10/2020

Digitising Europe Pulse

Tackling Climate Change

A Survey of 13 EU Countries

KANTAR

Vodafone Institute
for Society and
Communications

digitising
europe

1 Executive Summary

Executive Summary

Europe has recognized the challenges of climate change and set a course towards a more sustainable future. Unveiled at the end of 2019, the 'European Green Deal' will have far-reaching consequences for large sections of society.

More and more companies are committing themselves to implementing comprehensive sustainability measures, including climate neutrality.

And with good reason.

The expectations of their customers, regulators and financial investors regarding sustainable business strategies have risen markedly in recent years. But is the EU's ambitious environmental policy really striking a chord with the wider public? And how can the transformation towards a more sustainable economy and society succeed in times of disruptive digital transformation?

The third edition of "Digitising Europe Pulse" explores the expectations and attitudes of European citizens regarding these issues.

Large parts of Europe's population are already committed to sustainability, despite significant variations from one country to another. What's more, they recognize the potential of digitization to manage climate change.

This challenge – of protecting our planet while simultaneously exploiting the opportunities offered by digitization – is now regarded as a central issue for European societies - and we are convinced that this will remain the case for years to come.
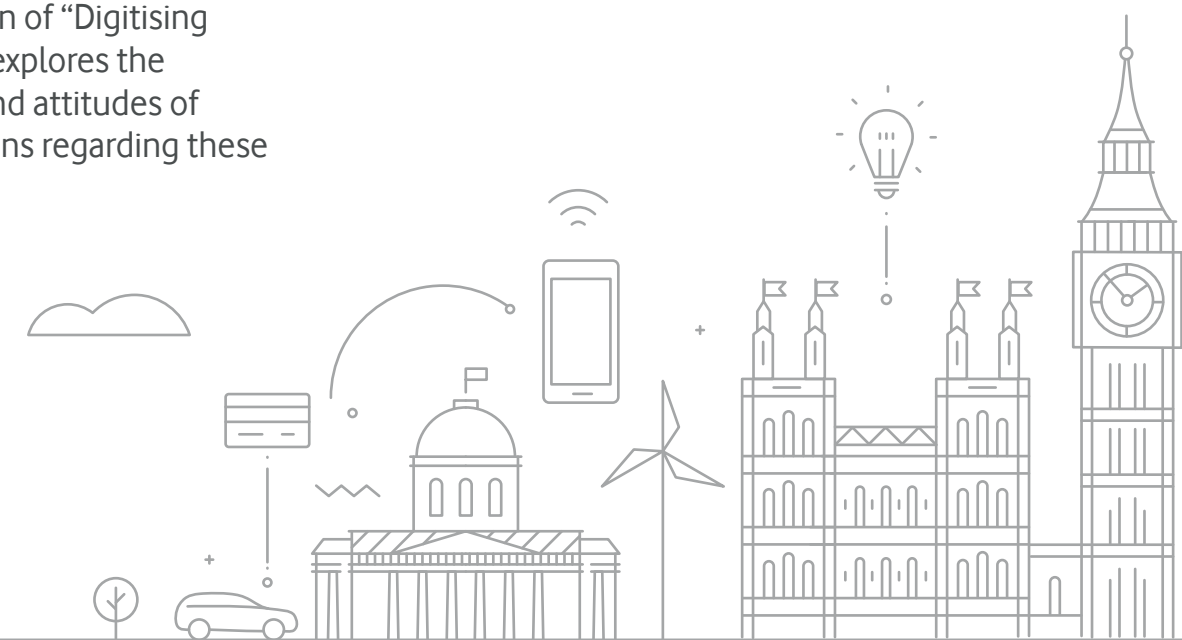
The key results of **"Digitising Europe Pulse: Tackling Climate Change"** and its survey of public attitudes across 13 EU nations are set out below:

- **More than half of respondents (54%) believe that digital technology can play a major role in combatting climate change.** In direct contrast, 14% of those surveyed see digital technology as a cause of climate change rather than a potential solution. The most positive attitudes towards digital technologies, according to the survey, are in Portugal (68% of the population), Italy (65%) and Hungary (64%), while French citizens are especially critical, with one third of those questioned arguing that digital technology actually contributes to global warming.

- 53% of all respondents argue that the EU should adopt a pioneering role in fighting climate change internationally. A large majority (72%) agrees that this pioneering role must be based on strict rules **with respect to the costs incurred by businesses and citizens**. Technological innovation is widely perceived as the best way for the EU to help combat climate change (approved by 81%). **Yet fewer than half of the EU citizens surveyed (42%) have to date heard of the 'Green Deal for Europe' initiative.**

- People reject the idea of sitting back and waiting for their national governments or local authorities to tackle climate change: **65% of respondents believe all individuals should contribute in the fight against global warming**, taking the lead and setting an example for governments, companies and EU institutions to follow.

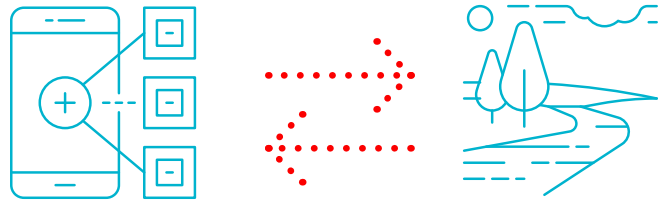- With regards to smart city technologies, **three-quarters of Europeans are willing to share their data for the sake of the environment**. A closer look, however, reveals an important limitation: 53% agree to data sharing only under strict conditions, like protecting their anonymity. Dutch respondents to the survey are the most reluctant, with a quarter of them unwilling to share any data at all, while the highest acceptance comes in Italy.

- A big majority of those EU citizens surveyed (87%) say they try to act in an **environmentally responsible fashion** while making their daily purchases, with 28% constantly paying attention to the issue and 59% occasionally.

Already published in the "Digitising Europe Pulse" series: "Views on the EU's Digital Agenda" (Spring 2020) and "Challenges in Times of COVID-19" (Summer 2020).
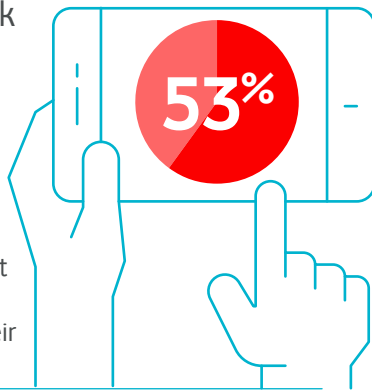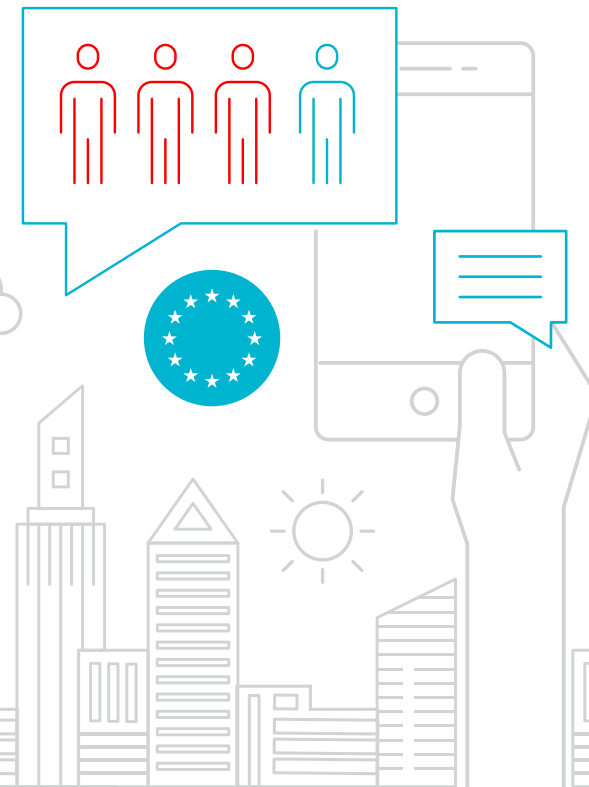
1 Digital and smart technology

With regards to smart city technologies, **three-quarters of Europeans are willing to share their data** for the sake of the environment.

