

THE EIB CLIMATE SURVEY 2019-2020

HOW CITIZENS ARE CONFRONTING THE CLIMATE CRISIS AND WHAT
ACTIONS THEY EXPECT FROM POLICYMAKERS AND BUSINESSES

OUR
FUTURE

IN
YOUR
HANDS



European
Investment
Bank

The EIB bank

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ACTIONS THEY EXPECT FROM POLICYMAKERS AND BUSINESSES**



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How citizens are confronting the climate crisis and what actions they expect from policymakers and businesses

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CONTENTS

V	FOREWORD BY WERNER HOYER
XII	METHODOLOGY
1	CITIZEN PERCEPTIONS ABOUT THE EXTENT OF CLIMATE CHANGE
27	CITIZENS' INDIVIDUAL COMMITMENTS TO FIGHT CLIMATE CHANGE FOR 2020
67	CITIZENS' SOLUTIONS FOR CLIMATE CHANGE
89	WHO IS RESPONSIBLE FOR TACKLING CLIMATE CHANGE?
109	AFTERWORD BY EMMA NAVARRO

FOREWORD

Actions for optimists

Werner Hoyer, President, European Investment Bank

The European Investment Bank is ambitious for its climate investment. We need to be, because climate change is a massive challenge on many levels, including in the financing of infrastructure and innovation.

Climate change was already a difficult issue to confront, even before the COVID-19 crisis struck at our economies. However, the confluence of these two crises gives us an opportunity now to reshape our economies and to lay the foundations of greater future prosperity. Though our climate survey for 2019-2020 was carried out before COVID-19 emerged, the results nevertheless show that citizens of Europe and elsewhere are determined that their societies should move towards a new, green economy – and they expect policymakers to push ahead on this path.

Every economic shock accelerates long-term structural shifts. Delivering on our increased climate and environmental sustainability ambitions is the best way for the European Investment Bank to help the economy recover from the pandemic. For example, the energy transition can contribute to the recovery by creating more jobs, new and fast-growing industries, more competitiveness and less energy dependence.

We must protect the environment, help the most vulnerable countries and ensure that business has a sustainable future everywhere. Failure to do so will have severe consequences for our societies in the long run – so severe that they could make coronavirus look like the common cold.

We know we can do this. Significant investment is required to address climate change and sustainability if we are to limit the global increase in temperature to below 1.5°C. As part of the recovery package, governments across Europe as well as the European Commission are – rightly – contemplating support packages of unprecedented scale. If we plan to spend so much public money, we need to be sure that this money is spent well and that it benefits the future generations who will have to reimburse it.

Climate finance is the tool by which the European Investment Bank makes its biggest contribution to climate action. The European Union is at the forefront of global efforts to reduce greenhouse gas emissions and to adjust to a changing climate, playing a leading role in the Paris Agreement – and the European Investment Bank is the EU climate bank. Not only because climate action is urgent and expensive, but also because it is an economic opportunity. Transitioning to a low-carbon, more resource-efficient economy is crucial to ensuring long-term competitiveness. With €150 billion of climate action and environment lending since 2012, the EIB Group is the largest multilateral provider of finance for projects supporting climate action and other environmental objectives in the world.

That is not the limit of our ambitions, however.

We shall align all EIB Group financing with the principles and goals of the Paris Agreement by the end of 2020. We aim to dedicate 50% of our new commitments to climate and environmental goals by 2025, compared to 30% last year. By 2030, we want to help unlock €1 trillion of climate and environmental investment, working with our public and private partners.

As an important first step, we will phase out energy projects that depend solely on fossil fuels. The burden of this change must be shared equitably across Europe. Therefore, it will be important to facilitate the transition for those facing the greatest challenge. We must offer a **just transition**. We will need to support growth and jobs in

regions currently dependent on fossil fuels. Failure to do so would weaken European growth, but also the strength of the European project. The European project whose values are so keenly reflected in the responses of citizens to this survey.

The European Investment Bank's second annual climate survey details the knowledge, attitudes, actions, fears and recommendations of citizens by country across the European Union (including the United Kingdom, which was still a member of the European Union when the survey was carried out). It lays out a clear picture of behaviours and beliefs from Estonia to Portugal. Compiled with Paris-based polling company BVA, our survey also collates the country-by-country data to calculate averages for the European Union and compares them to the United States and China, whose citizens were also included in our polling.

There is plenty of scientific evidence for climate change, of course, and mass demonstrations on our streets are but one manifestation of profound public misgiving. **Our survey provides insight after insight into the depth of public concern and the areas of lifestyle and the economy affected by it.**

Europe's policy response to this climate crisis – and to the public's anxiety – is based around the European Green Deal, in which the European Investment Bank is a key partner.

The European Commission has committed the continent to carbon neutrality by 2050. To make that happen, we need investment in climate action, environmental sustainability, innovation and cohesion. If we are to achieve our climate goals, we must invest in innovative technologies that accelerate our ability to counter climate change. We must ensure that societies everywhere make the transition to a climate-friendly economic reality without leaving anyone behind. We must also listen to the citizens who have spoken in our survey – and in demonstrations on the streets. In many ways, they are the same people. We found that more than a third of those we surveyed have already protested, petitioned their government or boycotted companies and brands, so as to fight climate change.

The European Commission's Green Deal sets challenging climate targets and it makes clear that these should be achieved by financing for innovative climate action technology in which the European Investment Bank will be key. Alongside these innovations, the Green Deal lays out details of the Just Transition Mechanism, which will ensure that communities and workers who rely on the fossil-fuel value chain will not be left behind by the move to clean energy. Jobs and opportunity are as much a factor in the Green Deal as the weather.

The European Investment Bank has already set itself up to take on this historic role. In November 2019, our board approved an increase to 50% in the share of our investment dedicated to climate action and environmental projects by 2025. We aim to support €1 trillion of total climate investment in the next decade. And we have a history of powerful action in support of poorer regions that goes back to our very first investments more than 60 years ago financing infrastructure and industry in southern Italy.

As Europe's climate bank, the European Investment Bank already makes massive investments in clean technologies. Just a small selection will demonstrate that our climate projects play a key role in advancing European technological innovation and ensuring that every region partakes in the development of our economy. We recently financed:

- a floating wind farm off the Portuguese coast;
- a ground-breaking Swedish factory developing lithium-ion batteries;
- green urban transport in many cities, including Katowice, the capital of Poland's Silesian mining region; and
- an electric car charging network in Central and Eastern European countries, including Poland and Slovakia.

The climate crisis affords Europe an opportunity to redress its shortfall in innovative technological investment over the past two decades. As we look for creative ways to store clean energy or to move people around without pollution, it ought to be clear to businesses that there is demand among the public for these new technologies and that governments support their development. For example, **70% of Europeans have already switched to a green energy provider or would be willing to do so, according to our survey. In Italy, that figure is at 82%.**

That is why I am confident that, in the case of climate technology, private investors will reverse the risk-aversion and venture capital shortfall that has hampered European innovation in recent times. In our survey, citizens make it clear that they are ready to join this move and in some regions they are ready to make sacrifices for it. Consider that we found 70% of Europeans willing to pay an extra tax to fight climate change.

The depth of climate concern among the 30 000 citizens we surveyed stands behind the surprising finding that a majority of citizens are willing to pay a new tax. Europeans do not see the climate crisis as something happening elsewhere and to other people. Our survey illustrates that Europeans believe they and their children will be – if they aren't already – directly affected by climate change:

- 90% of Europeans believe their children will feel the consequences of climate change in their everyday lives; and
- 33% of Europeans believe they will have to move to a colder or warmer region or country because of climate change.

Compare these striking numbers with the fact that only 9% of European citizens do not believe climate change is happening, compared to 18% in the United States. Europeans recognise the nature of the problem and, as our survey shows, have taken steps to counter it.

Our survey is a powerful tool for interpreting the variations in understanding of – and attitudes to – climate change across our continent. Southern Europeans, who so far are most affected by climate change, demonstrate a greater willingness to believe that climate change can be reversed. This optimism is important, because our study found that pessimism about whether climate change can be reversed leads to a fatalistic vision of the future, and that could be a self-fulfilling prophecy.

Climate change is, of course, neither a national nor even a continental phenomenon. So our survey examined the perceptions of climate change outside Europe, specifically among Chinese and American citizens. Though Americans are more sceptical than Europeans, it should be noted that even there we found that 76% of respondents believe developed countries have a responsibility to help developing countries fight climate change. This global front is cause for optimism, as is this finding from our survey: 80% of Chinese respondents believe climate change is still reversible and 72% of them say their individual behaviour can make a difference in the climate fight. **This is the kind of data that proves the European Investment Bank, Europe's climate bank, should continue with partners around the world in its powerful development work, in which climate action is such a significant factor.**

The climate technologies we finance – from the massive solar facilities at Ouarzazate in the Moroccan desert and off the German coast at Butendiek to a wind farm run by a collective in Austria and single, off-grid solar panels on the roofs of homes in Congo – transform the critical need for climate action into investment opportunities. Our participation demonstrates the validity of any project's business case, because of the depth of our expertise in climate action, and thus attracts private money into the climate battle alongside our own investments.

I am convinced that many more disruptive ideas are out there. We just need to put more financing into the right hands. We must inspire the right people and work with the right partners. We have to push industries to be more

creative and invent breakthrough technologies. Remember, our climate survey proves that there are customers waiting in every country of the European Union – and in China and the United States. For companies that are willing to invest in climate, it can be a source of future profit and growth.

Europe can reap many economic benefits by leading the way on climate action. European industries must show now that they truly want to be part of this. They need to innovate, create new solutions, commercialise new products and launch breakthrough technologies. Investments are urgently needed to drive down the cost of new technologies, increase efficiencies, support first-movers and create new markets.

Of course, this is not just a matter of investors wanting to help. The private sector obviously focuses on the bottom line. Putting money into new technologies and business models is risky and the outcomes are not guaranteed. However, **this survey is one supportive element in the business plan of any company aiming to contribute to climate action. The market is there. These numbers prove it.** Join with us – and the optimistic citizens of the world – to change our economies and build a clean, safe future.

METHODOLOGY

Samples were based on gender, age, region and social class quotas from official statistics in each country. The survey was conducted from 27 September to 21 October 2019 in 30 countries on a total of 30 088 respondents.

In China, the samples surveyed via online surveys are typically more urban, younger and more highly educated than the general population. However, this method of collection is the most effective and presents the highest quality results. It is conventionally used by international opinion studies.

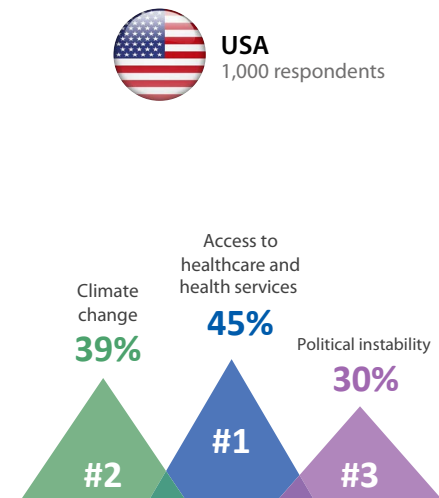
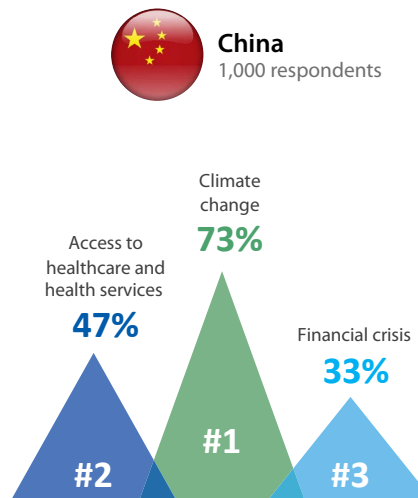
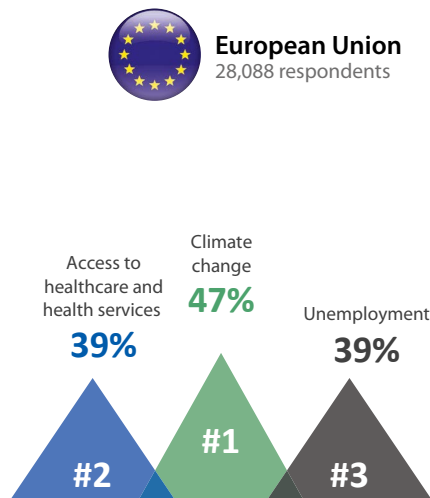
There has been a full redesign of the questionnaire for this survey, so no direct comparisons can be made with the EIB Climate Survey 2018-2019.

CITIZEN PERCEPTIONS ABOUT THE EXTENT OF CLIMATE CHANGE



FOR EUROPEANS AND CHINESE, CLIMATE CHANGE IS THE BIGGEST CHALLENGE. AMERICANS WORRY MORE ABOUT ACCESS TO HEALTH SERVICES

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



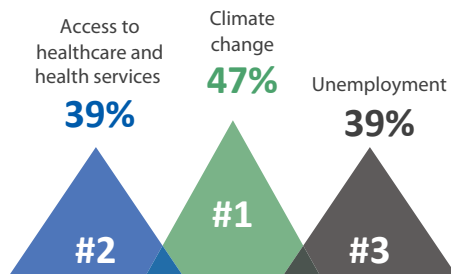
BIGGEST CHALLENGES FACED BY EUROPEAN CITIZENS

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

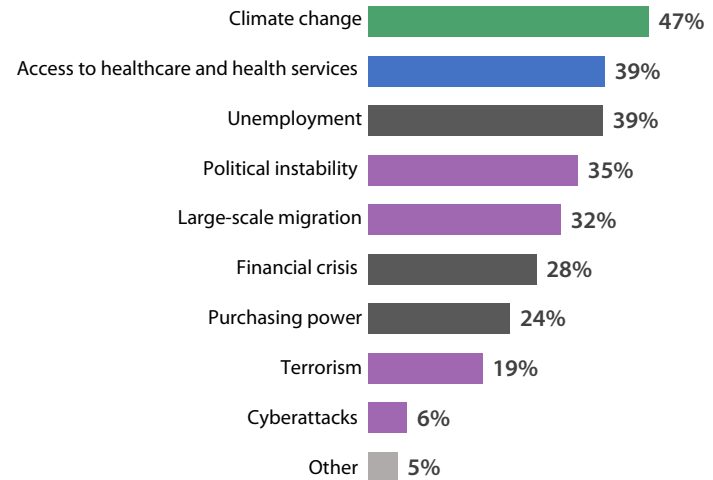


European Union
28,088 respondents

Top 3 biggest challenges faced by EU citizens



All challenges

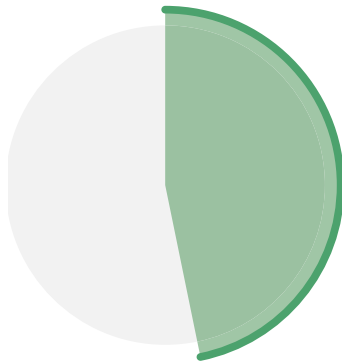


ALMOST HALF OF EUROPEANS CITE CLIMATE CHANGE AS ONE OF THE BIGGEST CHALLENGES FACING THEIR COUNTRY

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



European Union
28,088 respondents



47%

of EU citizens believe that climate change is among the biggest challenges they face

Female: 48% / Male: 45%

65 y.o and over: 52% / 30-64 y.o: 44%

Unemployed + inactive: 49% / Lower occupations: 43%

Without children: 49% / With children: 42%

Upper class: 48% / Underprivileged: 45%



China
1,000 respondents

73%

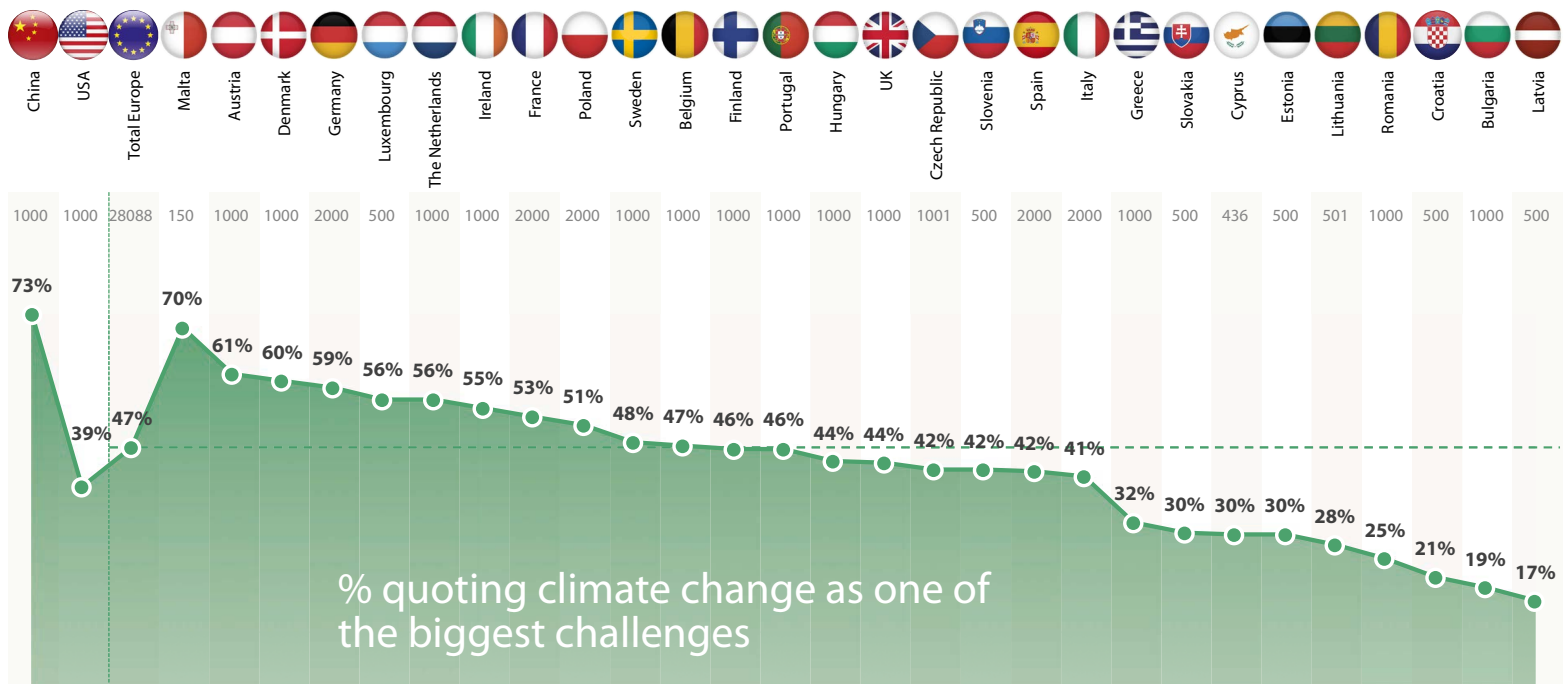


USA
1,000 respondents

39%

CITIZENS OF WESTERN EUROPE ARE MORE LIKELY TO CITE CLIMATE CHANGE AS AN ISSUE THAN EASTERN EUROPEANS

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



MORE THAN HALF OF EUROPEANS, CHINESE AND AMERICANS BELIEVE CLIMATE CHANGE IS REVERSIBLE

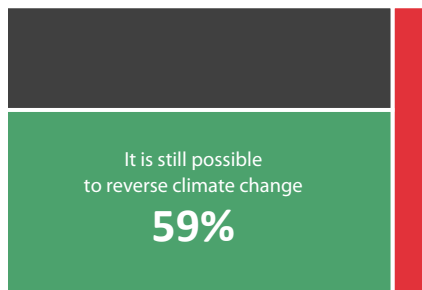
Considering your views on climate change, which statement do you most agree with?



European Union
28,088 respondents

Climate change is irreversible

33%



I don't believe in climate change

9%



China
1,000 respondents

Climate change is irreversible

19%



I don't believe in climate change

1%



USA
1,000 respondents

Climate change is irreversible

28%



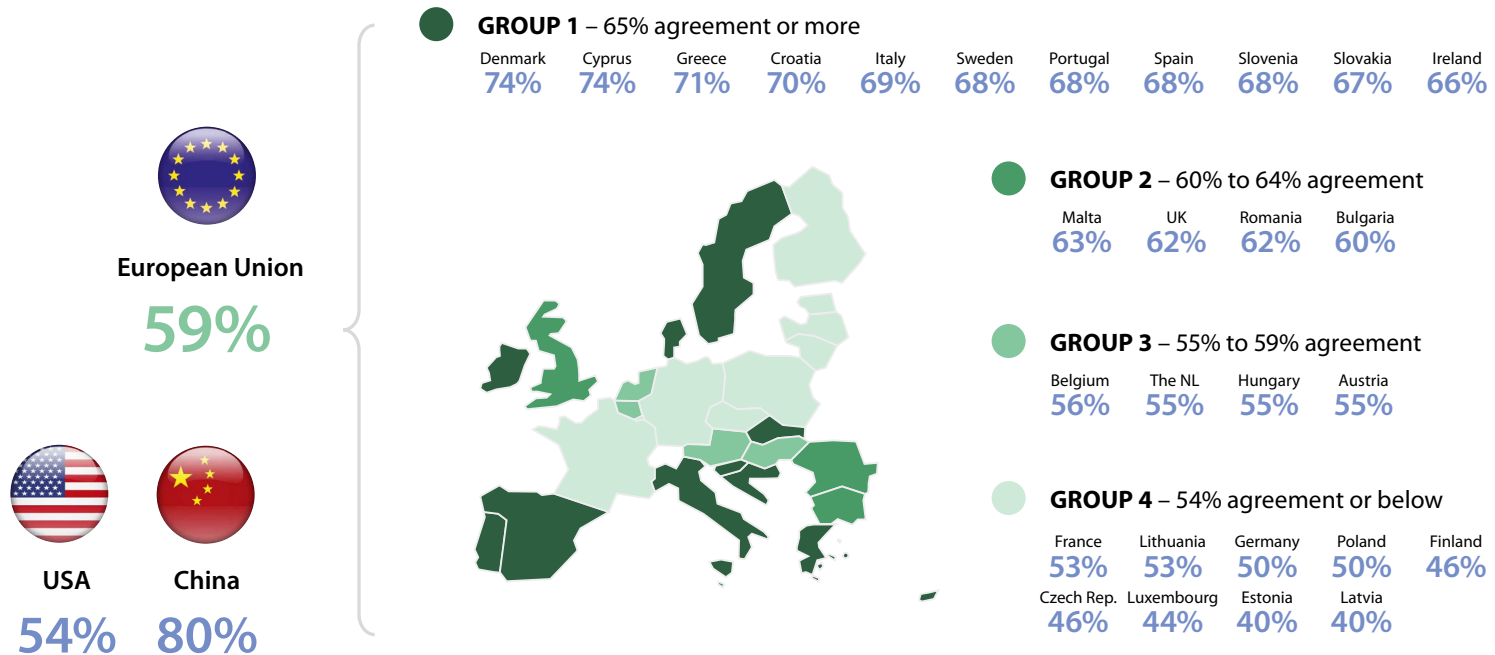
I don't believe in climate change

18%

SOUTHERN AND NORTHERN EUROPEANS ARE MORE OPTIMISTIC ABOUT REVERSING CLIMATE CHANGE THAN WESTERN AND CENTRAL EUROPEANS

Considering your views on climate change, which statement do you most agree with?

% who agree it is still possible to reverse climate change



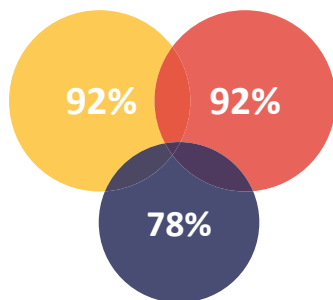
EUROPEANS AND CHINESE AGREE ON THE CAUSES AND CONSEQUENCES OF CLIMATE CHANGE. AMERICANS REMAIN DOUBTFUL



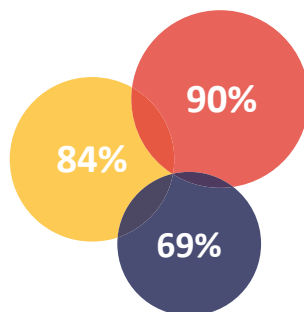
In your opinion, is each of the following statements concerning climate change true or false?

