

# Differing perceptions of the energy transition across European countries



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# Methodology

## TARGET SURVEY

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



**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.

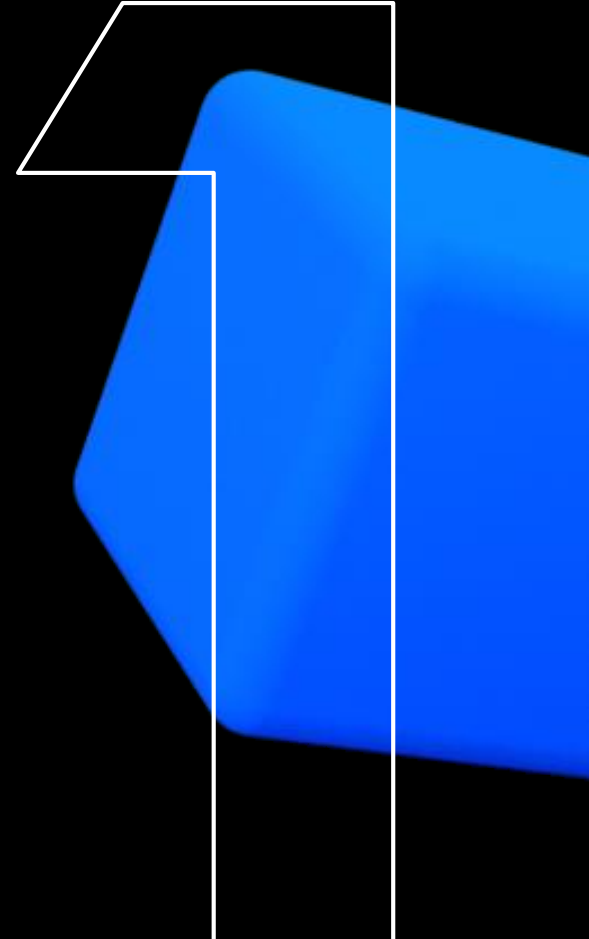
## FIELD DATES



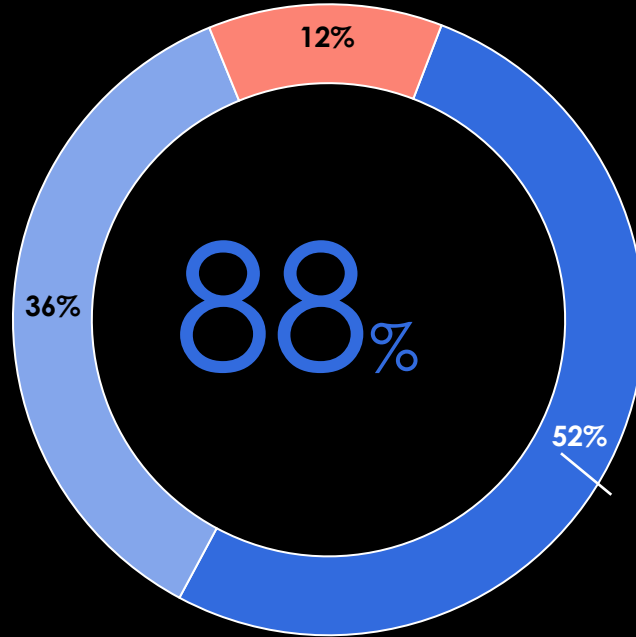
## COLLECTION MODE

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



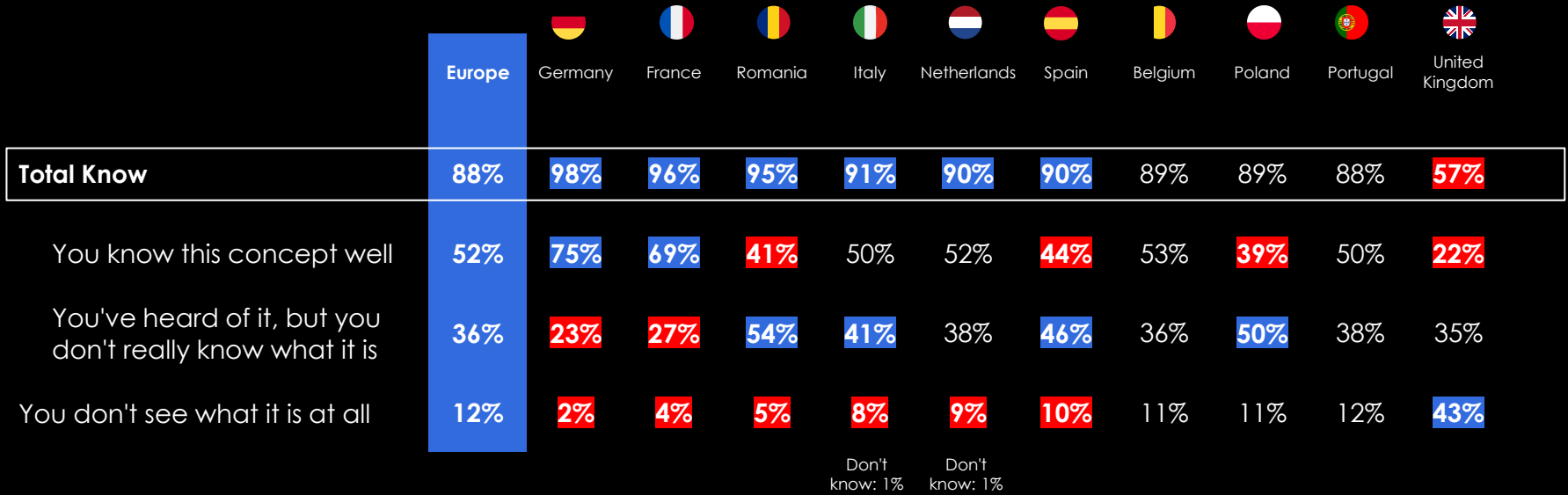
## Know the energy transition

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%

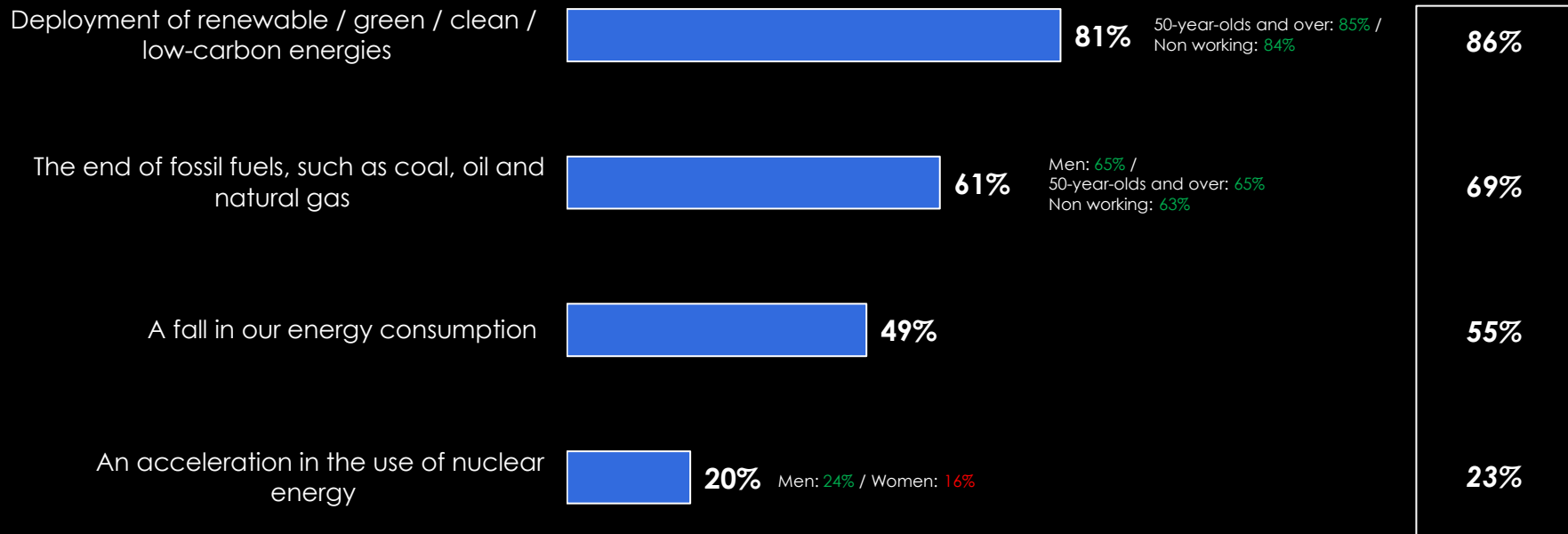
- You know this concept well
- You've heard of it, but you don't really know what it is
- You don't see what it is at all