A closer look reveals an important limitation:

53% agree, but only under strict conditions (e.g. maintaining their anonymity).

53%

75%

In comparison:

25% The Dutch are the most reluctant, with a quarter of them completely opposed to data sharing, while Italians are the most willing.
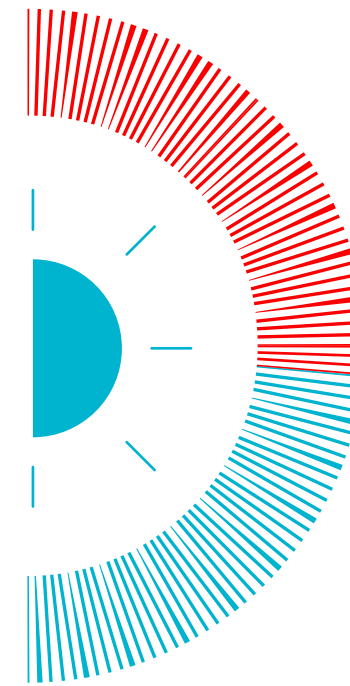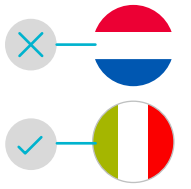
More than half of respondents (**54%**) believe that digital technology can play a major role in solving the problems posed by climate change.

54%

14%
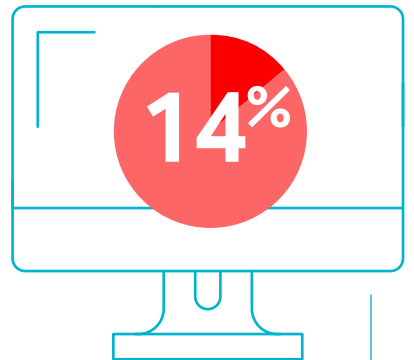
While 14% believe that digital technology, in direct contrast, actually **contributes** to climate change.

Acceptance of digital technologies

The **highest acceptance** of digital technologies occurs in **Portugal**, **Italy** and **Hungary**.

68% Portugal

65% Italy

64% Hungary

33%
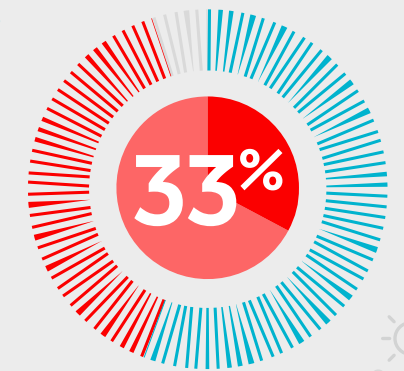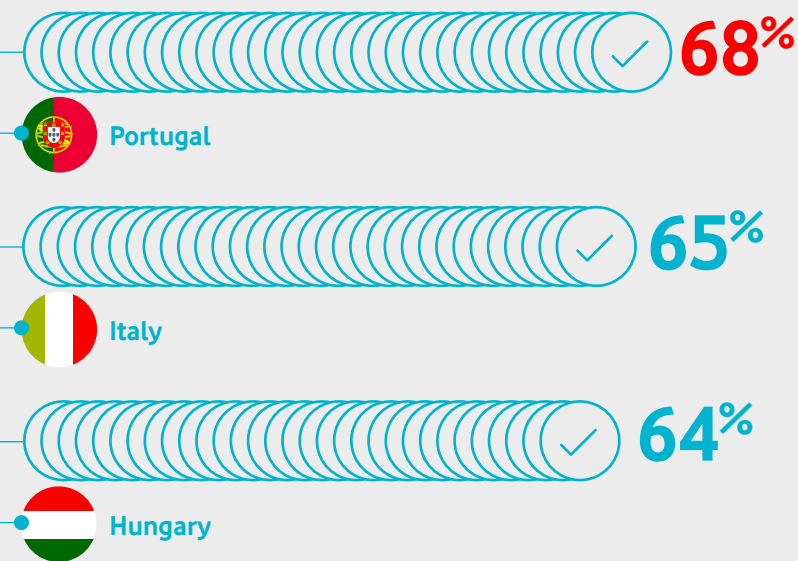
French citizens are especially critical:

One third consider digital technology as **one of the causes of climate change.**

2 The EU's role in tackling climate change
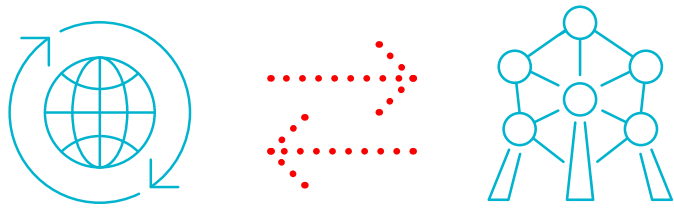
What do Europeans expect from their governments and politicians with regard to climate change?

For example, should the **European Union** take on a pioneering role internationally?

The answer depends on nationality:

The prevalent opinion in the Netherlands, Estonia and Poland is that **global agreements** must be relied upon.

By contrast, in Portugal, Greece, Spain and Ireland an **active role for the EU** is favoured.

53% Overall, more than half of Europeans agree that the EU should take the lead.
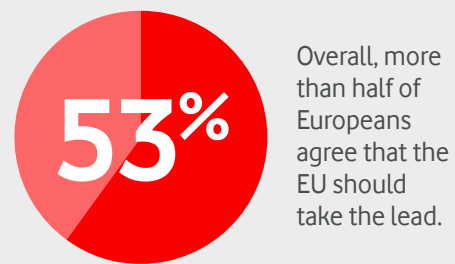
Overview

72% A large majority agrees that this pioneering role **must be based on strict rules** with respect to costs for businesses and citizens.

By far the preferred way for the EU to tackle climate change is via technological innovations.

81%
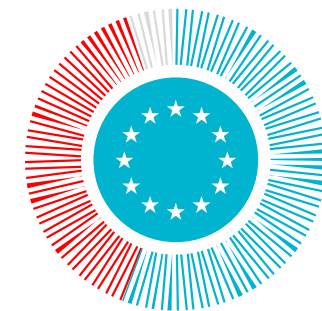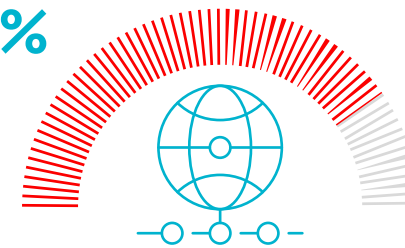
56% But the question whether the EU should take the global lead polarizes opinion, with more than half in favour but 39% against.

Green Deal for Europe

To date, fewer than half of surveyed **EU citizens** have heard of the 'Green Deal for Europe'.

42%
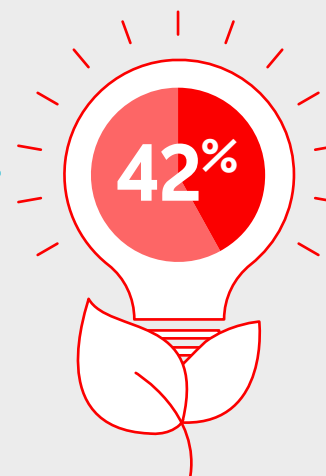
The highest awareness is in **Hungary**, the only country where more than half of people are familiar with the EU programme.