% true

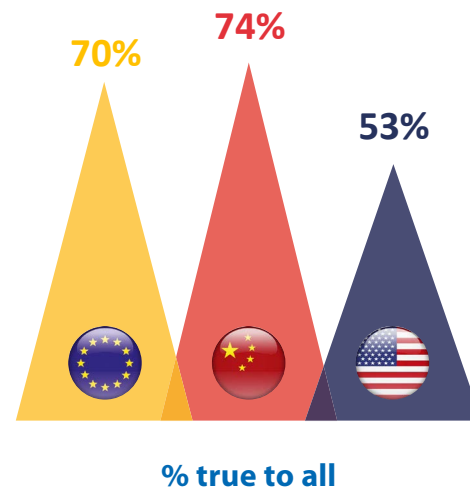
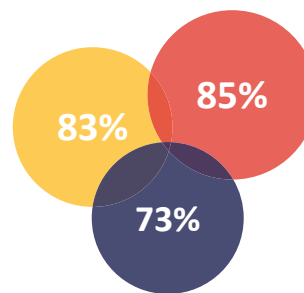
Climate change has had an impact on every ocean and every continent over the past few decades



Humans and human activity are the main cause of climate change



Even if greenhouse gas emissions cease, their consequences will continue to be felt for centuries



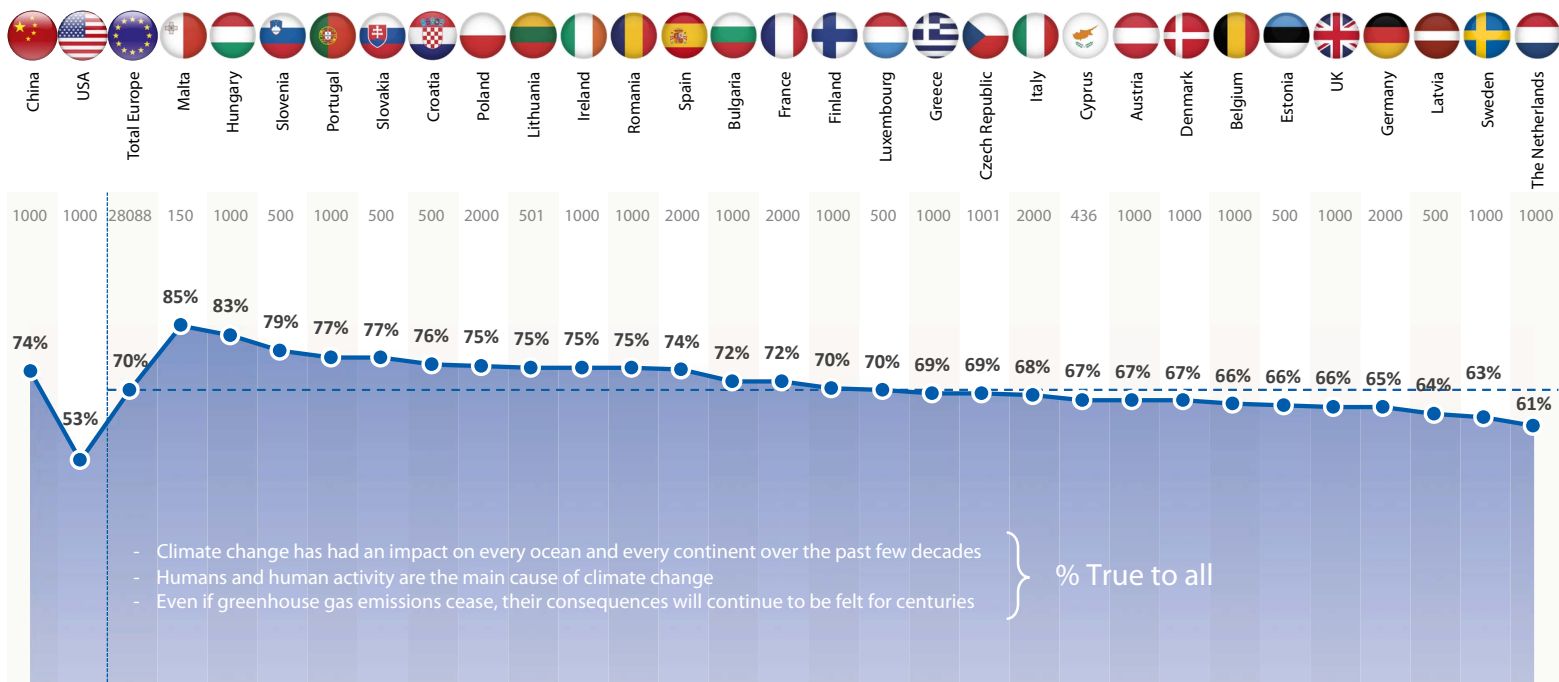
EUROPEANS AND CHINESE AGREE ON THE CAUSES AND CONSEQUENCES OF CLIMATE CHANGE. AMERICANS REMAIN DOUBTFUL

In your opinion, is each of the following statements concerning climate change true or false?



BELIEF IN STATEMENTS PRESENTED RELATING TO CLIMATE CHANGE

In your opinion, is each of the following statements concerning climate change true or false?



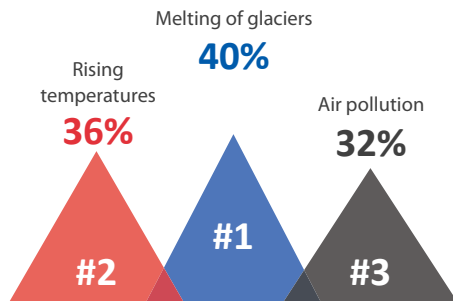
MORE THAN A THIRD OF CHINESE, EUROPEANS AND AMERICANS DEEM THE RISE IN TEMPERATURES THE MOST WORRYING SIGN OF CLIMATE CHANGE

Which of the signs of climate change do you find most worrying?

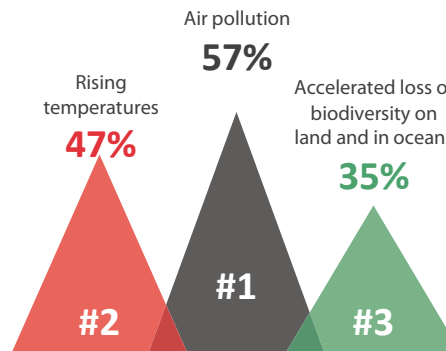
Top 3 signs of climate change



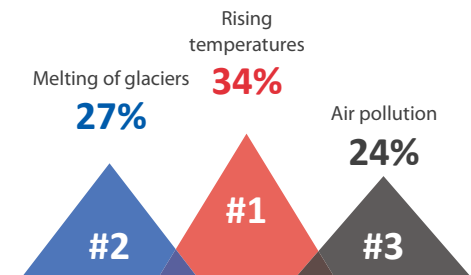
European Union
28,088 respondents



China
1,000 respondents

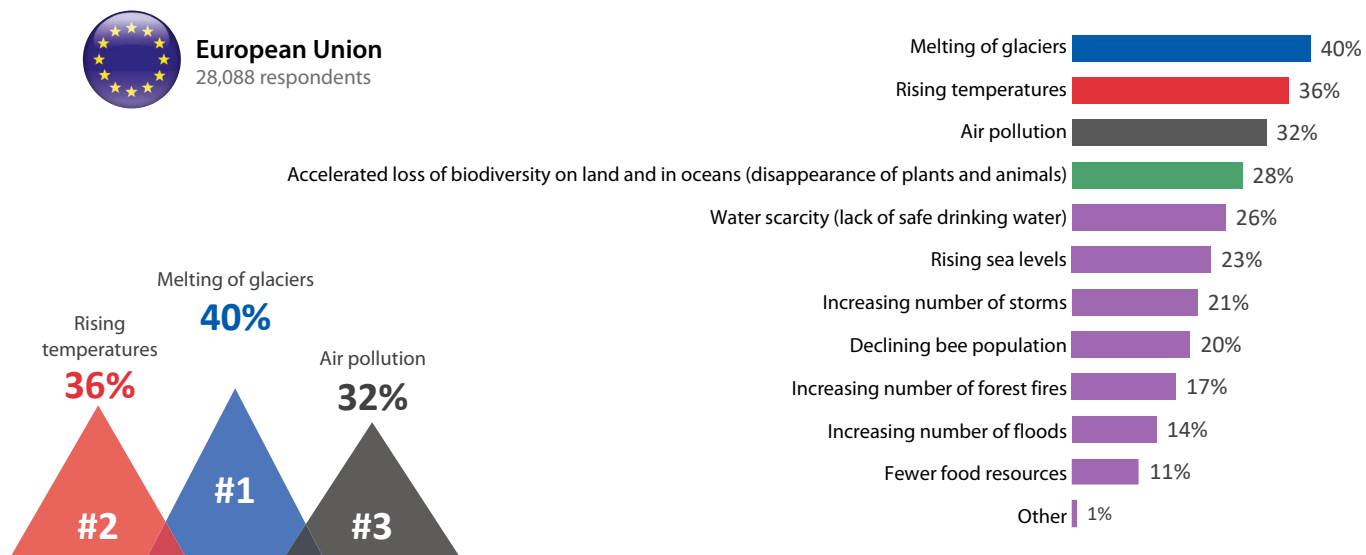


USA
1,000 respondents



EUROPEANS DEEM THE MELTING OF GLACIERS THE MOST WORRYING CONSEQUENCE OF CLIMATE CHANGE

Which of the following signs of climate change do you find most worrying?



COASTAL NATIONS FEAR MELTING GLACIERS AND RISING SEA LEVELS. LANDLOCKED AND EASTERN COUNTRIES FEAR AIR POLLUTION AND RISING TEMPERATURES

Which of the following signs of climate change do you find most worrying?



Melting of glaciers

Romania	Greece	Spain	Italy
50%	49%	48%	47%
Finland	Portugal	Croatia	Estonia
44%	43%	41%	40%
Slovenia	Sweden	Germany	UK
39%	39%	36%	34%
Ireland	EU		
34%	40%		



Air pollution

Malta	Bulgaria	Lithuania	Romania
71%	54%	53%	50%
Slovakia	Poland	Latvia	The NL
48%	48%	47%	37%



Rising sea levels

Ireland
34%



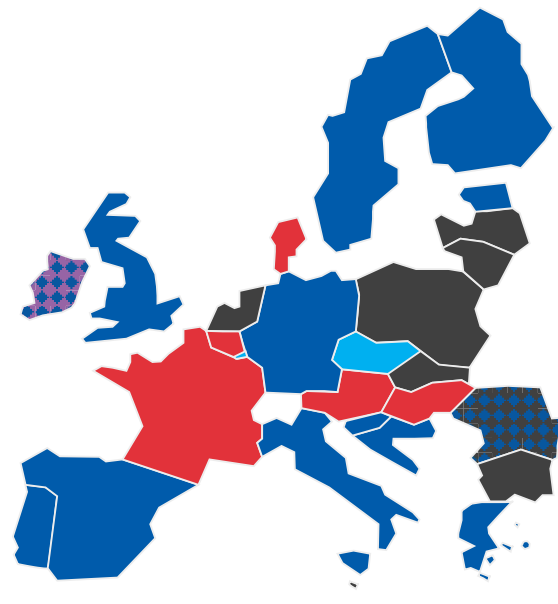
Water scarcity

Czech Rep.	Luxembourg
51%	38%



Rising temperatures

Cyprus	Hungary	France
47%	44%	39%
Denmark	Austria	Belgium
39%	36%	32%



6 OUT OF 10 EUROPEAN, CHINESE AND AMERICAN CITIZENS BELIEVE THEIR INDIVIDUAL BEHAVIOUR CAN HELP TACKLE CLIMATE CHANGE

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



European Union
28,088 respondents

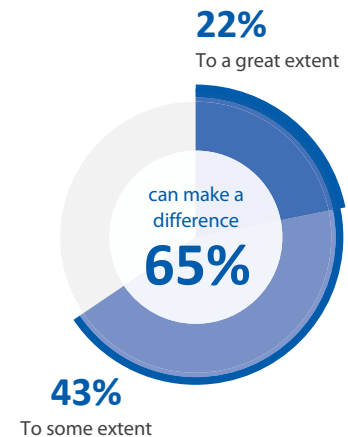
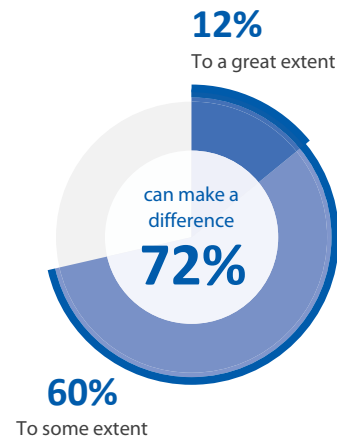
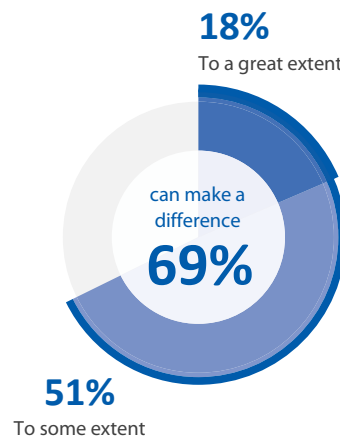


China
1,000 respondents



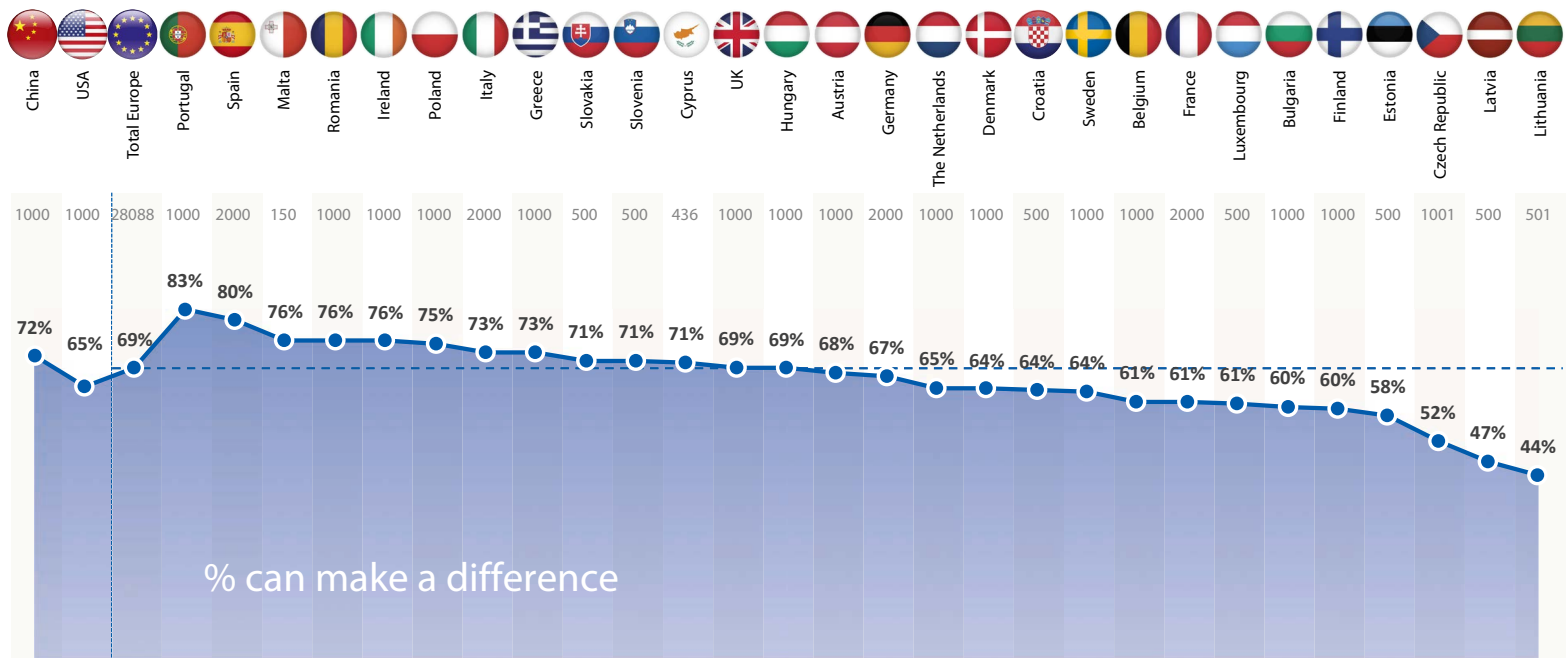
USA
1,000 respondents

More than **6**
respondents out of
10
think their behaviour can
make a difference in
tackling climate change



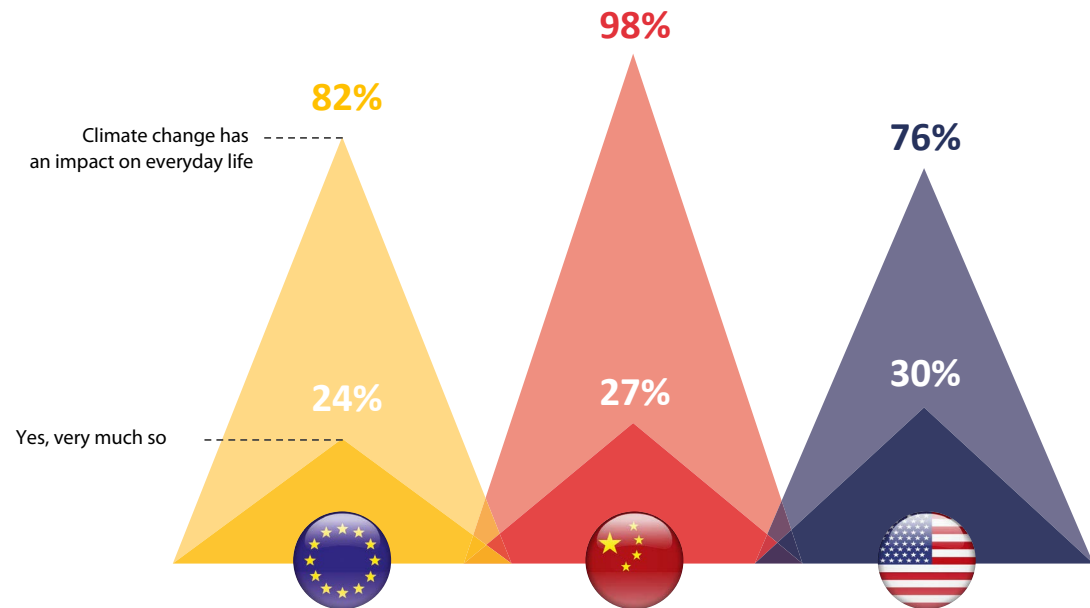
HOW MUCH DO EUROPEANS BELIEVE THEIR BEHAVIOUR CAN MAKE A DIFFERENCE, BY COUNTRY?

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



THREE QUARTERS OR MORE OF CHINESE, AMERICANS AND EUROPEANS BELIEVE CLIMATE CHANGE HAS AN IMPACT ON THEIR EVERYDAY LIFE

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



SOUTHERN EUROPEANS ARE MORE LIKELY TO BELIEVE CLIMATE CHANGE HAS AN IMPACT ON THEIR EVERYDAY LIFE

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

% who agree that climate change has an impact on everyday life



European Union

82%



USA

76%



China

98%



GROUP 1 – 90% or more agreement

Romania	Italy	Malta	Hungary	Croatia	Greece	Cyprus	Bulgaria	Slovenia
96%	94%	94%	94%	93%	93%	92%	90%	90%



GROUP 2 – 80% to 89% agreement

Portugal	Spain	Slovakia	Poland
88%	87%	87%	86%
Luxembourg	France	Czech Rep.	
86%	83%	82%	



GROUP 3 – 70% to 79% agreement

Germany	Austria	Ireland	Lithuania
78%	78%	77%	76%
Latvia	Belgium	Estonia	The NL
75%	73%	72%	70%



GROUP 4 – < 70% agreement

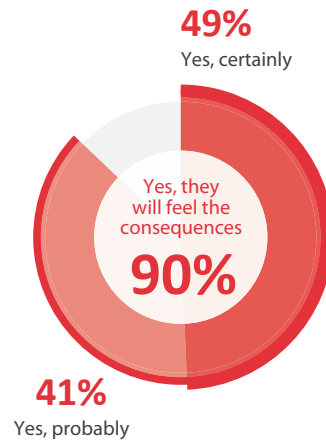
Finland	UK	Sweden	Denmark
67%	67%	66%	63%

MORE THAN THREE QUARTERS OF PARENTS BELIEVE THEIR CHILDREN WILL FEEL THE CONSEQUENCES OF CLIMATE CHANGE

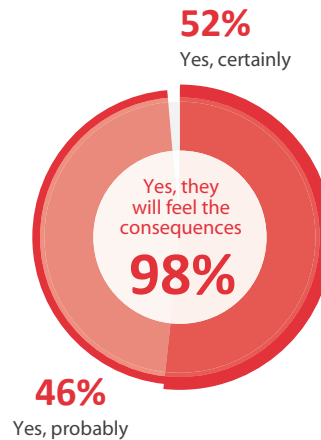
Do you think your children will feel the consequences of climate change in their future everyday life?



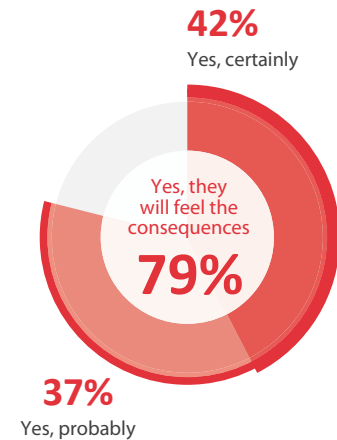
European Union
28,088 respondents



China
1,000 respondents

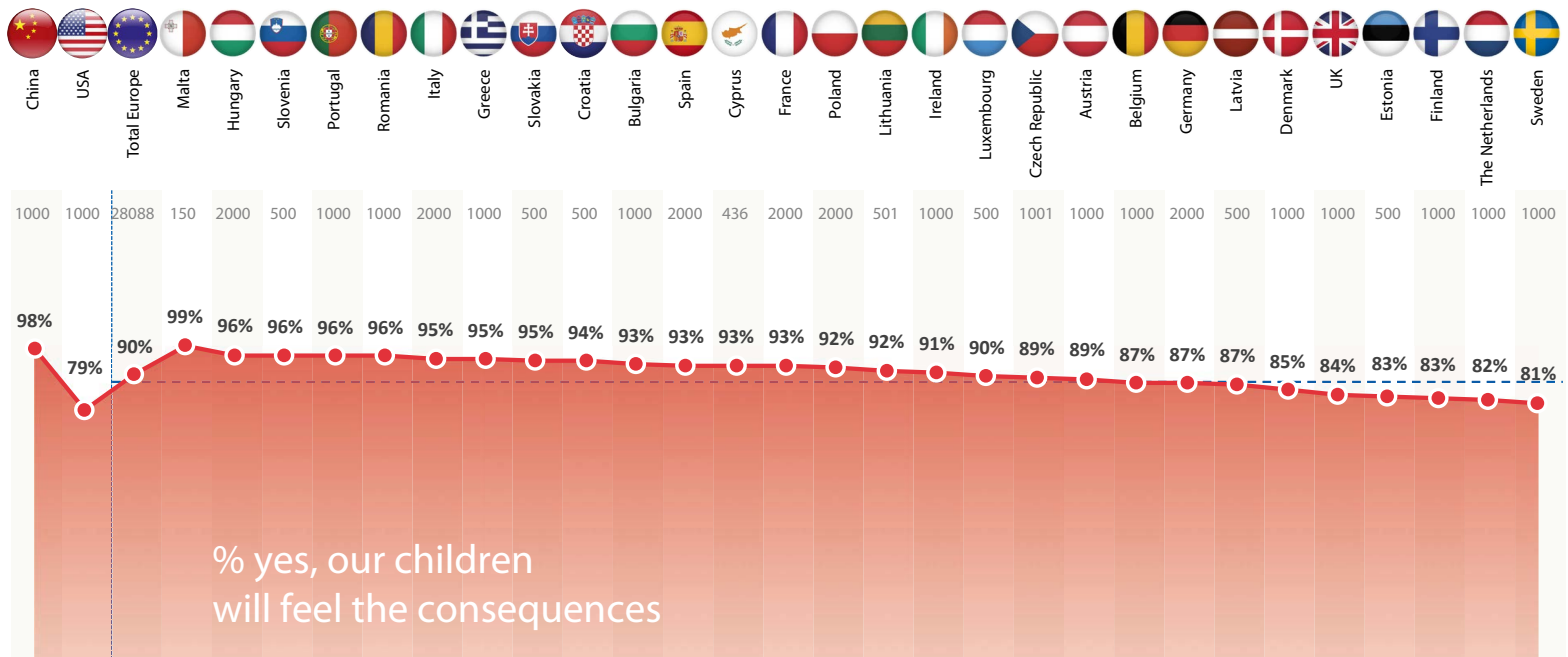


USA
1,000 respondents



BELIEF THAT FUTURE GENERATIONS WILL FEEL THE CONSEQUENCES OF CLIMATE CHANGE BY COUNTRY

Do you think your children will feel the consequences of climate change in their future everyday life?



NEARLY HALF OF AMERICANS AND CHINESE BELIEVE THEY WILL HAVE TO MOVE BECAUSE OF CLIMATE CHANGE

Do you think that you will have to move in the future because of climate change?



