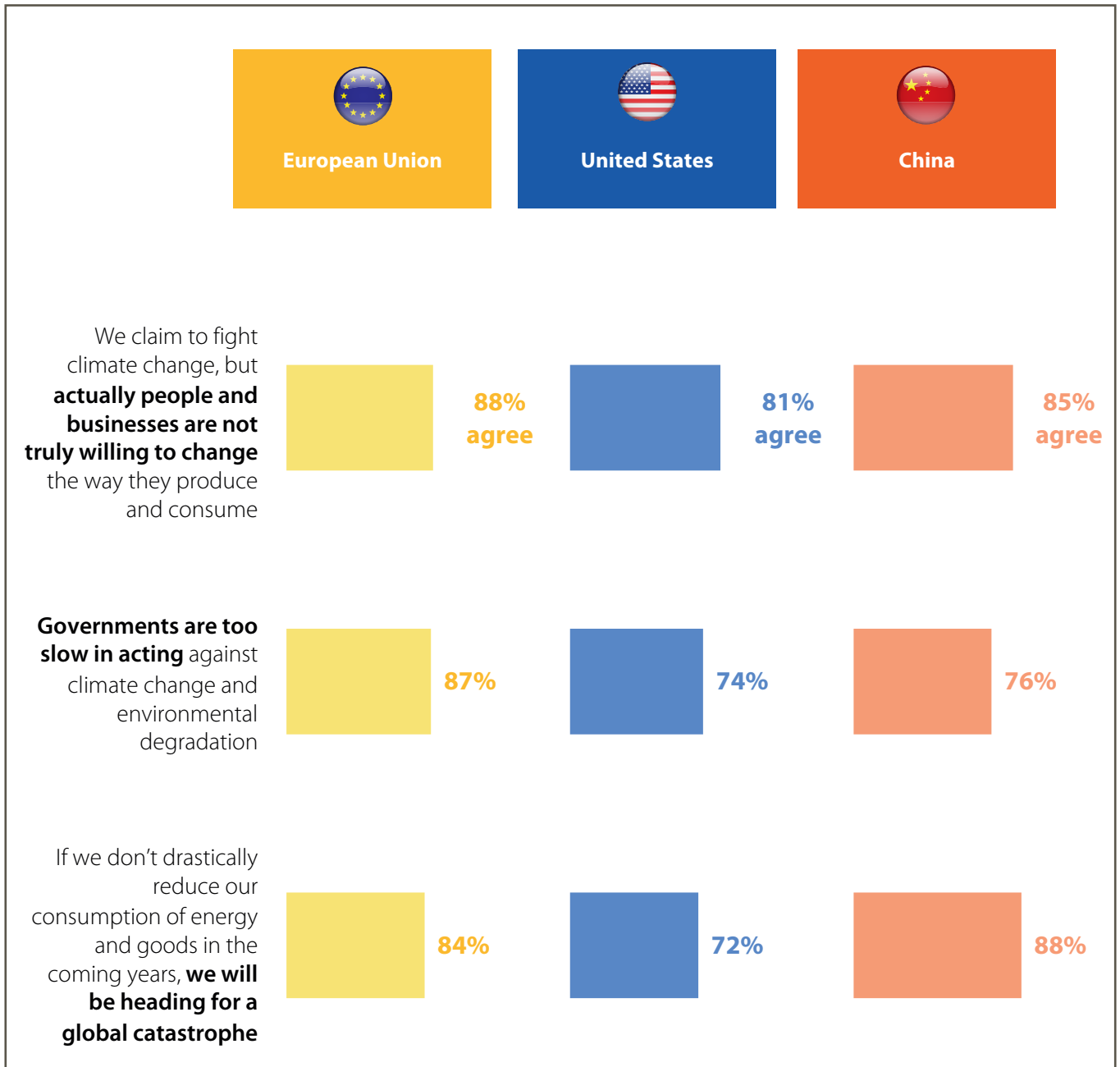
Do you feel that climate change has an impact on your everyday life?

% who responded yes



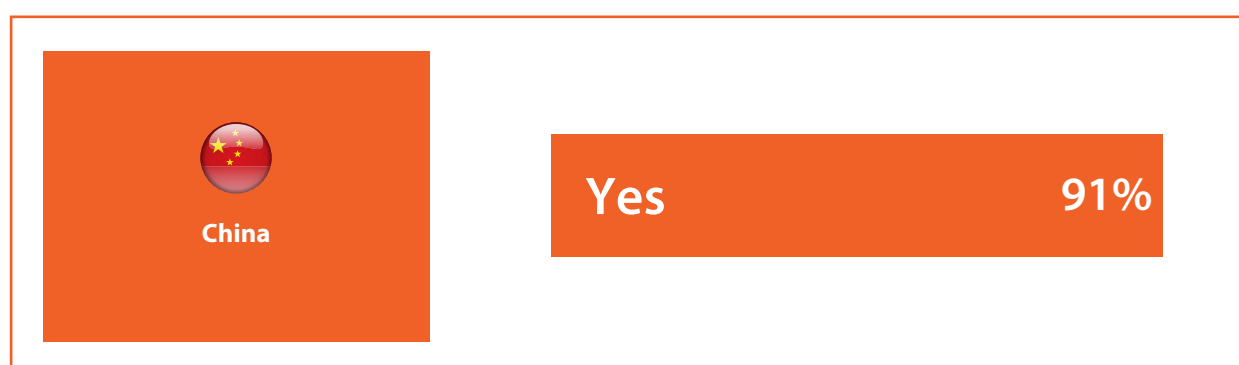
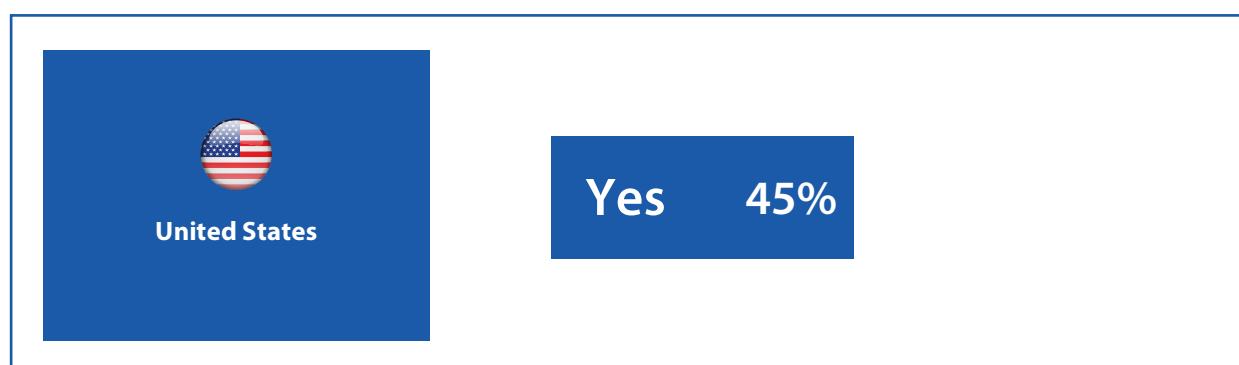
Americans, Chinese and Europeans are in broad agreement that they are not doing enough to fight the climate emergency

To what extent do you agree or disagree with each of the following statements:



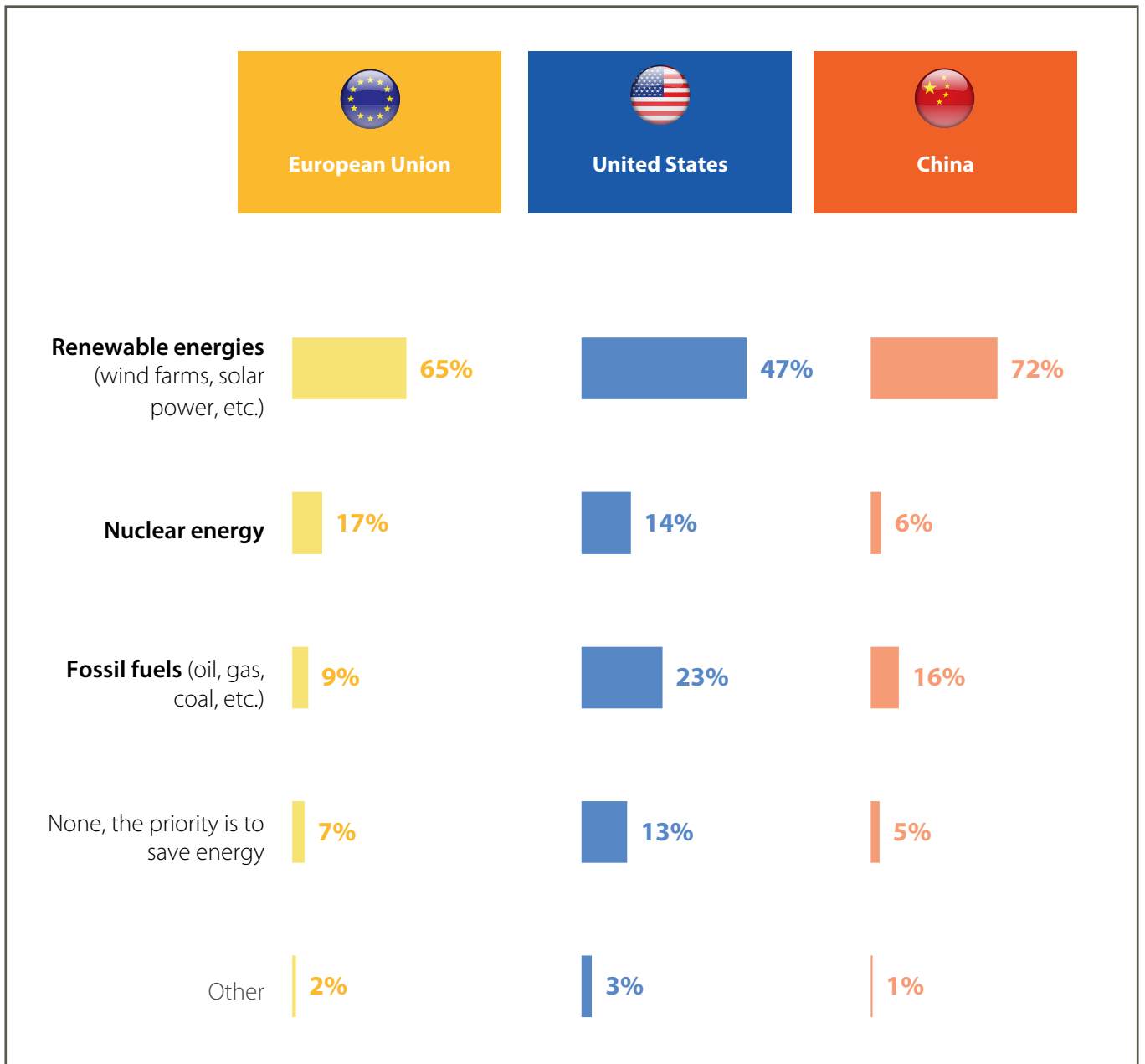
Only a minority of Europeans and Americans trust their country's ability to reduce carbon emissions by 2030

Your country has pledged to substantially reduce its carbon emissions by 2030. Do you think it will succeed?



Renewable energies are considered an investment priority in the European Union, China and, to a lesser extent, the United States

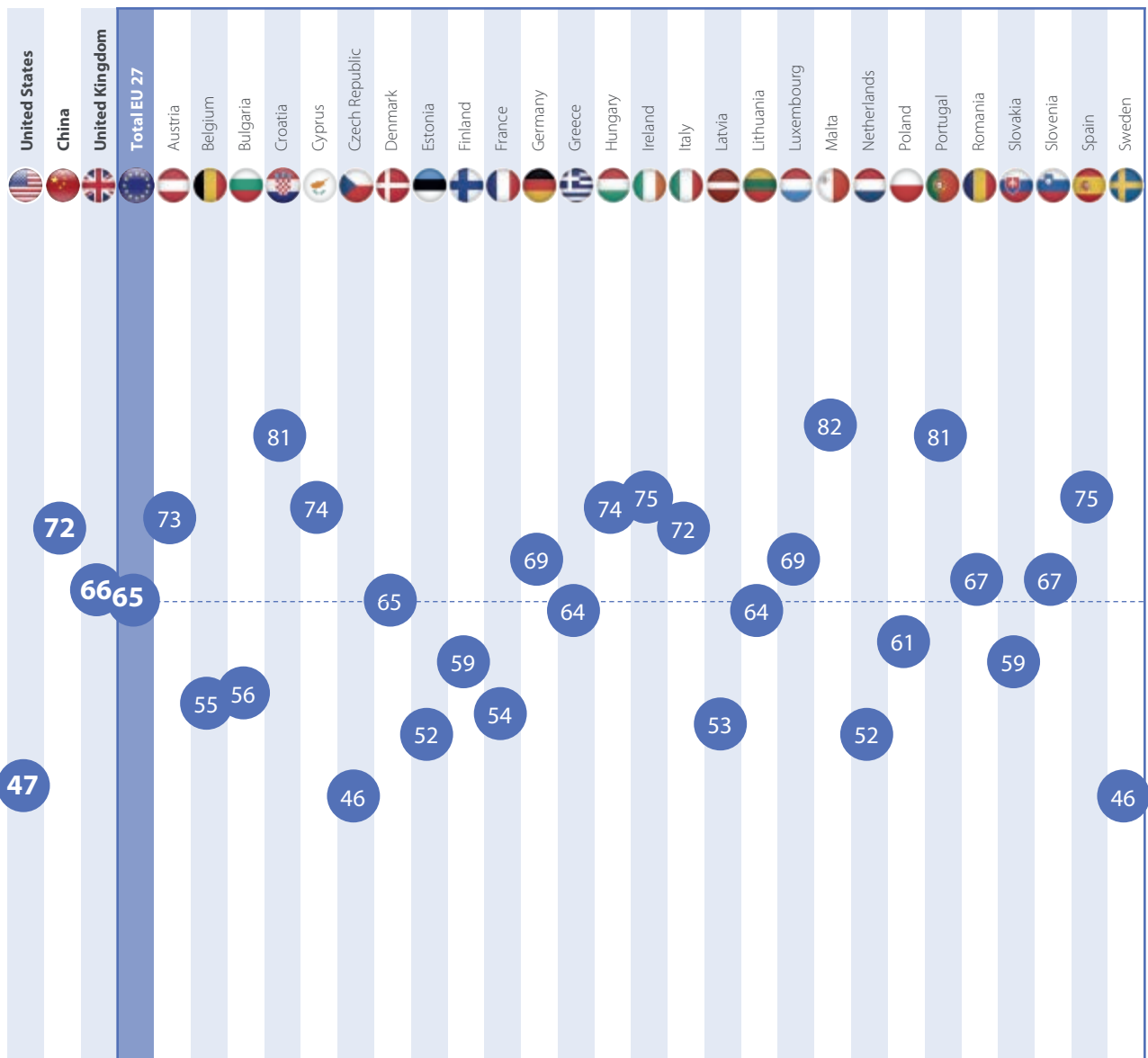
In which source of energy should your country invest the most in the coming years?