52%

There is also high awareness in **Portugal** and the **Netherlands** (both **50%**) and in **Poland** (**48%**). In **Germany** and the **Czech Republic** only a third of people have heard of the Green Deal.

3 Personal accountability vs government responsibility
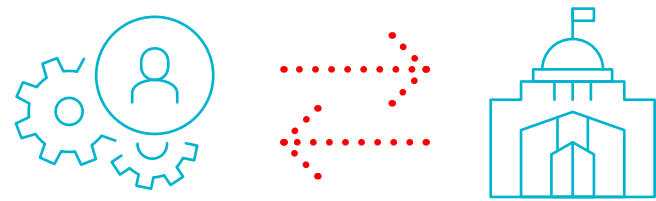
As the following figures illustrate, people are not sitting back and waiting for the authorities to tackle climate change.

65%

of people think each and every individual is **responsible for taking action**, while institutions such as the EU, national governments and companies lag behind.

87%

A large majority of the EU citizens surveyed are **aware of the need to be environmentally responsible** in their everyday lives.

28% Constantly pay attention
59% Occasionally pay attention
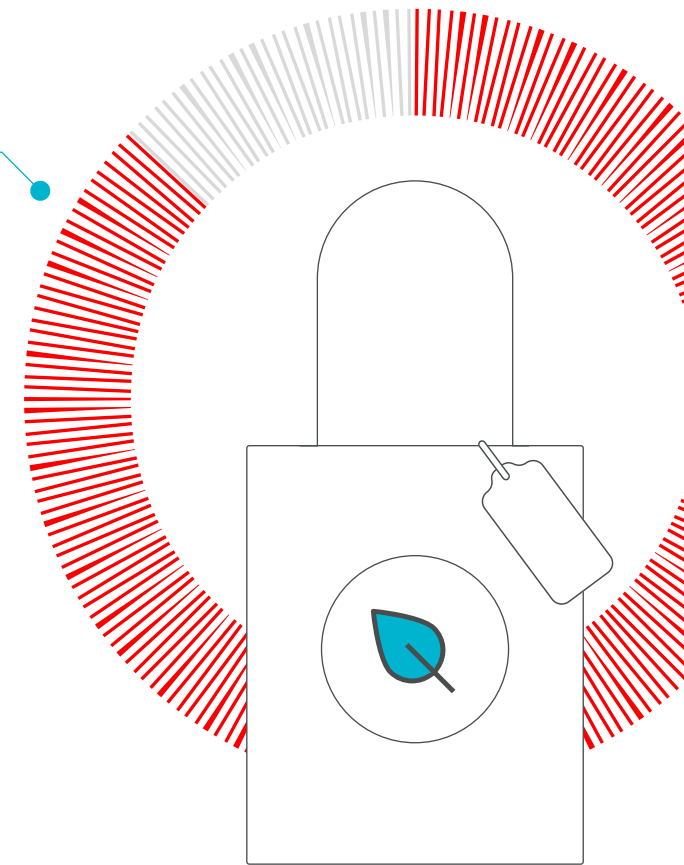
Almost three out of four say they are keeping their smartphones for longer and not replacing them too often.

72%

60%
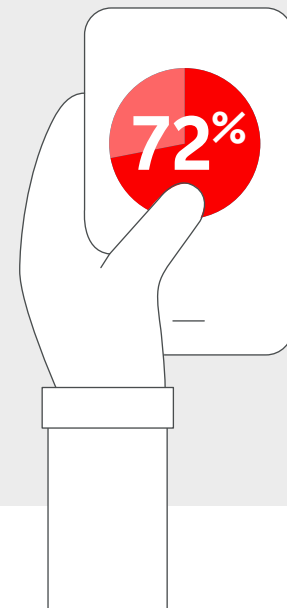
While **69%** avoid single-use plastics, **60%** are buying locally produced products such as food and clothes.

44%
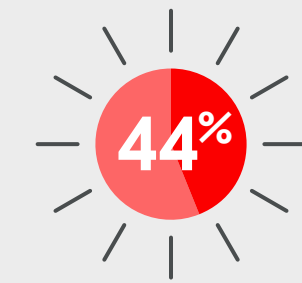
One in two people **(49%)** prefer to travel by public transport or bike rather than by car, while **44%** are flying less often.

49%
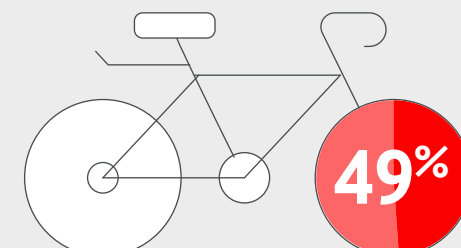
Fewer than one third **(30%)** have installed eco-friendly appliances such as smart meters – but a further **40%** are considering doing so in future.

40%
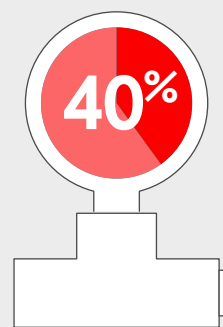
2 Data Insights

Awareness and impact on climate change

Awareness of the 'Green Deal for Europe'

Fewer than half of European citizens have heard of the **'Green Deal for Europe'**.

Have you heard of this EU initiative?

42%

✓ Yes, I have heard of it.

✕ No, I have not heard of it.

The range of public awareness among EU countries is relatively small, varying from a **half** to **one third**.

Total ✓	Czech Republic	Estonia	France	Germany	Greece	Hungary
42	33	39	**31**	34	45	**52**
41	46	50	48	50	37	35
Ireland	Italy	Neth	Poland	Portugal	Spain	Sweden
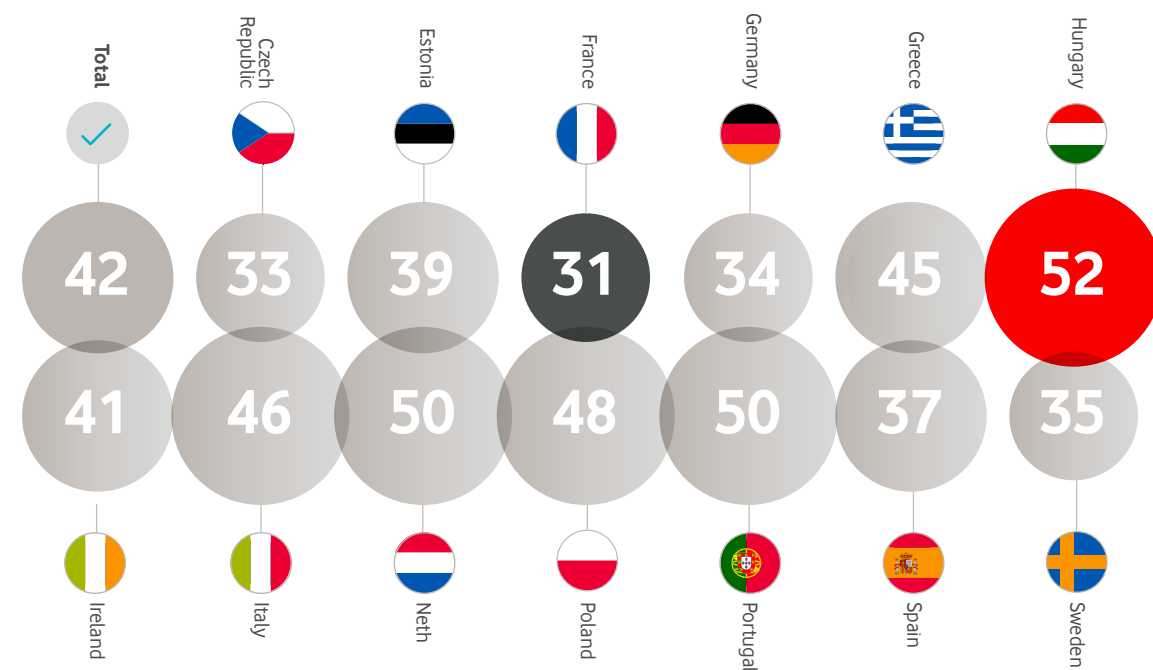
Public attitudes towards the impact of digital technology on climate change

Which opinion comes closer to your view?