33% of European
Citizens think they will
have to move because
of climate change



48%
of Americans

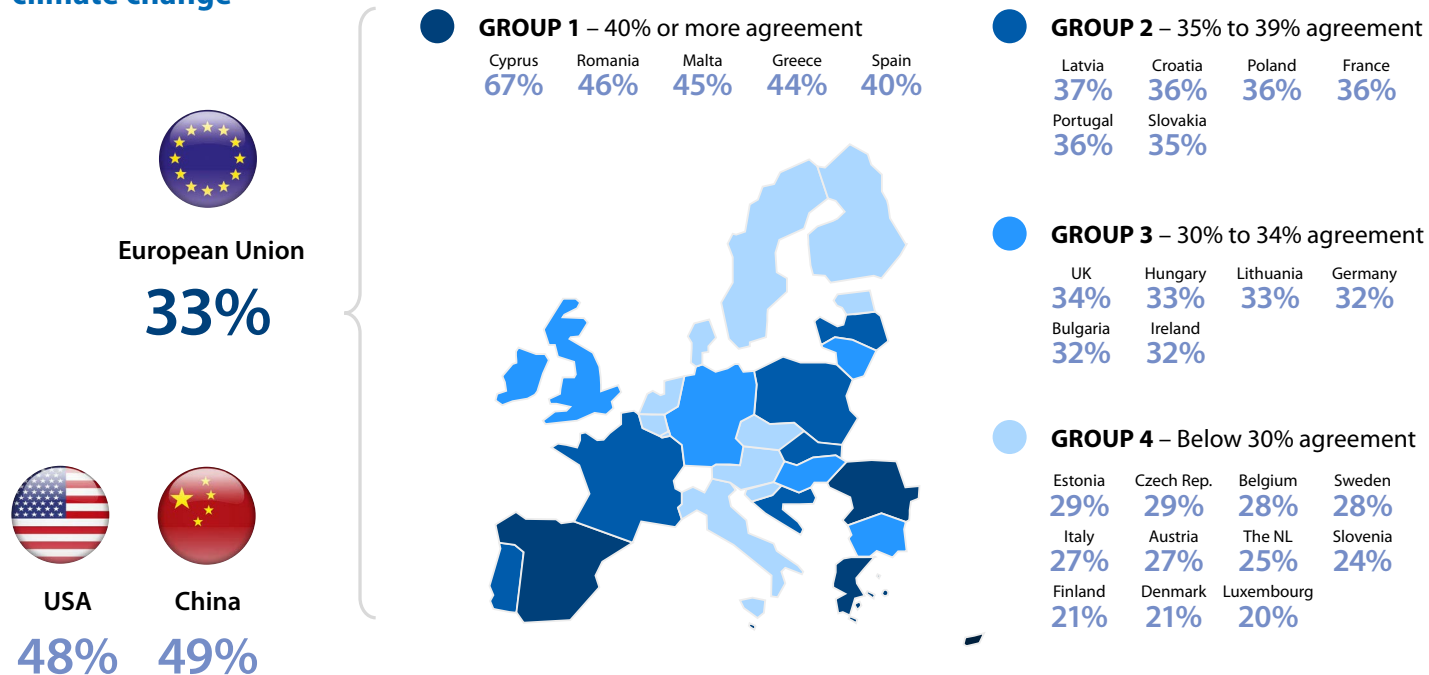


49%
of Chinese

WESTERN AND EASTERN EUROPEANS ARE MORE LIKELY TO BELIEVE THEY WILL HAVE TO MOVE BECAUSE OF CLIMATE CHANGE

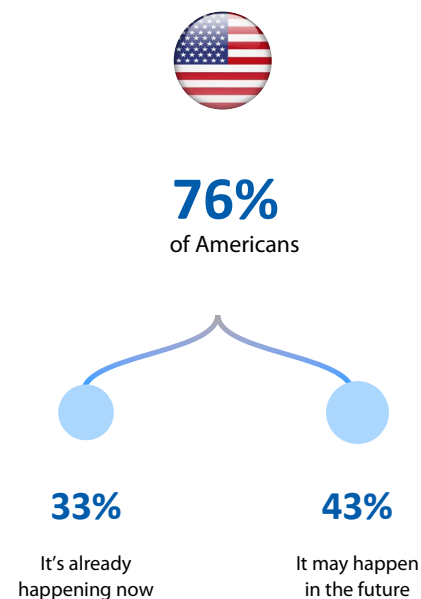
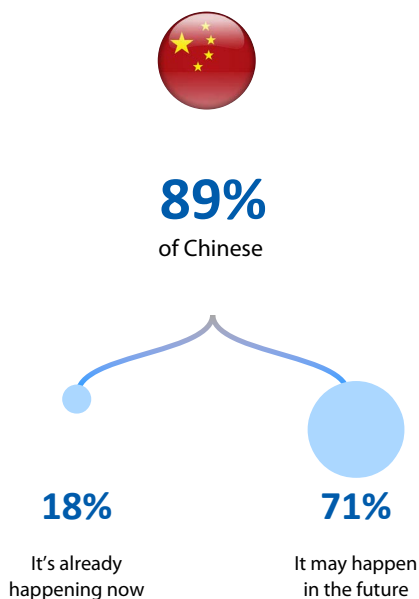
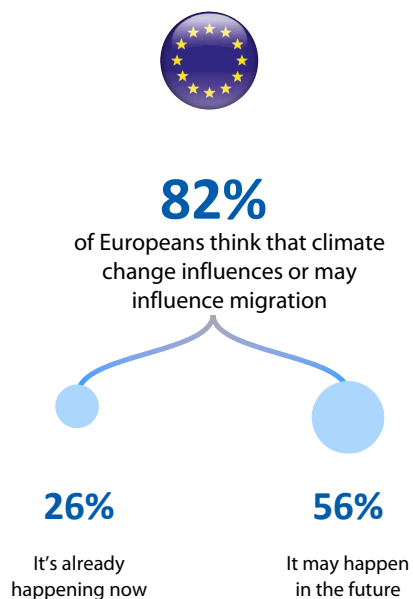
Do you think that you will have to move in the future because of climate change?

% think they will have to move because of climate change



MORE THAN THREE QUARTERS OF CHINESE, EUROPEANS AND AMERICANS BELIEVE CLIMATE CHANGE INFLUENCES OR WILL INFLUENCE MIGRATION

Do you think climate change influences migration, i.e. do you think people will migrate from their countries and move to yours because of extreme climate conditions?



PROFESSIONALS ARE MORE LIKELY TO BELIEVE CLIMATE CHANGE INFLUENCES OR WILL INFLUENCE MIGRATION

Do you think climate change influences migration, i.e. do you think people will migrate from their countries and move to yours because of extreme climate conditions?



82%

of Europeans think that climate change influences or may influence migration

15-29 y.o: 87%

30-64 y.o: 81%

Higher occup.: 85%

Left wing: 88%

Right wing: 79%



89%

of Chinese

30-64 y.o: 93%

15-29 y.o: 82%

Higher occup: 92%

Unemployed + Inactive: 75%

With children: 94%

Without: 83%

Higher income: 96%

Lower: 71%



76%

of Americans

15-29 y.o: 87%

65 y.o+: 64%

Higher occup: 82%

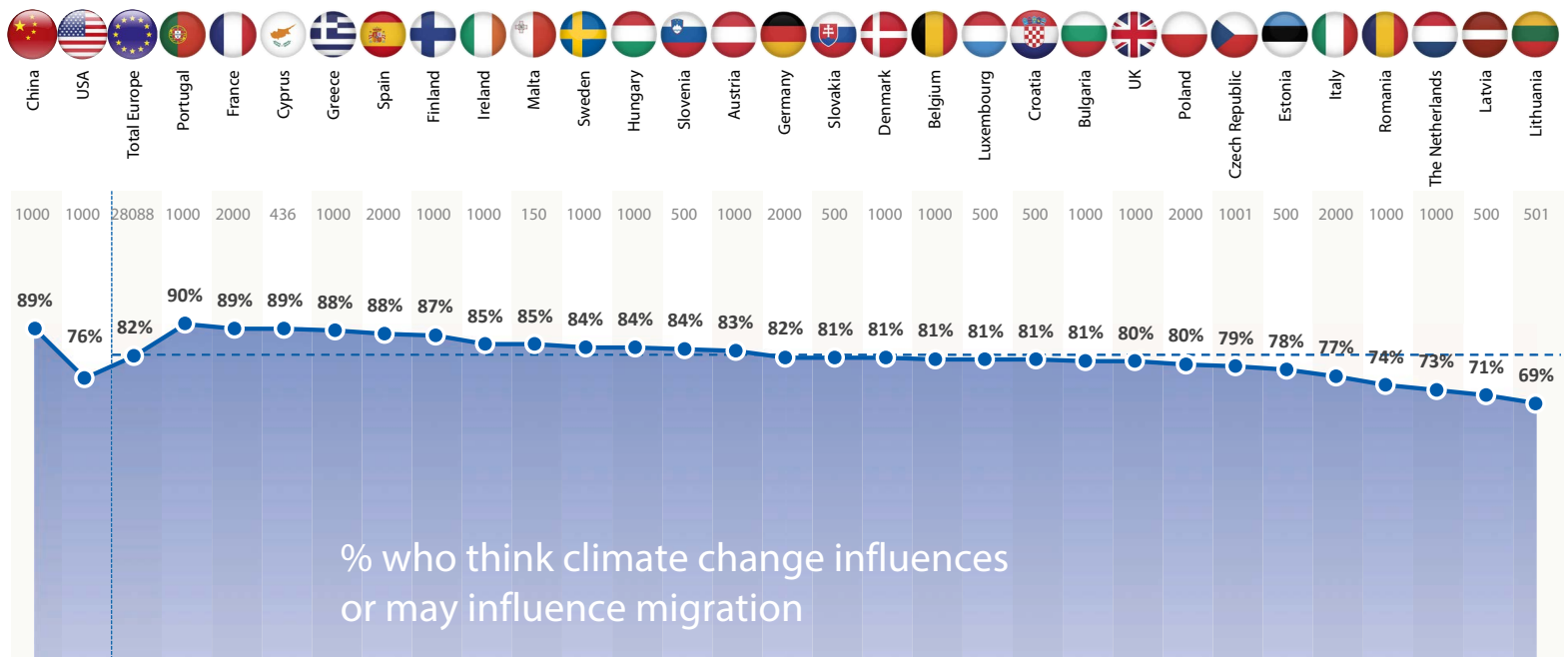
Unemployed + Inactive : 72%

Liberal: 92%

Conservative: 69%

BELIEF THAT CLIMATE CHANGE INFLUENCES OR WILL INFLUENCE MIGRATION

Do you think climate change influences migration, i.e. do you think people will migrate from their countries and move to yours because of extreme climate conditions?

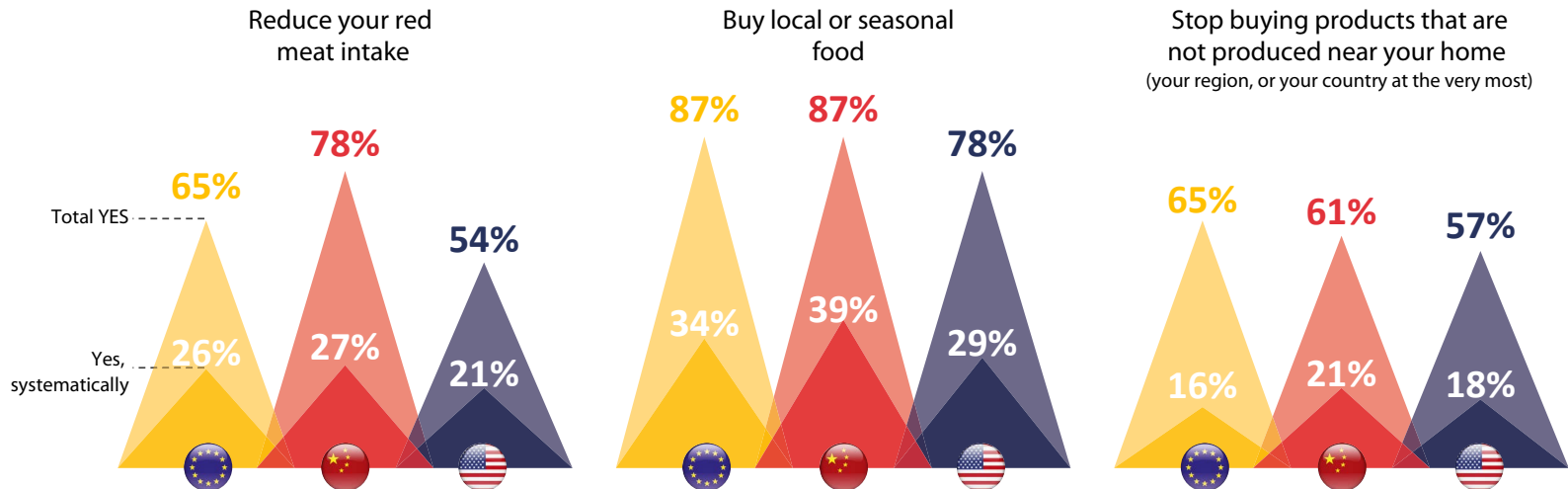


CITIZENS' INDIVIDUAL COMMITMENTS TO FIGHT CLIMATE CHANGE FOR 2020



BUYING LOCAL AND SEASONAL FOOD IS THE LEADING ACTION TAKEN BY CITIZENS TO FIGHT CLIMATE CHANGE

Do you do any of the following to fight climate change?



CHINESE CITIZENS HAVE A MORE SYSTEMATIC APPROACH TOWARD FOOD-RELATED ACTIONS TO FIGHT CLIMATE CHANGE THAN AMERICANS OR EUROPEANS

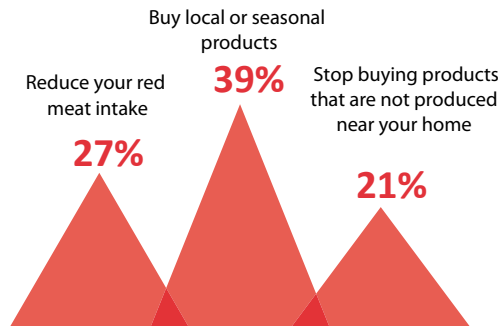
Do you do any of the following to fight climate change?



European Union
28,088 respondents



China
1,000 respondents



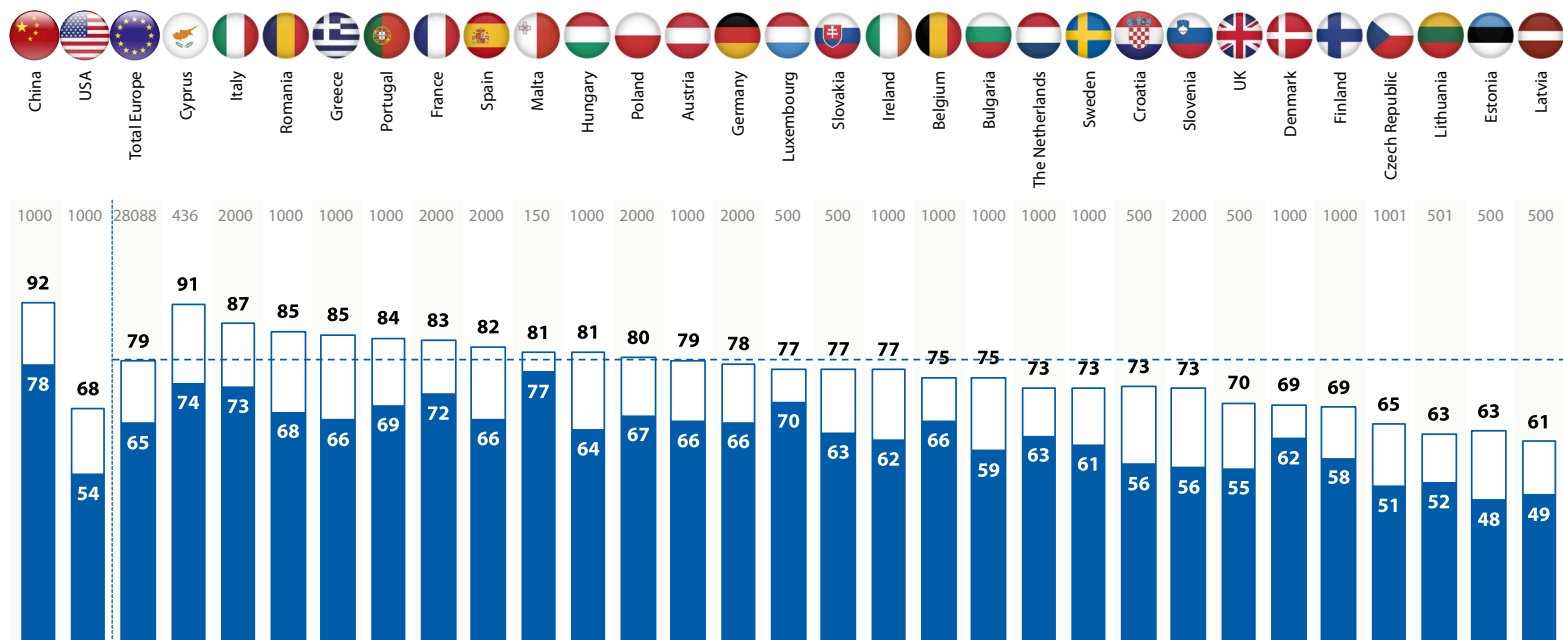
USA
1,000 respondents



EFFORTS TO REDUCE RED MEAT INTAKE, BY COUNTRY

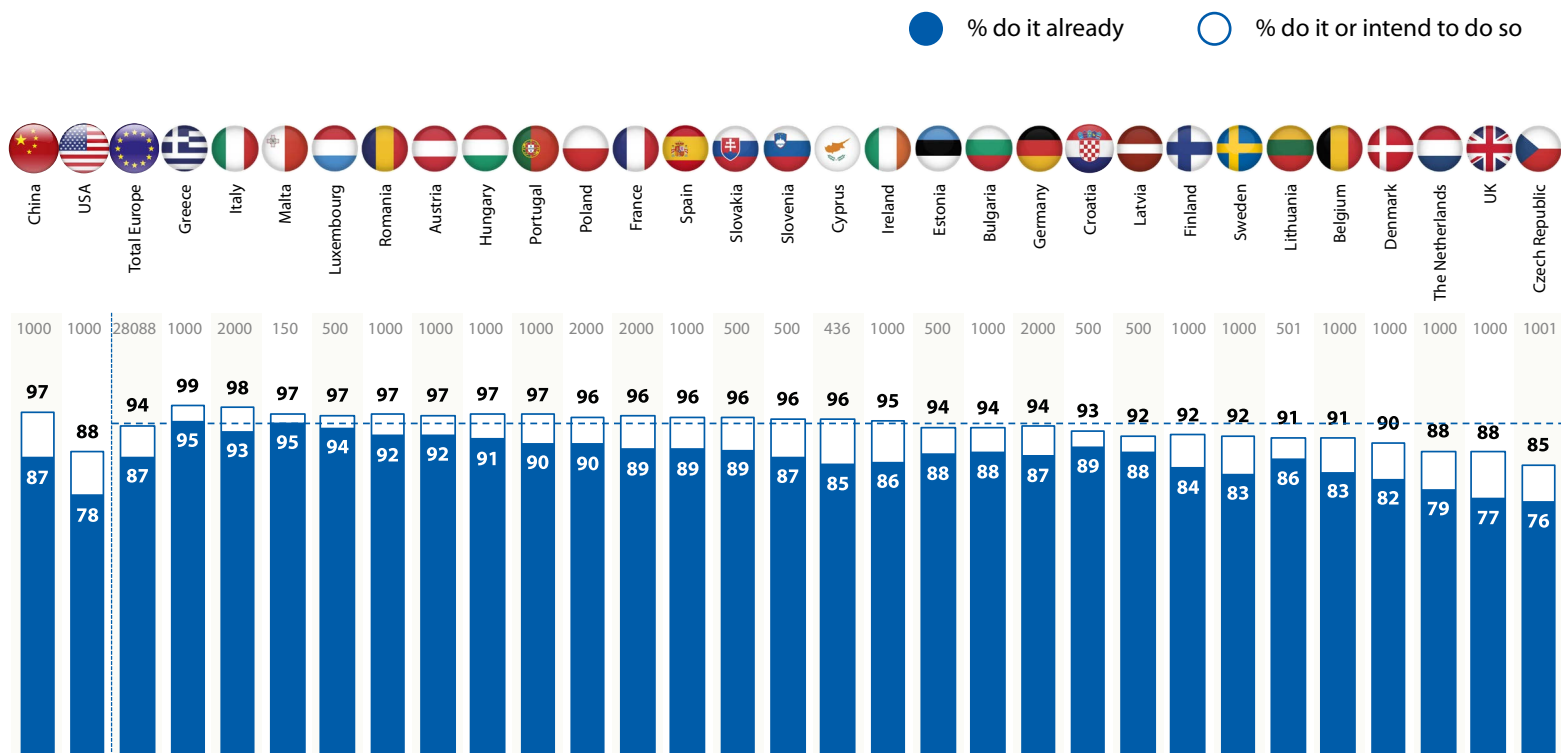
Have you reduced your red meat intake to fight climate change?

● % do it already ○ % do it or intend to do so



EFFORTS TO BUY LOCAL OR SEASONAL PRODUCTS, BY COUNTRY

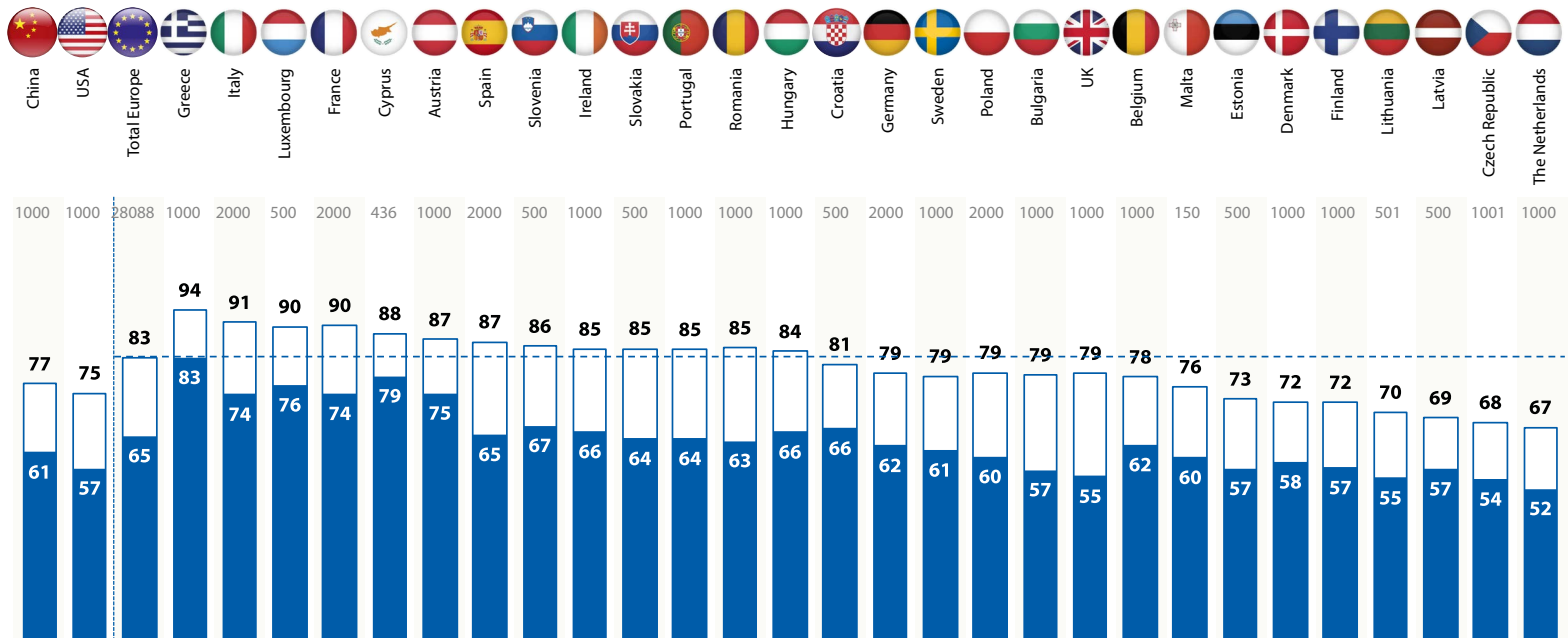
Do you buy local or seasonal products to fight climate change?



EFFORTS TO STOP BUYING PRODUCTS FROM FAR AWAY, BY COUNTRY

Have you stopped buying products that are not produced near your home (your region, or your country at the very most)?

● % do it already ○ % do it or intend to do so



CHINESE AND EUROPEAN CITIZENS ARE MORE LIKELY TO WALK, CYCLE OR USE PUBLIC TRANSPORT THAN AMERICANS

Regarding transport, do you do any of the following to fight climate change?