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

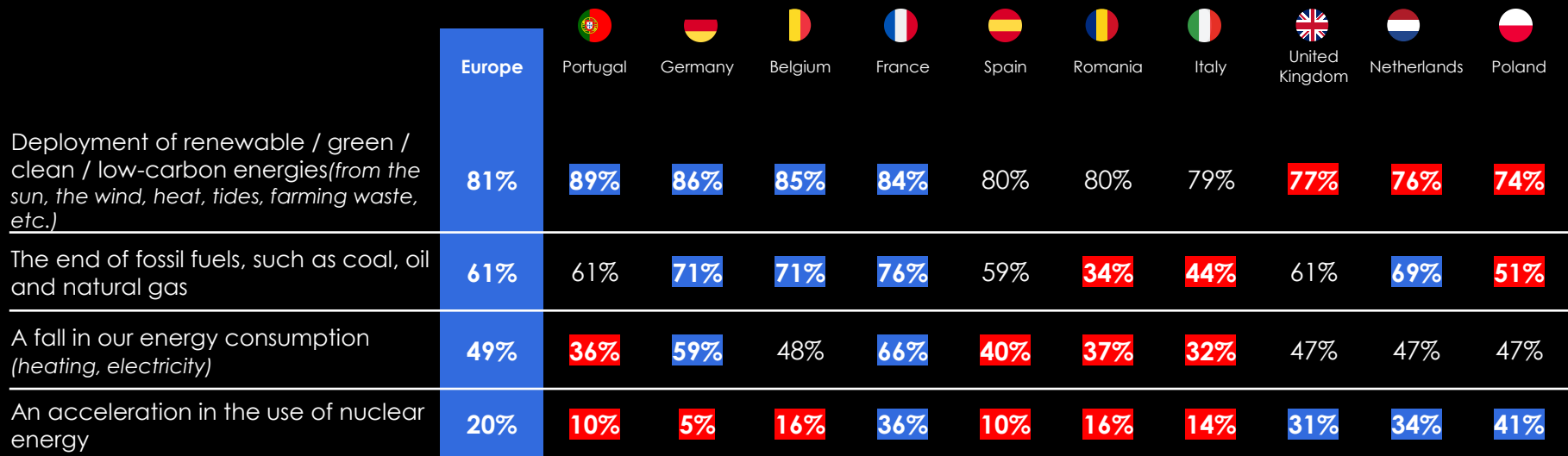


# The energy transition, essentially involves the deployment of renewable energies and the end of fossil fuels

Among those who say they are familiar with the energy transition

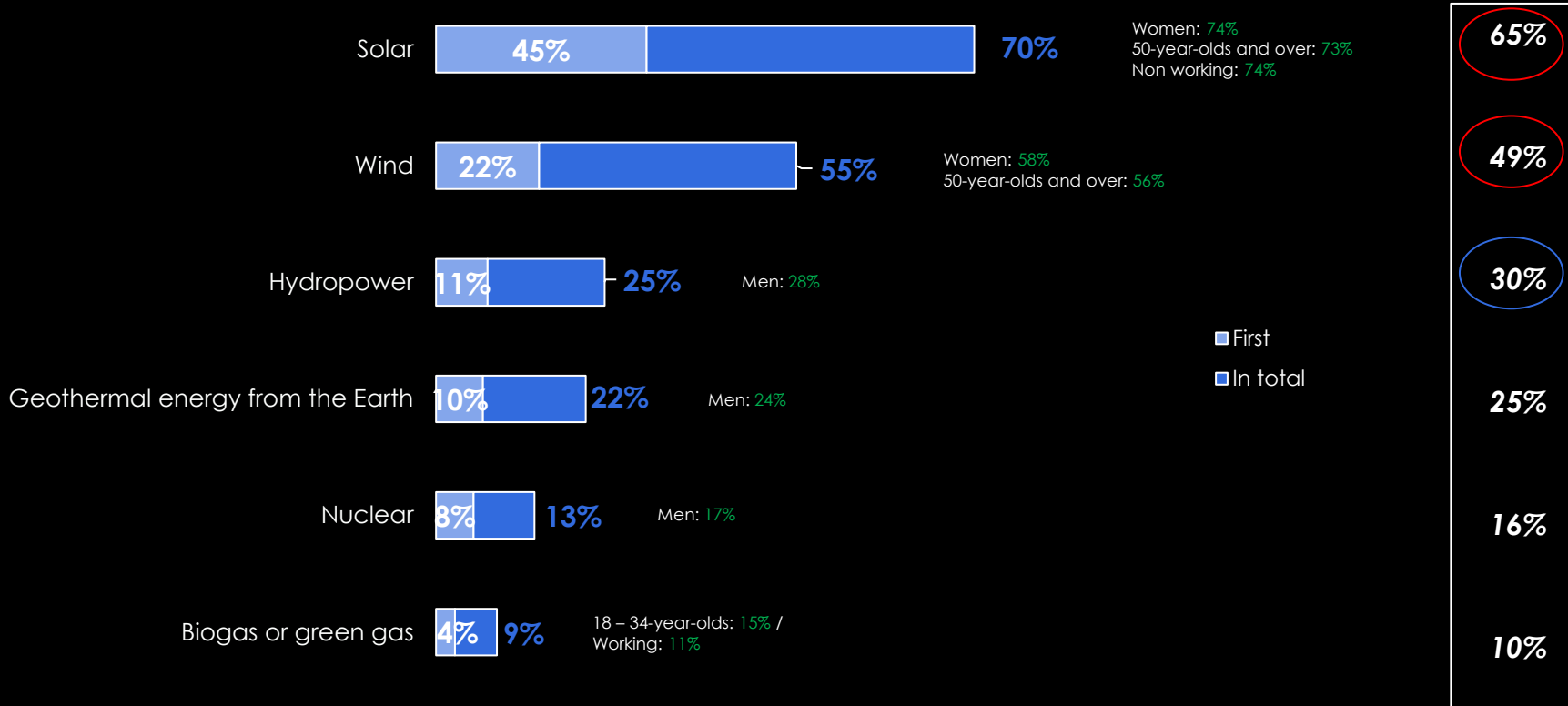


# Again, France and Germany have a broader vision of the energy transition, contrary to Italy, Romania and Spain



# Solar – the cleanest energy there is

Among those who say they are familiar with the energy transition



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

Base: All (n=10 043) – Two possible answers – Cleanest, second cleanest



# France and wind power – a lack of trust

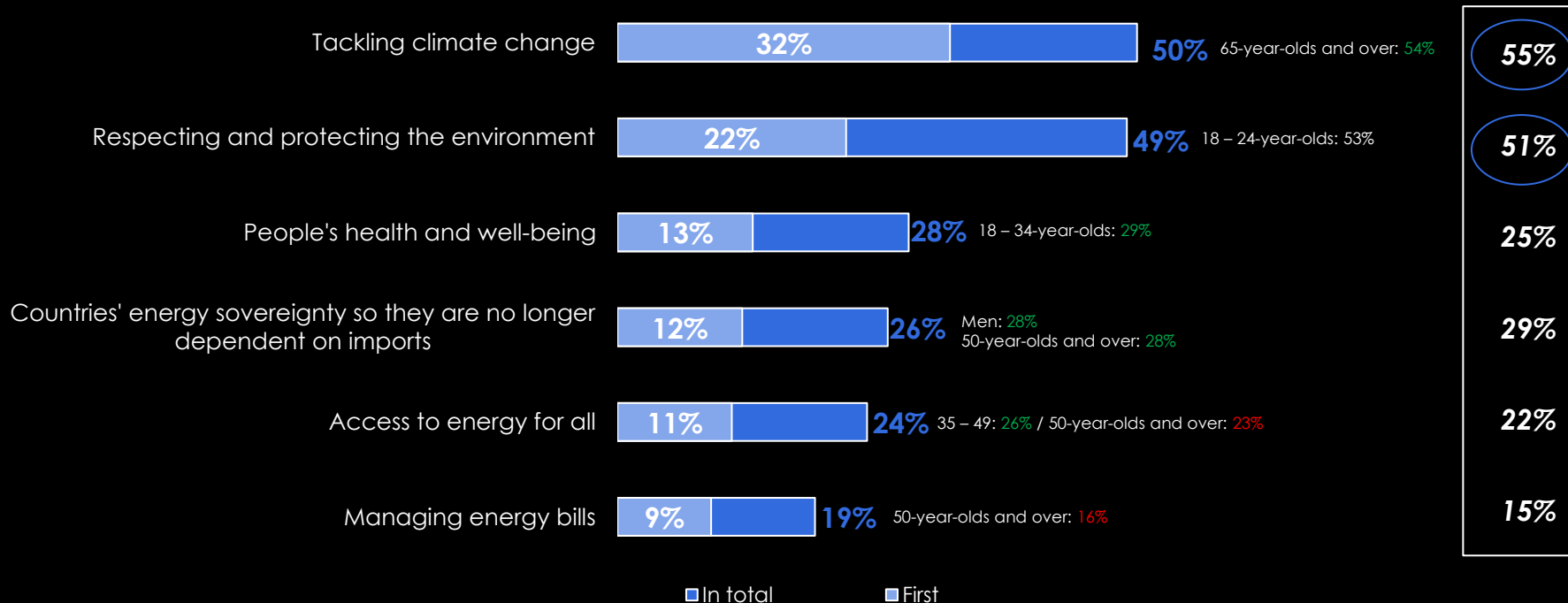


Q8. Of the following energies, which you think are the “cleanest”? The cleanest of all? The second cleanest?