Most countries see digital technology as **beneficial** but France stands out for its scepticism.

54%

14%

32% Neither/ nor

✕ Digital technology is one of the reasons for climate change

✓ Digital technology can play a big role in solving the problems of climate change

Public attitudes towards digital technology, country-by-country

	Total ✓	Czech Republic	Estonia	France	Germany	Greece	Hungary	Ireland	Italy	Neth	Poland	Portugal	Spain	Sweden
Dark (big role)	54	55	54	23	41	63	64	54	65	43	64	68	52	51
Neither/nor	32	32	38	44	43	24	26	33	21	47	18	22	32	38
Blue (reason)	14	13	8	33	17	13	10	14	15	10	18	10	16	11

■ Digital technology is one of the reasons for climate change   ■ Neither/ nor
■ Digital technology can play a big role to solve the problems of climate change

Eco-friendly buying habits and actions

Eco-friendly buying habits

An overwhelming majority of people

87%

say they behave as eco-friendly consumers at **least occasionally.**

Are your purchasing decisions influenced by environmental issues?

59% ✓ Yes, I pay attention constantly

28% ✓ Yes, I pay attention occasionally

✕ No, not at all

All national populations in the EU display eco-friendly buying habits but the intensity varies.

	Total	Czech Republic	Estonia	France	Germany	Greece	Hungary	Ireland	Italy	Neth	Poland	Portugal	Spain	Sweden
No, not at all	13	22	14	13	12	10	8	13	9	27	7	8	10	13
Yes, occasionally	59	61	65	55	66	63	61	58	48	61	55	61	55	61
Yes, constantly	28	17	21	32	22	28	32	29	43	12	38	30	35	25

■ Yes, I pay attention constantly   ■ Yes, I pay attention occasionally   ■ No, not at all

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Eco-friendly actions

Most people **focus more on** their **buying habits** than on their travel and transport choices.

Flying less
44% · 13% · 20% · 33%

Buying locally produced products (e.g. food or clothes)
60% · 24% · 11% · 5%

Installing eco-friendly appliances (e.g. smart meters)
40% · 31% · 17% · 12%

Avoiding single-use plastics
69% · 21% · 7% · 3%

Avoiding the car and take public transport or bike instead
49% · 18% · 20% · 14%

Avoiding buying a new smartphone too often
72% · 13% · 9% · 6%

■ I am currently doing this   ■ I'm going to do this in the future   ■ I don't plan to do this   ■ Not applicable for me

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Most countries share a similar ranking of eco-friendly actions, except for the **Netherlands**.

Legend: Czech Republic, Estonia, France, Germany, Greece, Hungary, Ireland, Italy, Neth, Poland, Portugal, Spain, Sweden

X-axis categories: Avoiding buying a new smartphone too often by using my smartphone or a longer period · Avoiding the car and take public transport or bike instead · Avoiding single-use plastics · Installing eco-friendly appliances (e.g. smart meters) · Buying locally produced products (e.g. food or clothes) · Flying less
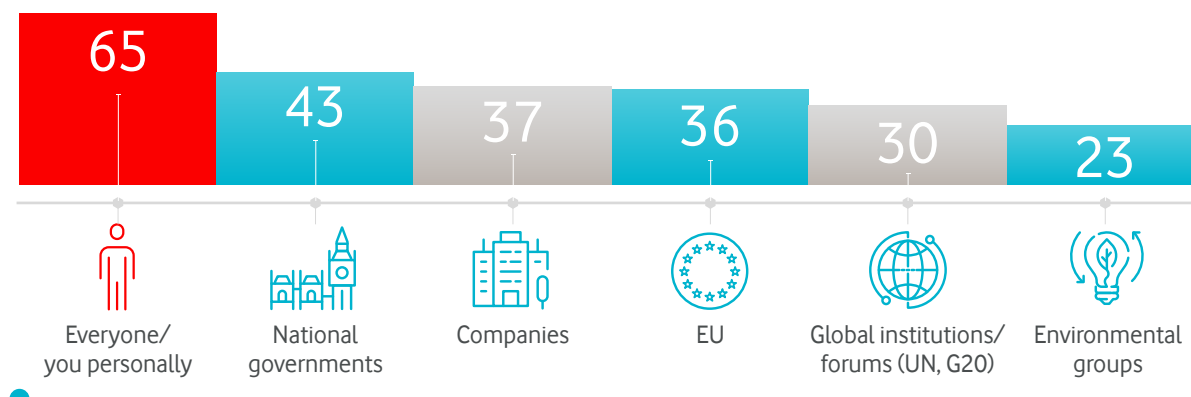
Y-axis: 10, 20, 30, 40, 50, 60, 70, 80

Responsibility for action against climate change

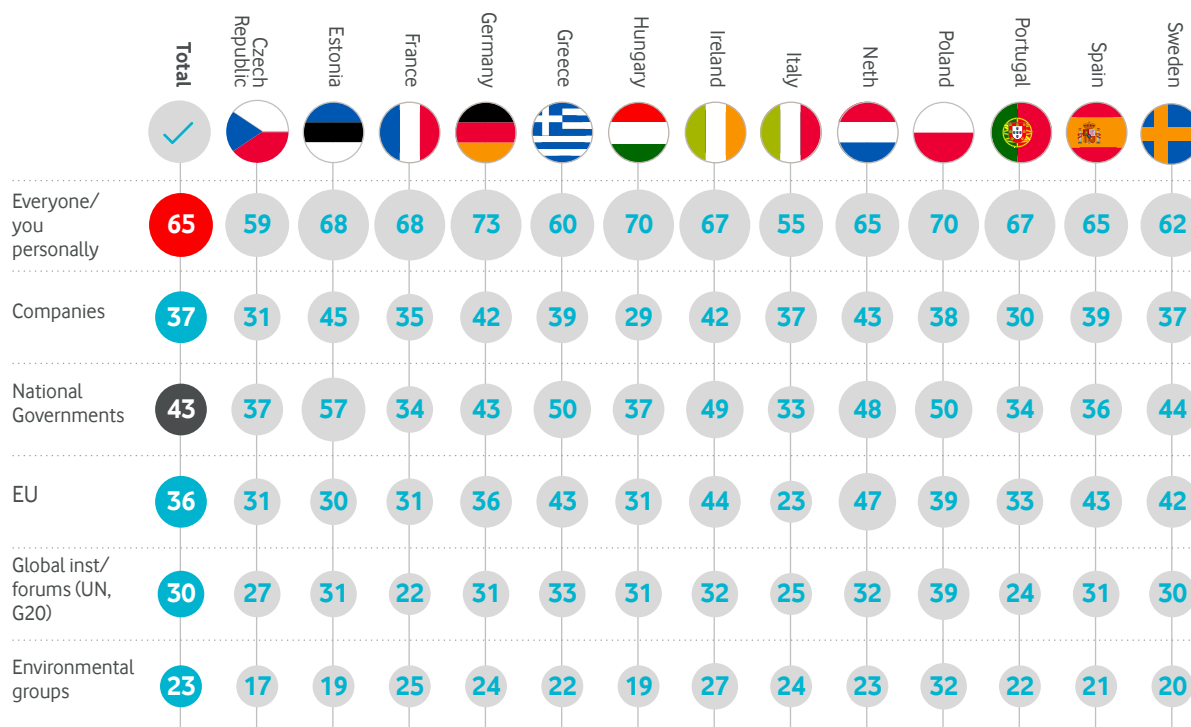## The responsibility for taking action is mostly perceived on an **individual** level.