European Union
28,088 respondents

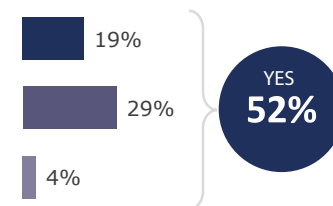
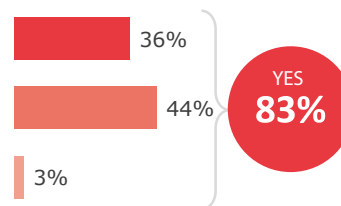
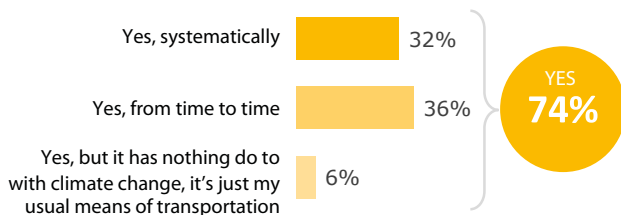


China
1,000 respondents

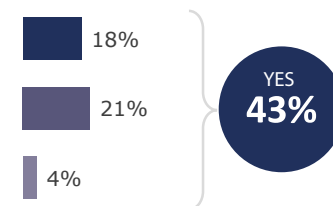
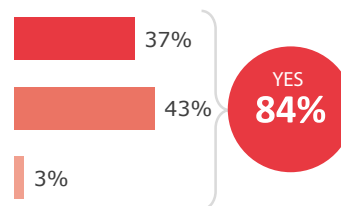
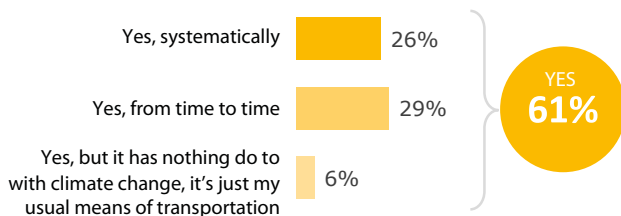


USA
1,000 respondents

Walk or cycle on your daily trips



Use public transport rather than drive on your daily trips



YOUNG PEOPLE ARE MORE LIKELY TO SYSTEMATICALLY WALK, CYCLE OR USE PUBLIC TRANSPORT ON THEIR DAILY TRIPS

Regarding transport, do you do any of the following to fight climate change?

% of 15- to 29-year-olds responding yes, systematically



European Union
28,088 respondents



China
1,000 respondents



USA
1,000 respondents

Walk or cycle on
your daily trips

32%

36%

19%

Use public transport
rather than drive on
your daily trips

26%

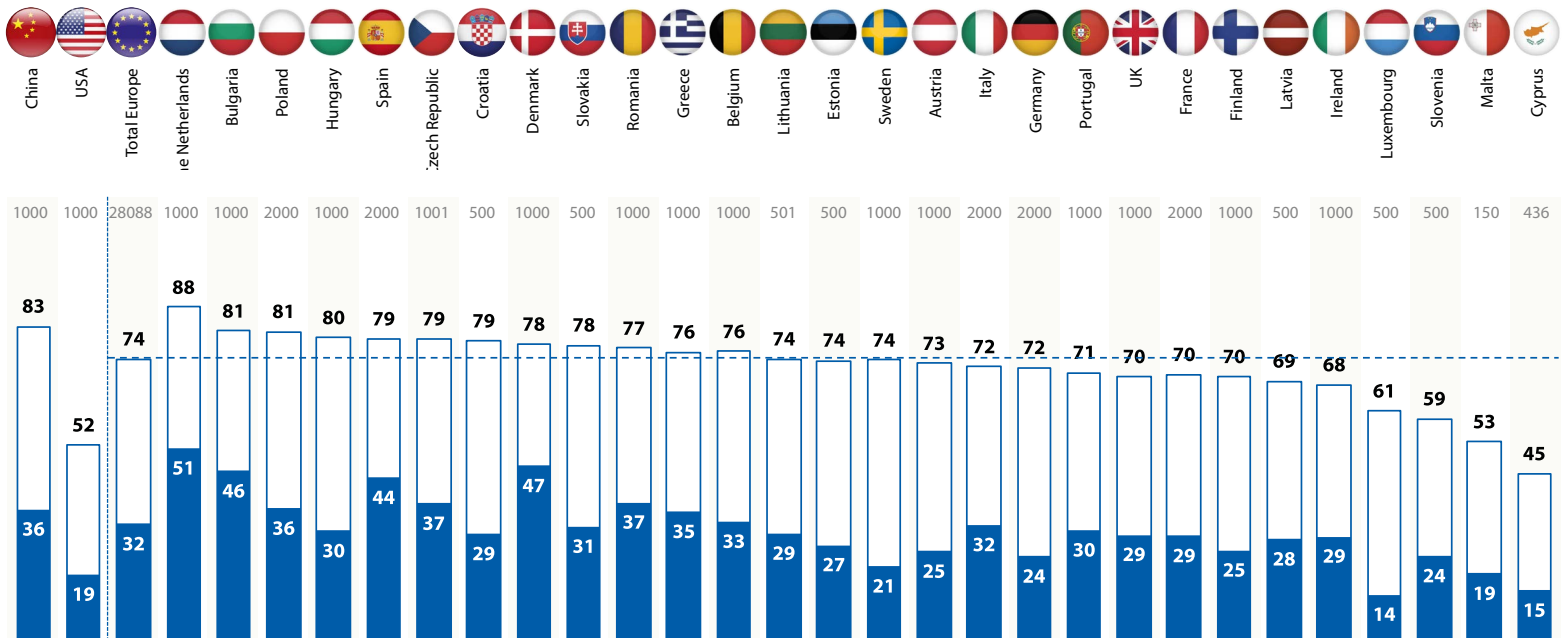
37%

18%

EFFORTS TO WALK OR CYCLE ON DAILY TRIPS, BY COUNTRY

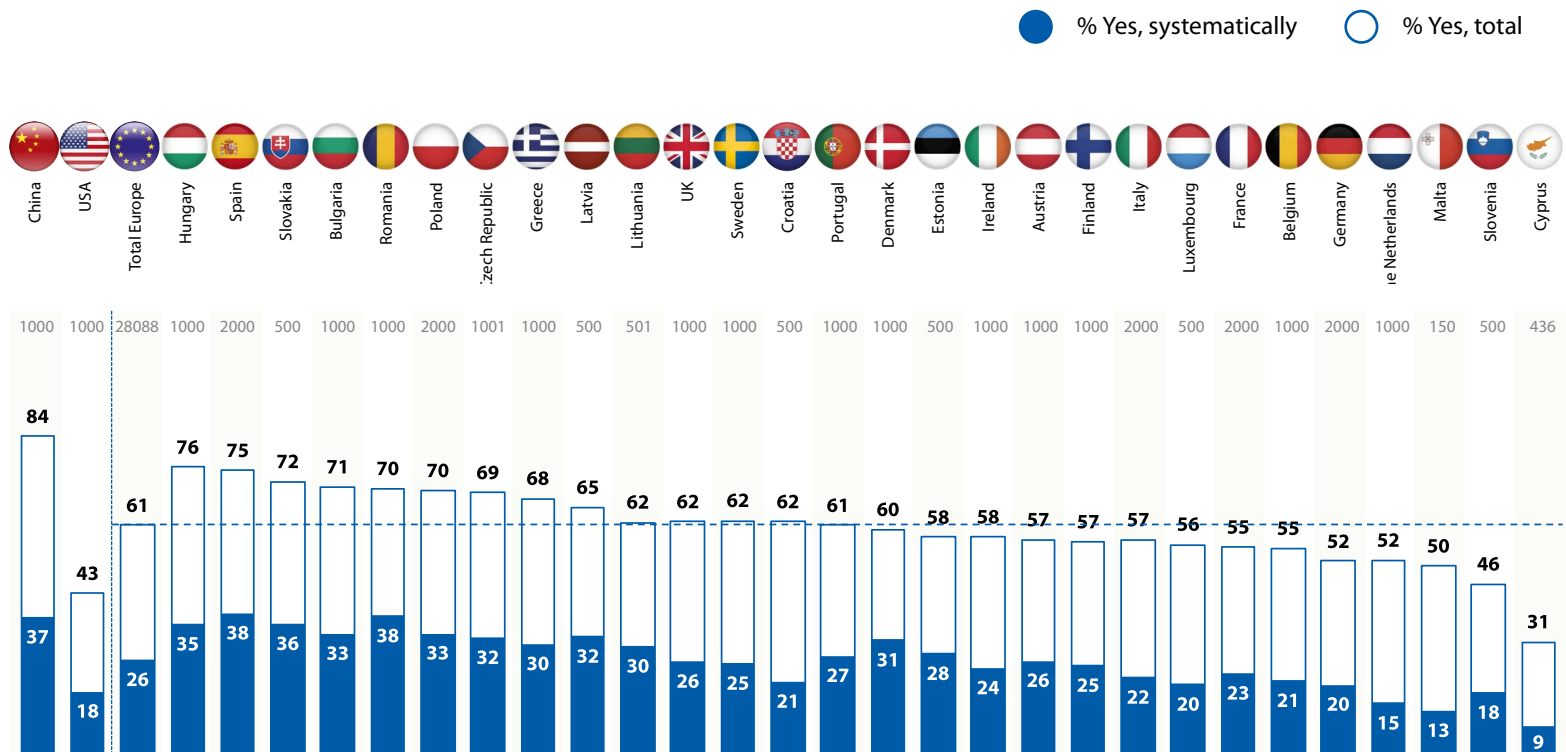
Do you walk or cycle on your daily trips to fight climate change?

● % Yes, systematically ○ % Yes, total



EFFORTS TO USE PUBLIC TRANSPORT ON DAILY TRIPS, BY COUNTRY

Do you use public transport rather than drive on your daily trips to fight climate change?



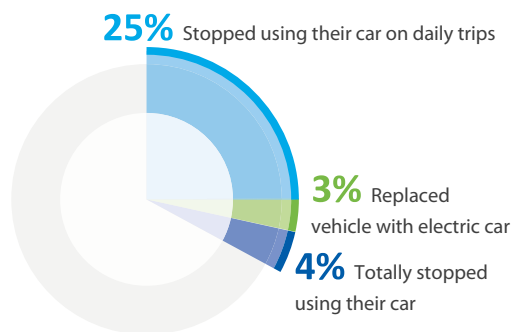
CHINESE AND EUROPEAN CITIZENS HAVE MADE SIGNIFICANT EFFORTS TO CHANGE THEIR DRIVING HABITS. AMERICANS LAG BEHIND

More specifically concerning your driving habits with regard to the fight against climate change, which attitude would you say most closely resembles yours?



32%

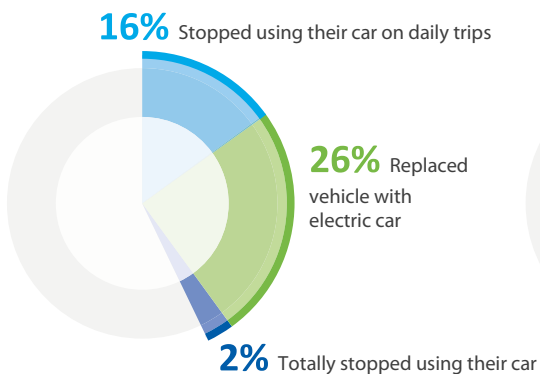
of European citizens have adapted their driving habits



You have stopped using your car for your daily trips



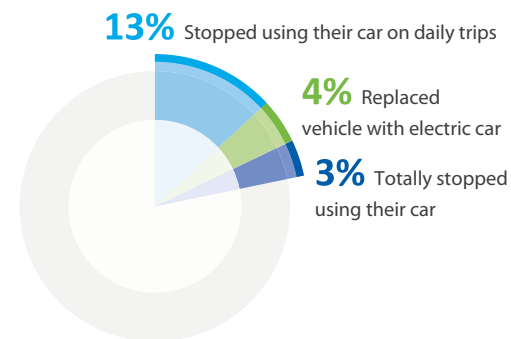
44%



You have replaced your vehicle with an electric car



20%



You have totally stopped using your car

EASTERN EUROPEANS HAVE TAKEN THE LEAD IN CHANGING DRIVING THEIR HABITS

More specifically concerning your driving habits with regard to the fight against climate change, which attitude would you say most closely resembles yours?

% have adapted their driving habits



European Union

32%



USA

20%



China

44%



GROUP 1 – 35% or more agreement

Spain	Romania	Hungary	Bulgaria
45%	38%	37%	37%
Poland	The NL	Croatia	
36%	35%	35%	



GROUP 2 – 35% to 34% agreement

Greece	Austria	Portugal	Belgium
34%	33%	32%	32%
Germany	France	Italy	
32%	31%	30%	



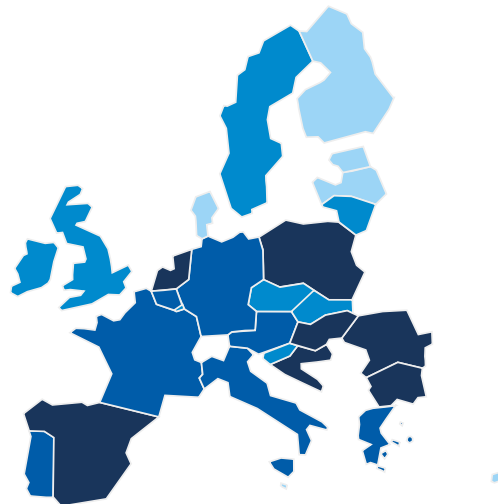
GROUP 3 – 21% to 29% agreement

Slovakia	Lithuania	Luxembourg	Czech Rep.
29%	29%	28%	28%
UK	Ireland	Slovenia	Sweden
27%	26%	24%	23%



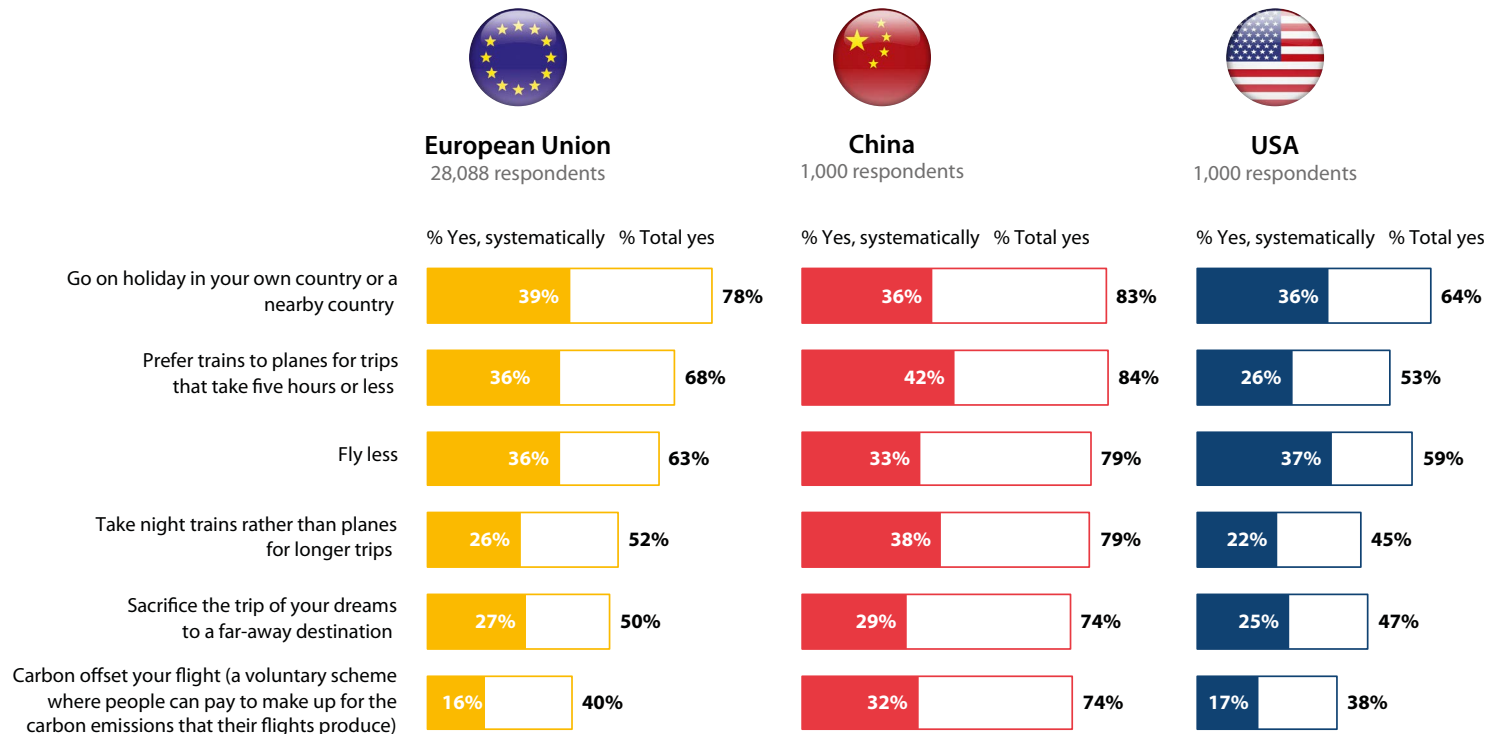
GROUP 4 – 20% agreement or below

Malta	Finland	Denmark	Estonia
20%	20%	19%	18%
Latvia	Cyprus		
15%	13%		



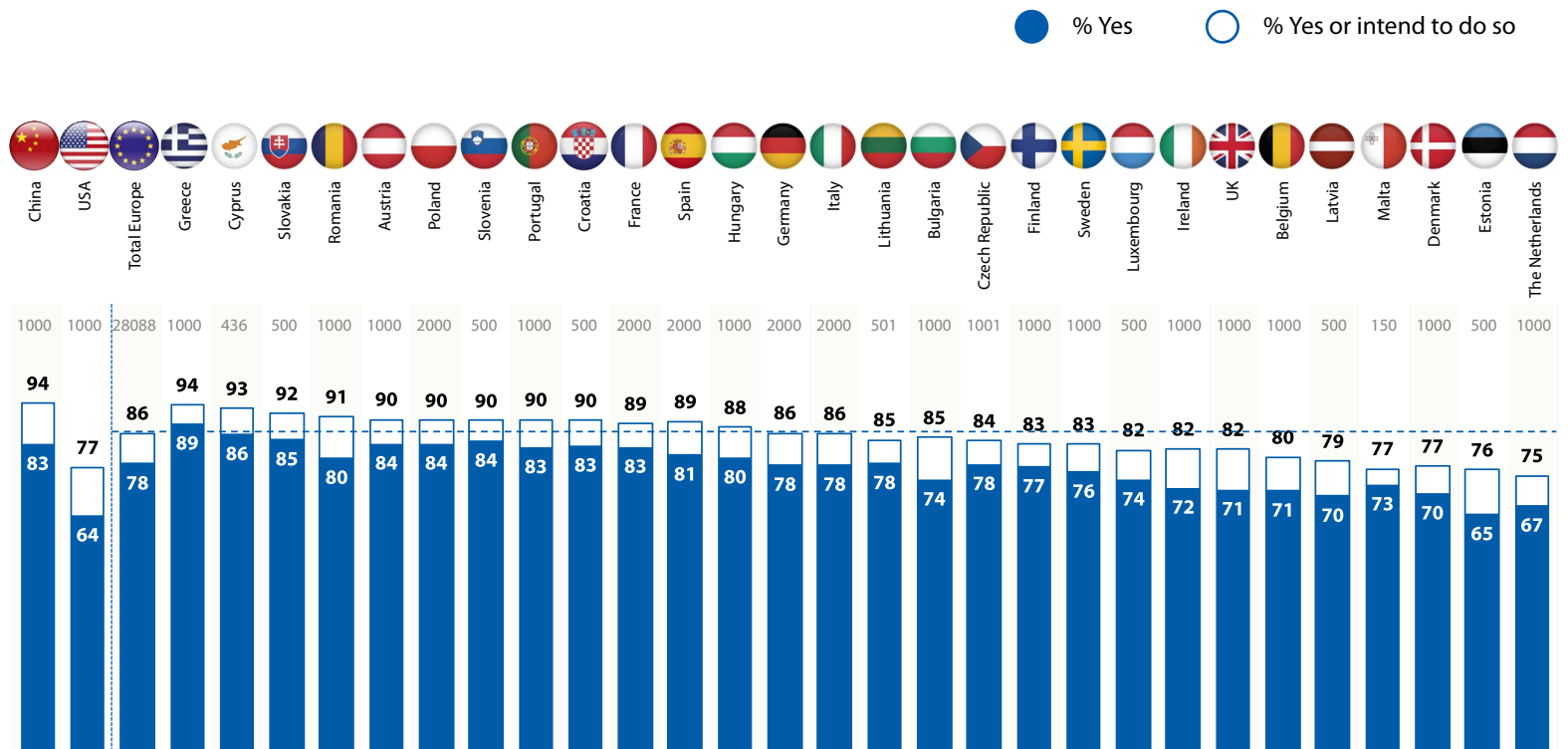
EUROPEAN AND CHINESE CITIZENS ARE MORE LIKELY TO ADJUST THEIR HOLIDAYS TO FIGHT CLIMATE CHANGE THAN AMERICANS

Do you do any of the following to fight climate change?



EFFORTS TO HOLIDAY IN ONE'S OWN COUNTRY OR A NEARBY COUNTRY

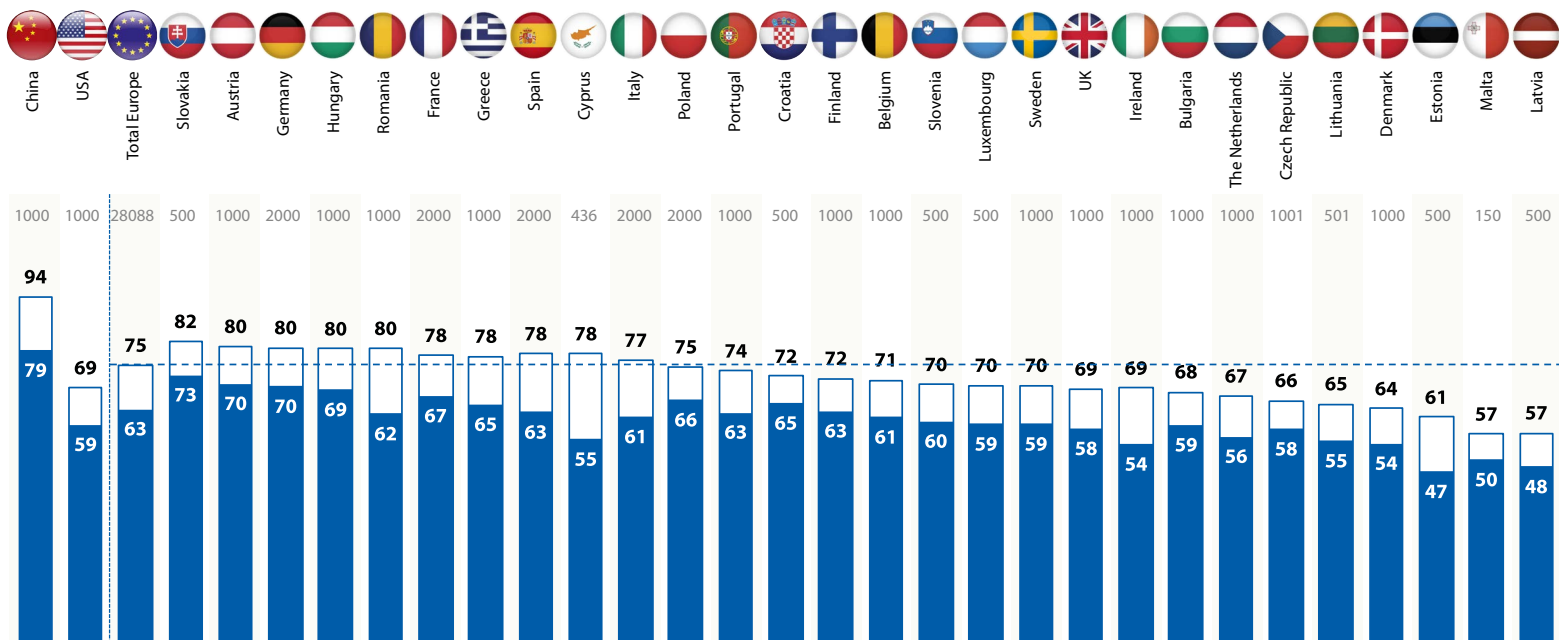
Do you holiday in your own country or a nearby country to fight climate change?