The majority of respondents in all countries support investment in renewable energy, except in the United States, the Czech Republic and Sweden

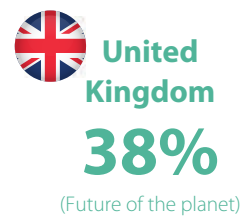
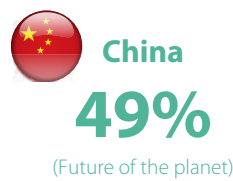
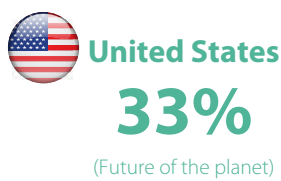
In which source of energy should your country invest the most in the coming years?

% who would invest in renewable energies



In most European nations, protecting the future of the planet is cited as the main advantage of giving up fossil fuels, but some countries say the primary benefit is energy independence

What would be the main benefit of giving up fossil fuels (oil, gas and coal)?



Future of the planet

Total European Union: 36%

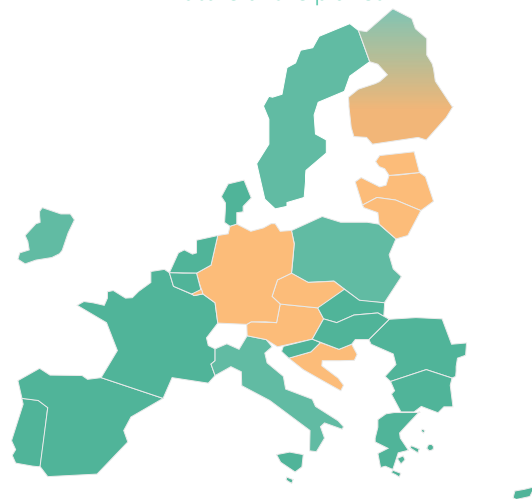
Portugal	51%
Malta	47%
Sweden	46%
Hungary	43%
Denmark	41%
Ireland	41%
Italy	41%
Slovenia	39%
Spain	37%
France	36%
Romania	36%
Netherlands	34%
Belgium	34%
Greece	34%
Bulgaria	33%
Cyprus	33%
Poland	33%
Slovakia	31%



Total European Union

36%

Future of the planet



Independence

Total European Union: 32%

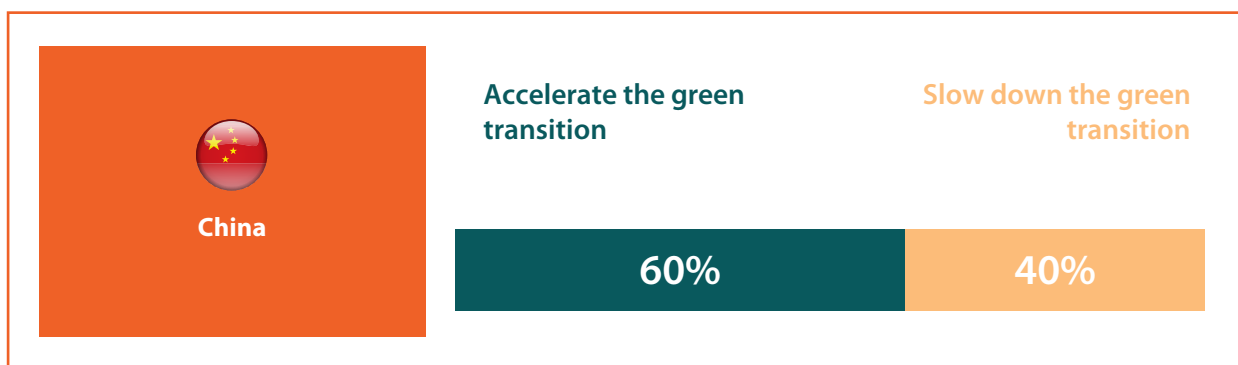
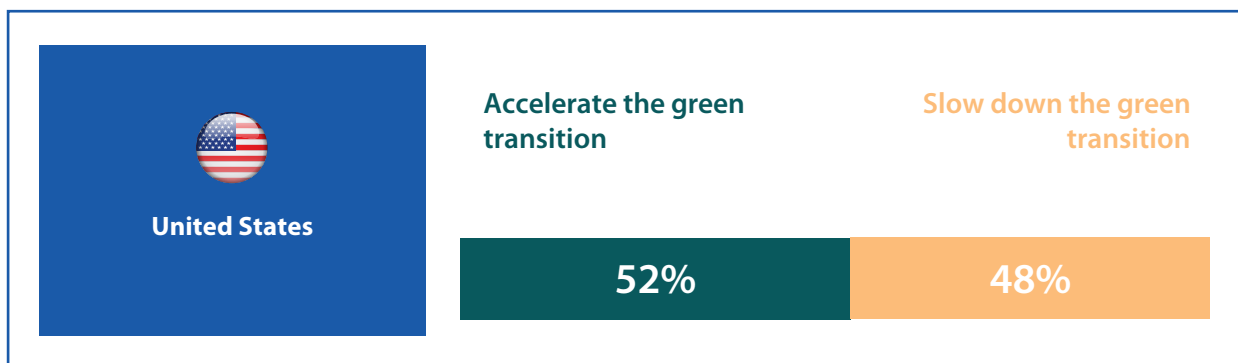
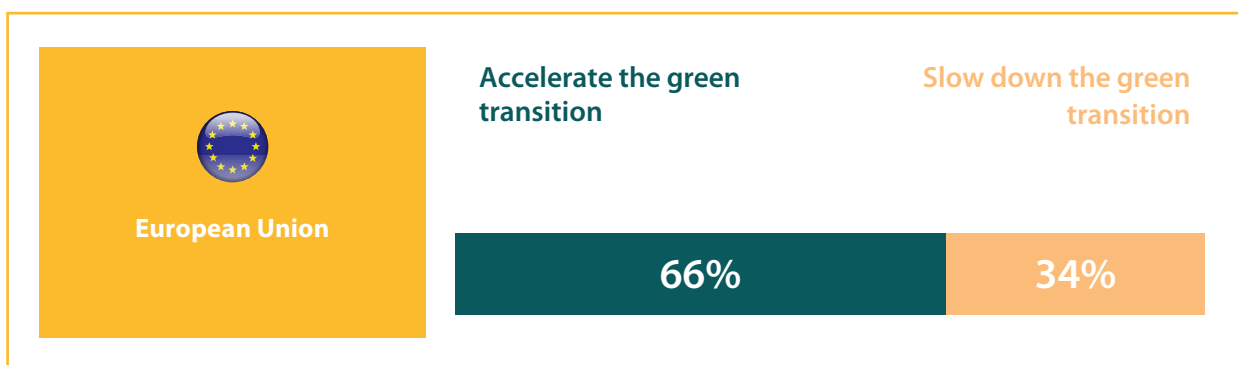
Austria	43%
Germany	41%
Croatia	37%
Luxembourg	36%
Estonia	36%
Lithuania	34%
Czech Republic	32%
Latvia	31%

Both future of the planet and independence

Finland	34%
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The war in Ukraine is perceived as an opportunity to accelerate the green transition in the European Union

Do you think that the war in Ukraine and its consequences on the price of oil and gas should make us accelerate the green transition by reducing our consumption of fossil fuels, or slow down the green transition to secure energy availability in the short term?



Southern European countries are the most convinced that the Ukraine crisis is an opportunity to accelerate the green transition

Do you think that the war in Ukraine and its consequences on the price of oil and gas should make us accelerate or slow down the green transition?

% who see the crisis as an opportunity to accelerate the green transition



United States
52%



China
60%



United Kingdom
62%

GROUP 1 (More than 67%)

Croatia	81%
Italy	77%
Hungary	77%
Cyprus	76%
Portugal	75%
Romania	73%
Malta	72%
France	71%
Denmark	71%
Spain	69%

GROUP 2 (Between 62% and 67%)

Slovenia	67%
Latvia	67%
Lithuania	65%



Total European Union
66%



GROUP 2 (Cont.)

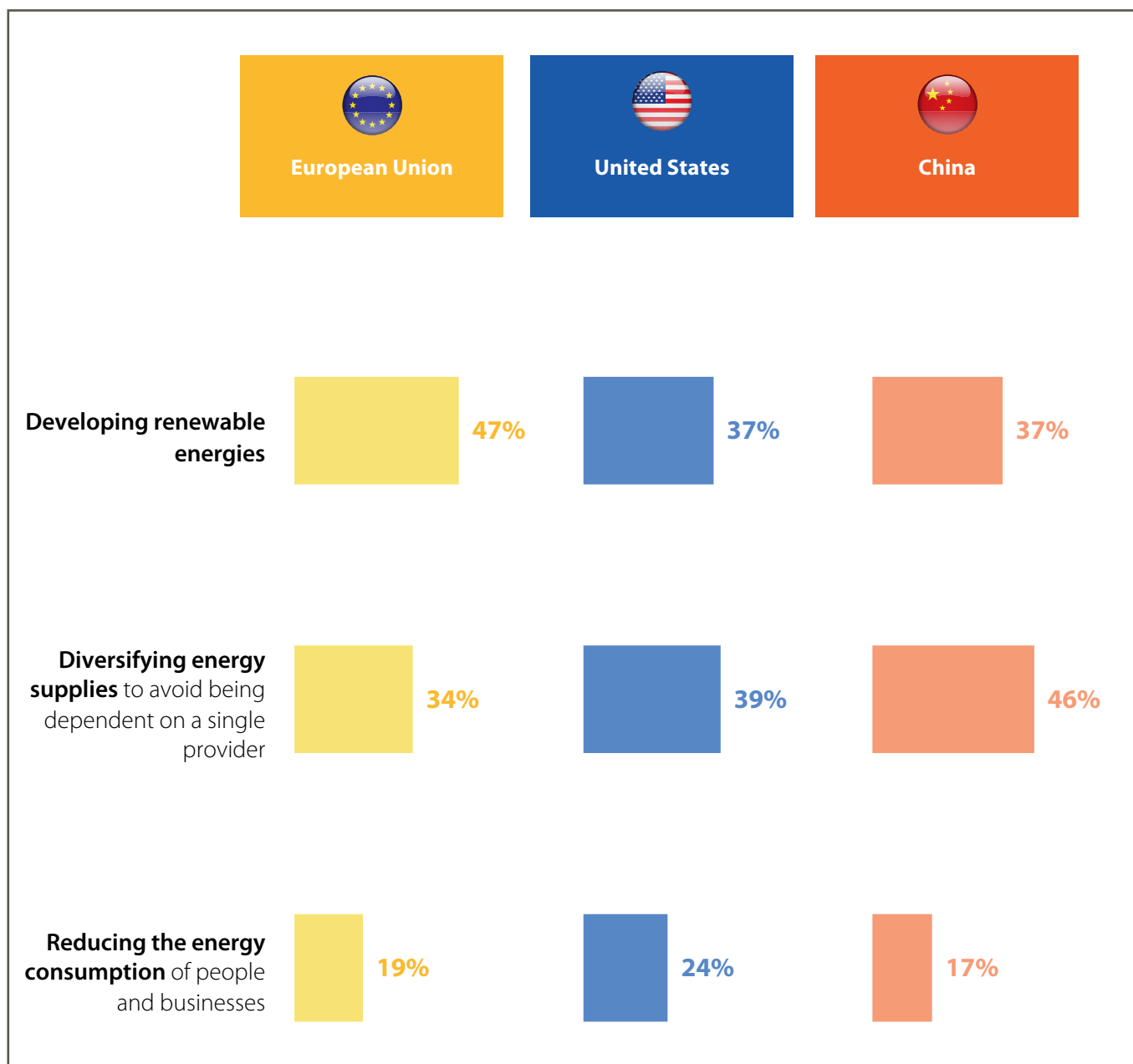
Poland	65%
Luxembourg	64%
Ireland	64%
Greece	63%
Belgium	63%
Slovakia	63%

GROUP 3 (Less than 62%)

Bulgaria	62%
Netherlands	57%
Austria	57%
Sweden	55%
Germany	54%
Czech Republic	50%
Finland	49%
Estonia	48%

Europeans, Americans and Chinese have different views on how to handle the energy crisis

In the current context, what should your country's priority regarding energy be?



For most EU countries, priority should be given to the production of renewable energy

In the current context, what should your country's priority regarding energy be?

% who say developing renewable energies should be the priority



United States
37%



China
37%



United Kingdom
45%

GROUP 1 (More than 50%)

	Cyprus	70%
	Croatia	68%
	Hungary	63%
	Portugal	60%
	Slovakia	56%
	Italy	55%
	Slovenia	54%
	Denmark	53%
	Bulgaria	51%

GROUP 2 (Between 45% and 50%)

	Malta	50%
	Spain	50%
	Lithuania	50%
	Ireland	49%
	Romania	49%
	Poland	49%



Total European Union
47%



GROUP 2 (Cont.)