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

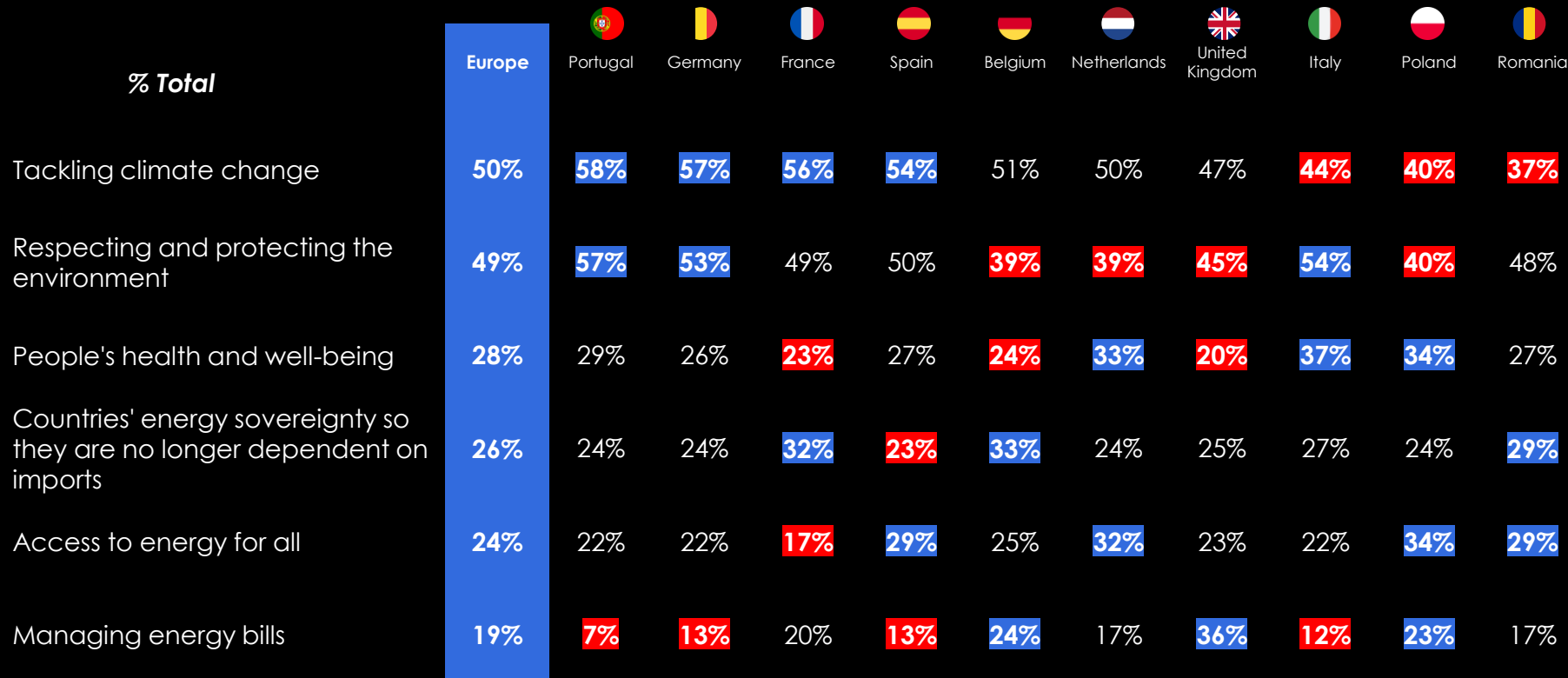


**LEVELLING UP:** The energy transition is the switch from carbon-based forms of energy, such as oil and coal, to cleaner forms of energy – renewable energies, such as solar, wind or green gas

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

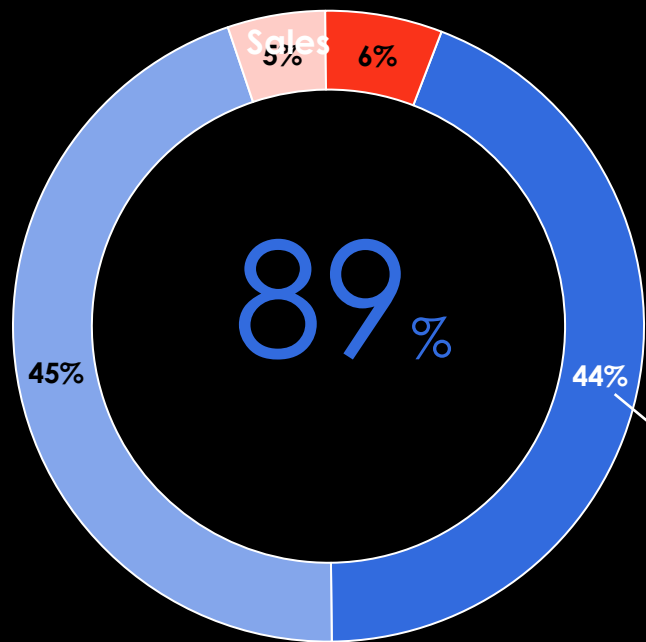
Q3. *In your opinion, what is the primary aim of the energy transition? The most important aim? The second most important aim?*

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

An ongoing, yet fragile  
dynamic



# Going further, but cautiously...

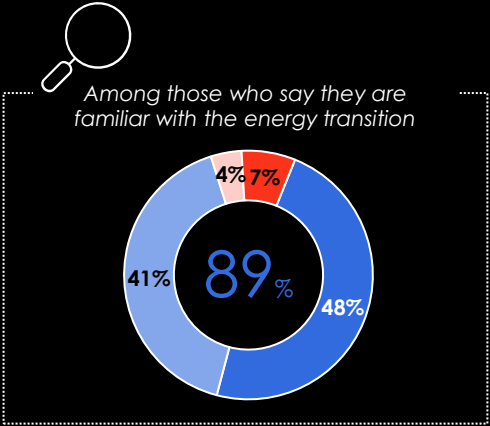


- Go further
- Continue with our efforts, but cautiously
- Things are fine as they are
- Go back