EFFORTS TO FLY LESS WHILE ON HOLIDAY, BY COUNTRY

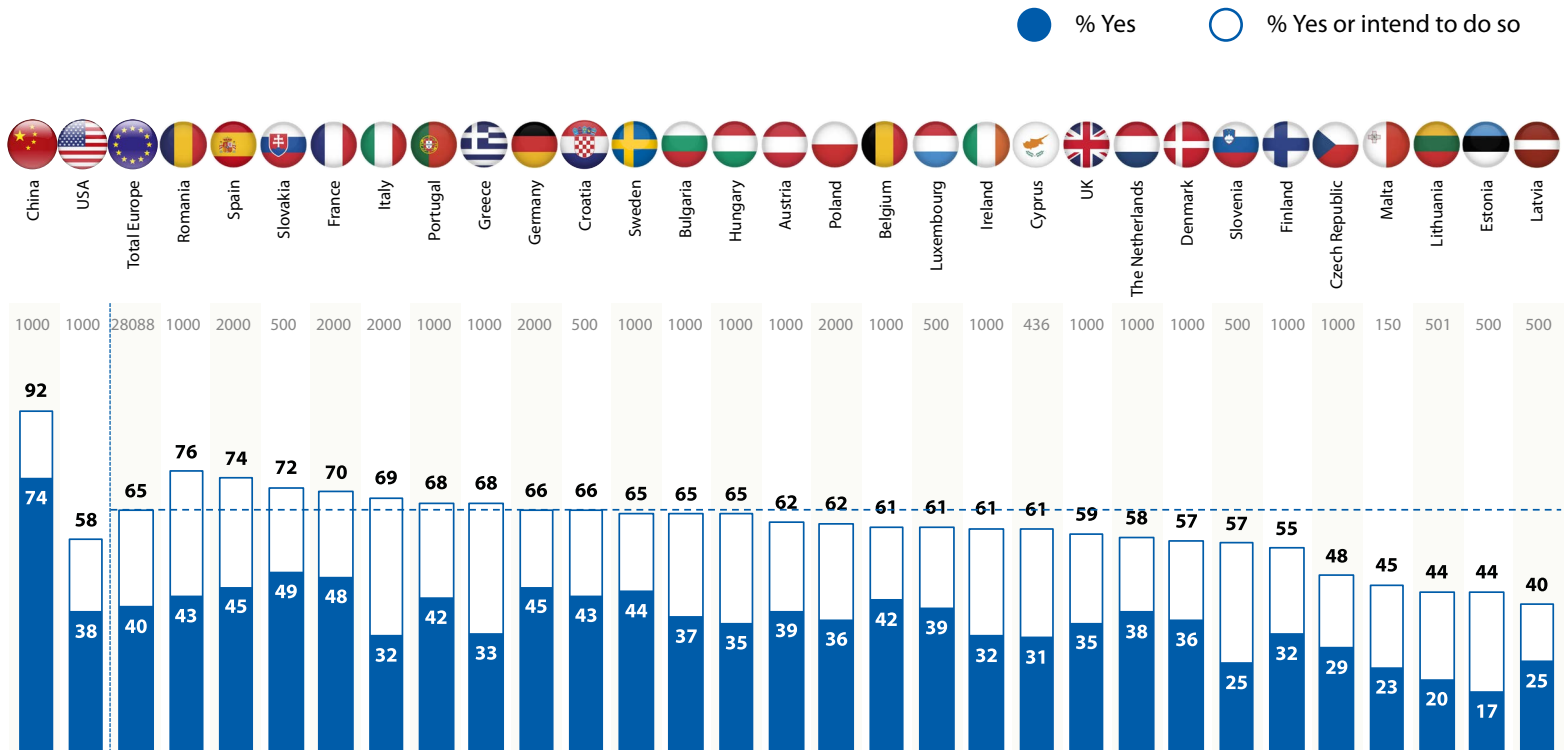
Do you fly less for your holidays to fight climate change?

● % Yes ○ % Yes or intend to do so



EFFORTS TO CARBON-OFFSET FLIGHTS, BY COUNTRY

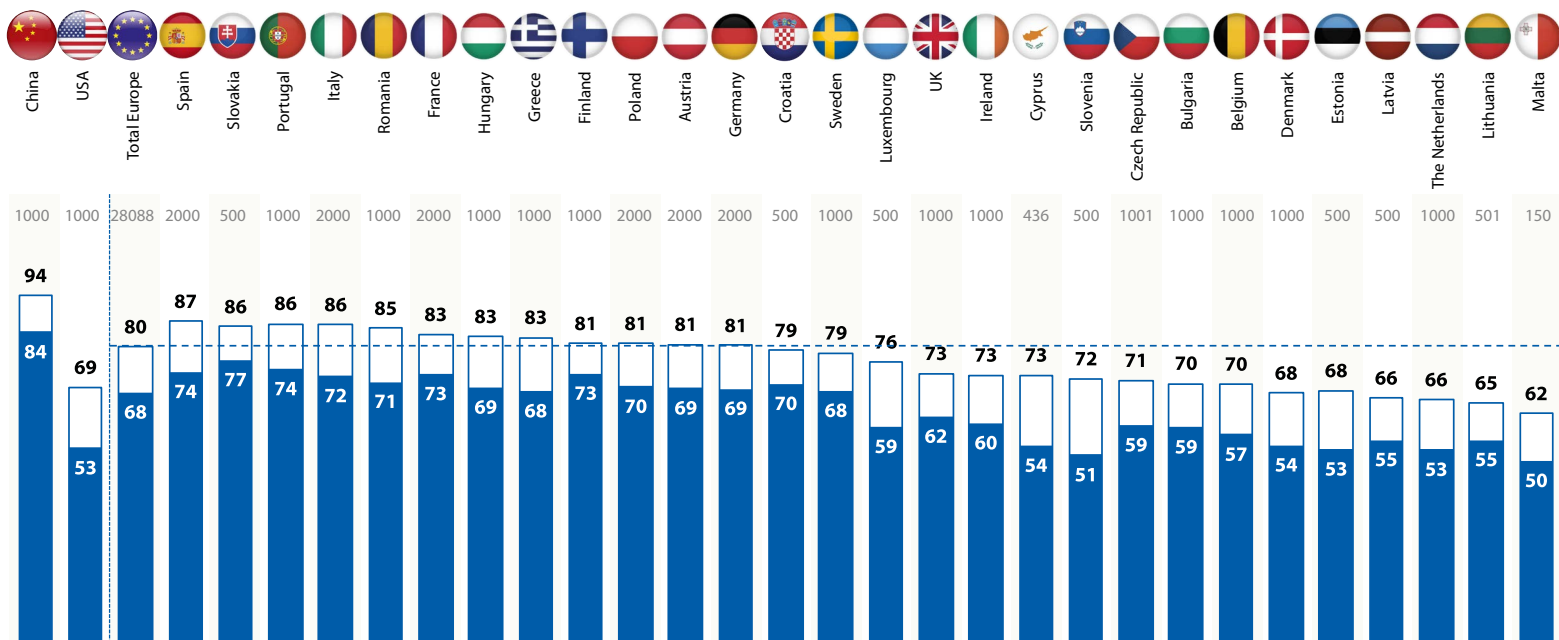
Do you carbon-offset your flight (a voluntary scheme where people can pay to make up for the carbon emissions that their flights produce) to fight climate change?



EFFORTS TO TAKE THE TRAIN RATHER THAN FLY FOR HOLIDAYS, BY COUNTRY

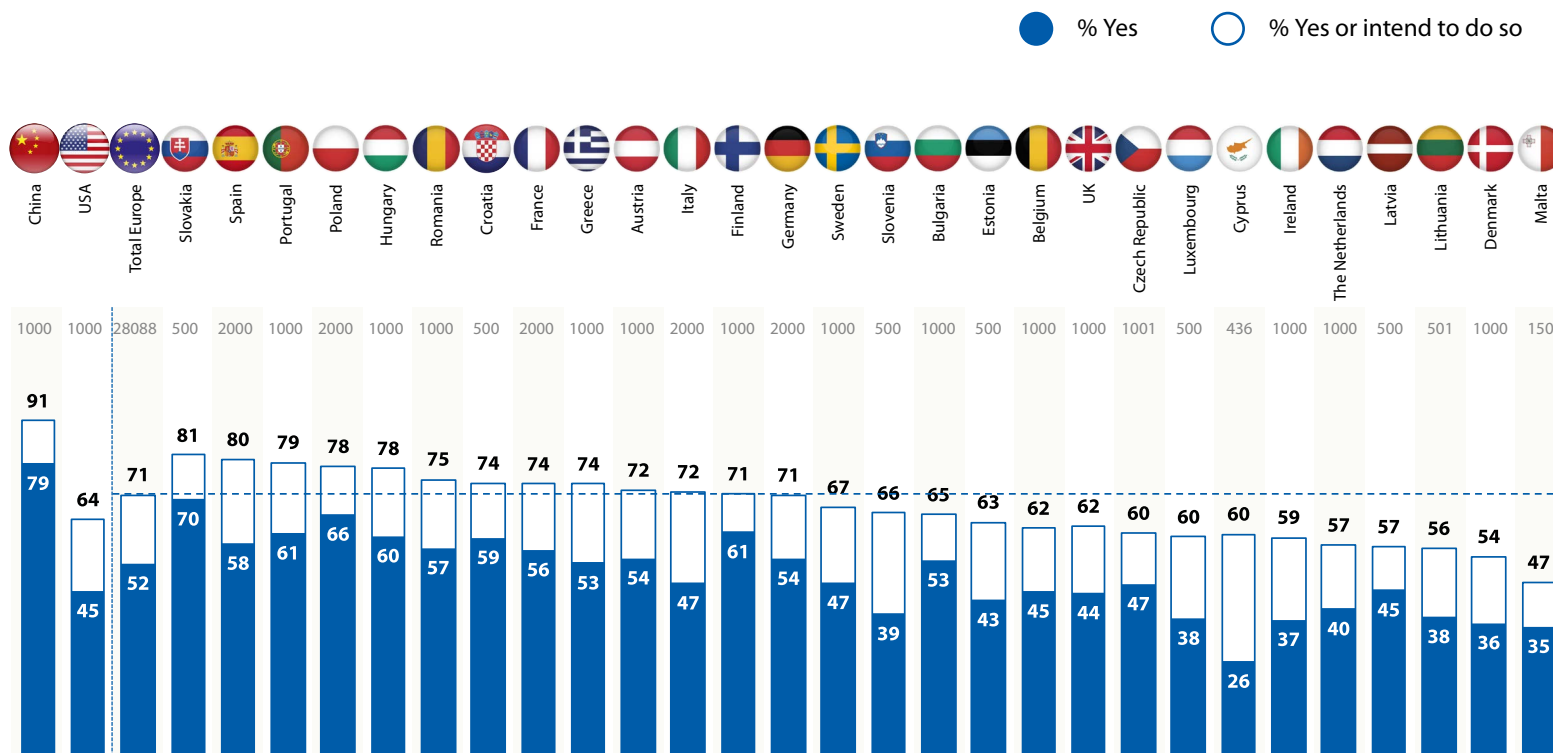
Do you prefer trains to planes for trips of five hours or less?

● % Yes ○ % Yes or intend to do so



EFFORTS TO TAKE NIGHT TRAINS RATHER THAN PLANES FOR HOLIDAYS, BY COUNTRY

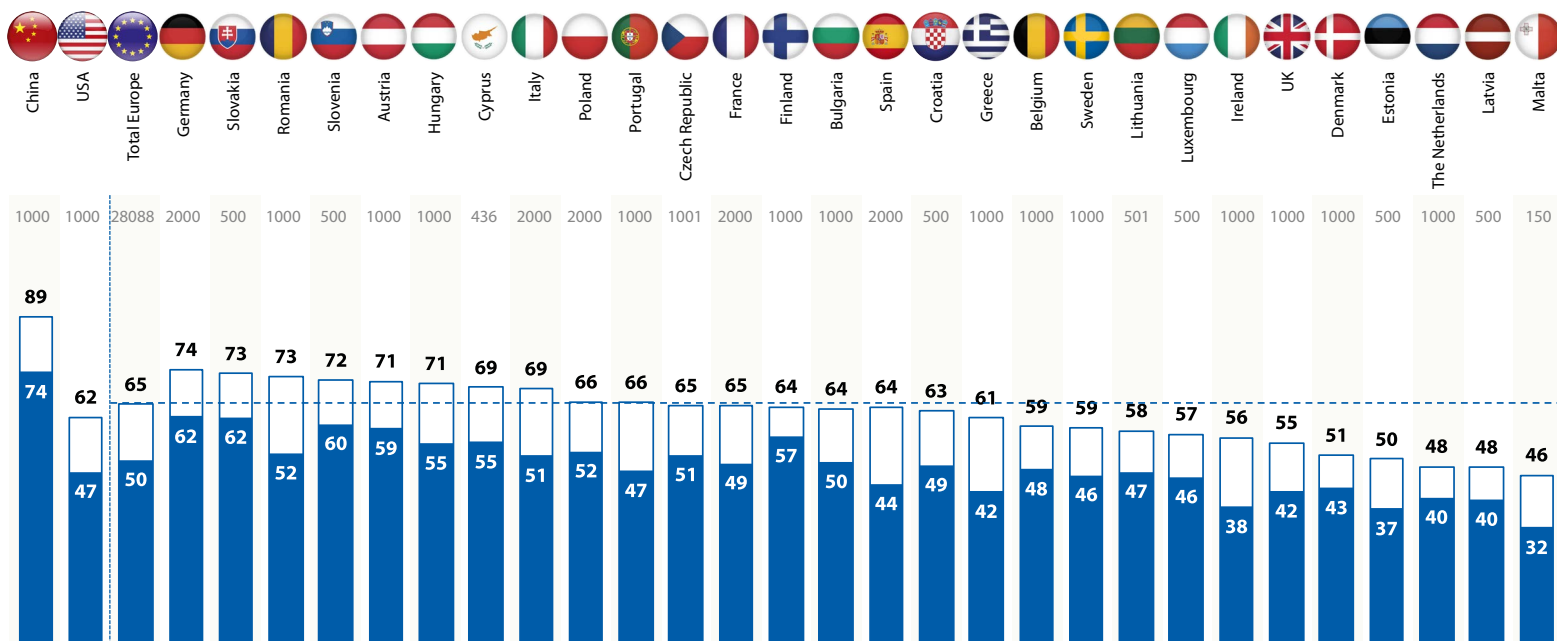
Do you take night trains rather than planes for longer trips?



WILLINGNESS TO SACRIFICE ONE'S DREAM DESTINATION, BY COUNTRY

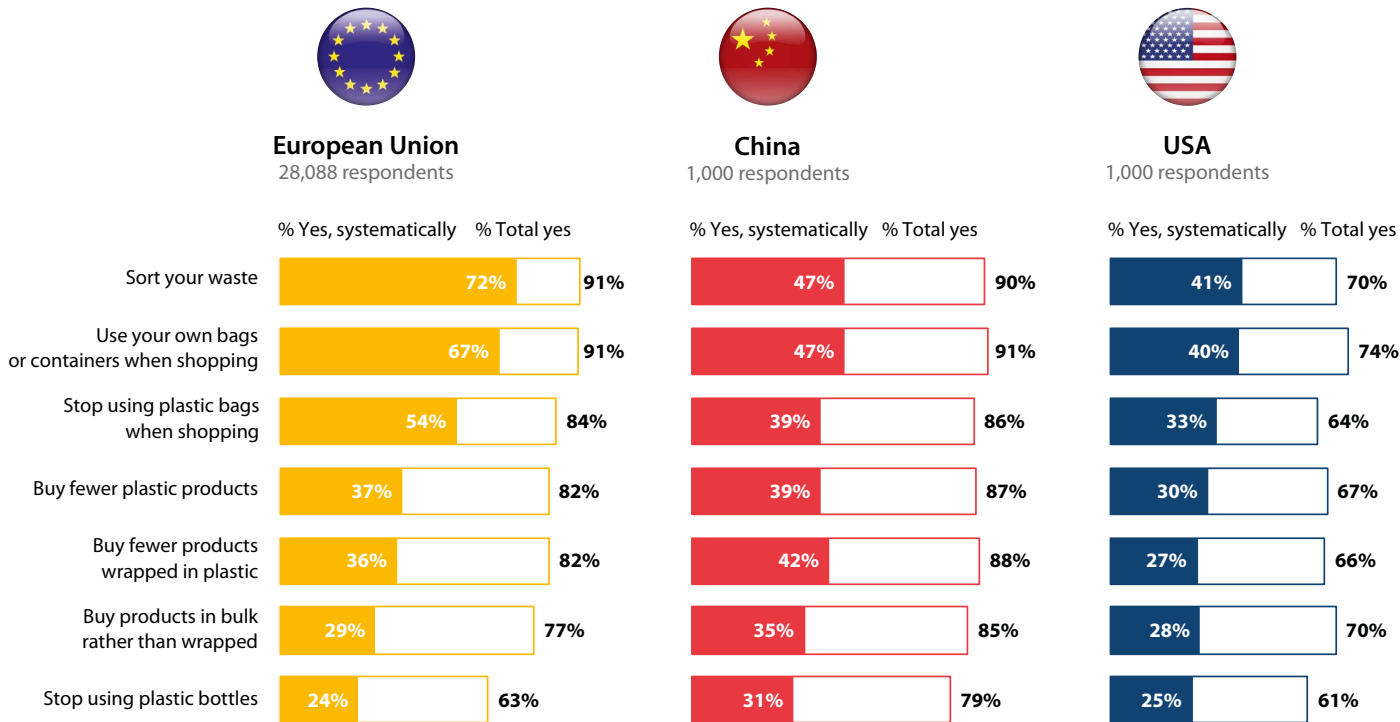
Are you willing to sacrifice the trip of your dreams to a far-away destination to fight climate change?

● % Yes ○ % Yes or intend to do so



EUROPE AND CHINA HAVE INCORPORATED ECO-FRIENDLY ACTIONS INTO THEIR EVERYDAY LIVES. THE US LAGS BEHIND

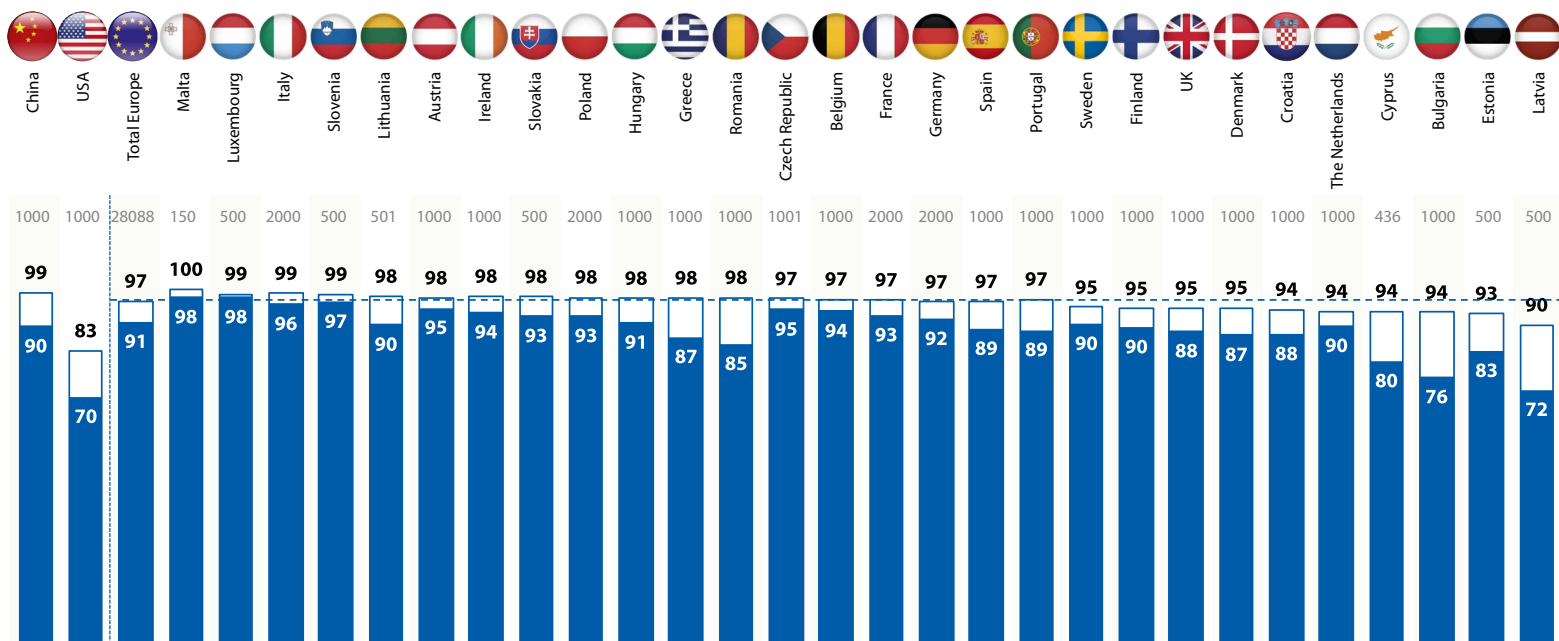
Do you do any of the following to fight climate change?



EFFORTS TO SORT WASTE TO FIGHT CLIMATE CHANGE, BY COUNTRY

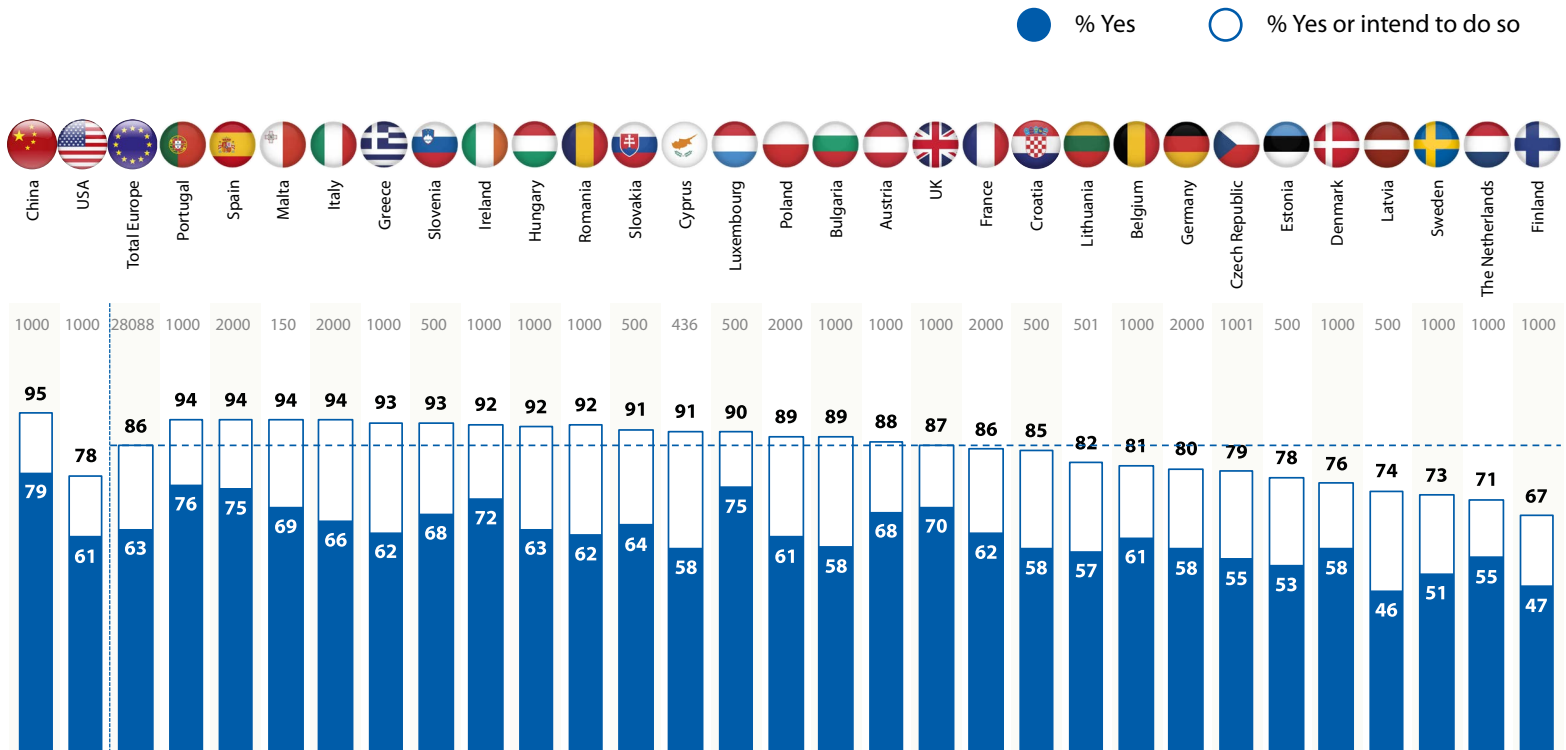
Do you sort waste to fight climate change?