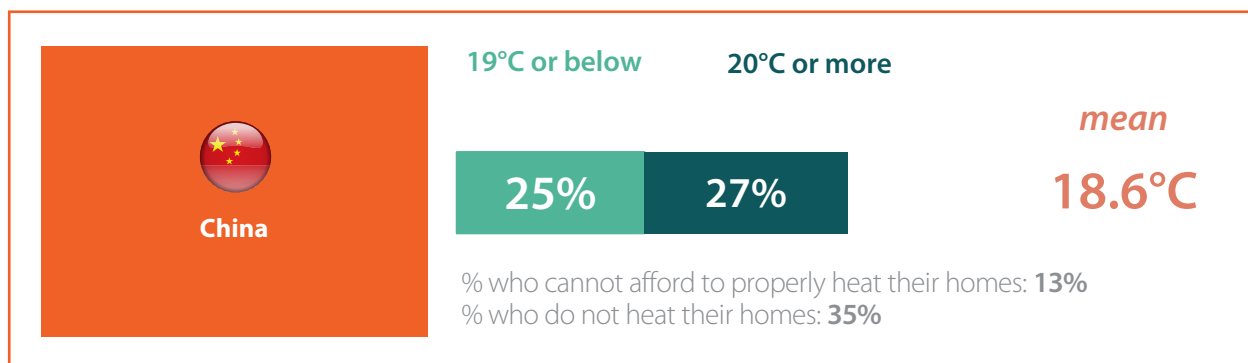
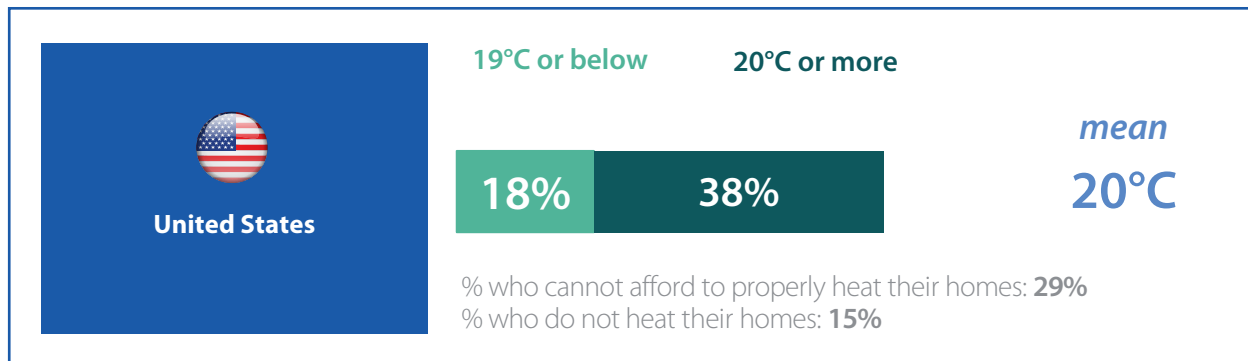
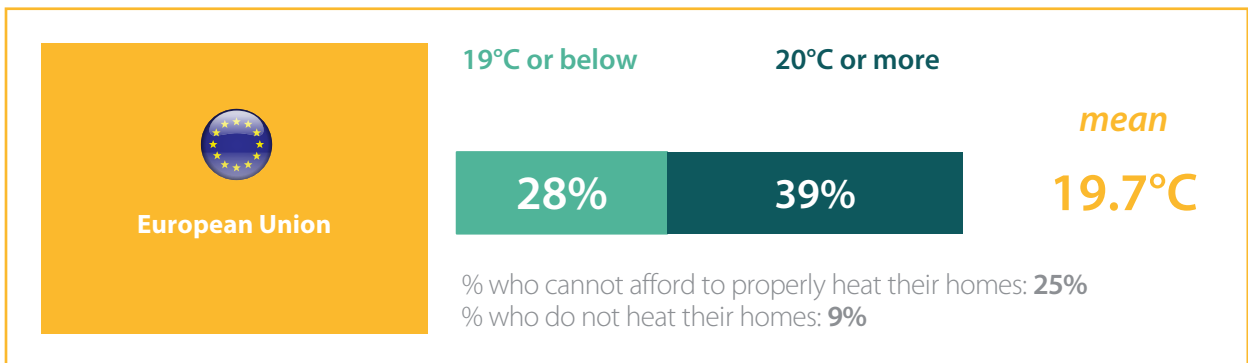
	Greece	48%
	Sweden	47%
	Czech Republic	46%

GROUP 3 (Less than 45%)

	Austria	43%
	Belgium	43%
	Netherlands	42%
	Finland	42%
	Luxembourg	41%
	France	41%
	Latvia	40%
	Germany	38%
	Estonia	36%

Fewer than three in ten people would accept capping the temperature in homes at 19°C in winter

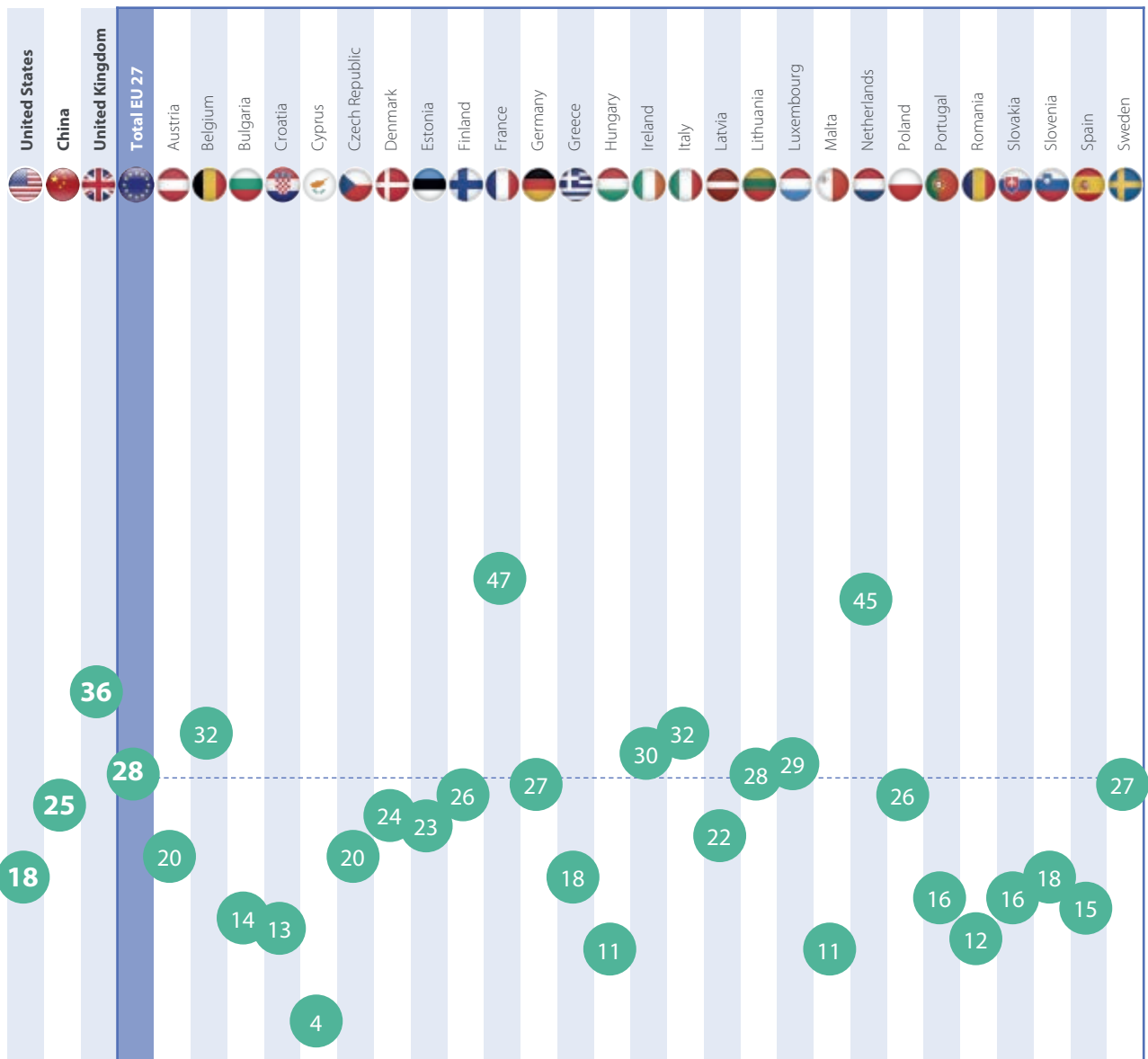
If you had to reduce the temperature of your home next winter, what minimum temperature would still be acceptable for you and your family?



Only a minority of people would accept a 19°C home temperature cap in winter

If you had to reduce the temperature of your home next winter, what minimum temperature would still be acceptable for you and your family?

% who would accept 19°C

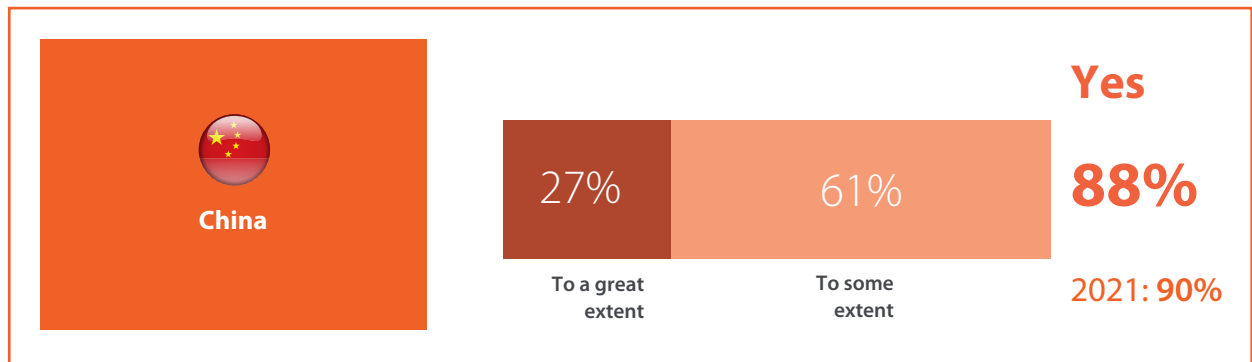
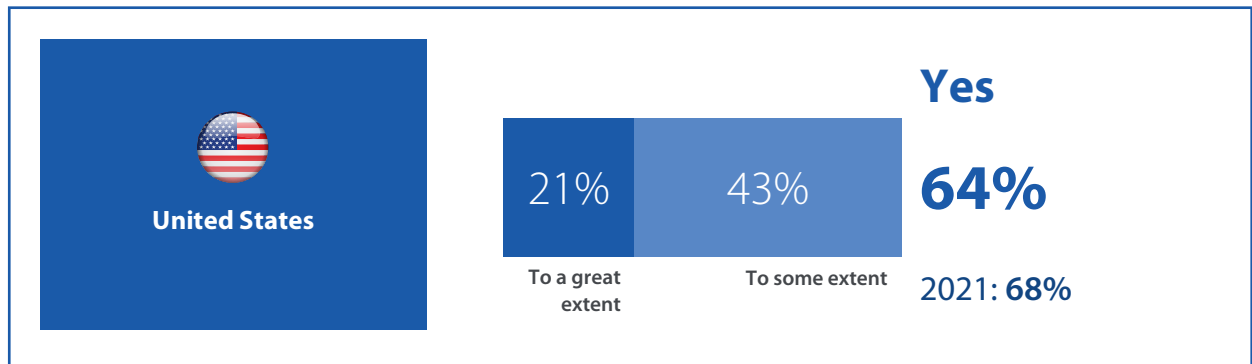
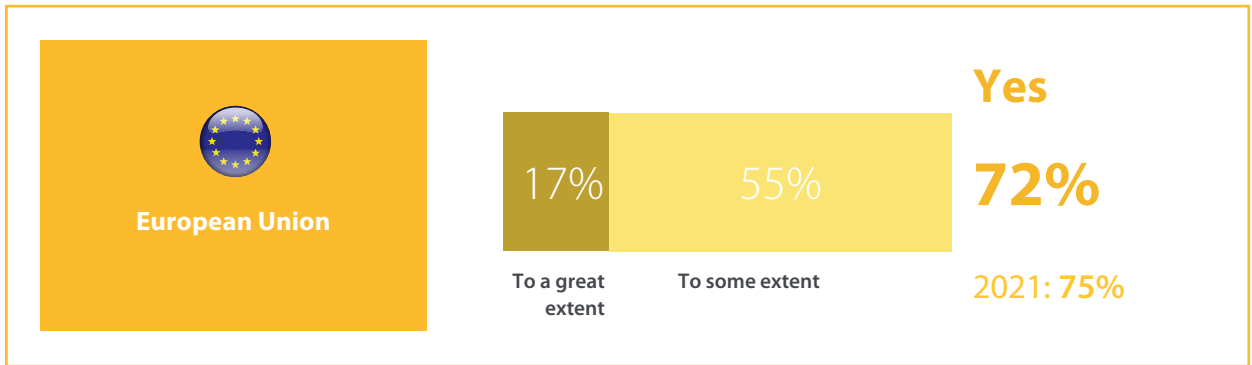


2

**WHAT ARE INDIVIDUALS
WILLING TO DO TO FIGHT
CLIMATE CHANGE?**

Most people believe that their behaviour can make a difference in the fight against climate change


To what extent, if at all, do you think your own behaviour can make a difference in tackling climate change?




Northern Europeans are less optimistic about the difference their behaviour can make to combat climate change









To what extent, if at all, do you think your own behaviour can make a difference in tackling climate change?

 **United States**
64%




 **China**
88%

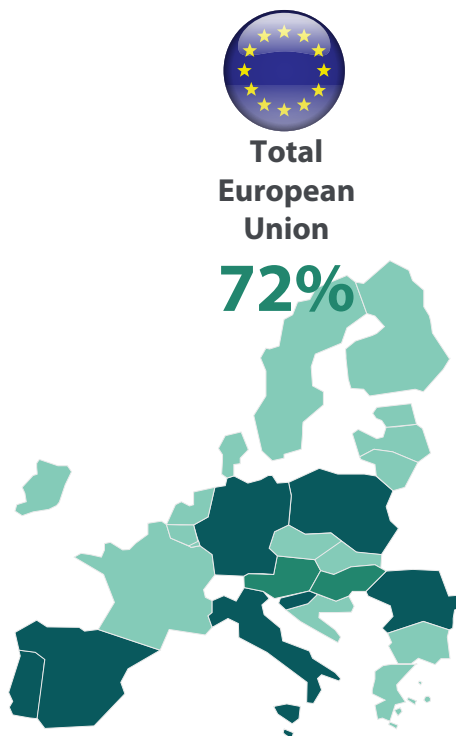
 **United Kingdom**
66%

GROUP 1 (More than 75%)

















 Portugal	86%
 Italy	80%
 Spain	80%
 Poland	79%
 Malta	78%
 Slovenia	77%
 Romania	76%
 Germany	75%

GROUP 2 (Around 72%)

 Cyprus	71%
 Hungary	71%
 Austria	70%

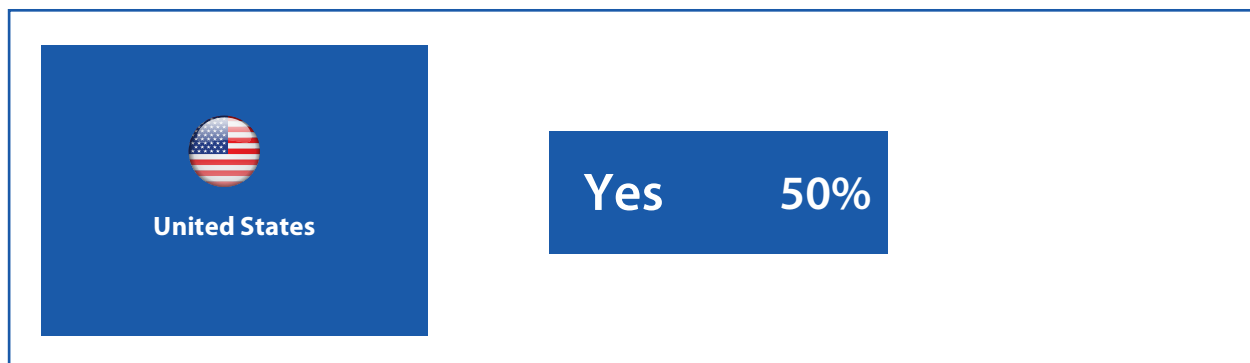
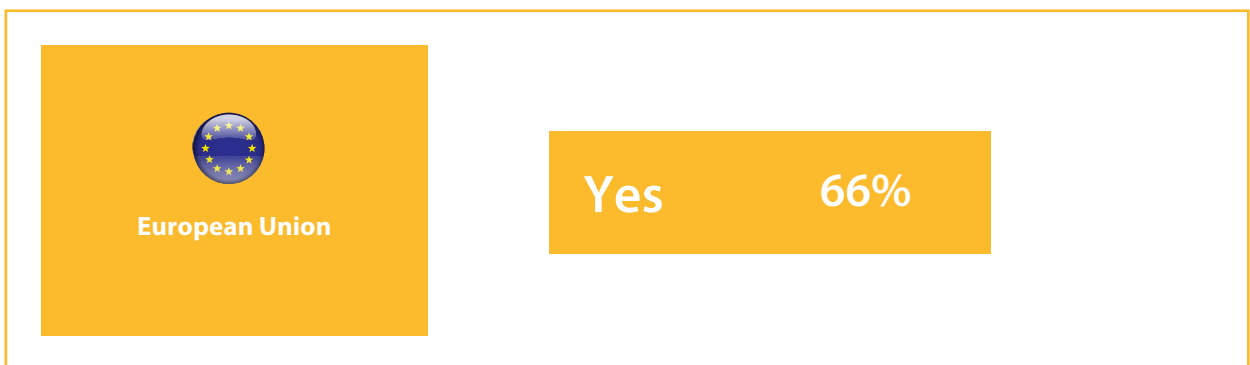