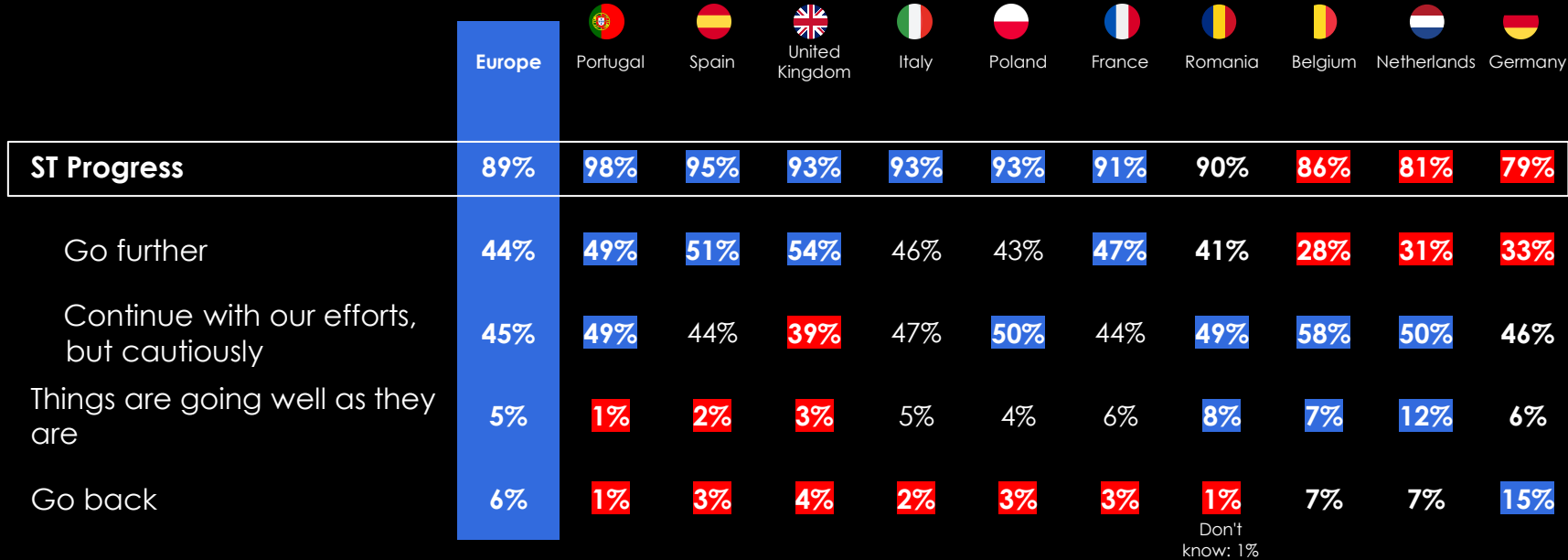
## Want the energy transition to progress

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

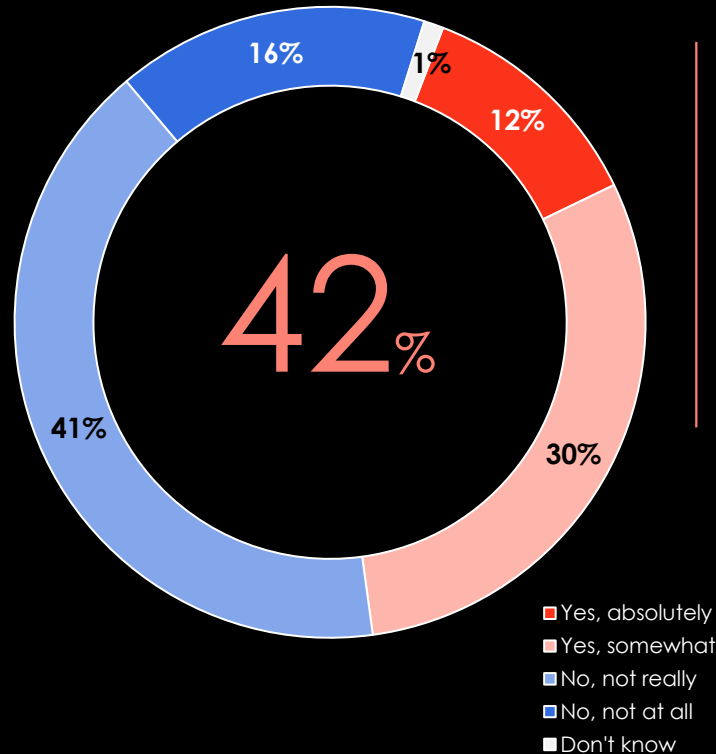
18 – 34-year-olds: 46%  
35 – 49-year-olds: 44%  
50-year-olds and over: 43%



# Germans are far more hesitant, 15% are even reluctant



# An ongoing yet fragile movement

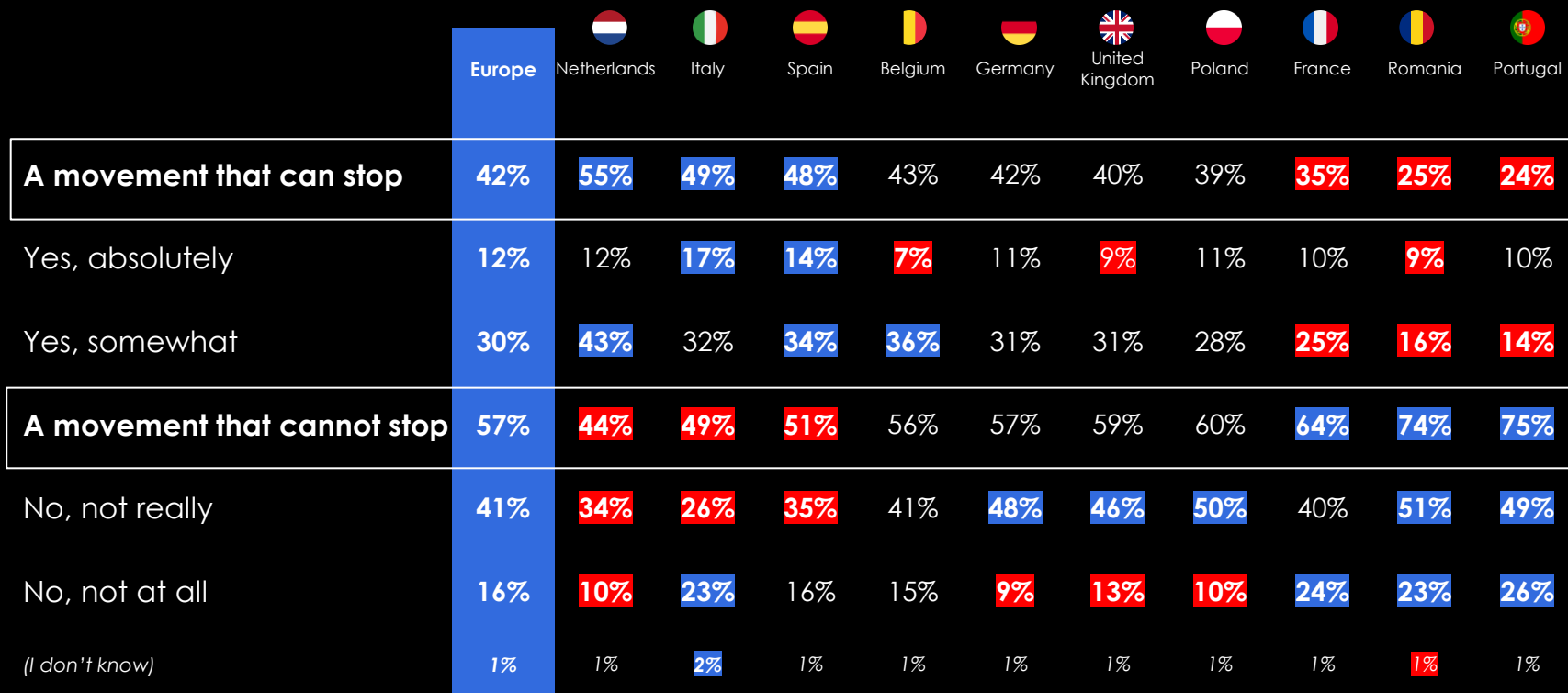


## A movement that can stop

18 to 34-year-olds: 52%  
Working: 45%

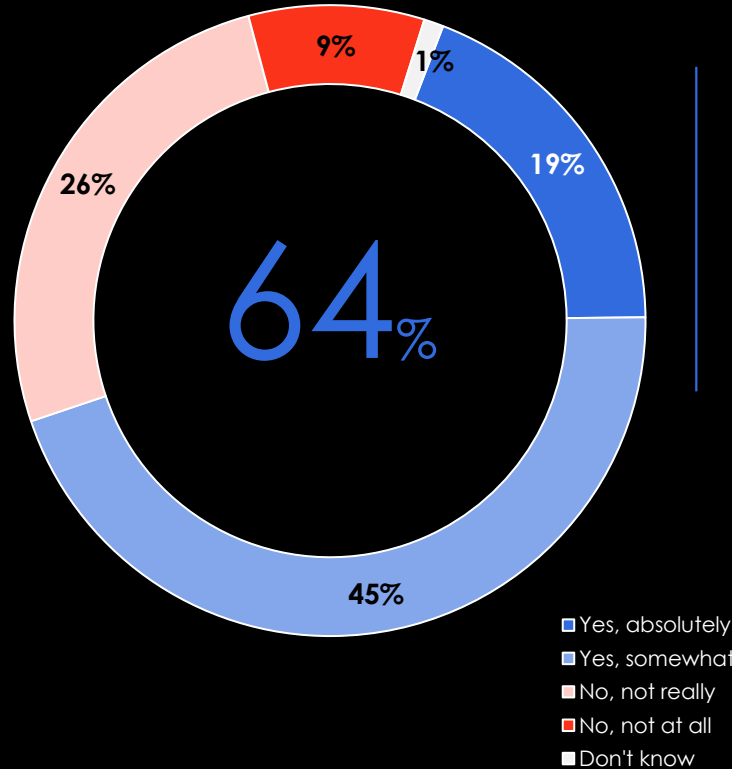
Among those who say they are familiar with  
the energy transition: 41%