● % Yes ○ % Yes or intend to do so



EFFORTS TO STOP USING PLASTIC BOTTLES TO FIGHT CLIMATE CHANGE, BY COUNTRY

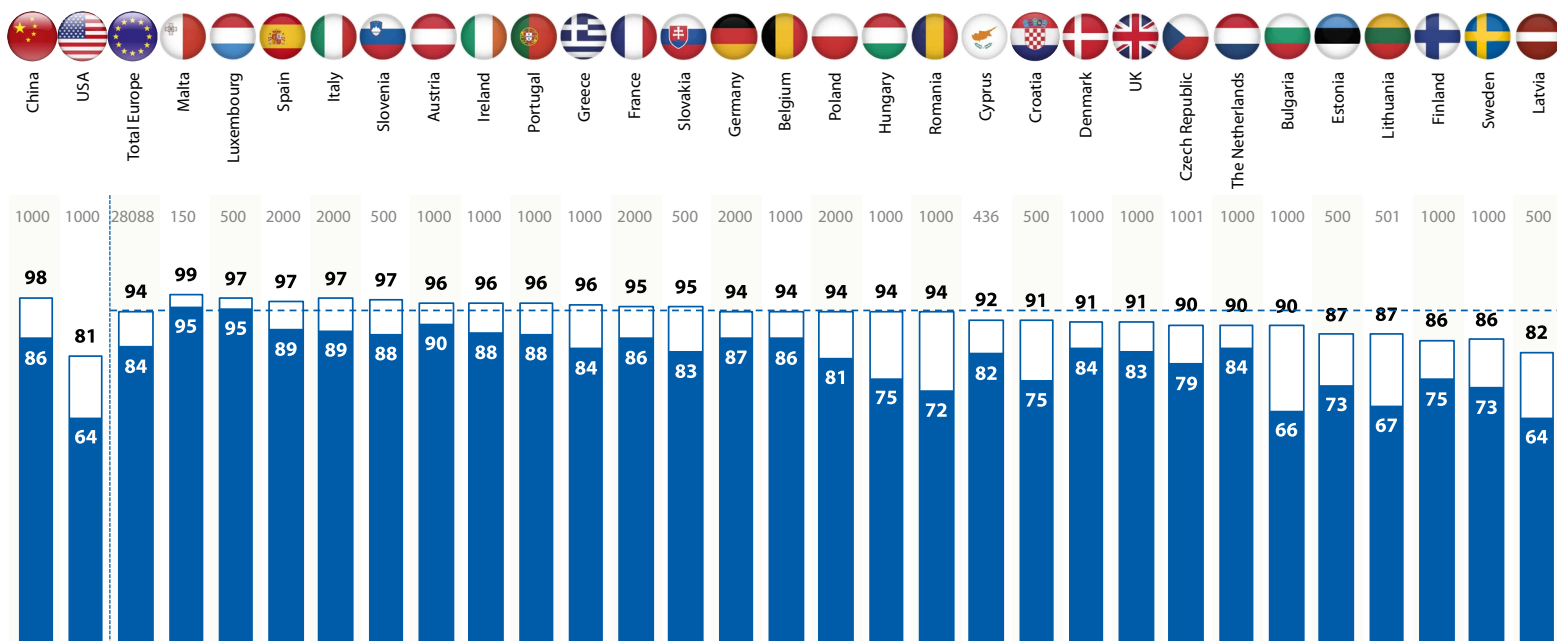
Have you stopped using plastic bottles to fight climate change?



EFFORTS TO LIMIT THE USE OF PLASTIC BAGS WHILE SHOPPING, BY COUNTRY

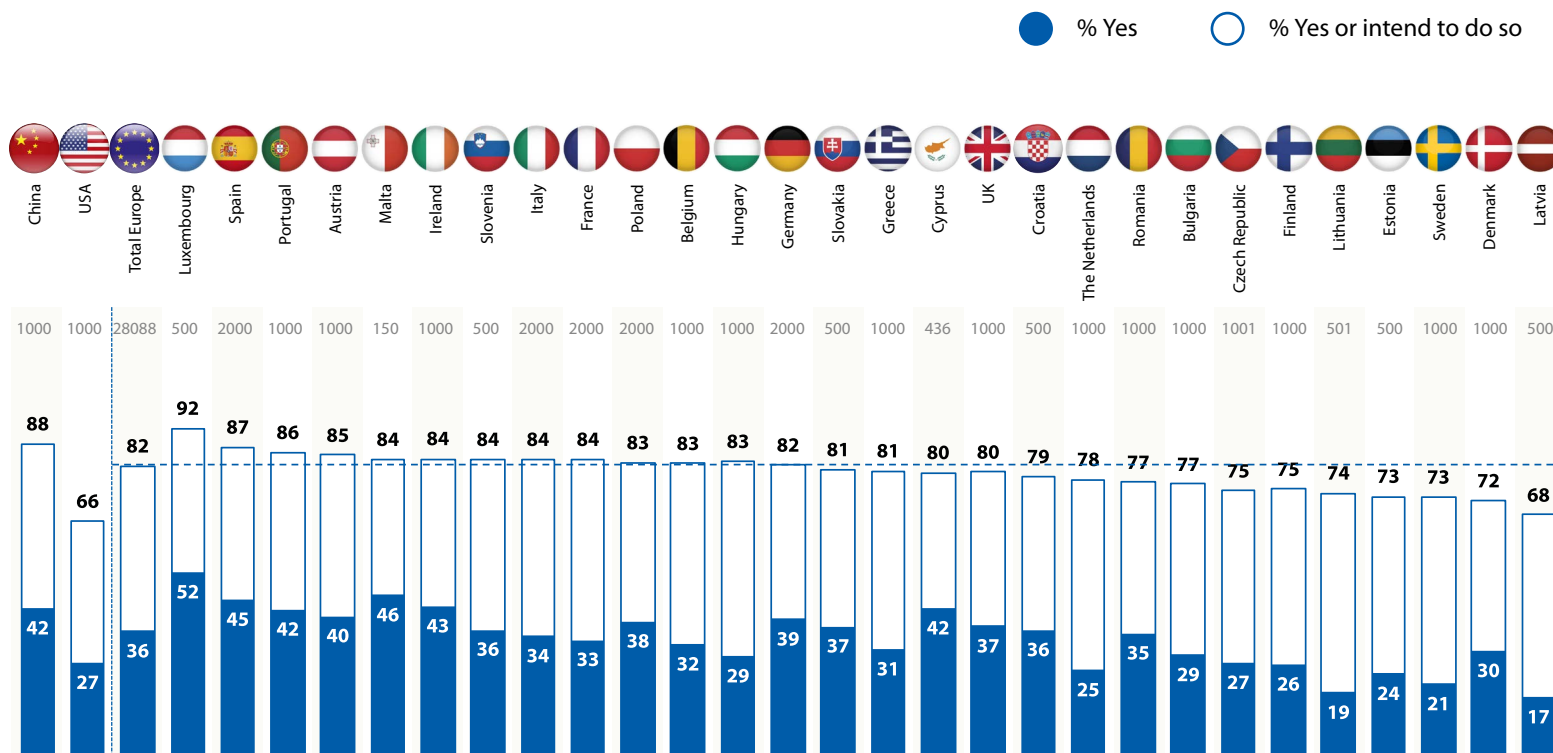
Have you stopped using plastic bags when shopping to fight climate change?

● % Yes ○ % Yes or intend to do so



EFFORTS TO BUY FEWER PRODUCTS WRAPPED IN PLASTIC, BY COUNTRY

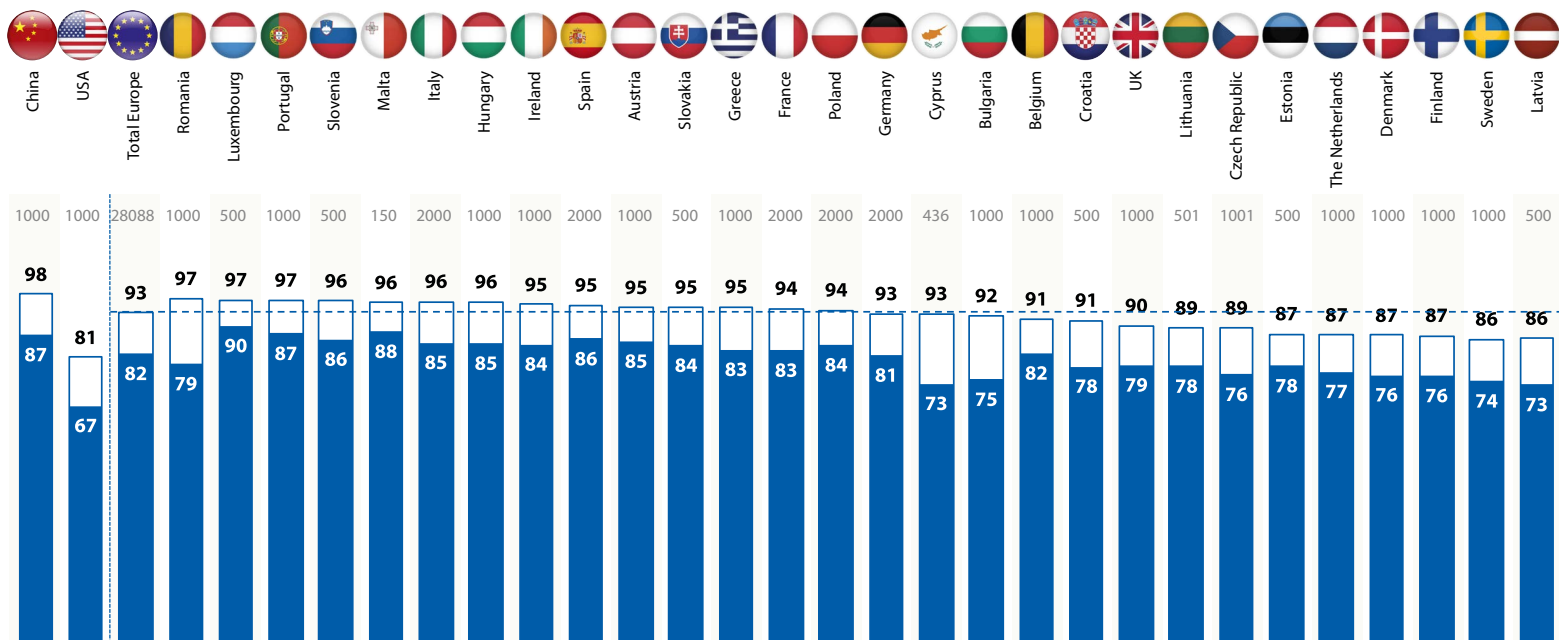
Do you buy fewer products wrapped in plastic to fight climate change?



EFFORTS TO BUY FEWER PLASTIC PRODUCTS, BY COUNTRY

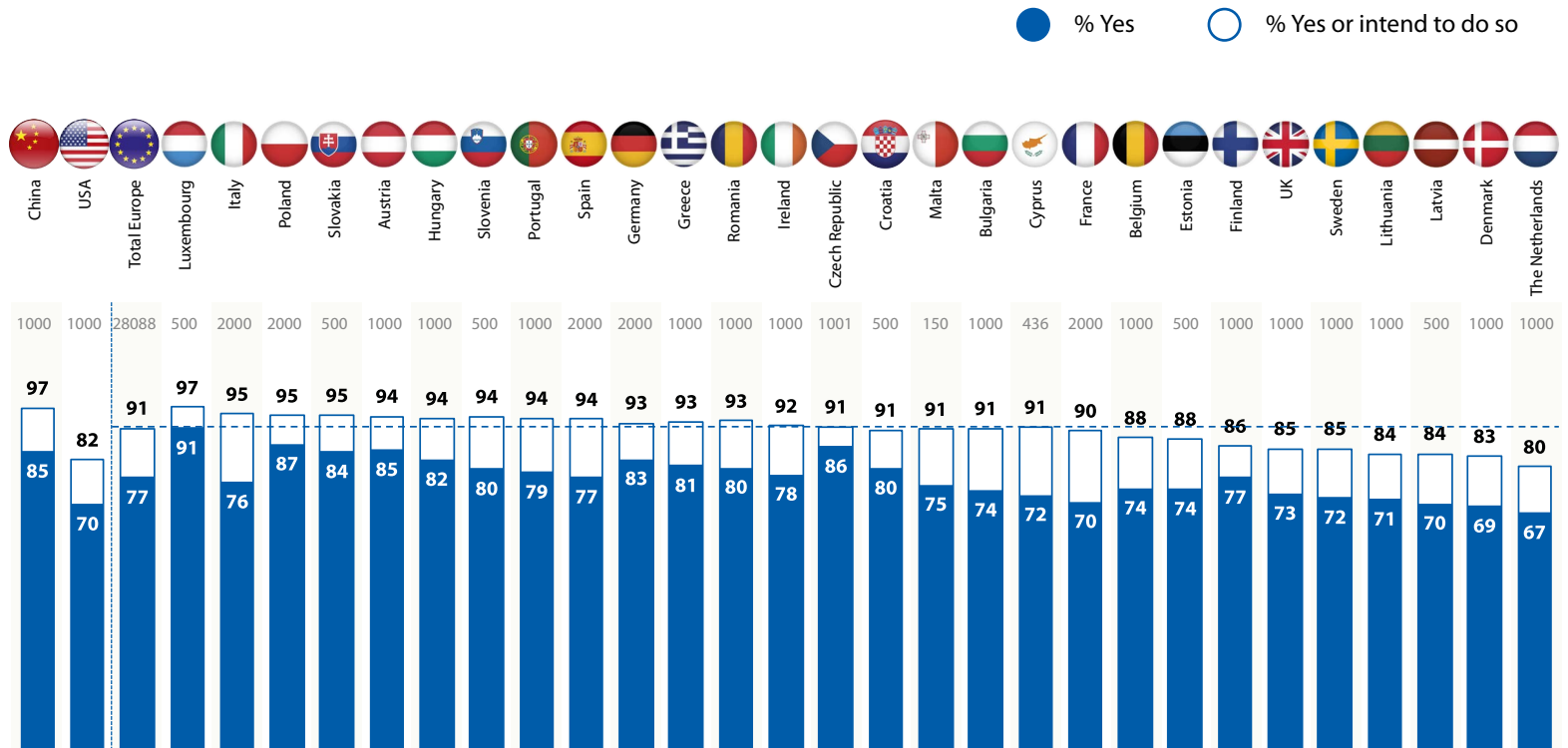
Do you buy fewer plastic products to fight climate change?

● % Yes ○ % Yes or intend to do so



EFFORTS TO BUY IN BULK RATHER THAN WRAPPED, BY COUNTRY

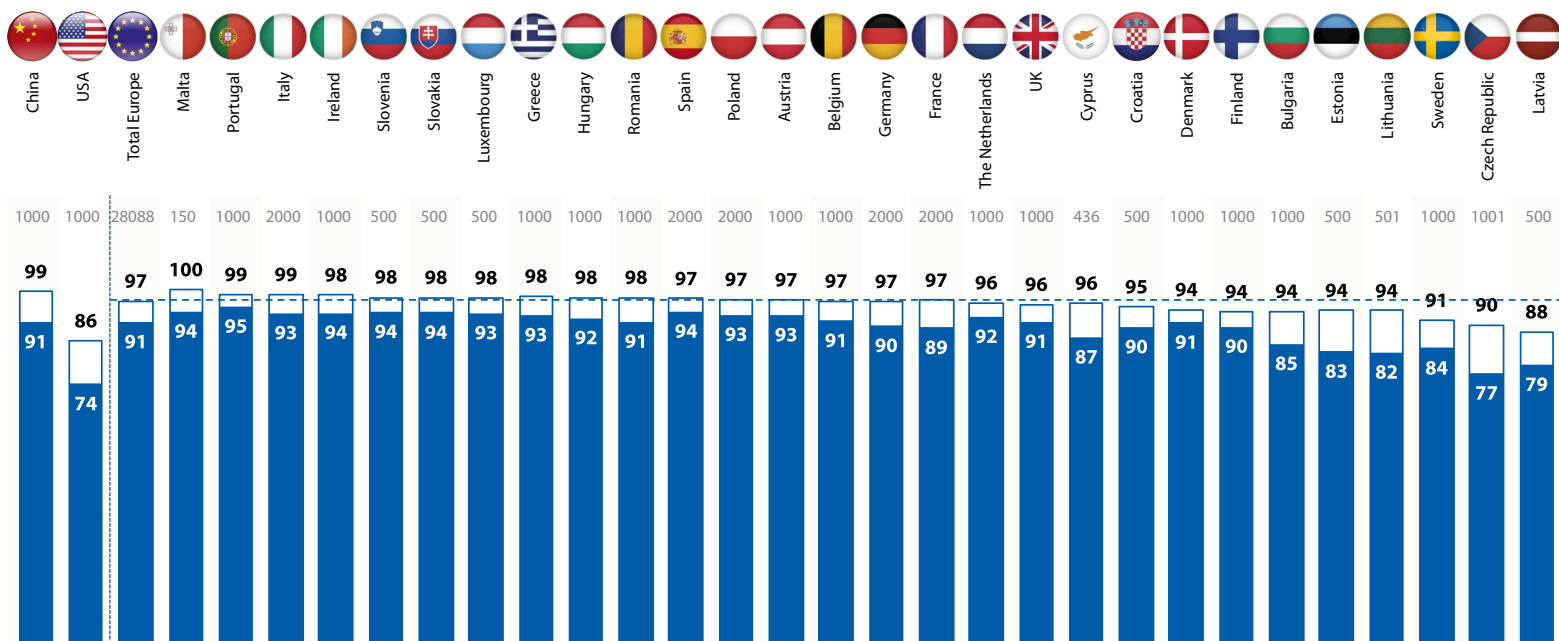
Do you buy products in bulk rather than wrapped to fight climate change?



EFFORTS TO USE ONE'S BAGS OR CONTAINERS WHILE SHOPPING, BY COUNTRY

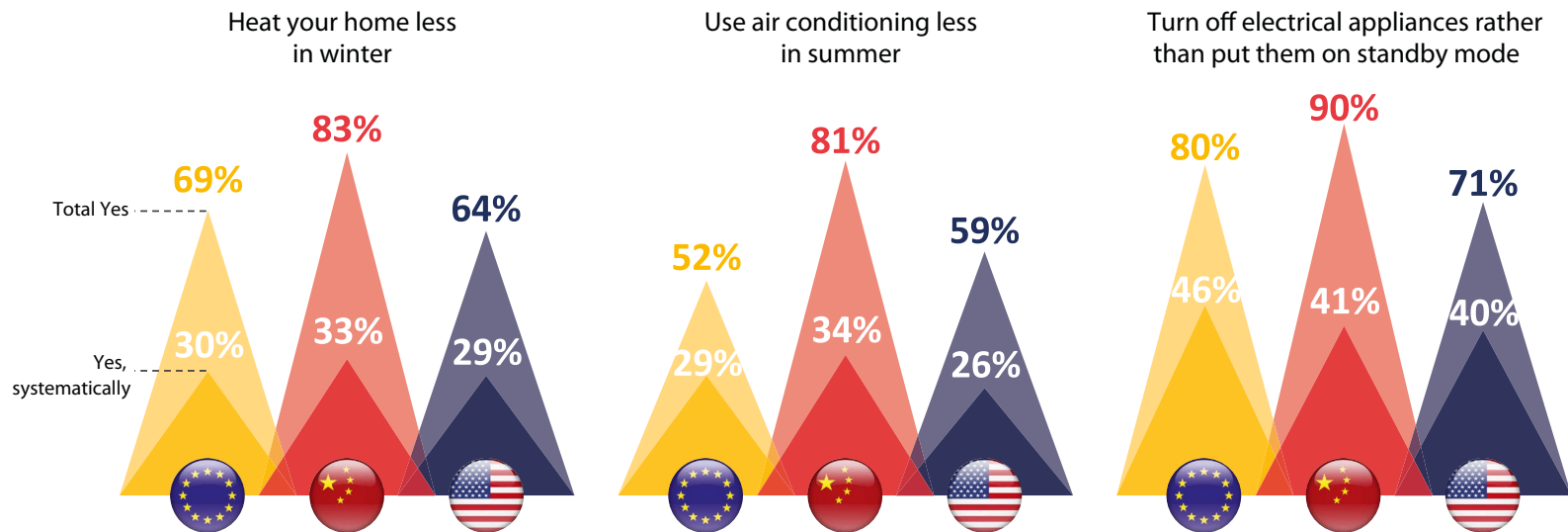
Do you use your own bags or containers when shopping to fight climate change?

● % Yes ○ % Yes or intend to do so



CHINESE CITIZENS COME FAR AHEAD OF EUROPEANS AND AMERICANS WHEN IT COMES TO ECO-FRIENDLY PRACTICES AT HOME

Do you do any of the following to fight climate change?



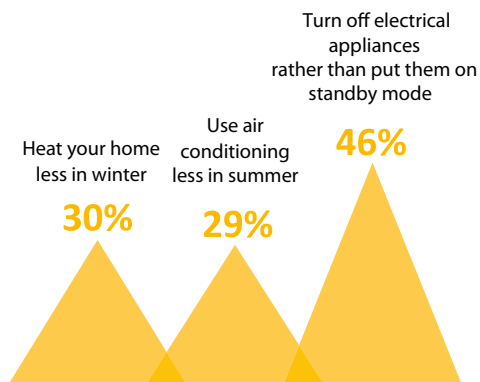
CHINESE CITIZENS COME FAR AHEAD OF EUROPEANS AND AMERICANS WHEN IT COMES TO ECO-FRIENDLY PRACTICES AT HOME

Do you do any of the following to fight climate change?

% yes, systematically



European Union
28,088 respondents



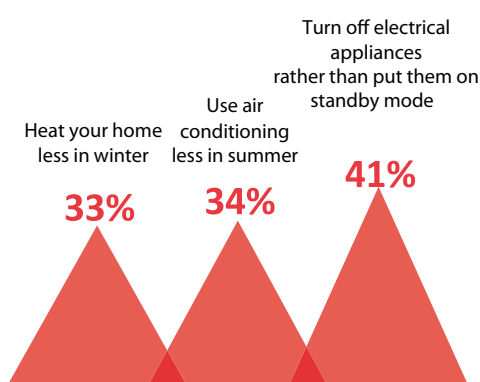
Female: 31% Male: 28% 65 y.o+: 34% 15-29 y.o: 25%

Female: 32% Male: 27% 15-29 y.o: 32% 65 y.o+: 26%

Female: 48% Male: 44% 65 y.o+: 53% 15-29 y.o: 40% Unemployed + Inactive: 48% Workforce: 44%