GROUP 3 (Less than 70%)

 Netherlands	69%
 Ireland	69%
 Greece	69%
 Slovakia	67%
 Croatia	65%
 Sweden	64%
 France	63%
 Czech Republic	62%
 Belgium	62%
 Denmark	62%
 Luxembourg	60%
 Bulgaria	56%
 Estonia	52%
 Latvia	49%
 Finland	49%
 Lithuania	42%

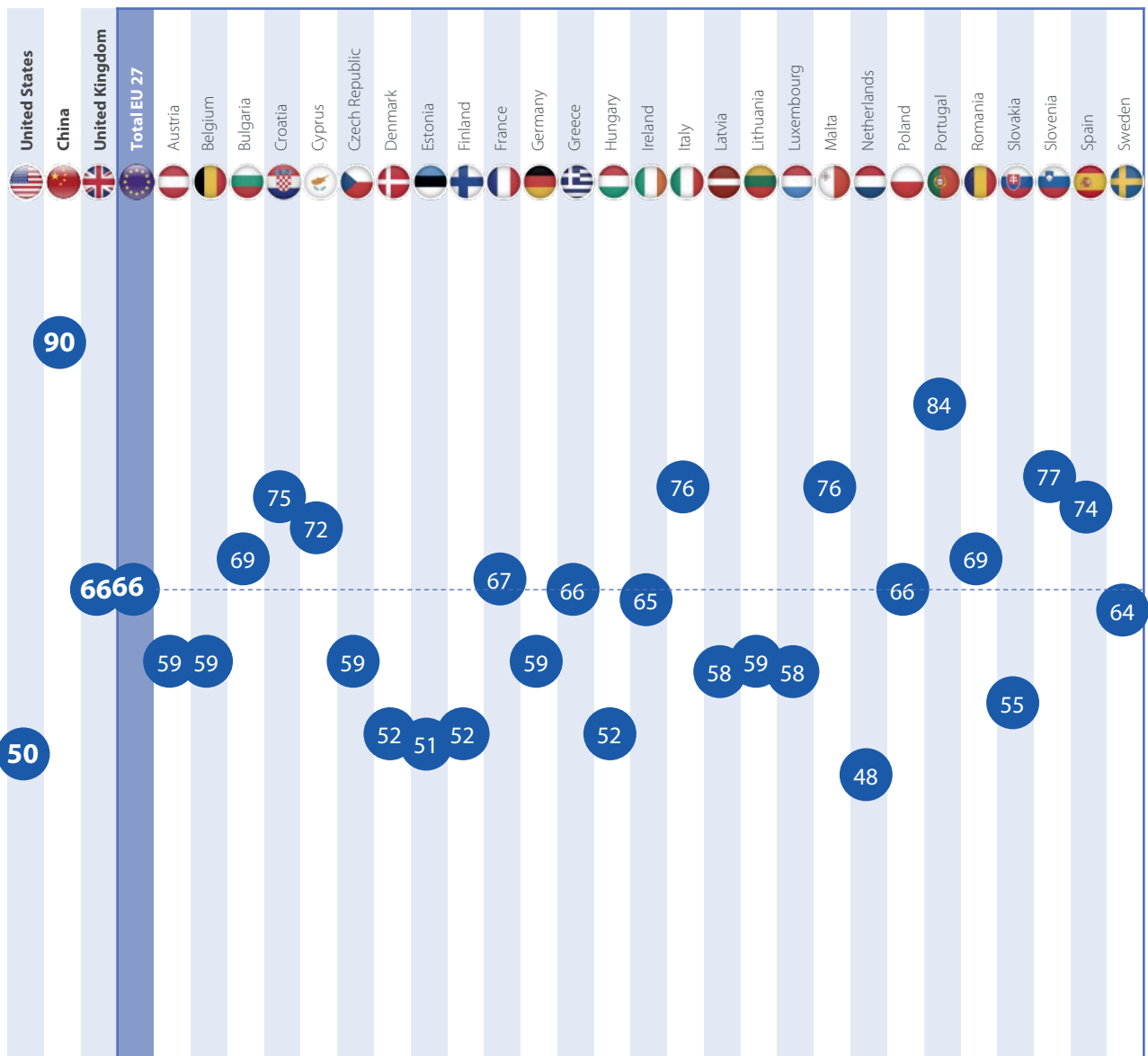
Most Europeans and Chinese people are in favour of stricter government measures to fight climate change, but Americans are divided

Would you be in favour of stricter government measures imposing changes in people's behaviour to tackle climate change?



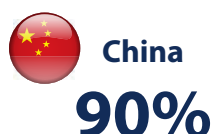
The willingness to tighten government measures varies greatly among countries but remains in the majority almost across the board

Would you be in favour of stricter government measures imposing changes in people's behaviour to tackle climate change?



People living in countries where the effects of climate change are most frequently felt are also those with the highest expectations of stricter government measures

Would you be in favour of stricter government measures imposing changes in people's behaviour to tackle climate change?



GROUP 1 (More than 68%)

Portugal	84%
Slovenia	77%
Malta	76%
Italy	76%
Croatia	75%
Spain	74%
Cyprus	72%
Romania	69%
Bulgaria	69%

GROUP 2 (Between 64% and 68%)

France	67%
Poland	66%
Greece	66%
Ireland	65%
Sweden	64%



Total European Union
66%

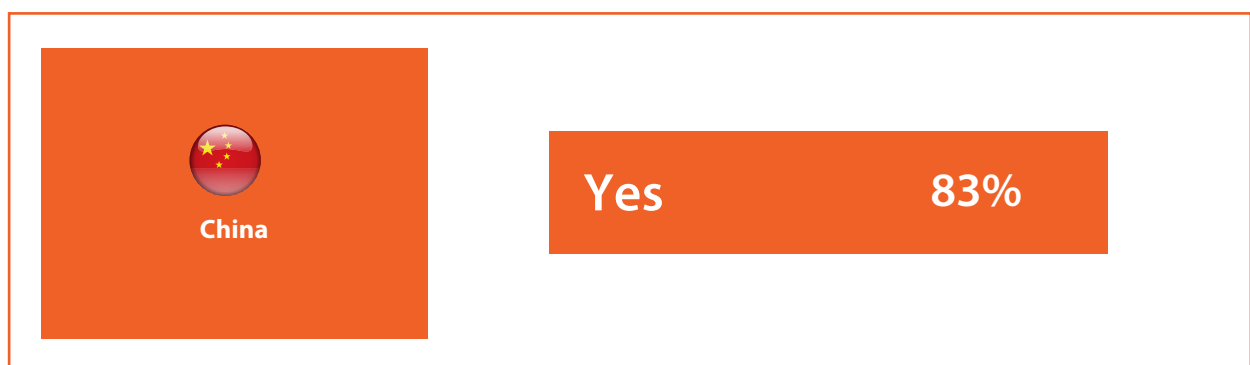
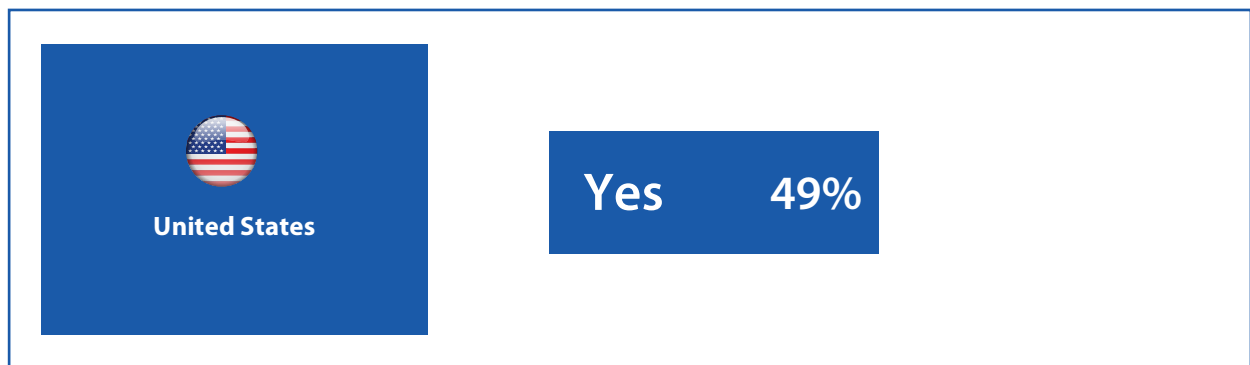
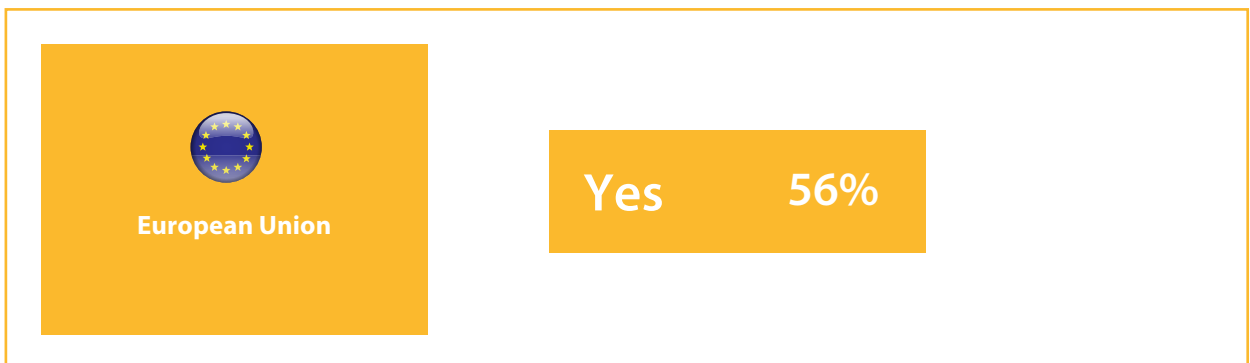


GROUP 3 (Less than 64%)

Czech Republic	59%
Austria	59%
Belgium	59%
Lithuania	59%
Germany	59%
Latvia	58%
Luxembourg	58%
Slovakia	55%
Finland	52%
Denmark	52%
Hungary	52%
Estonia	51%
Netherlands	48%

Most Chinese and Europeans are in favour of a carbon budget system while Americans remain divided

To tackle the climate emergency, some suggest setting up a carbon rationing system*. Would you be in favour of such a system to fight the climate emergency?



*Each person would be allocated a fixed amount of yearly credits to spend on items with a big carbon footprint (such as non-essential goods, flights, meat, etc.). Regardless of wealth or status, everyone would receive the same amount of credits and would not be able to spend more than they were allocated.

Southern Europeans are more favourable to carbon rationing than people in Northern Europe

To tackle the climate emergency, some suggest setting up a carbon rationing system*. Would you be in favour of such a system to fight the climate emergency?

% in favour of a carbon rationing system



United States
49%



China
83%



United Kingdom
54%

GROUP 1 (More than 59%)

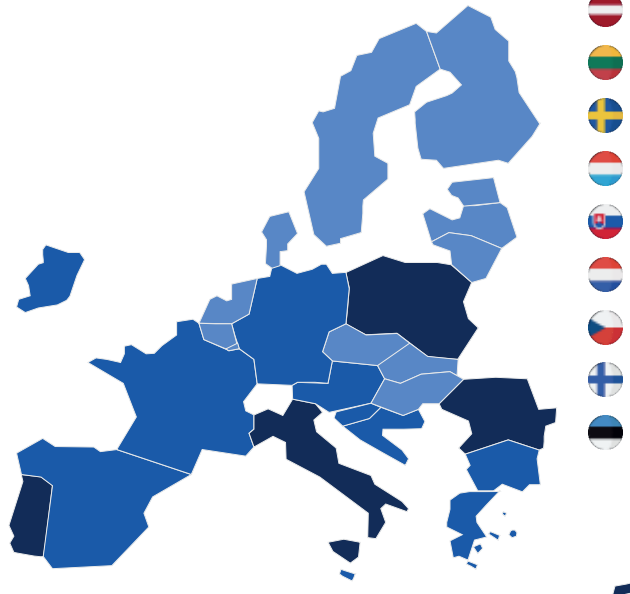
Portugal	68%
Italy	64%
Cyprus	62%
Romania	62%
Poland	60%

GROUP 2 (Between 52% and 59%)

Spain	59%
Croatia	58%
Malta	57%
France	57%
Greece	57%
Germany	56%
Bulgaria	56%
Austria	54%
Ireland	52%
Slovenia	52%