In your opinion, who is primarily responsible for tackling climate change in Europe?

65	43	37	36	30	23
Everyone/ you personally	National governments	Companies	EU	Global institutions/ forums (UN, G20)	Environmental groups

Ranking who should be held responsible, country-by-country: **individuals come first**, **followed by national governments**.

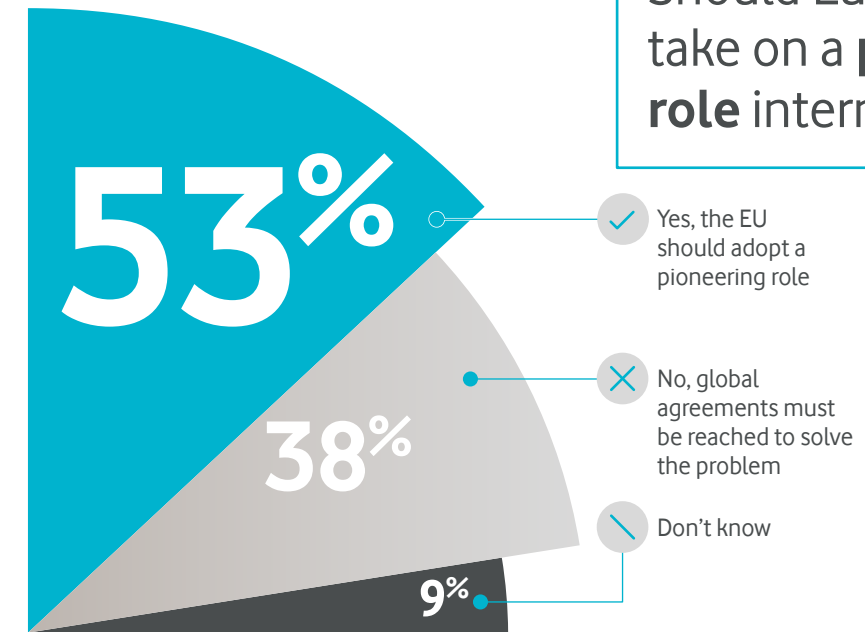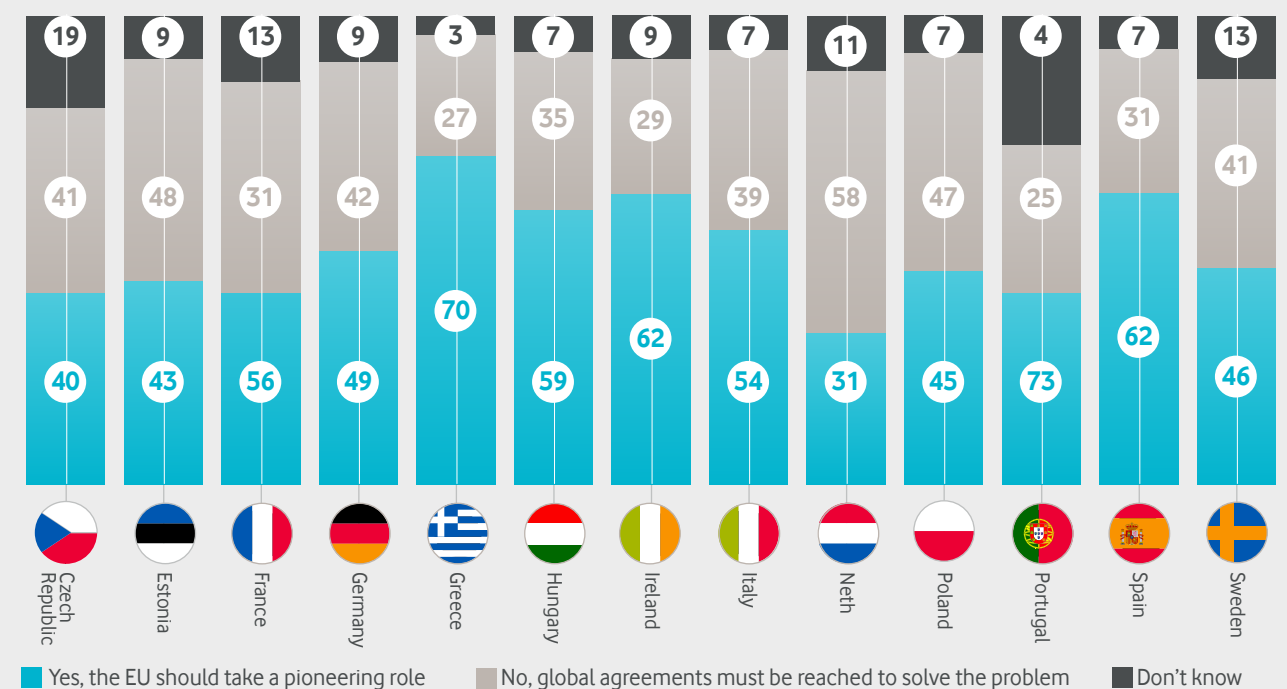|	Total	Czech Republic	Estonia	France	Germany	Greece	Hungary	Ireland	Italy	Neth	Poland	Portugal	Spain	Sweden
Everyone/ you personally	65	59	68	68	73	60	70	67	55	65	70	67	65	62
Companies	37	31	45	35	42	39	29	42	37	43	38	30	39	37
National Governments	43	37	57	34	43	50	37	49	33	48	50	34	36	44
EU	36	31	30	31	36	43	31	44	23	47	39	33	43	42
Global inst/ forums (UN, G20)	30	27	31	22	31	33	31	32	25	32	39	24	31	30
Environmental groups	23	17	19	25	24	22	19	27	24	23	32	22	21	20

The global role of the EU is **polarizing public opinion**.

Climate change is a global problem.

53% Yes, the EU should adopt a pioneering role

38% No, global agreements must be reached to solve the problem

9% Don't know

Should Europe, the EU, take on a **pioneering role** internationally?