China
1,000 respondents

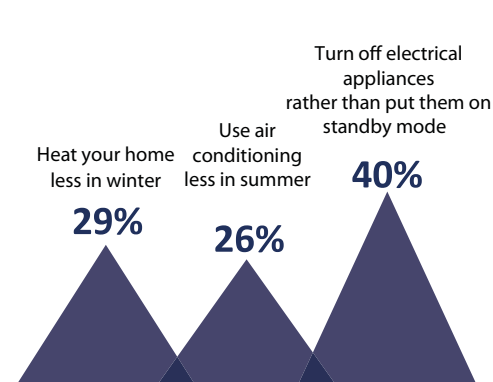


30-64 y.o: 29% 15-29 y.o: 41% Higher occup: 46% Lower occup: 24%

Higher occup: 38% 30-64 y.o: 29% Higher occup: 39% Lower occup: 20%



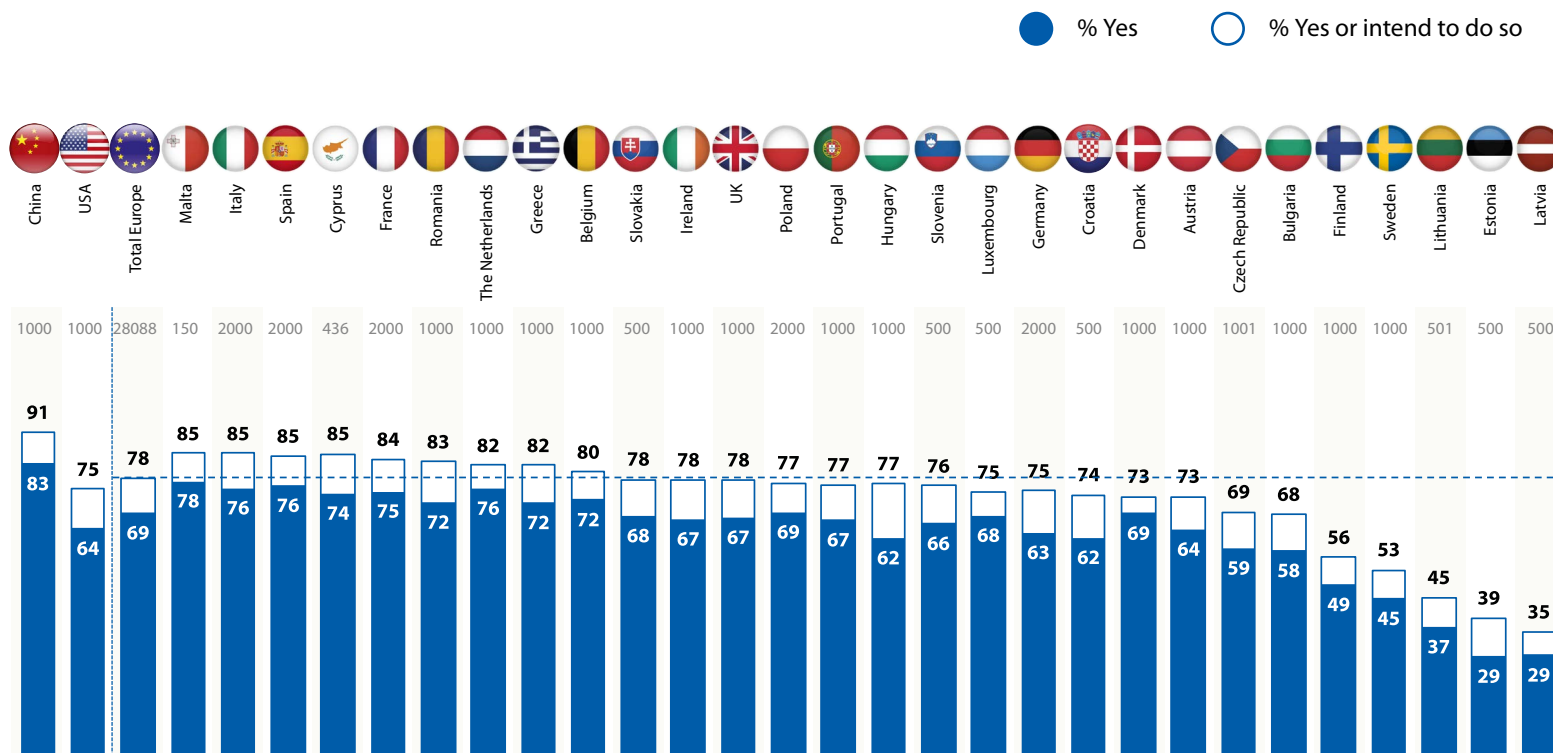
USA
1,000 respondents



Female: 44% Male: 37%

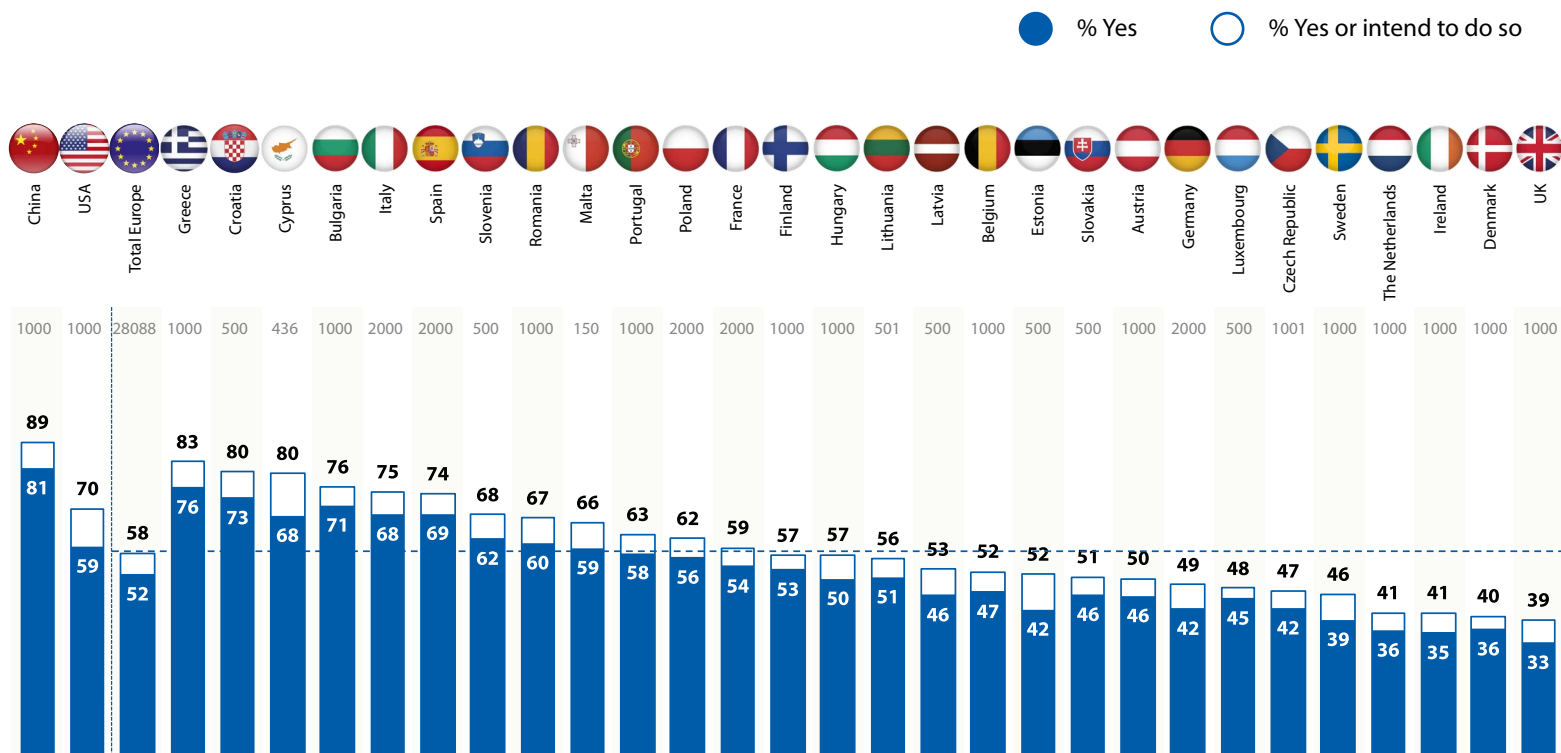
EFFORTS TO HEAT ONE'S HOME LESS IN WINTER, BY COUNTRY

Do you heat your home less in winter to fight climate change?



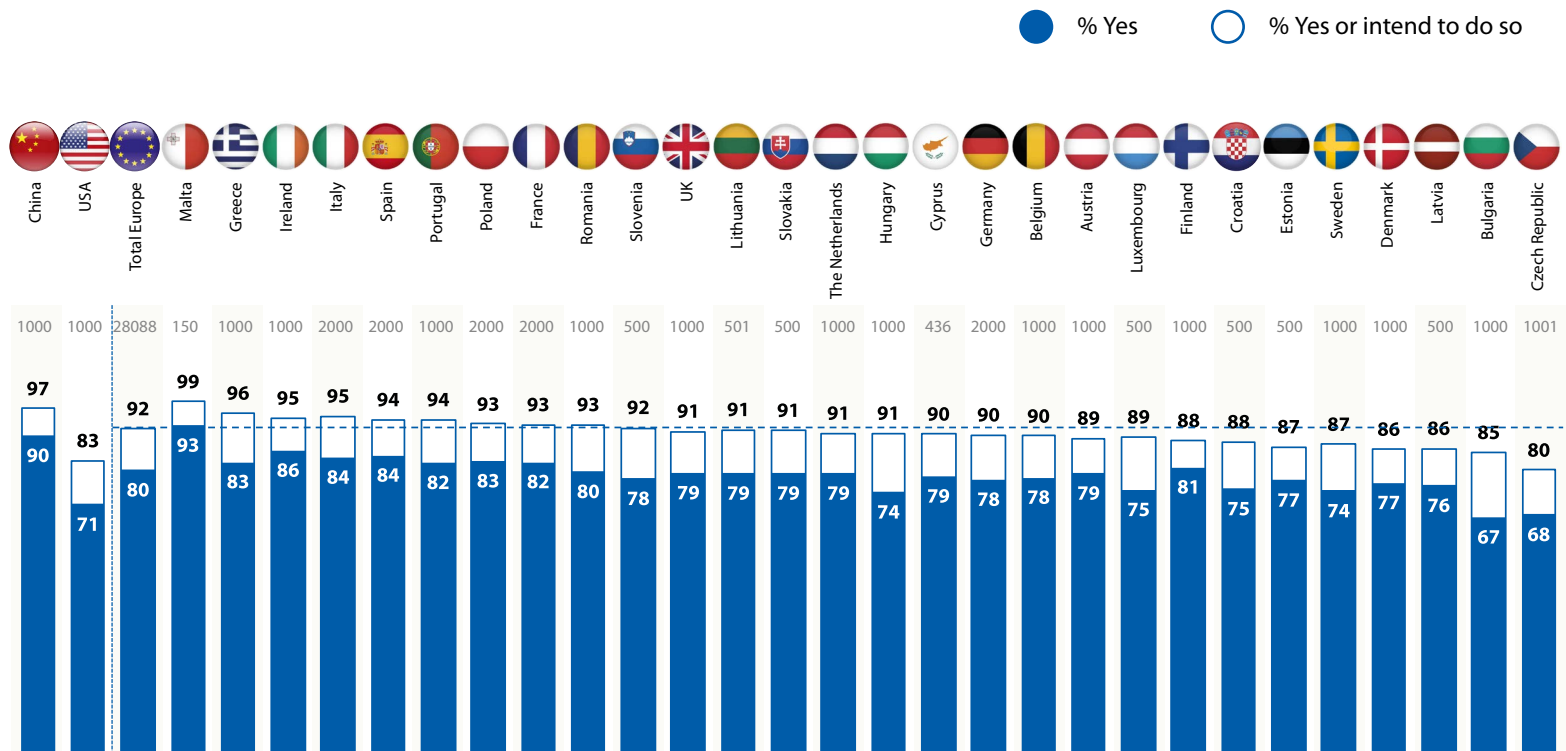
EFFORTS TO USE LESS AIR CONDITIONING IN SUMMER, BY COUNTRY

Do you use air conditioning less in summer to fight climate change?



EFFORTS TO TURN OFF ELECTRICAL APPLIANCES, BY COUNTRY

Do you turn off electrical appliances rather than put them on standby mode to fight climate change?



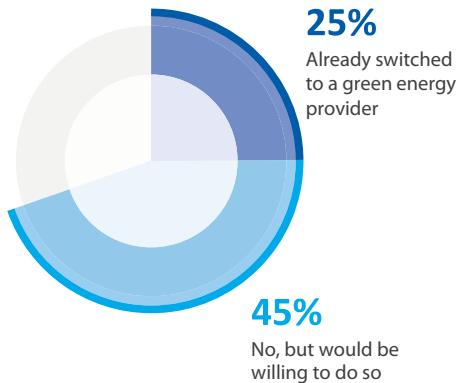
MORE THAN A THIRD OF CHINESE AND A QUARTER OF AMERICANS AND EUROPEANS HAVE SWITCHED TO A GREEN ENERGY PROVIDER

Have you already switched to a green energy provider to fight climate change?

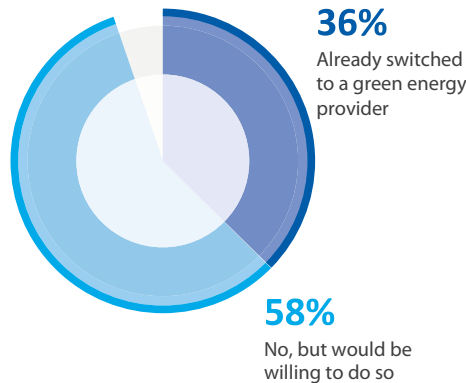


70%

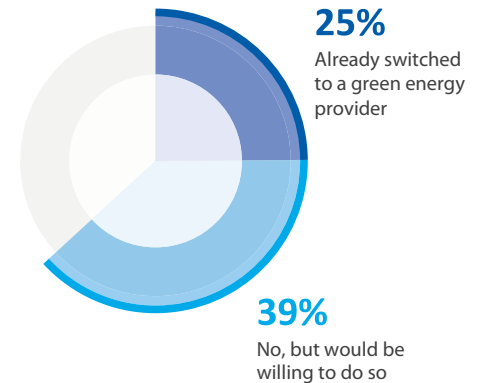
of European citizens have already switched to a green energy provider or intend to do so



94%



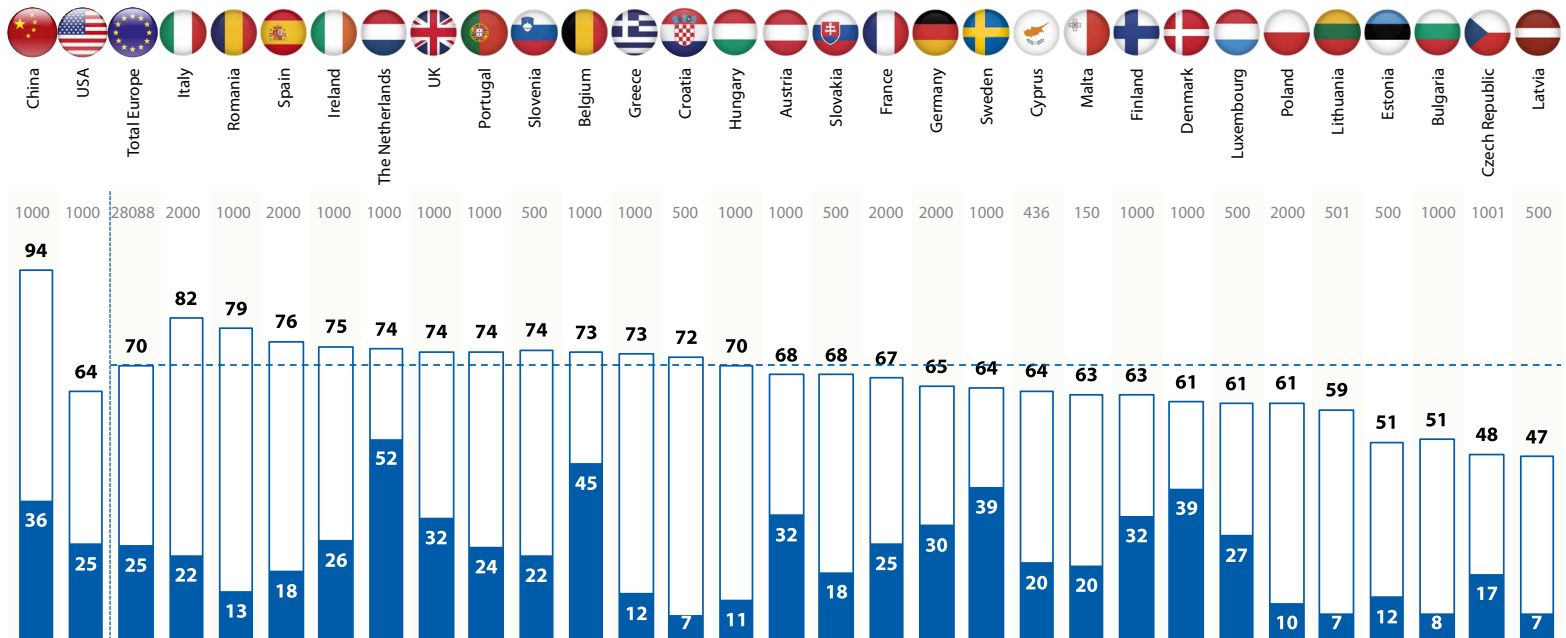
64%



EFFORTS TO SWITCH TO A GREEN ENERGY PROVIDER, BY COUNTRY

Have you already switched to a green energy provider to fight climate change?

● % Have already switched to a green energy provider ○ Yes or would be willing to do so



BOYCOTTING AND PETITIONING ARE THE MOST FAVOURED MEANS OF POLITICAL ACTION TO FIGHT CLIMATE CHANGE

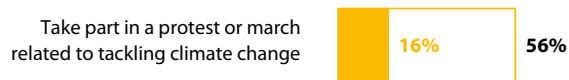
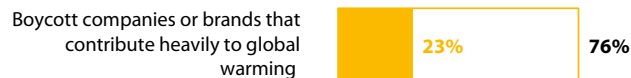
Have you already done or would you be willing to do any of the following to fight climate change?



European Union

28,088 respondents

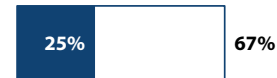
% Have already done so % Total yes



USA

1,000 respondents

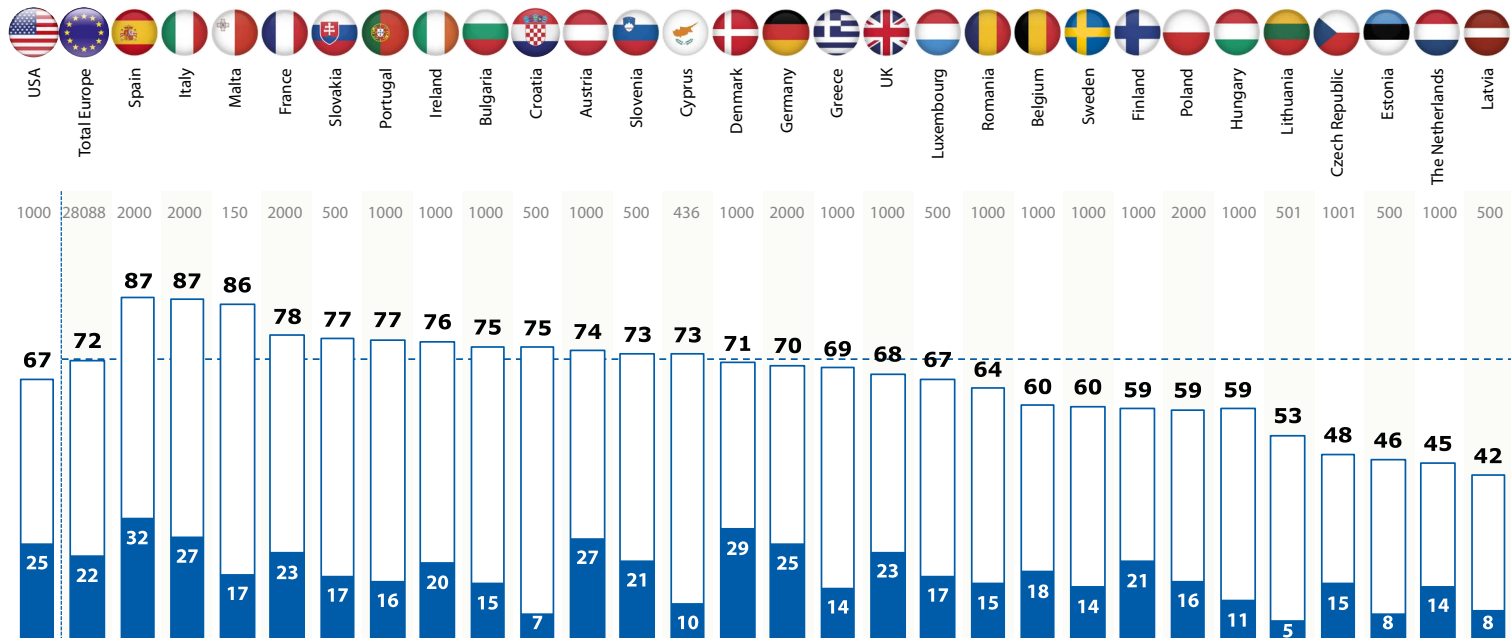
% Have already done so % Total yes



EFFORTS TO PETITION ONE'S GOVERNMENT TO DO MORE TO FIGHT CLIMATE CHANGE, BY COUNTRY

Have you already petitioned your government to do more to tackle climate change?

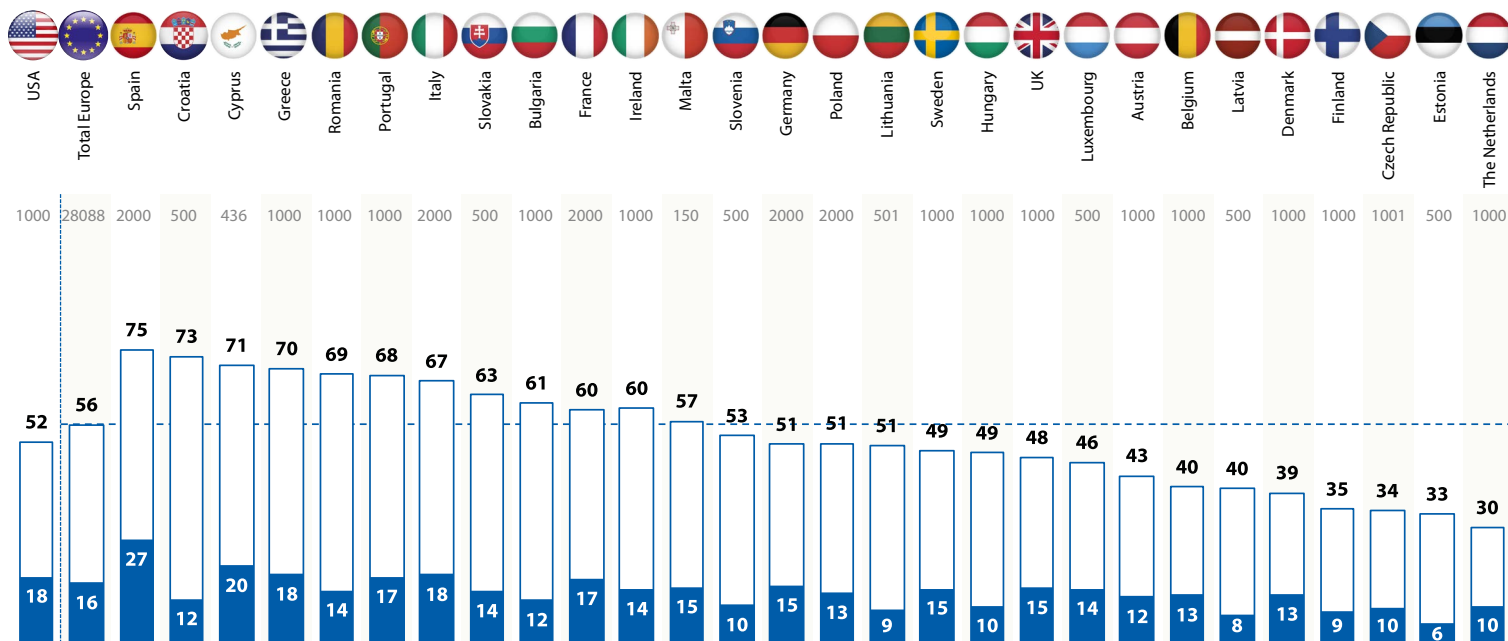
Yes Yes or intend to do so



EFFORTS TO TAKE PART IN A PROTEST OR MARCH TO FIGHT CLIMATE CHANGE, BY COUNTRY

Have you already taken part in a protest or march related to tackling climate change, or would you be willing to do so?

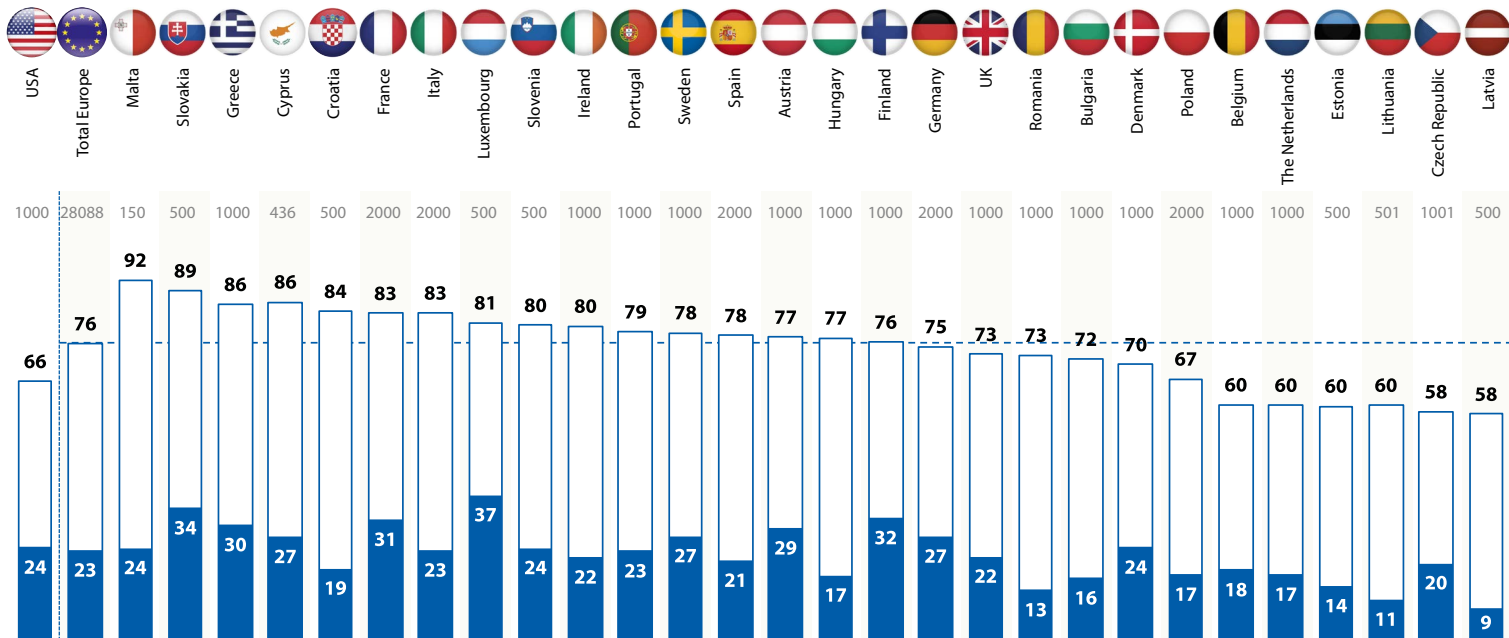
● Yes ○ Yes or intend to do so



EFFORTS TO BOYCOTT COMPANIES OR BRANDS TO FIGHT CLIMATE CHANGE, BY COUNTRY

Have you already boycotted - or would you be willing to boycott - companies or brands that contribute heavily to global warming?