Total European Union
56%



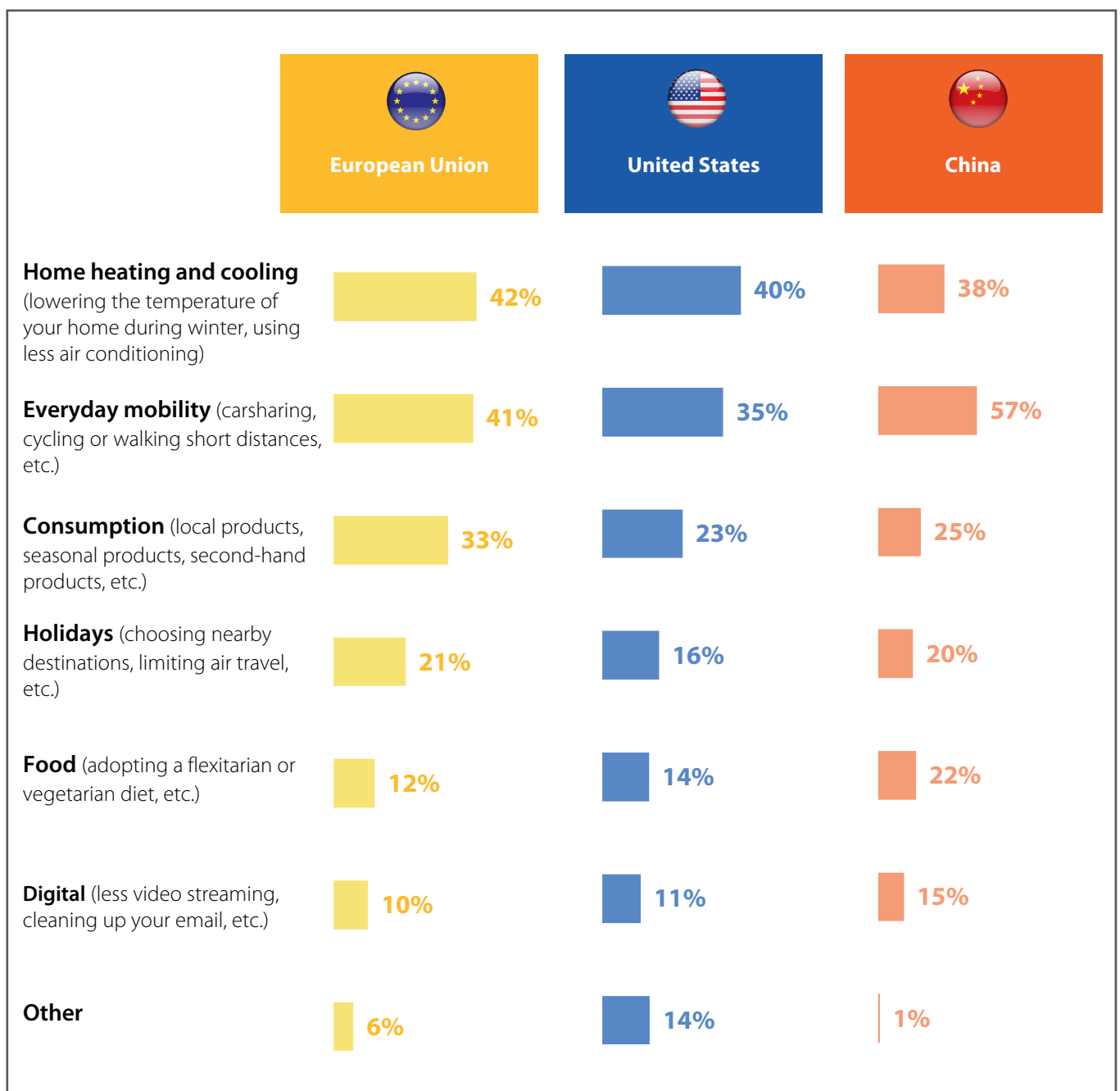
GROUP 3 (Less than 52%)

Belgium	51%
Hungary	47%
Denmark	47%
Latvia	46%
Lithuania	45%
Sweden	45%
Luxembourg	44%
Slovakia	44%
Netherlands	44%
Czech Republic	40%
Finland	40%
Estonia	35%

*Each person would be allocated a fixed amount of yearly credits to spend on items with a big carbon footprint (such as non-essential goods, flights, meat, etc.). Regardless of wealth or status, everyone would receive the same amount of credits and would not be able to spend more than they were allocated.

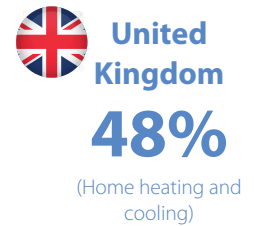
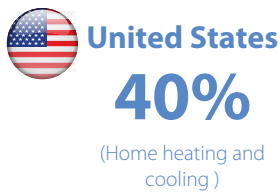
Heating, air conditioning and daily mobility are the areas where people believe their individual actions can have the greatest impact on reducing their carbon footprint

In which areas of your daily life do you think your individual actions can reduce your carbon footprint the most?



In Europe, there is no unanimous opinion on which individual actions have the most impact on people's carbon footprint

In which areas of your daily life do you think your individual actions can reduce your carbon footprint the most?

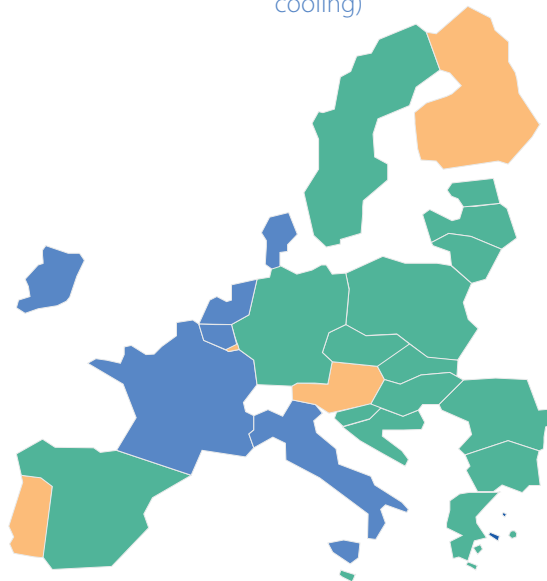


Everyday mobility (Total European Union: 41%)

	Cyprus	53%
	Greece	52%
	Croatia	51%
	Spain	50%
	Romania	50%
	Malta	50%
	Slovenia	47%
	Lithuania	46%
	Bulgaria	45%
	Estonia	44%
	Slovakia	43%
	Poland	42%
	Latvia	40%
	Germany	39%
	Czech Republic	39%
	Hungary	39%
	Sweden	35%



Total European Union
42%
(Home heating and cooling)



Home heating and cooling (Total European Union: 42%)

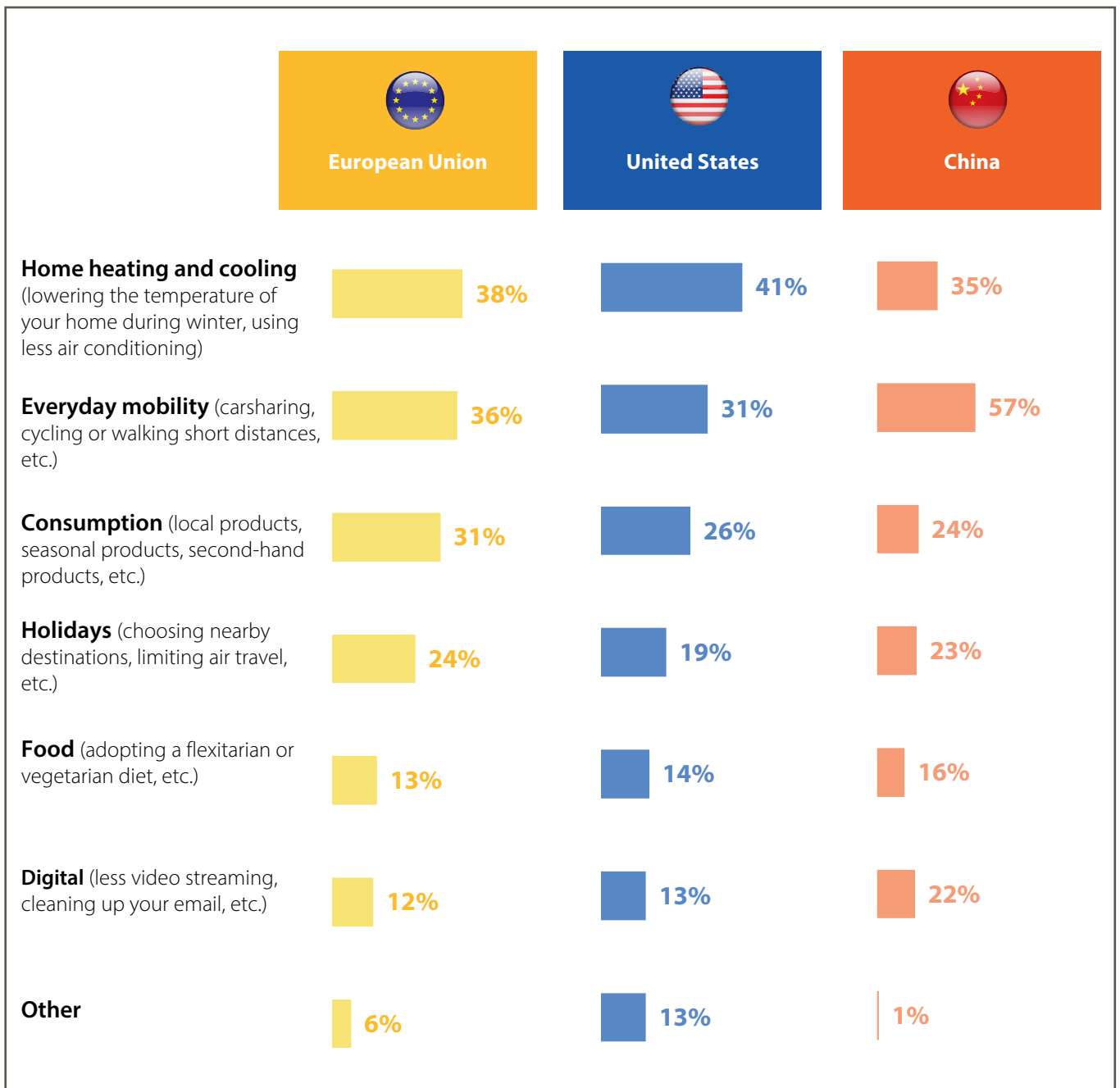
	Italy	58%
	Ireland	44%
	France	42%
	Netherlands	40%
	Belgium	37%
	Denmark	36%

Consumption (Total European Union: 33%)

	Luxembourg	45%
	Finland	41%
	Austria	40%
	Portugal	39%

Europeans and Americans are the most willing to change heating and cooling habits, while Chinese people are more willing to change everyday mobility habits

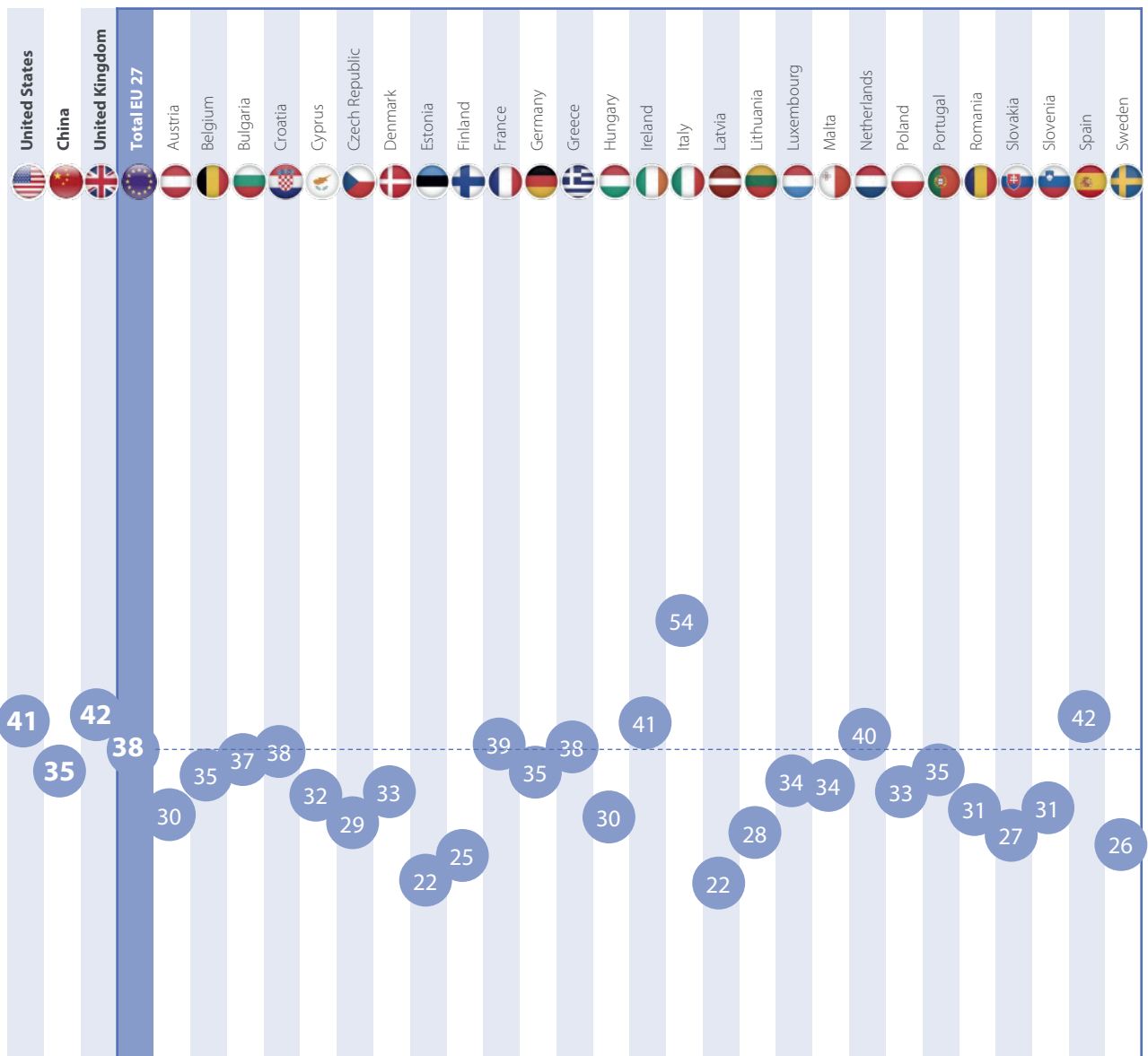
In which of the following areas would you be most willing to change your habits to reduce your carbon footprint?



Except in Italy, most people aren't willing to change their home heating and cooling habits

In which of the following areas would you be most willing to change your habits to reduce your carbon footprint?