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





# 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%

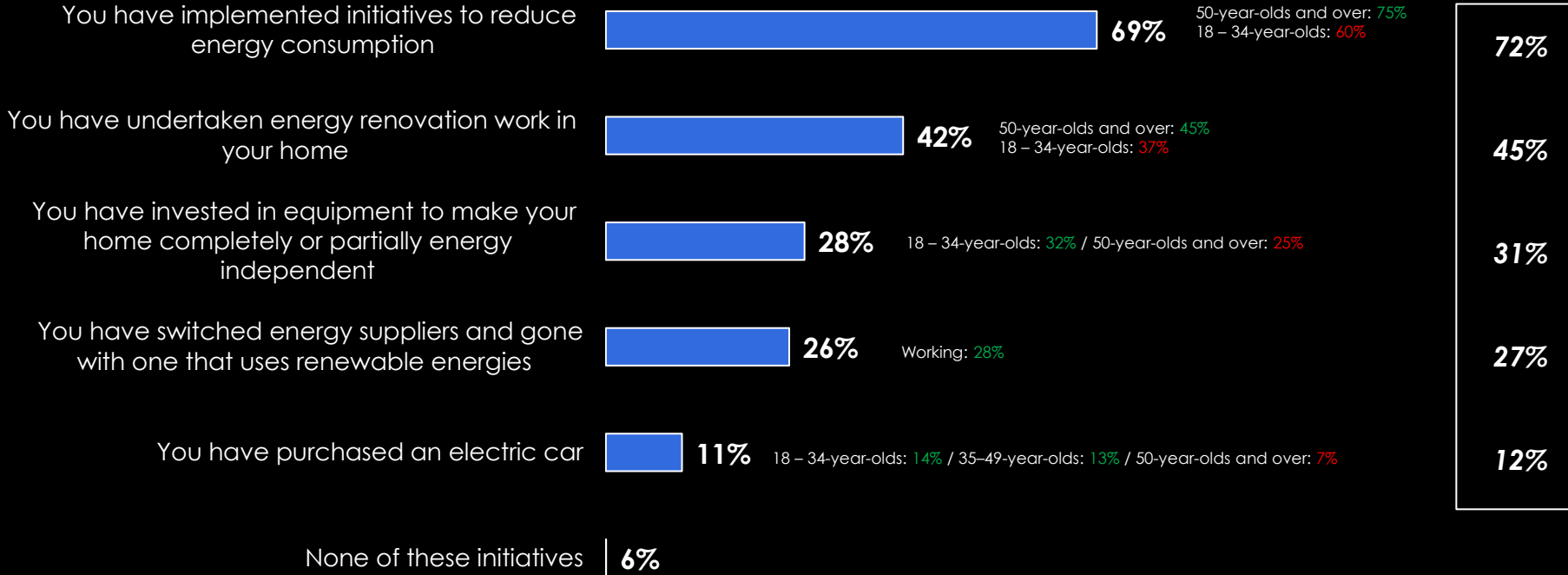
Among those who say they are familiar with the energy transition: 75%