There are **significant differences of opinion** country-by-country regarding the EU's international role.
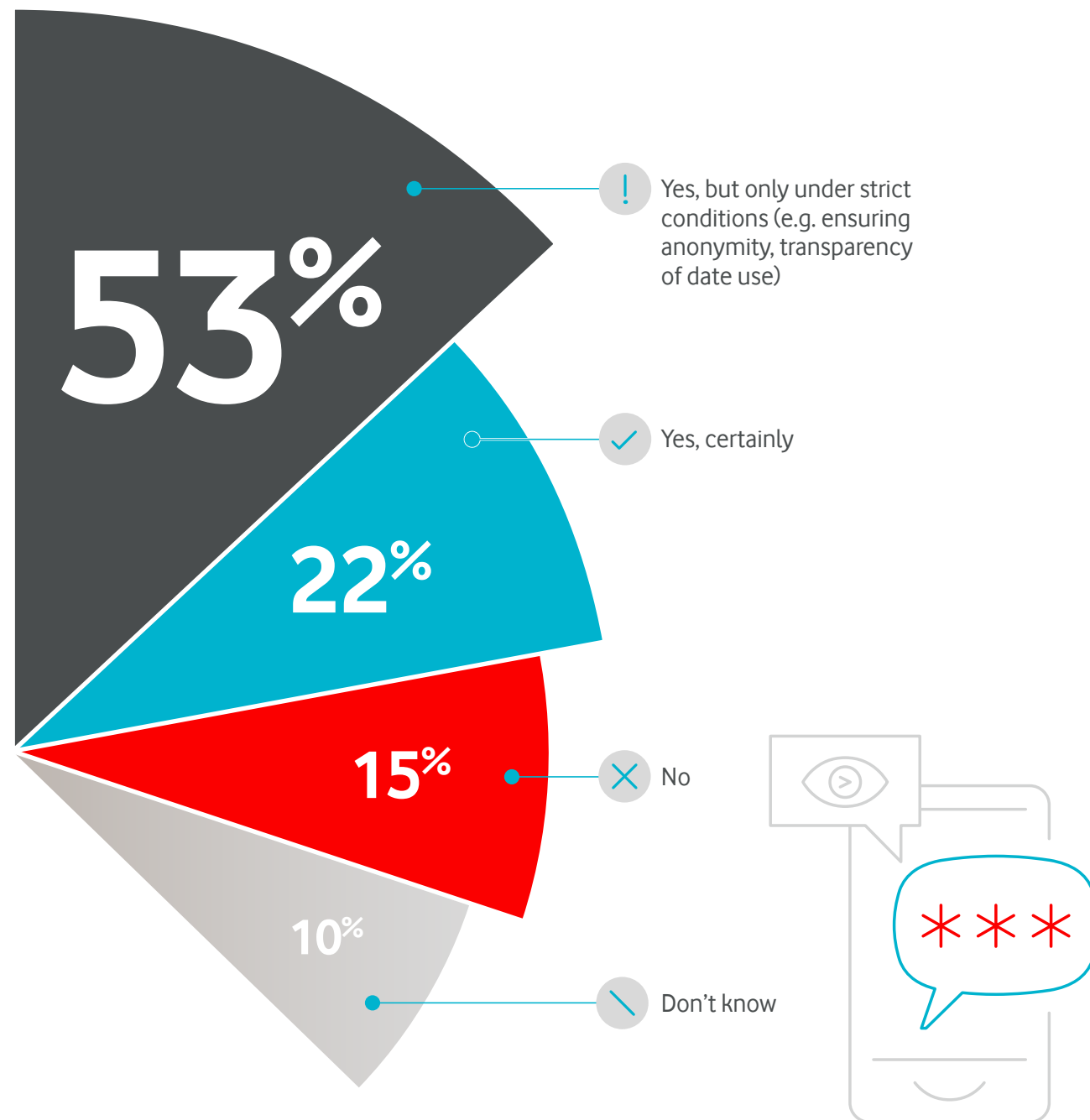
	Czech Republic	Estonia	France	Germany	Greece	Hungary	Ireland	Italy	Neth	Poland	Portugal	Spain	Sweden
Don't know	19	9	13	9	3	7	9	7	11	7	4	7	13
No, global agreements must be reached to solve the problem	41	48	31	42	27	35	29	39	58	47	25	31	41
Yes, the EU should take a pioneering role	40	43	56	49	70	59	62	54	31	45	73	62	46

Smart cities

Middle European **countries** like the Netherlands and Germany are the **most reluctant**.

Would you be willing to share your data with the state for the benefit of the environment?

Overall attitudes in the EU

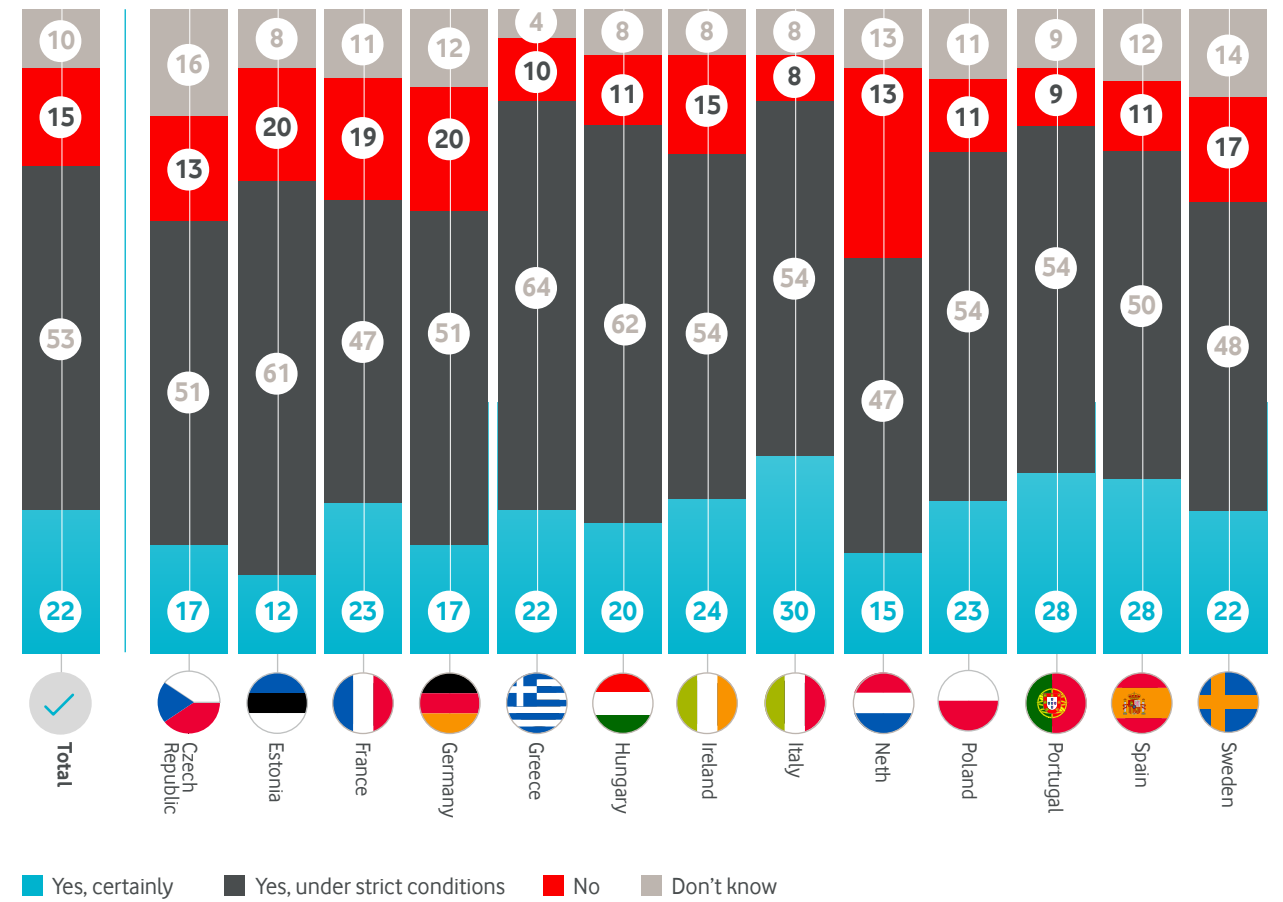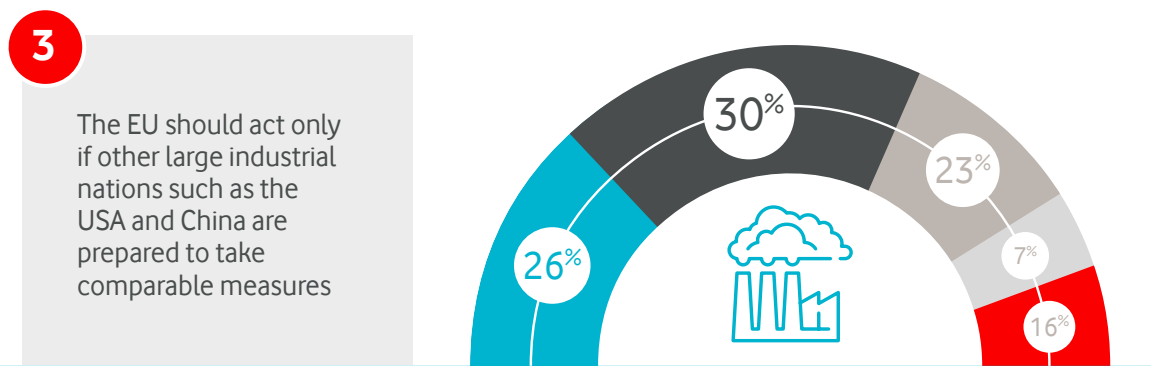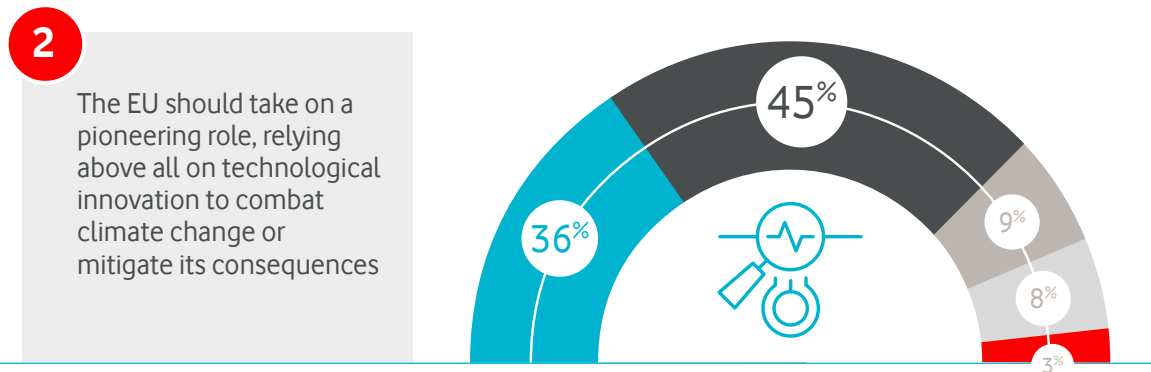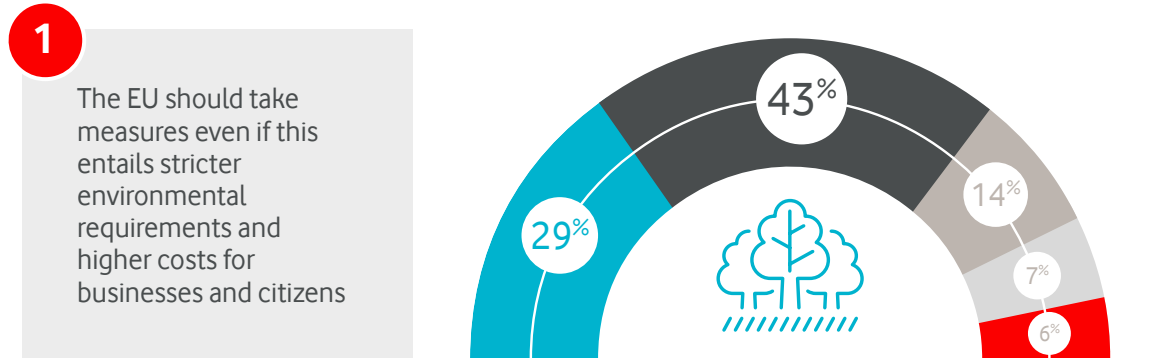## The need for **energy efficiency** still does not justify data sharing without strict conditions.