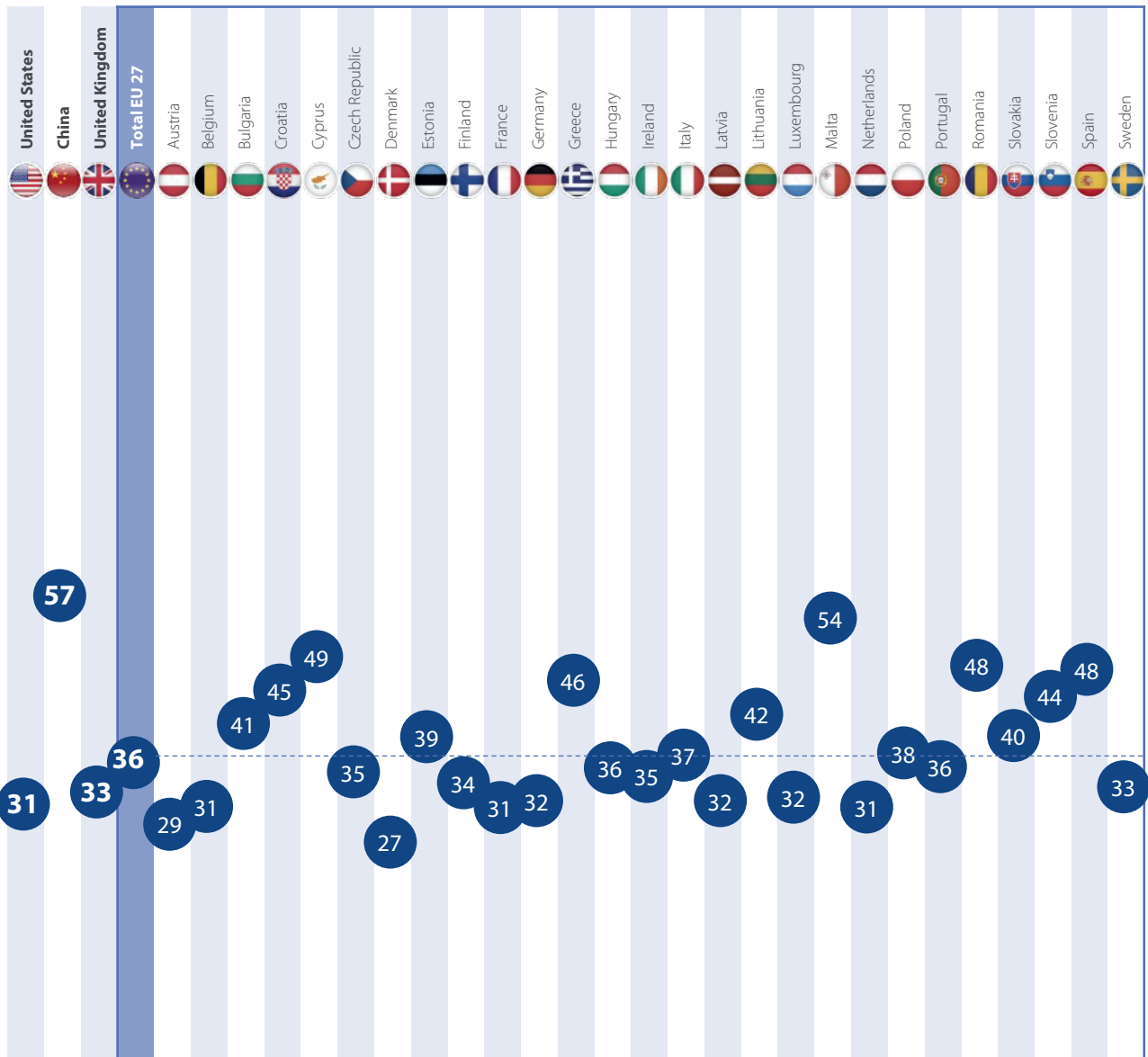
% willing to change **home heating and cooling** habits



Just over one-third of French and Germans are prepared to change daily mobility habits

In which of the following areas would you be most willing to change your habits to reduce your carbon footprint?

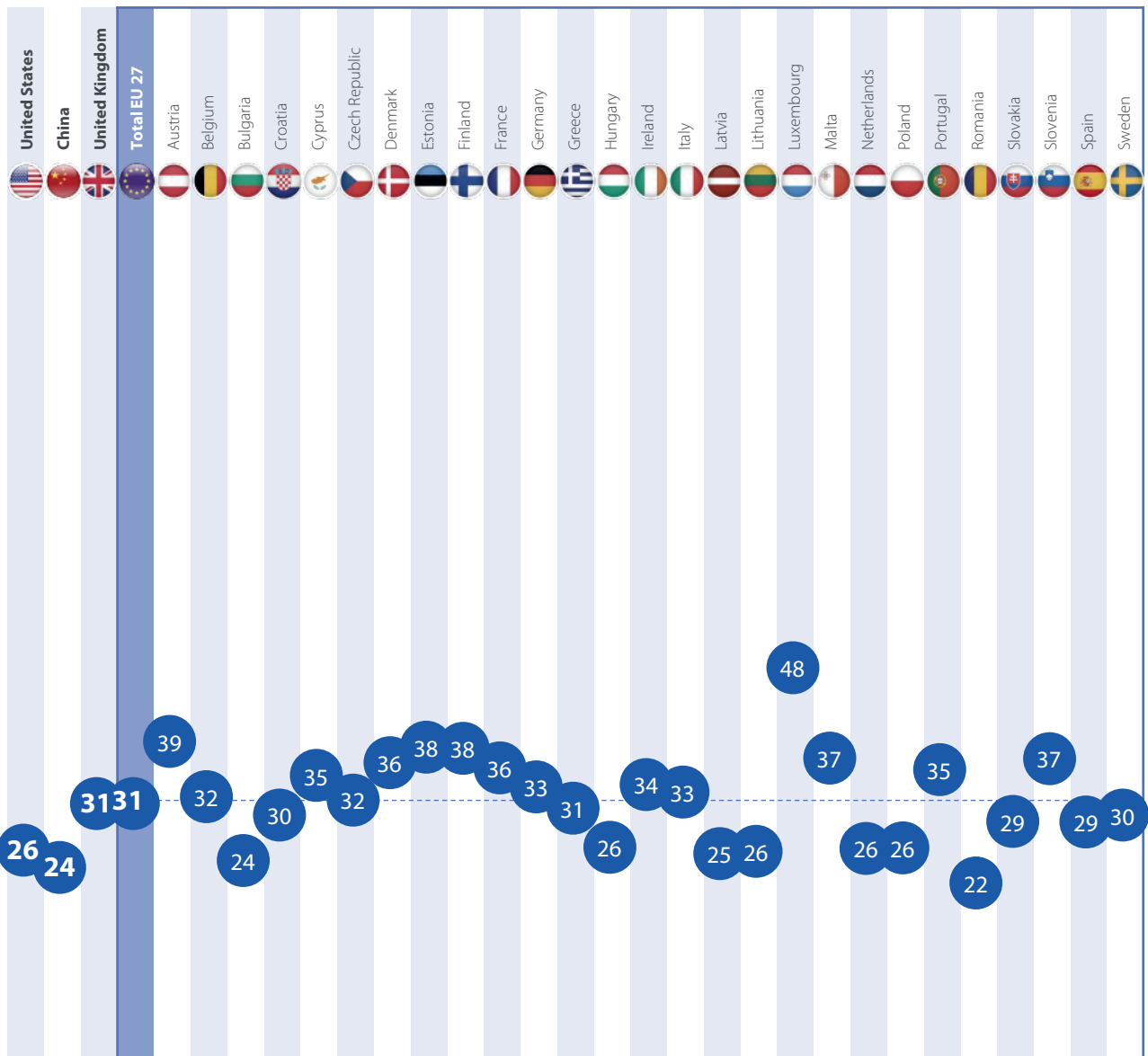
% willing to change **everyday mobility** habits



The willingness of Europeans to change their consumption habits is fairly even, except in Luxembourg, where it is stronger

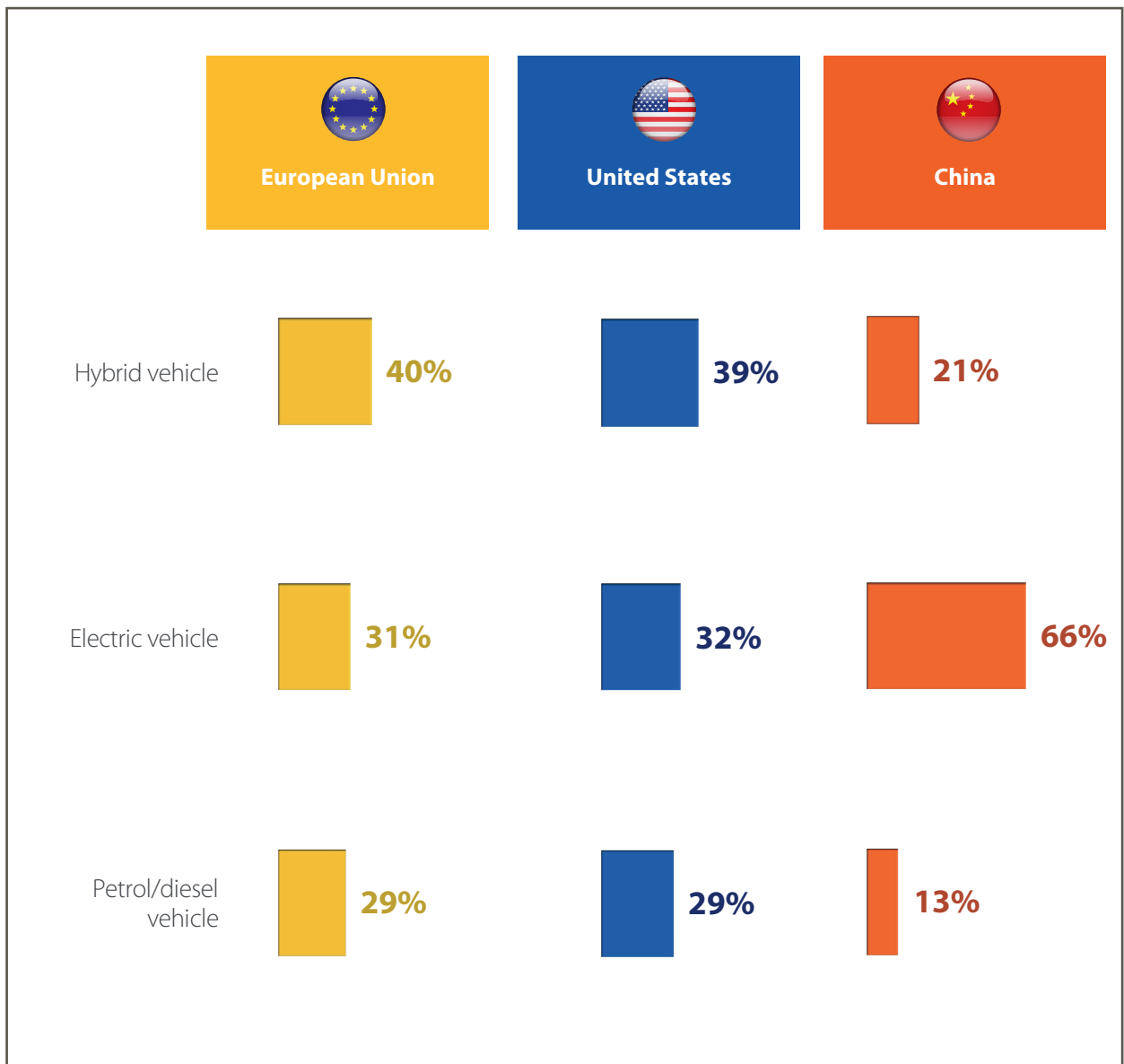
In which of the following areas would you be most willing to change your habits to reduce your carbon footprint?

% willing to change consumption habits



If they had to change cars, Europeans and Americans would prefer a hybrid vehicle, whereas many Chinese people would opt for an electric one

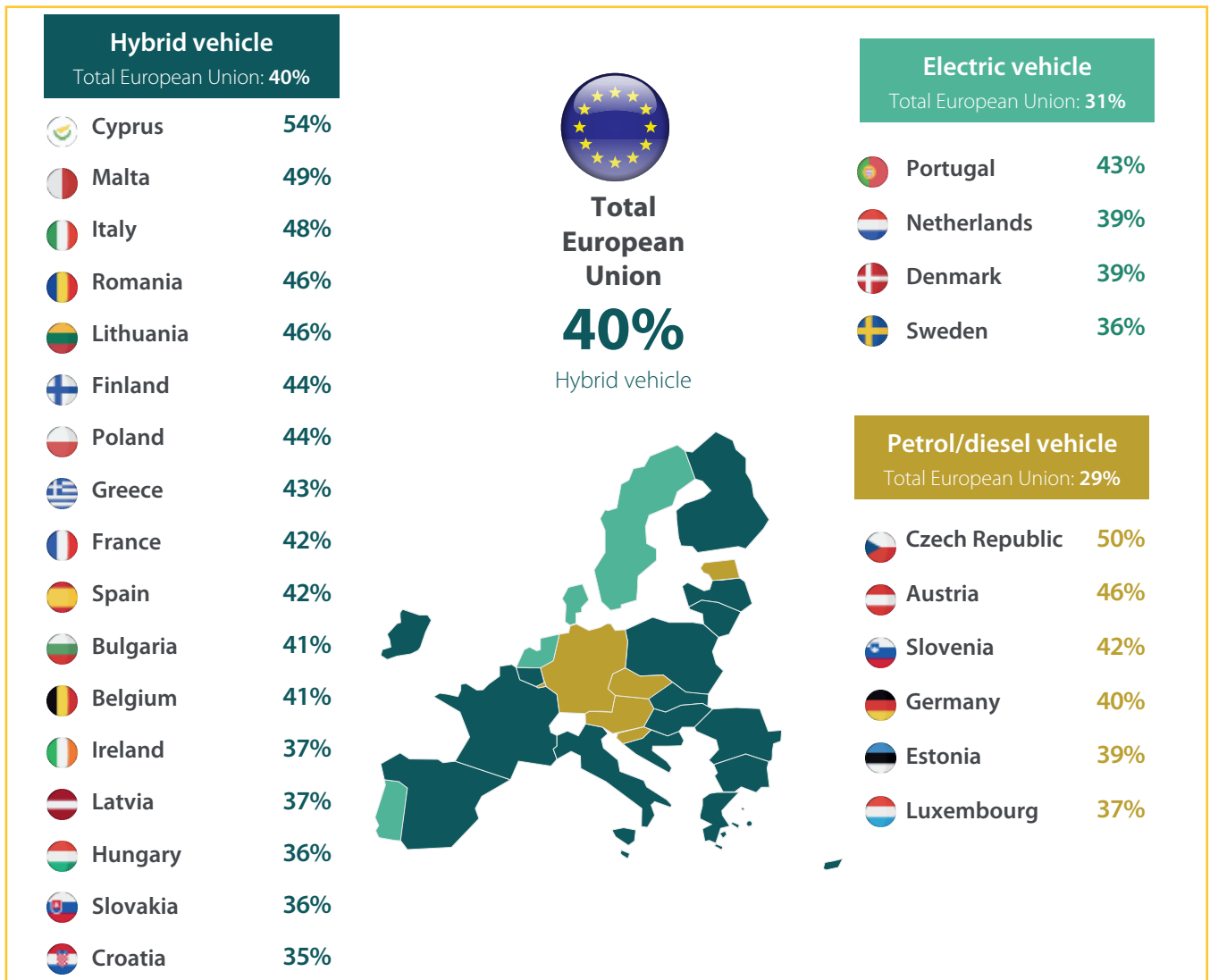
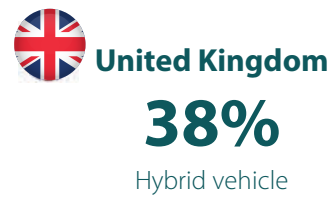
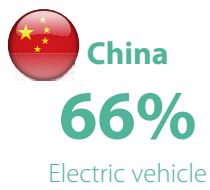
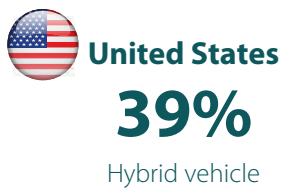
If you were to change your car or buy one for the first time, would you choose a hybrid, electric or petrol/diesel vehicle?