# The French and the Italians seem to be more involved

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



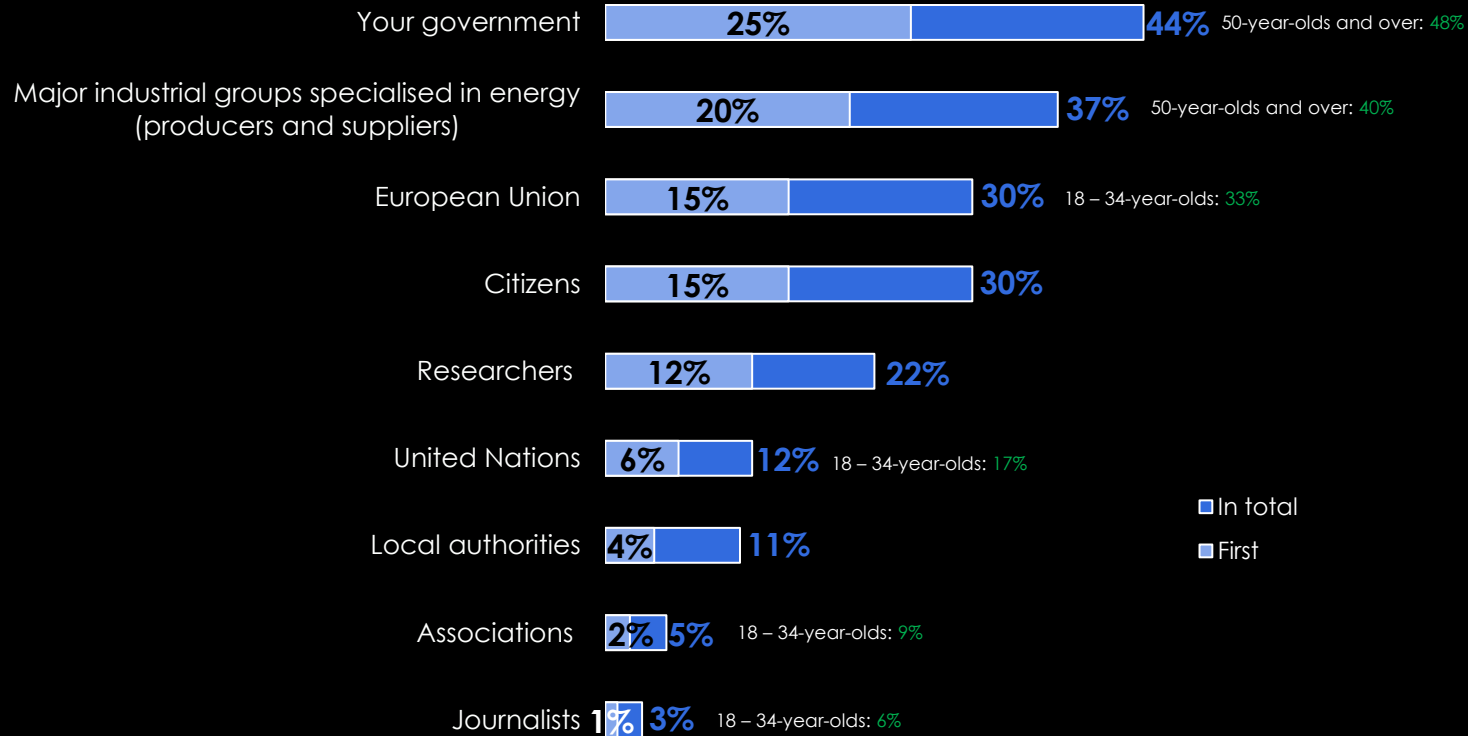
# A measure shared by all countries



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

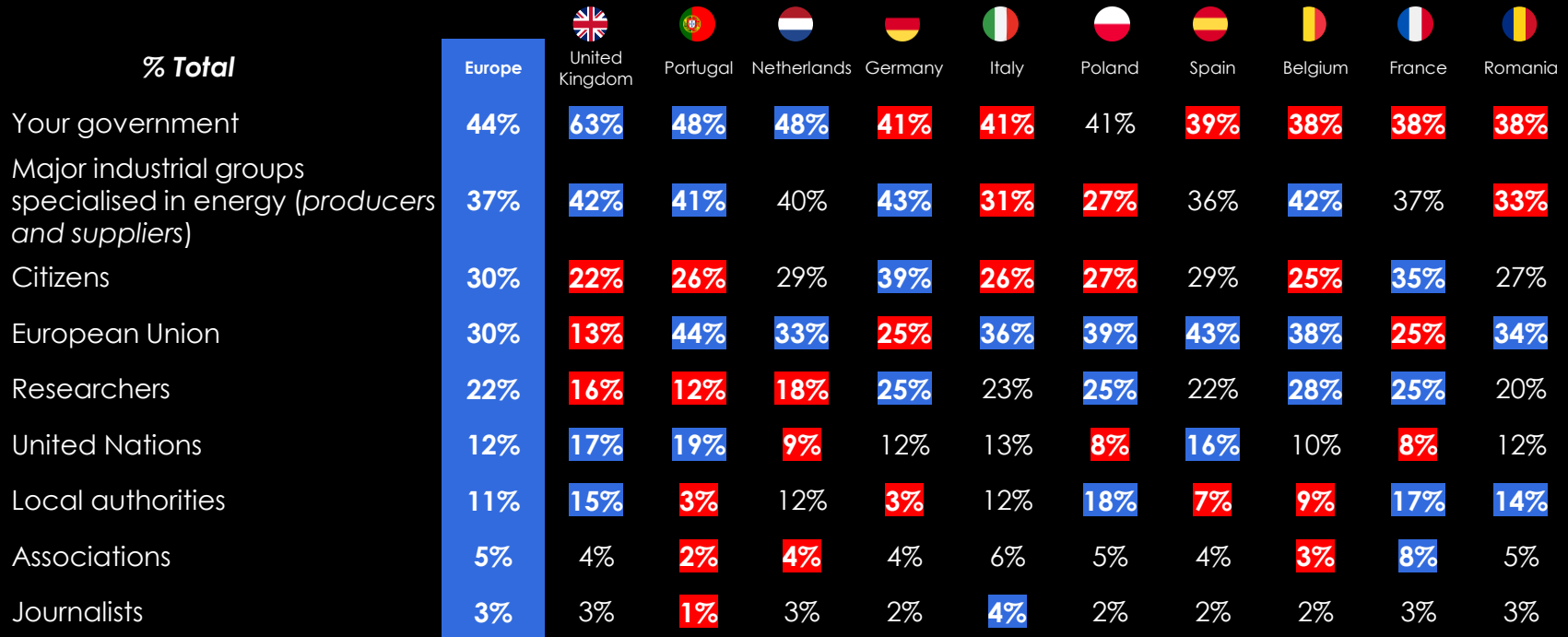


# Major industrial groups strongly eagerly scrutinized on the issue



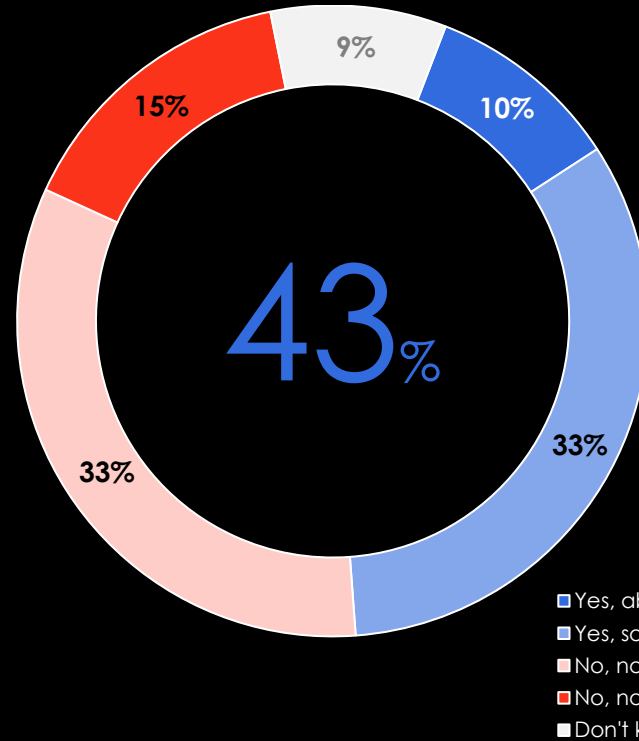
Q9. Which of the following stakeholders do you consider to be the most legitimate in advancing the energy transition? The most important aim? The second most important aim? Base: All(n=10,043) – Two possible answers – The most legitimate, the second most legitimate

# Greater scepticism directed at governments in Belgium, France and Romania



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

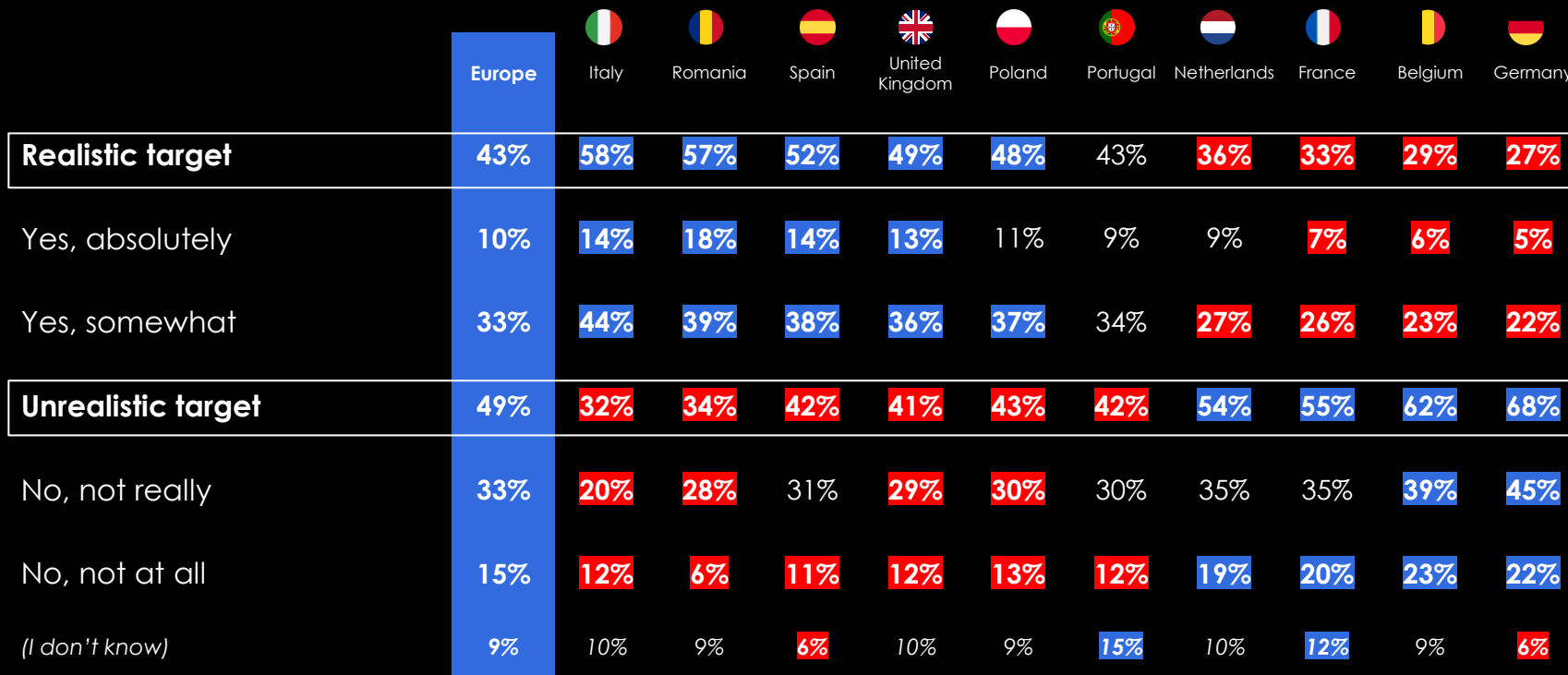
18-34 year olds 53% / 50 year olds and over: 37%  
Want to turn back the clock on the energy transition: 8%