Would you be willing to share your data with the state for the benefit of the environment?

53% Yes, but only under strict conditions (e.g. ensuring anonymity, transparency of date use)

22% Yes, certainly

15% No

10% Don't know

Legend: Yes, certainly | Yes, under strict conditions | No | Don't know

EU climate politics

Country-by country attitudes

1 The EU should take measures even if this entails stricter environmental requirements and higher costs for businesses and citizens

Czech Republic 62 | Estonia 71 | France 69 | Germany 62 | Greece 81 | Hungary 80 | Ireland 70 | Italy 77 | Neth 61 | Poland 74 | Portugal 84 | Spain 83 | Sweden 64

2 The EU should take on a pioneering role, relying above all on technological innovation to combat climate change or mitigate its consequences

Czech Republic 73 | Estonia 81 | France 75 | Germany 72 | Greece 90 | Hungary 82 | Ireland 77 | Italy 85 | Neth 71 | Poland 86 | Portugal 94 | Spain 87 | Sweden 75

3 The EU should act only if other large industrial nations such as the USA and China are prepared to take comparable measures

Czech Republic 65 | Estonia 48 | France 53 | Germany 49 | Greece 52 | Hungary 50 | Ireland 51 | Italy 57 | Neth 57 | Poland 69 | Portugal 63 | Spain 58 | Sweden 46

Overall attitudes in the EU

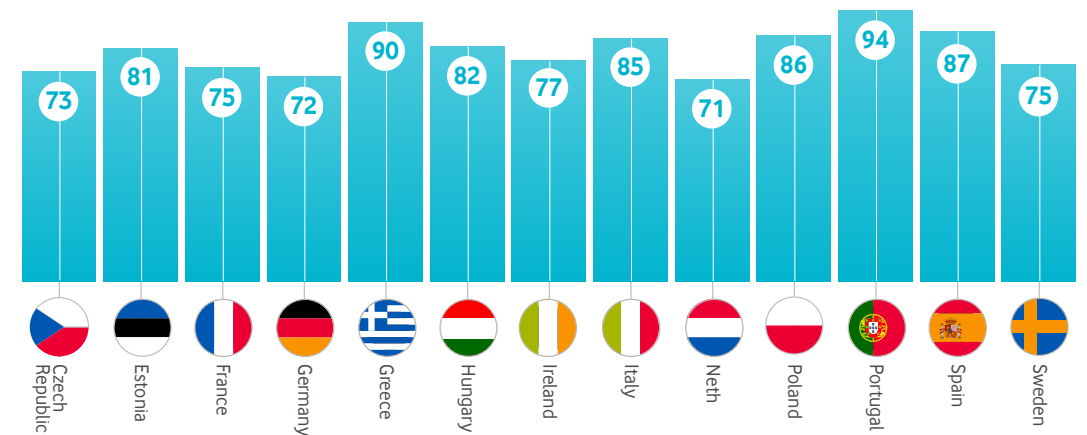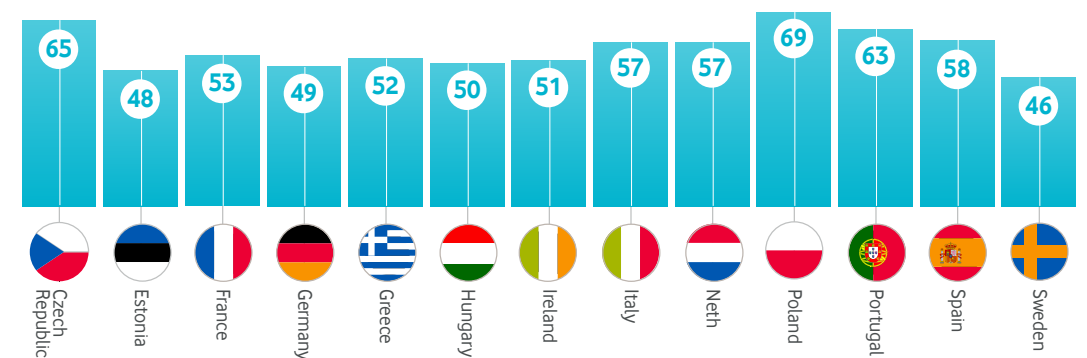Technological innovation is the **most popular way** among people surveyed to combat climate change.