% of people who would own their own vehicle

Breakdown of vehicle choice by country

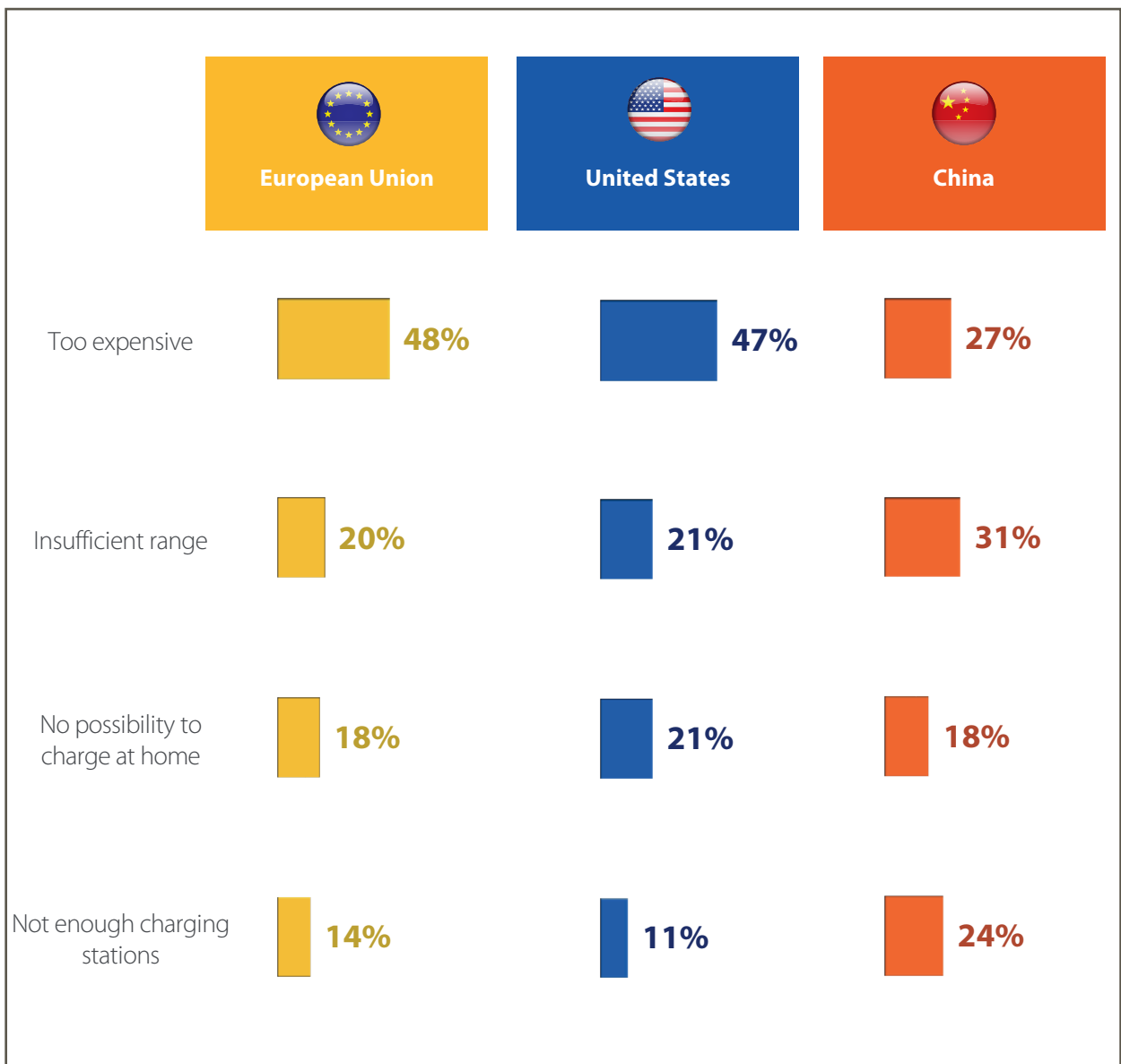
If you were to change your car or buy one for the first time, would you choose a hybrid, electric or petrol/diesel vehicle?



% of people who would own their own vehicle

For Americans and Europeans, price is the main barrier to buying an electric vehicle; Chinese people are more divided and have concerns about driving range

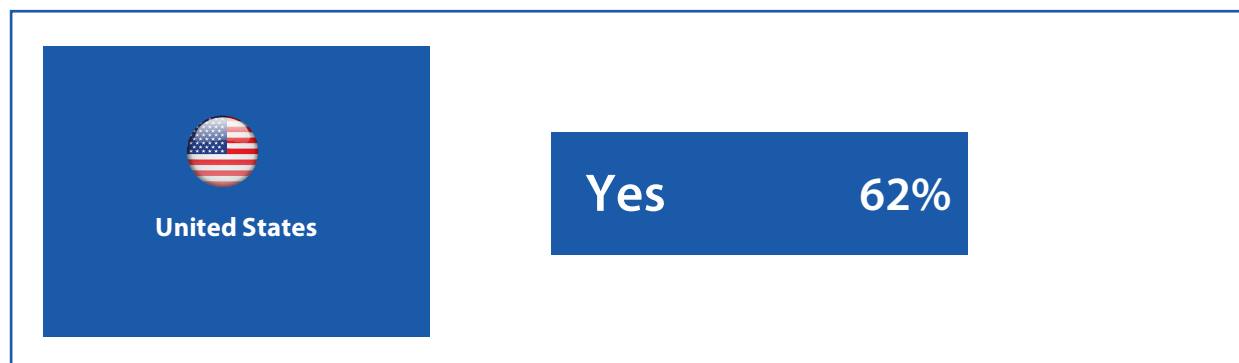
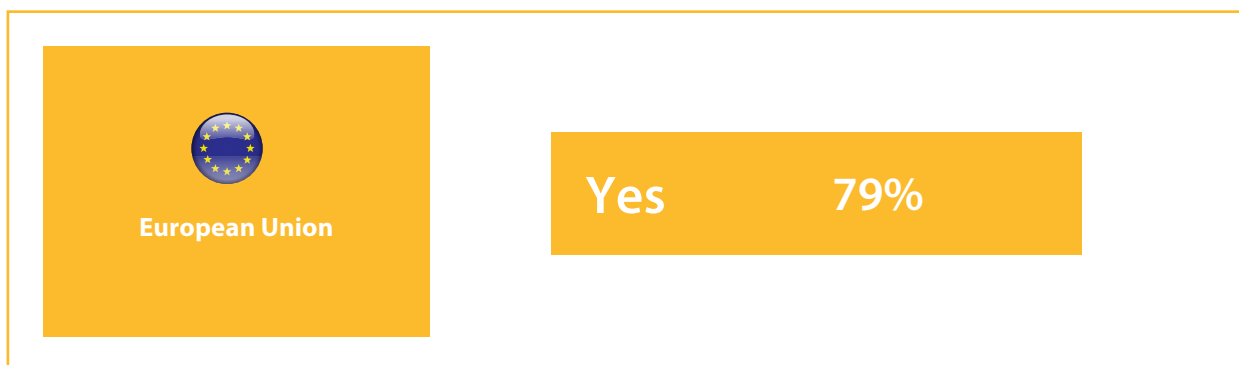
What would prevent you from buying/leasing an electric car?



% of people who would own their own vehicle

Labelling all food products is widely accepted in China and the European Union, but Americans are slightly less enthusiastic

Are you in favour of labelling all food in order to limit climate change and environmental impact?




Southern European countries are particularly in favour of labelling all food

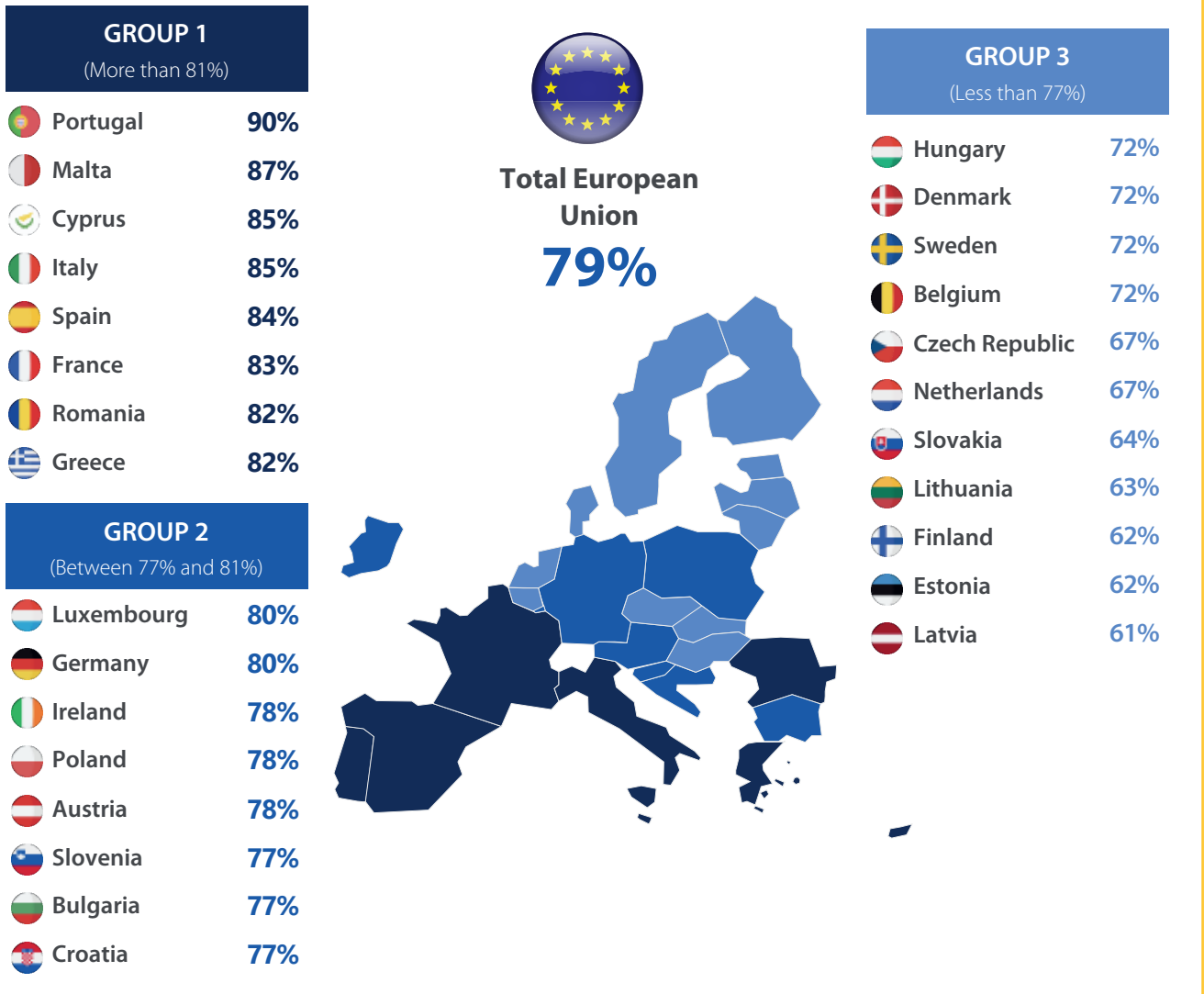
Are you in favour of labelling all food in order to limit climate change and environmental impact?

% who support labelling all food to fight climate change and reduce the environmental impact

 **United States**
62%

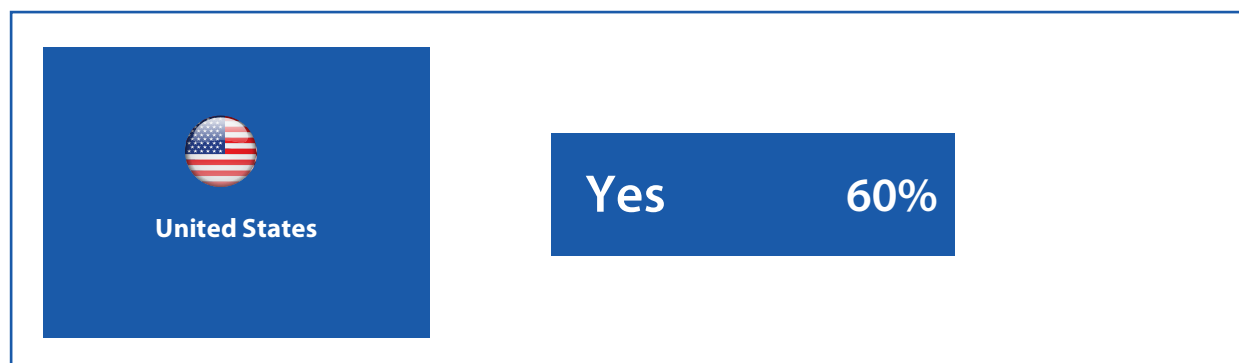
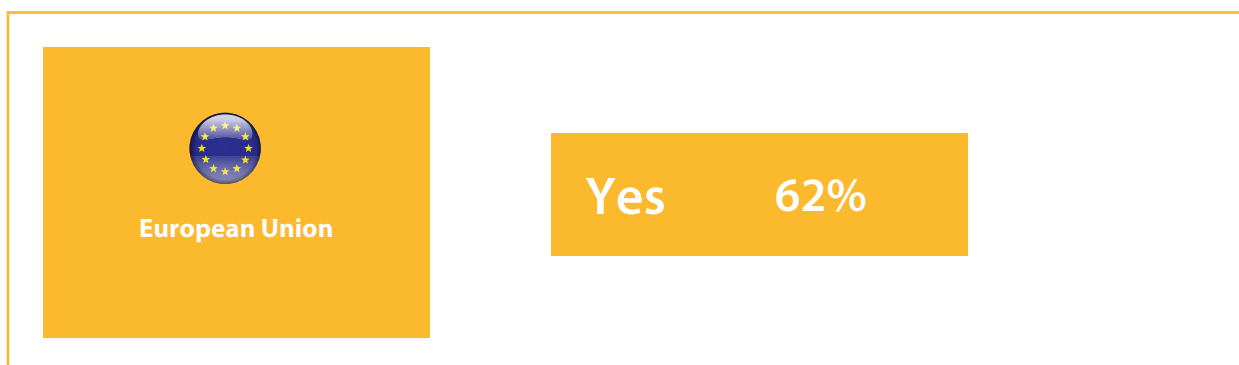
 **China**
88%

 **United Kingdom**
77%



Most respondents in the European Union, United States and China are willing to pay a little more for locally grown food that has a lower impact on the environment


Would you be willing to pay slightly more for food that is produced locally and has less environmental impact?