**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

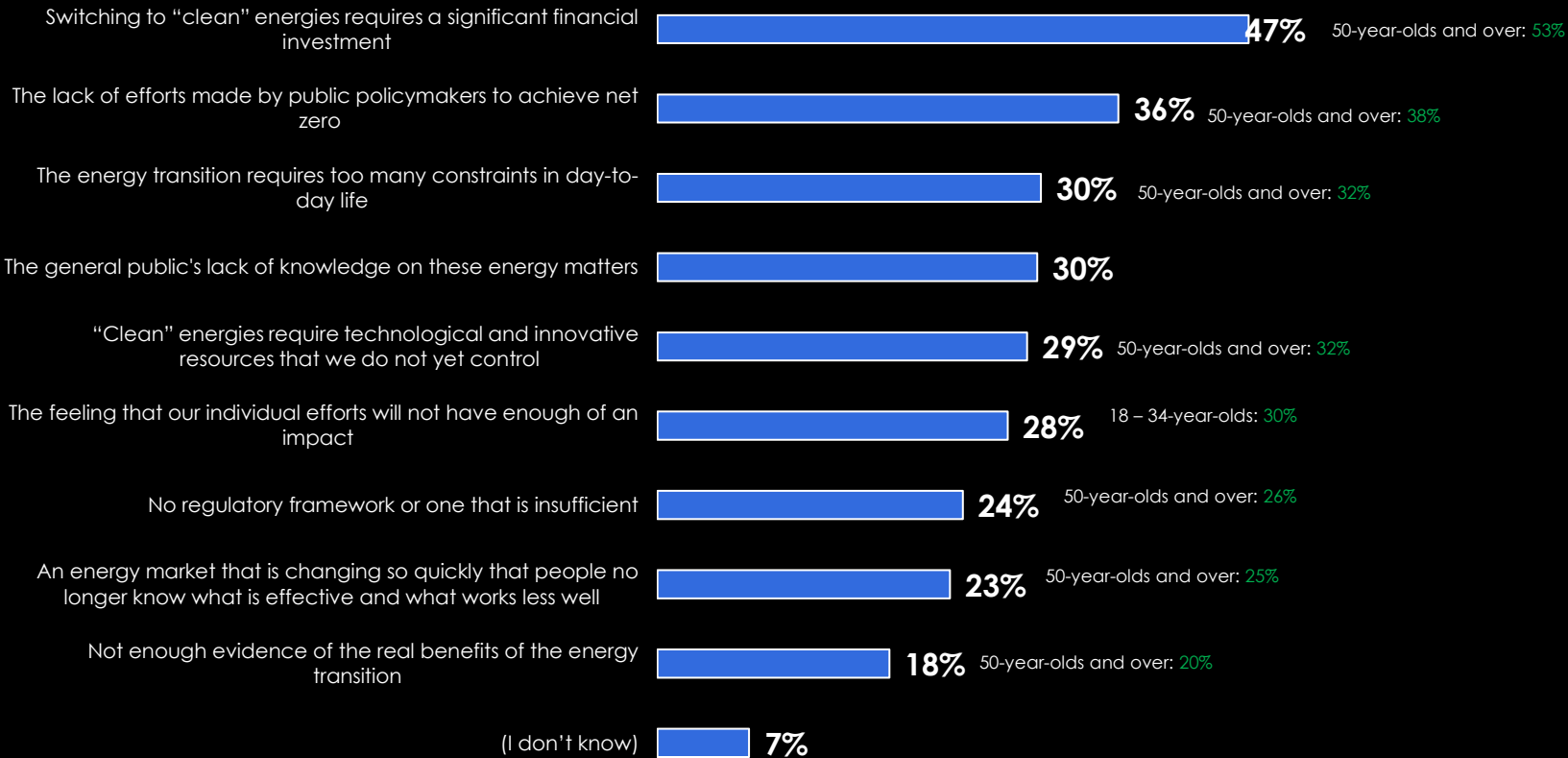


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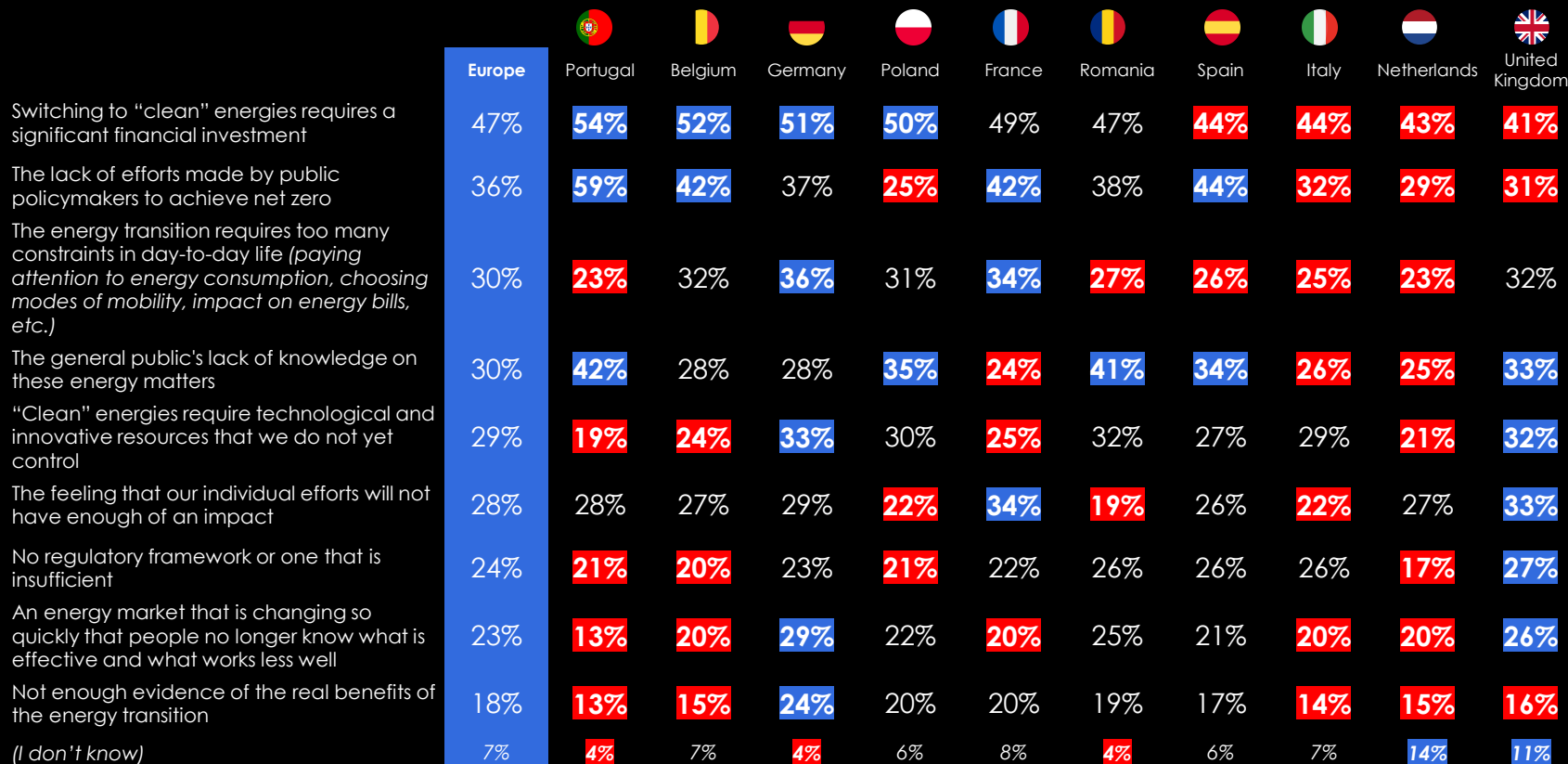
# The primary obstacle to the energy transition: the financial investment involved