1 The EU should take measures even if this entails stricter environmental requirements and higher costs for businesses and citizens

43% | 29% | 14% | 7% | 6%

2 The EU should take on a pioneering role, relying above all on technological innovation to combat climate change or mitigate its consequences

45% | 36% | 9% | 8% | 3%

3 The EU should act only if other large industrial nations such as the USA and China are prepared to take comparable measures

30% | 26% | 23% | 7% | 16%

- ■ I totally agree
- ■ I rather agree
- ■ I rather disagree
- ■ I do not agree at all
- ■ Don't know

Top 3 Green Deal measures

Overall attitudes in the EU

Selection of twelve possible **Green Deal measures**.

What measures should the new EU Commission focus on?

38%

Stricter **environmental regulations for industries** (e.g. transport sector, manufacturing industry)

37%

Actions to champion a **green and healthier agriculture**

35%

Draw up a **sustainable product** policy, to save on materials

More measures

34% Measures to protect biodiversity, including the tackling of solid and water pollution.

27% Support for companies operating sustainably and wanting to become carbon neutral.

26% Funding research programmes into technologies combating climate change.

24% Consumer education.
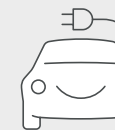
24% Stricter environmental requirements for private transport.

17% Taxation of CO2.

16% Significant increase in the renovation rate of buildings, ensuring a higher level of energy efficiency.

11% Promotion of new mobility concepts.

11% Reform of emissions trading.

Meeting the costs

The **favoured single player is the state**, chosen by every fourth (in Italy even by 36%).

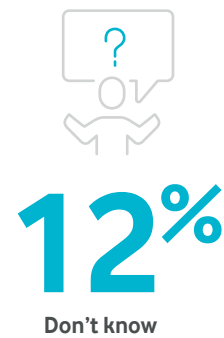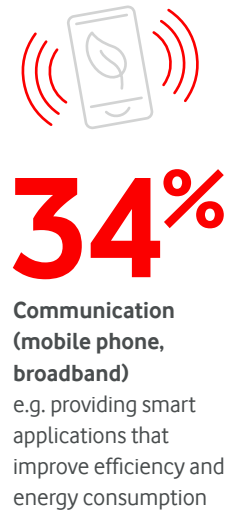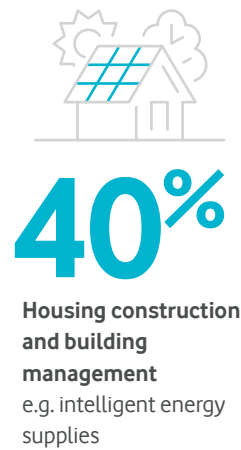**In your opinion, who should primarily bear the costs of combatting climate change?**

Every second says **state**, **companies** and **citizens** need to bear the costs alike.

In your opinion, who should primarily bear the costs of combatting climate change?
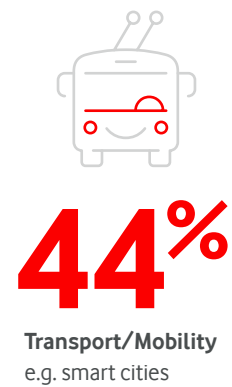
51%

Most people across the EU consider that governments, companies and citizens should share the costs of combatting climate change.

25% Especially **the state**

19% Especially **companies**

4% Especially **citizens**

	Total	Czech Republic	Estonia	France	Germany	Greece	Hungary	Ireland	Italy	Neth	Poland	Portugal	Spain	Sweden
State, companies and citizens alike	51	52	70	50	53	48	46	48	44	50	50	50	47	58
Especially citizens	4	8	2	5	3	2	3	8	5	4	5	4	4	4
Especially companies	19	17	11	20	20	22	21	28	15	24	20	17	19	16
Especially the state	25	23	18	25	24	24	30	17	36	22	25	29	31	23

■ Especially the state   ■ Especially companies   ■ Especially citizens   ■ State, companies and citizens alike

Sustainability

People in Greece see **comparatively high digital potentials** in housing construction and communication.
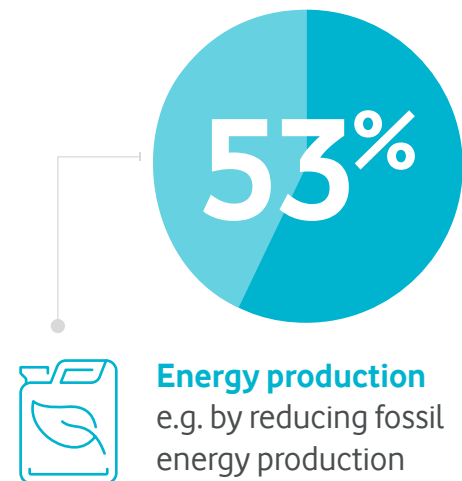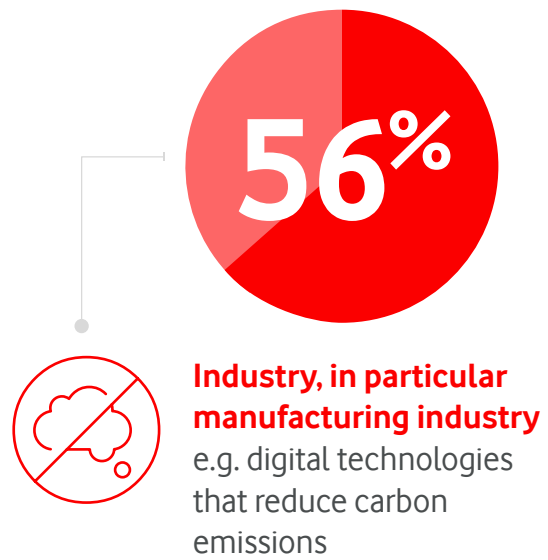
Manufacturing industry together with energy production is the most promising sectors when it comes to digital innovations with a **positive impact on the environment and climate**.

In which life and economic sectors do you think digitalization will help promote innovations that will have a significant, positive impact on the environment and the climate?

56%

Industry, in particular manufacturing industry
e.g. digital technologies that reduce carbon emissions

53%

Energy production
e.g. by reducing fossil energy production

44%

Transport/Mobility
e.g. smart cities

40%

Housing construction and building management
e.g. intelligent energy supplies

34%

Communication (mobile phone, broadband)
e.g. providing smart applications that improve efficiency and energy consumption

12%

Don't know

	Total	Czech Republic	Estonia	France	Germany	Greece	Hungary	Ireland	Italy	Neth	Poland	Portugal	Spain	Sweden
Manufacturing industry	56	58	69	46	51	67	55	55	50	48	56	64	53	54
Energy production	53	50	57	44	50	60	54	55	53	42	59	60	55	50
Transport/Mobility	40	40	48	34	45	48	42	48	50	36	40	53	45	38
Housing construction	40	31	49	40	27	54	35	44	37	31	48	46	41	35
Communication	34	27	32	25	26	47	31	42	33	24	39	37	39	35
Don't know	12	12	6	20	17	4	9	10	8	23	8	6	11	17

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Design Concept

Studio 11