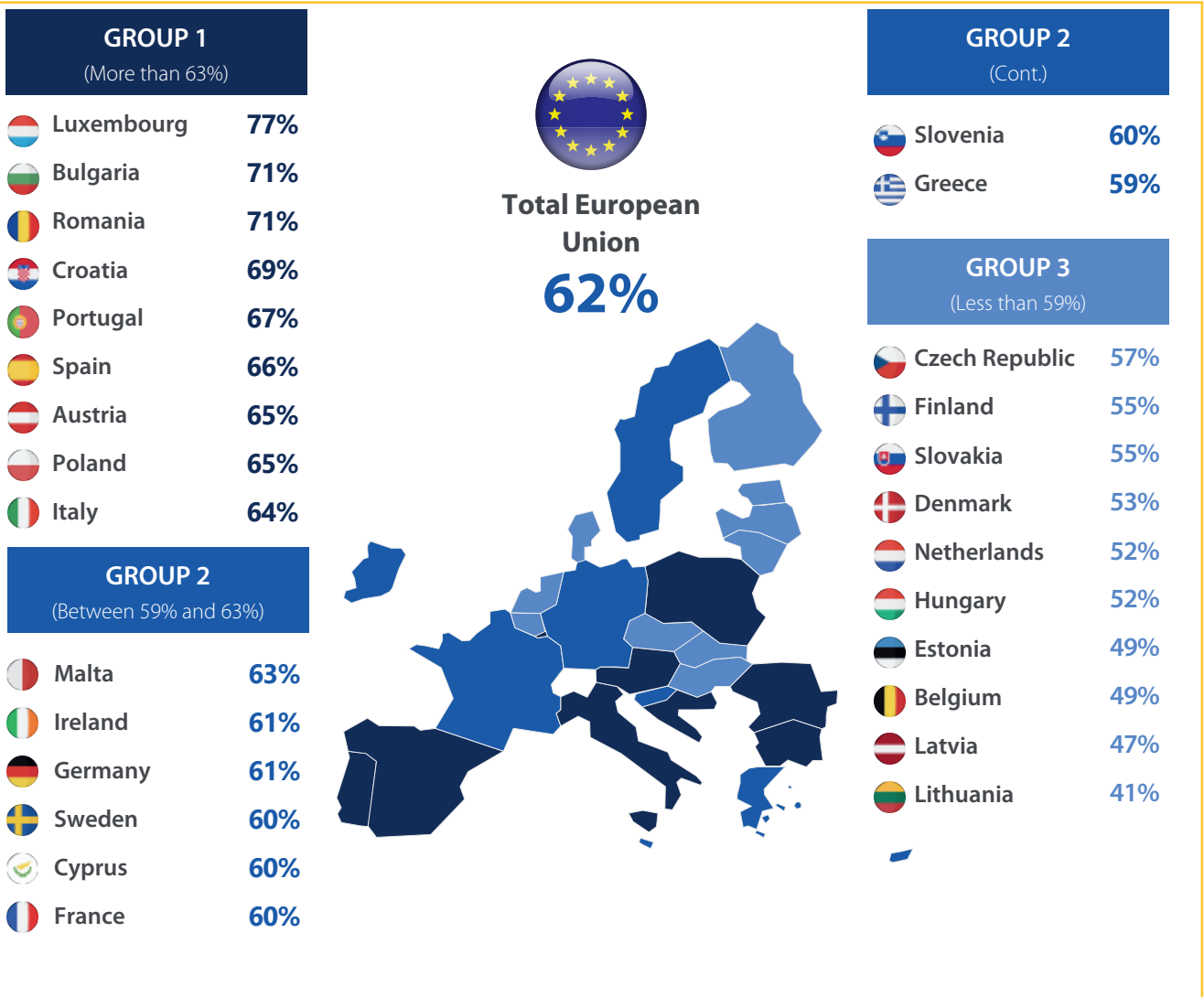
Southern European countries tend to be more willing to pay extra for locally produced food with a lower impact on the environment

Would you be willing to pay slightly more for food that is produced locally and has less environmental impact?

 **United States**
60%

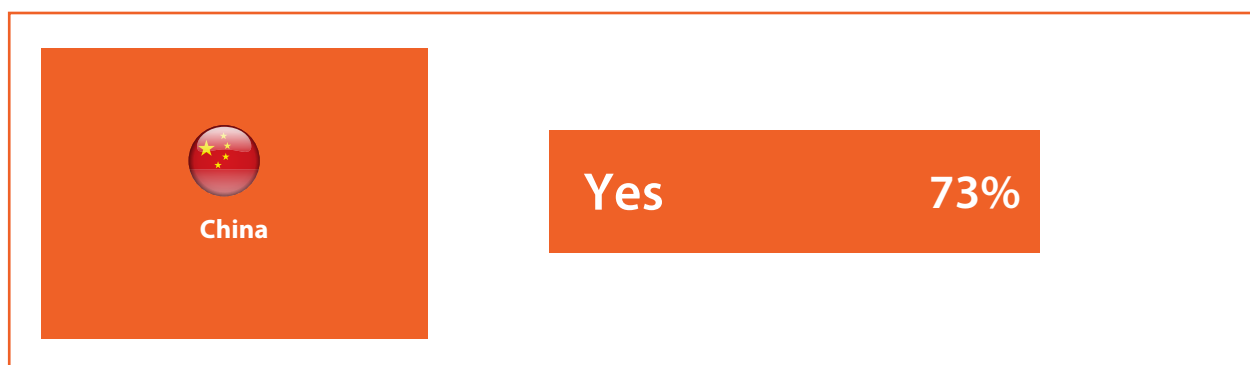
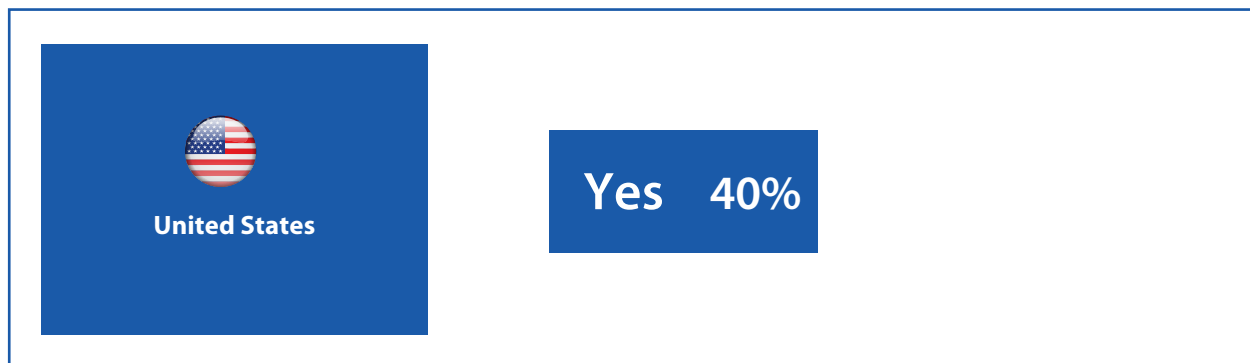
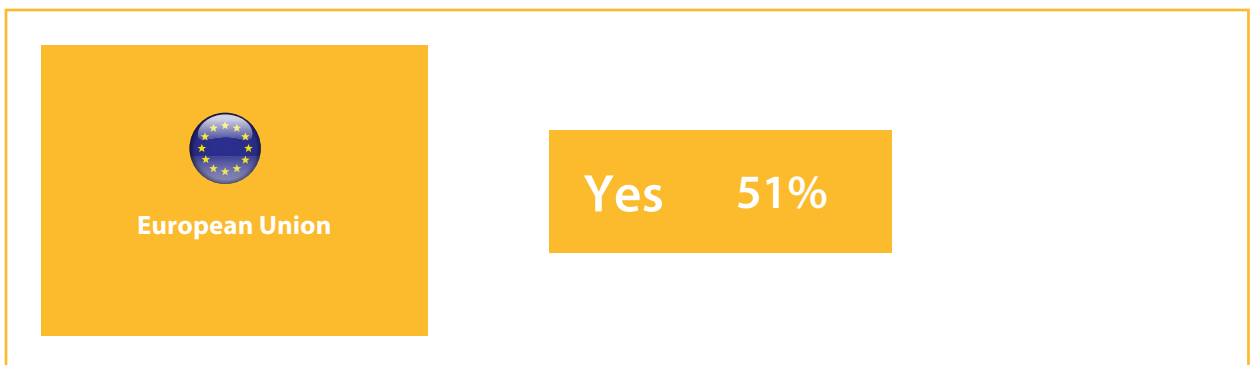
 **China**
83%

 **United Kingdom**
58%



Half of Europeans support a limit on the amount of meat and dairy products each person can buy, while most Americans reject this measure

Are you in favour of limiting the amount of meat and dairy products each person can buy in order to limit climate change?



Most Northern and Eastern Europeans oppose a limit on the quantity of meat and dairy products each person can buy

Are you in favour of limiting the amount of meat and dairy products each person can buy in order to limit climate change?

% who support limiting the amount of meat and dairy products to fight climate change



United States
40%



China
73%



United Kingdom
50%

GROUP 1 (More than 54%)

- Italy **68%**
- Cyprus **58%**
- Portugal **57%**
- France **57%**

GROUP 2 (Between 49% and 54%)

- Greece **54%**
- Malta **53%**
- Romania **52%**
- Spain **50%**
- Luxembourg **49%**
- Germany **49%**
- Croatia **49%**



Total European Union
51%

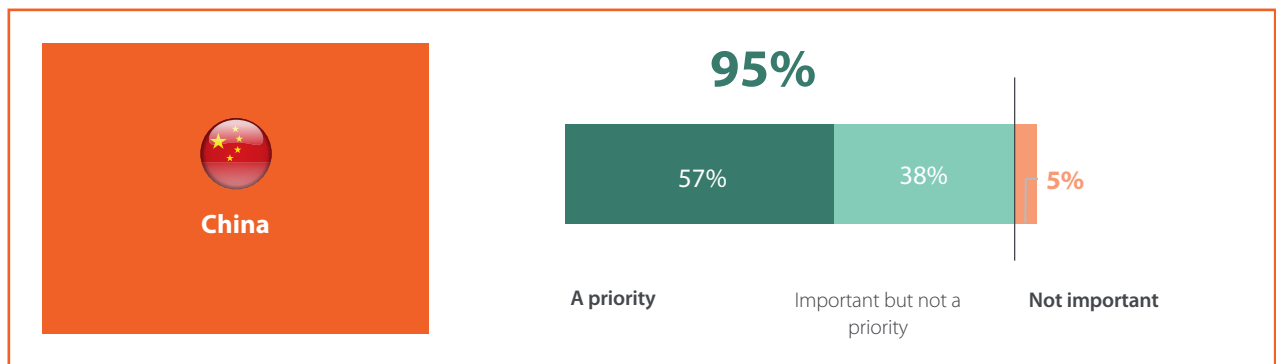
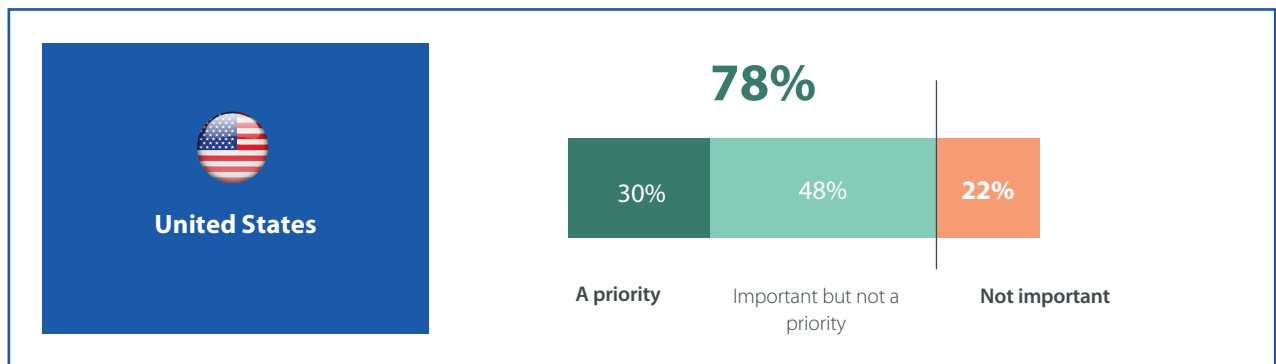
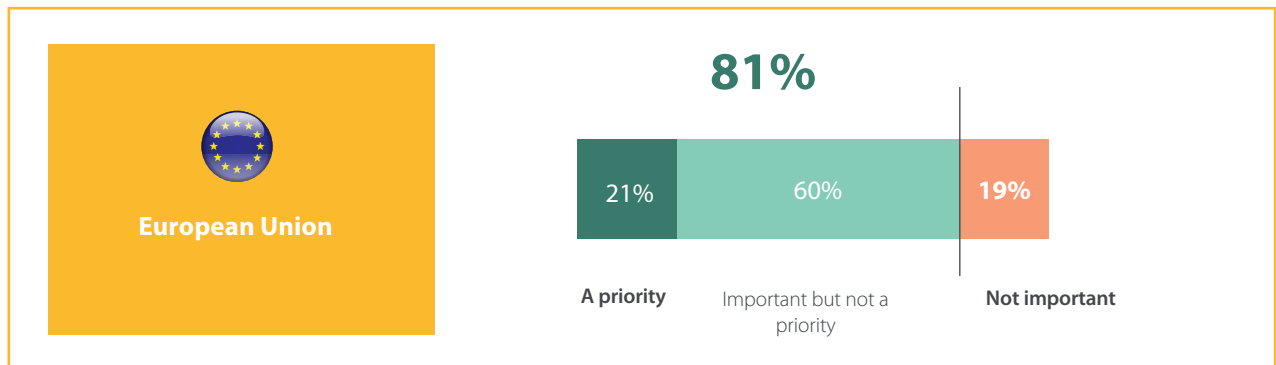


GROUP 3 (Less than 49%)

- Austria **48%**
- Belgium **48%**
- Ireland **47%**
- Sweden **47%**
- Netherlands **45%**
- Poland **44%**
- Denmark **44%**
- Slovenia **44%**
- Czech Republic **40%**
- Bulgaria **39%**
- Slovakia **38%**
- Hungary **38%**
- Finland **34%**
- Latvia **32%**
- Estonia **31%**
- Lithuania **28%**

For the vast majority of people in three parts of the world, sustainability is an important factor when seeking a job

When looking for a job, how important is it for you that your prospective employer prioritise sustainability?




When looking for a job, the priority an employer gives to sustainability is more important for Southern Europeans than Northern Europeans

When looking for a job, how important is it for you that your prospective employer prioritises sustainability?











% who say the priority an employer gives to sustainability is important or is a priority when looking for a job

 **United States**
78%

 **China**
95%

 **United Kingdom**
75%

GROUP 1 (More than 83%)

 Slovenia	89%
 Cyprus	89%
 Malta	86%
 Italy	86%
 Romania	86%
 Portugal	85%
 Greece	85%
 Bulgaria	85%
 Spain	84%
 Poland	84%

GROUP 2 (Between 78% and 83%)

 Latvia	83%
 Hungary	81%
 Croatia	81%
 Austria	79%












Total European Union
81%



GROUP 2 (Cont.)

 Belgium	79%
 France	79%
 Germany	79%
 Luxembourg	78%

GROUP 3 (Less than 78%)

 Estonia	77%
 Ireland	76%
 Netherlands	75%
 Lithuania	72%
 Slovakia	72%
 Sweden	71%
 Denmark	68%
 Finland	68%
 Czech Republic	66%

Fifth edition — 2022-2023

THE EIB CLIMATE SURVEY

**GOVERNMENT ACTION, PERSONAL
CHOICES AND THE GREEN TRANSITION**