Among those who say they are familiar with the energy transition



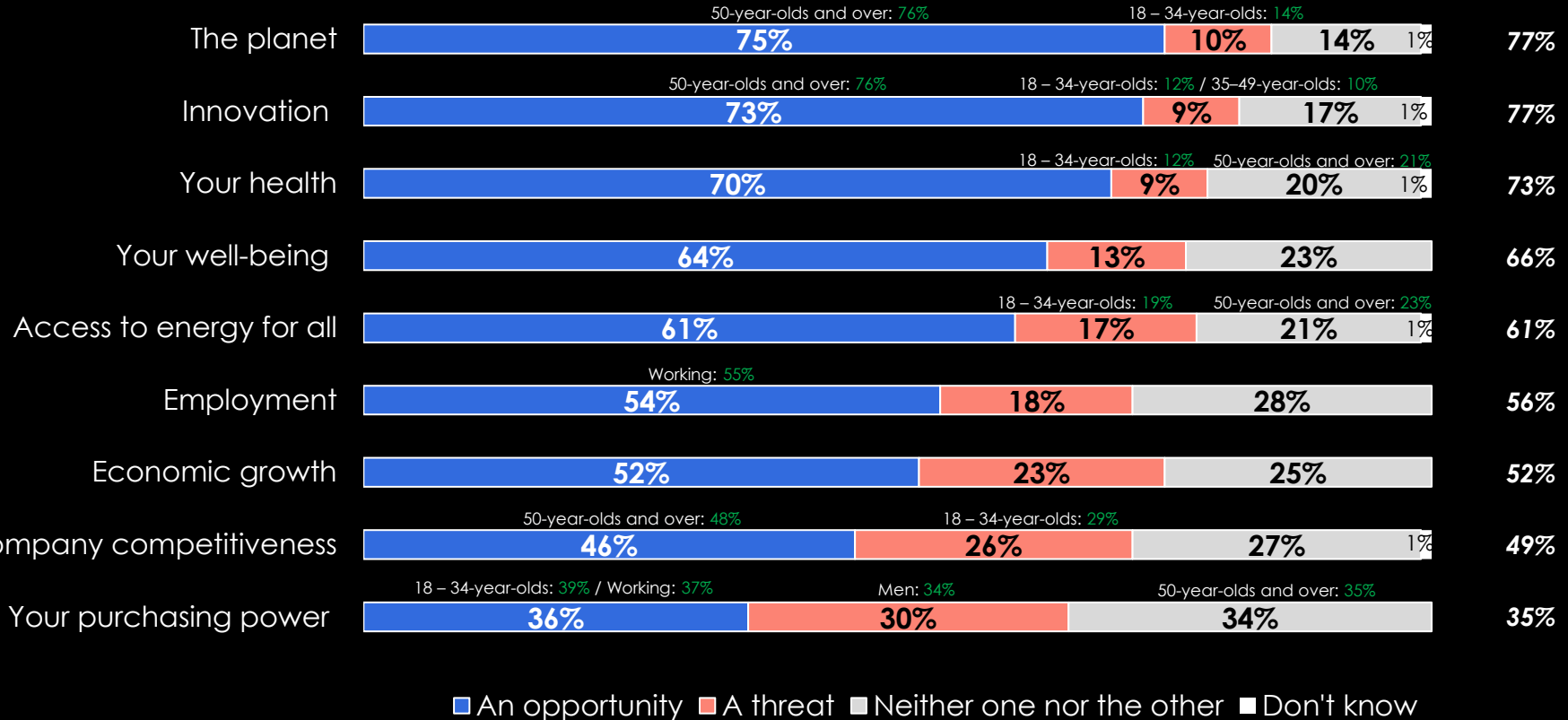
Q11. In your opinion, what is currently preventing the energy transition from happening?  
Base: All (n=10,043) – Multiple answers possible

# 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



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

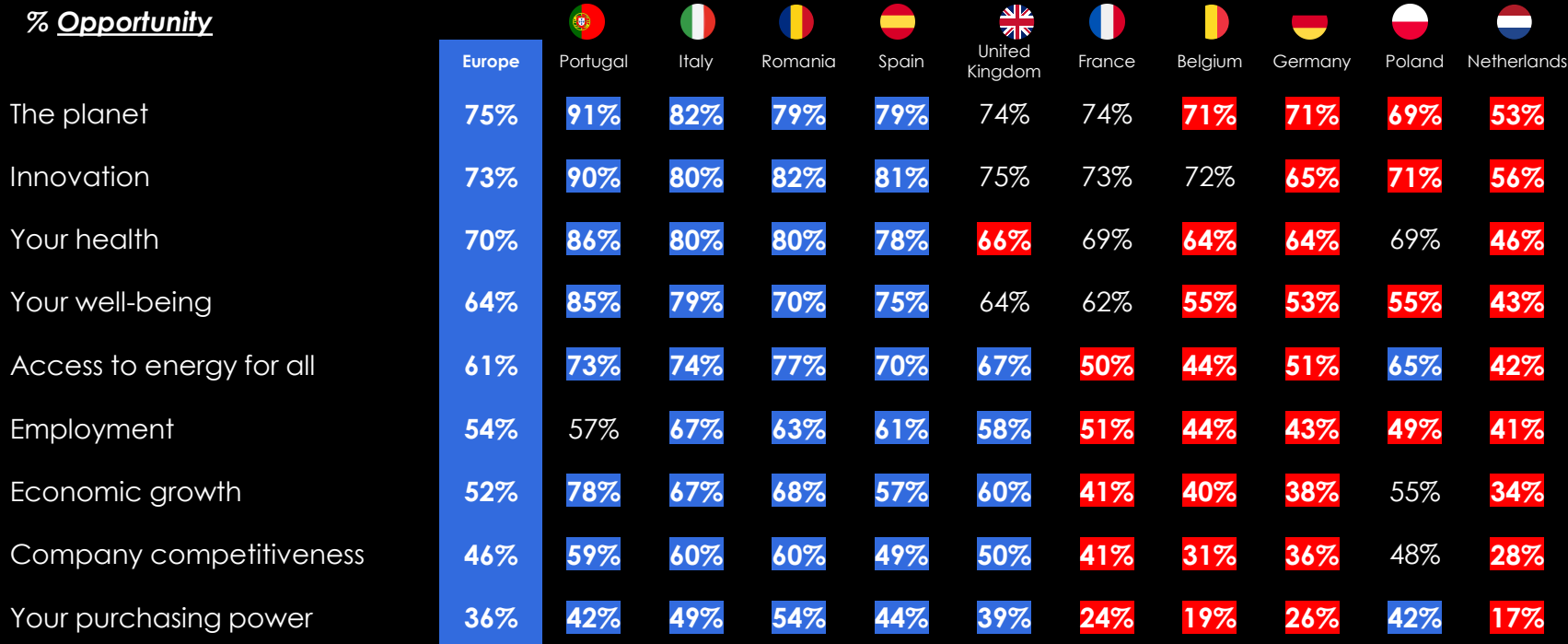
% opportunity among those who say they are familiar with the energy transition













Q12. In your opinion, does the energy transition represent an opportunity or a threat for...

Base: All (n=10 043) – Only one answer possible per line

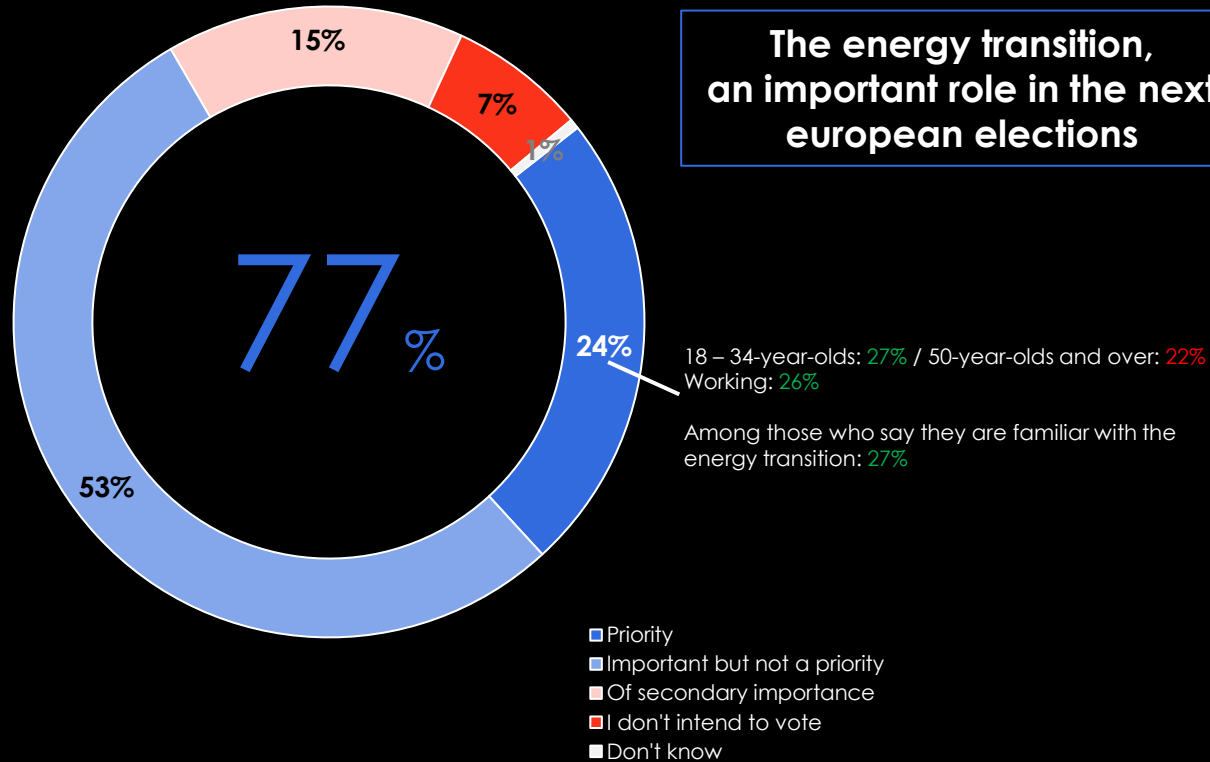
# Portugal, Italy, Romania and Spain are far more enthusiastic about the energy transition



# 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





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# THANK YOU