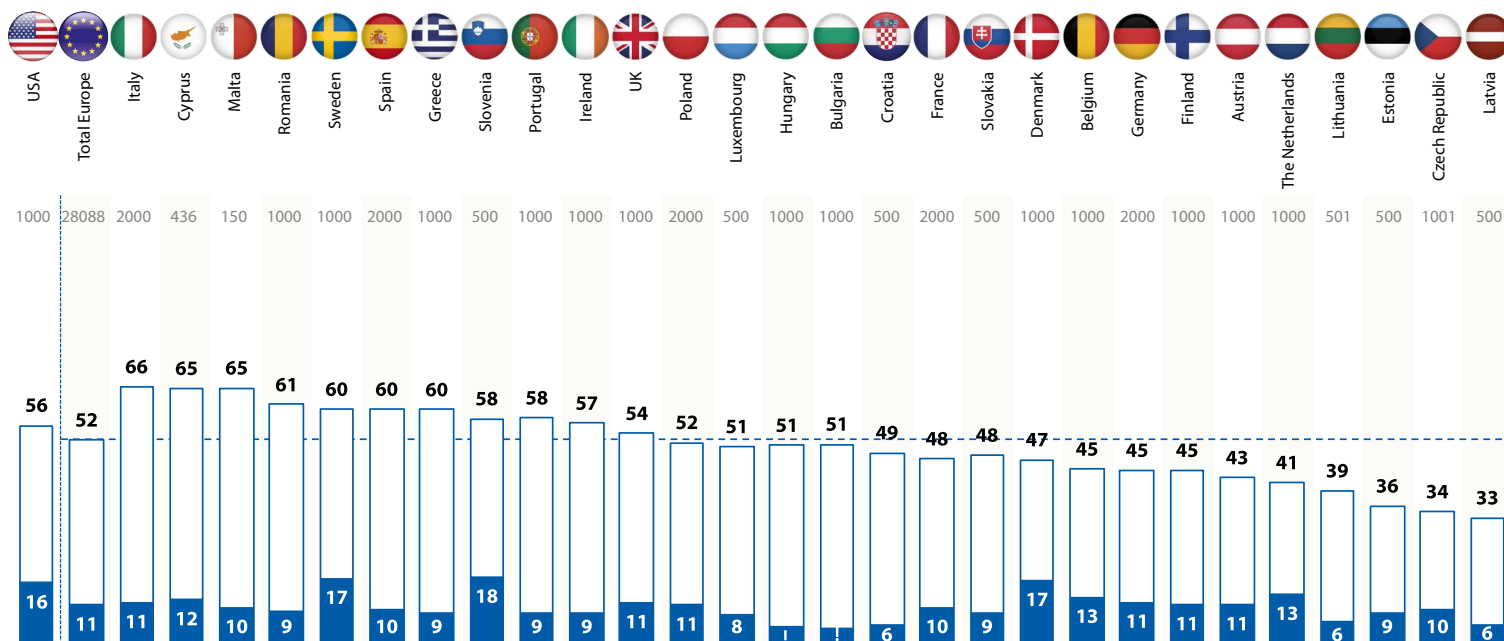
☒ Yes
 ☐ Yes or intend to do so



EFFORTS TO INVEST IN GREEN FUNDS, BY COUNTRY

Have you already invested your savings or your pension in green funds, or would you be willing to do so?

● Yes ○ Yes or intend to do so

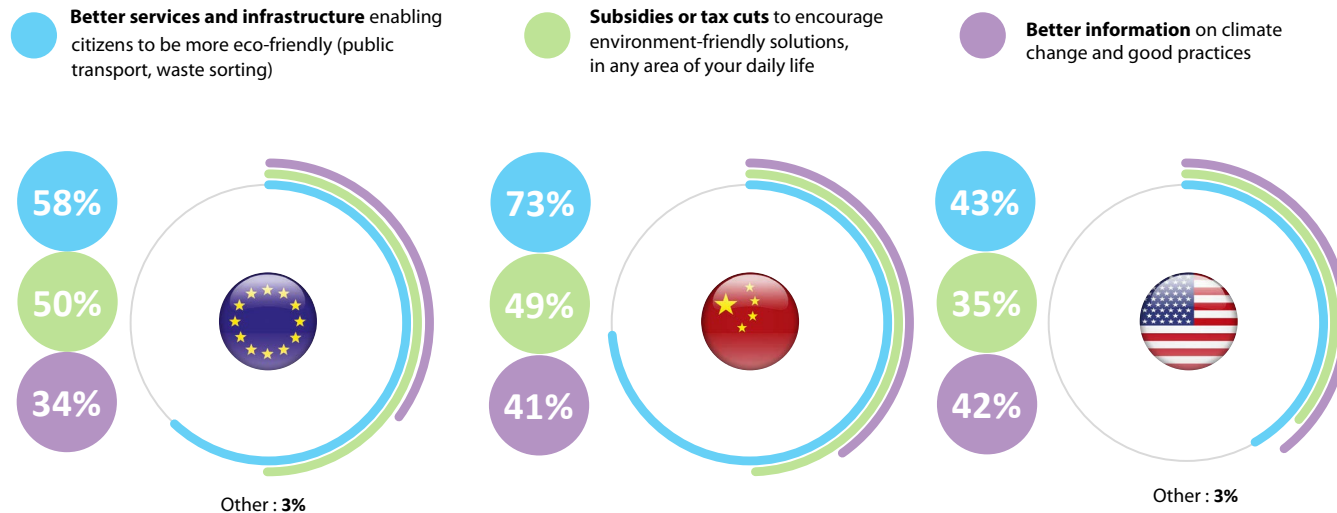


CITIZENS' SOLUTIONS FOR CLIMATE CHANGE




CHINESE, EUROPEAN AND AMERICAN CITIZENS PREFER BETTER SERVICES AND INFRASTRUCTURE OVER SUBSIDIES AND BETTER INFORMATION

What would personally help you to take action to fight climate change?




SOUTHERN AND EASTERN EUROPE WOULD OVERWHELMINGLY PREFER BETTER SERVICES OVER SUBSIDIES

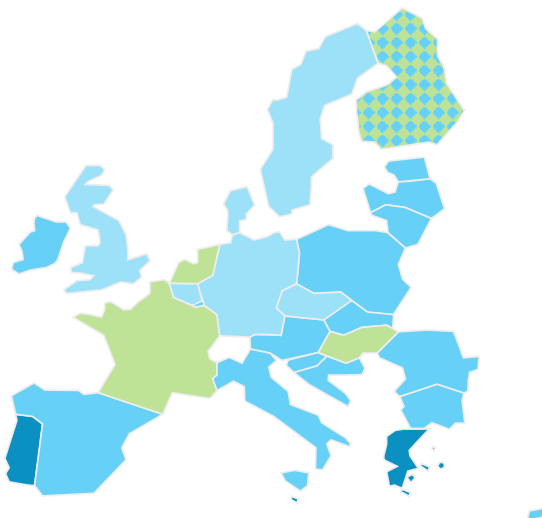
What would personally help you to take action to fight climate change?

 Better services and infrastructure enabling citizens to be more eco-friendly (public transport, waste sorting)

Malta	Portugal	Greece	Croatia
77%	74%	70%	69%
Bulgaria	Romania	Italy	Cyprus
66%	66%	65%	65%
Ireland	Lithuania	Spain	Austria
65%	65%	64%	64%
Estonia	Slovenia	Luxembourg	Slovakia
64%	64%	64%	61%
Poland	Latvia	Finland	Sweden
60%	60%	59%	57%
Germany	Denmark	Czech Rep.	Belgium
57%	55%	54%	53%
UK			
52%			

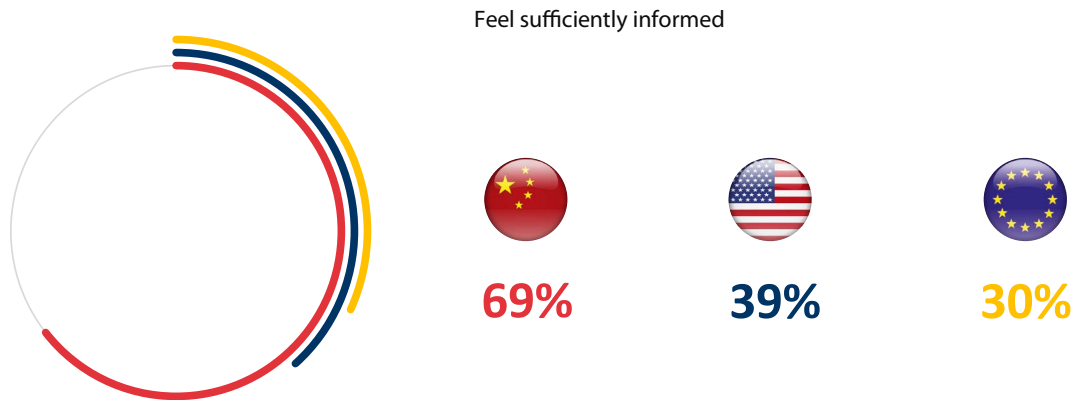
 Subsidies or tax cuts to encourage environment-friendly solutions, in any area of your daily life

Hungary	Finland	France	The NL
60%	59%	52%	51%



MORE THAN TWO THIRDS OF CHINESE FEEL SUFFICIENTLY INFORMED TO INVEST IN GREEN FUNDS, FAR AHEAD OF THE US AND EUROPE

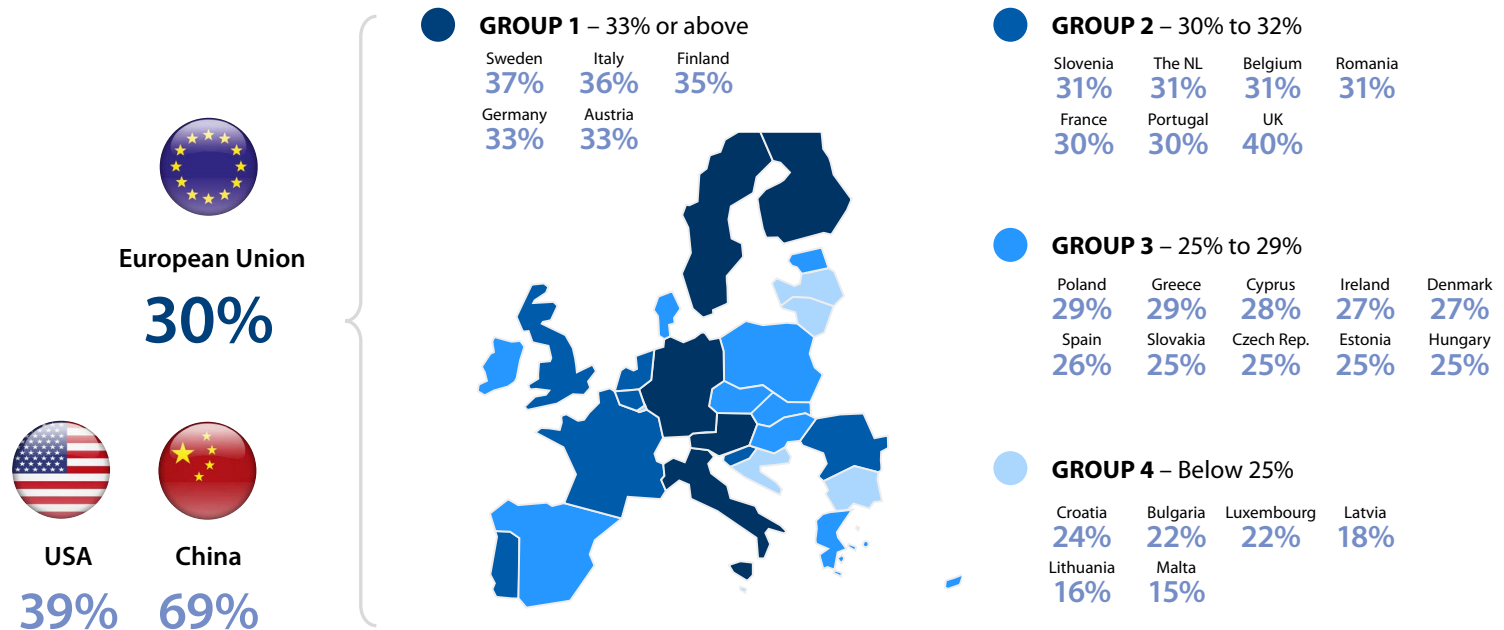
Do you think you are sufficiently informed to invest your pension and/or savings in climate-friendly and/or green projects or companies?



WESTERN AND CENTRAL EUROPEAN COUNTRIES FEEL MORE INFORMED ABOUT THE POSSIBILITY OF INVESTING IN GREEN FUNDS/PROJECTS/ COMPANIES

Do you think you are sufficiently informed to invest your pension and/or savings in climate-friendly and/or green projects or companies?

% who responded yes, sufficiently informed



EUROPEAN AND CHINESE CITIZENS SHOW MORE ENTHUSIASM FOR VARIOUS STEPS TO FIGHT CLIMATE CHANGE THAN AMERICANS

Are you in favour of the following steps or solutions to fight climate change?



European Union

28,088 respondents



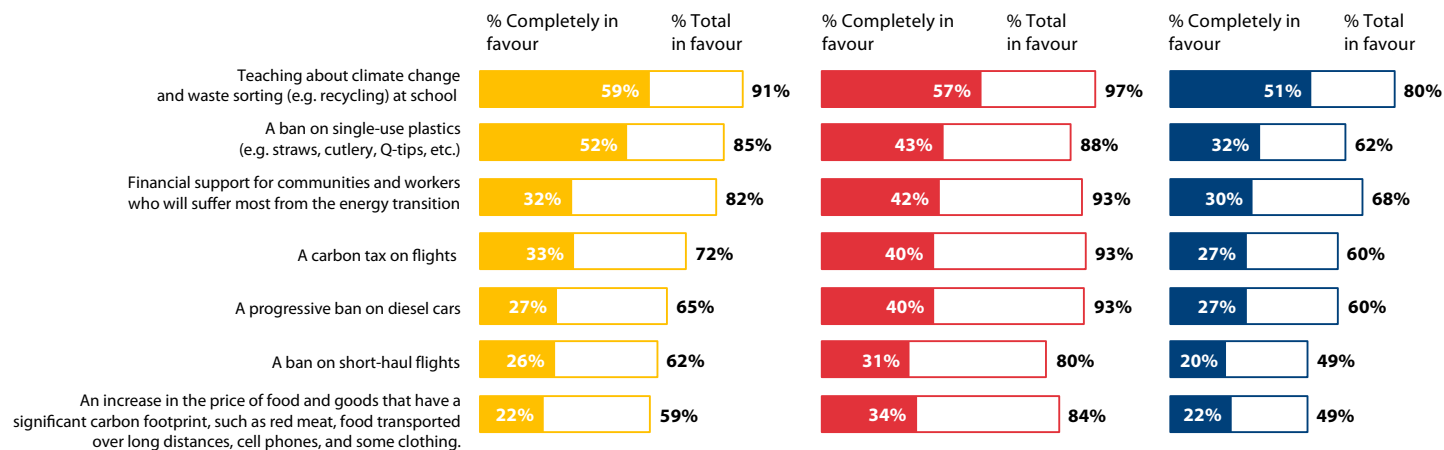
China

1,000 respondents



USA

1,000 respondents

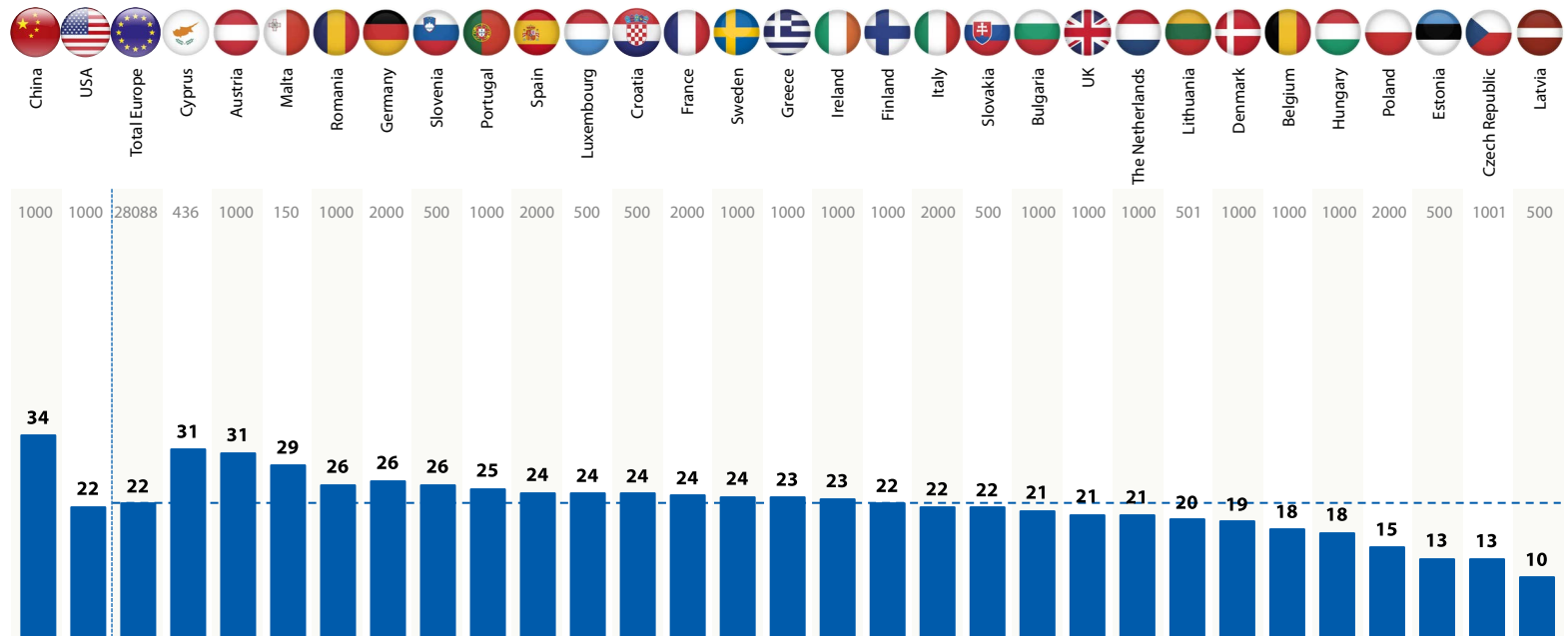


Total higher than 100% because more than one answer was possible

SUPPORT FOR AN INCREASE IN THE PRICE OF HEAVILY-POLLUTING FOOD AND GOODS TO FIGHT CLIMATE CHANGE, BY COUNTRY

Are you in favour of an increase in the price of food and goods that have a significant carbon footprint, such as red meat, food transported over long distances and cell phones?

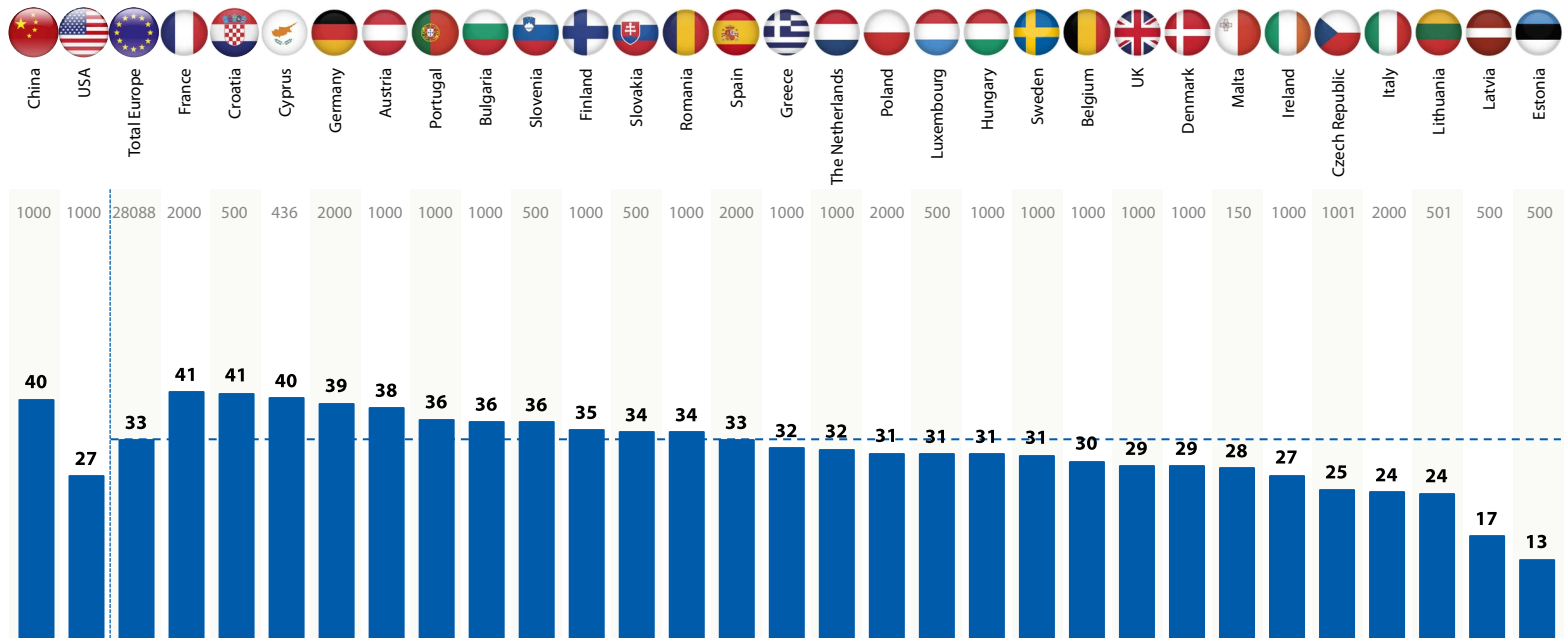
● % completely in favour



SUPPORT FOR A CARBON TAX ON FLIGHTS, BY COUNTRY

Are you in favour of a carbon tax on flights to fight climate change?

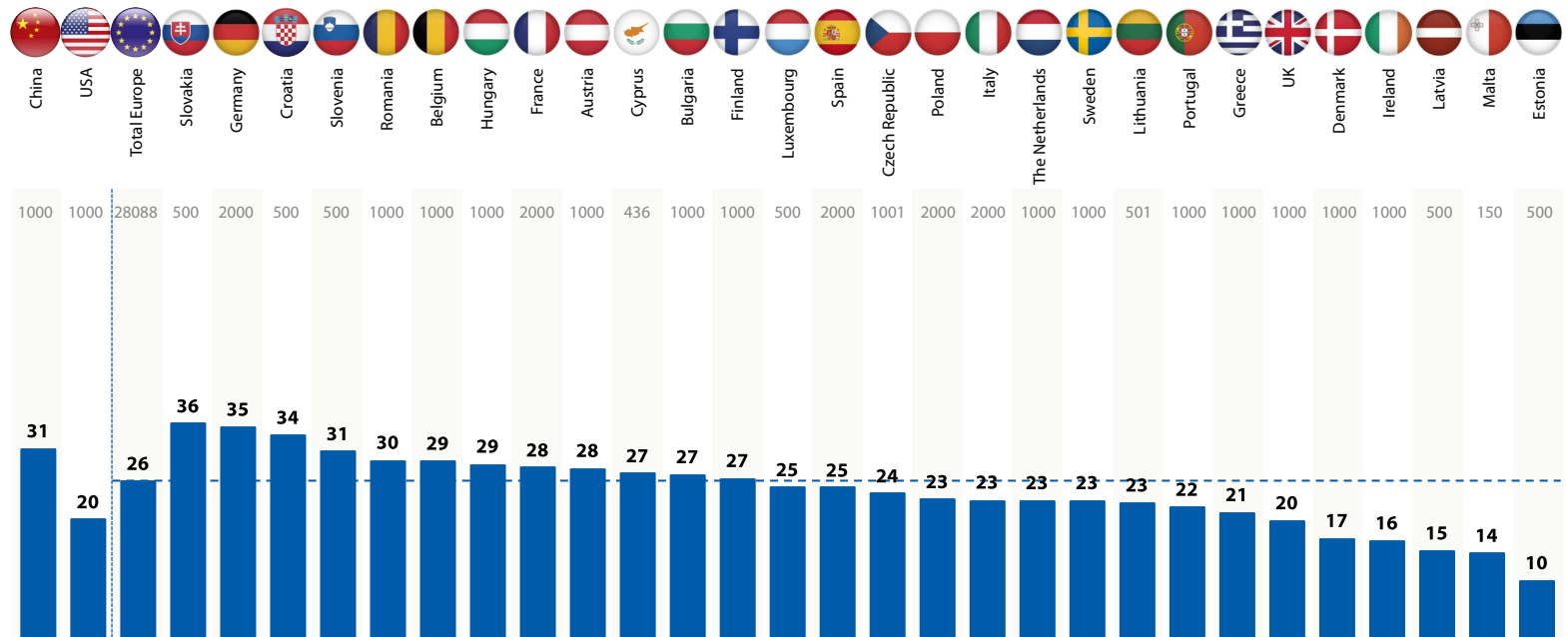
● % Completely in favour



SUPPORT FOR A BAN ON SHORT-HAUL FLIGHTS, BY COUNTRY

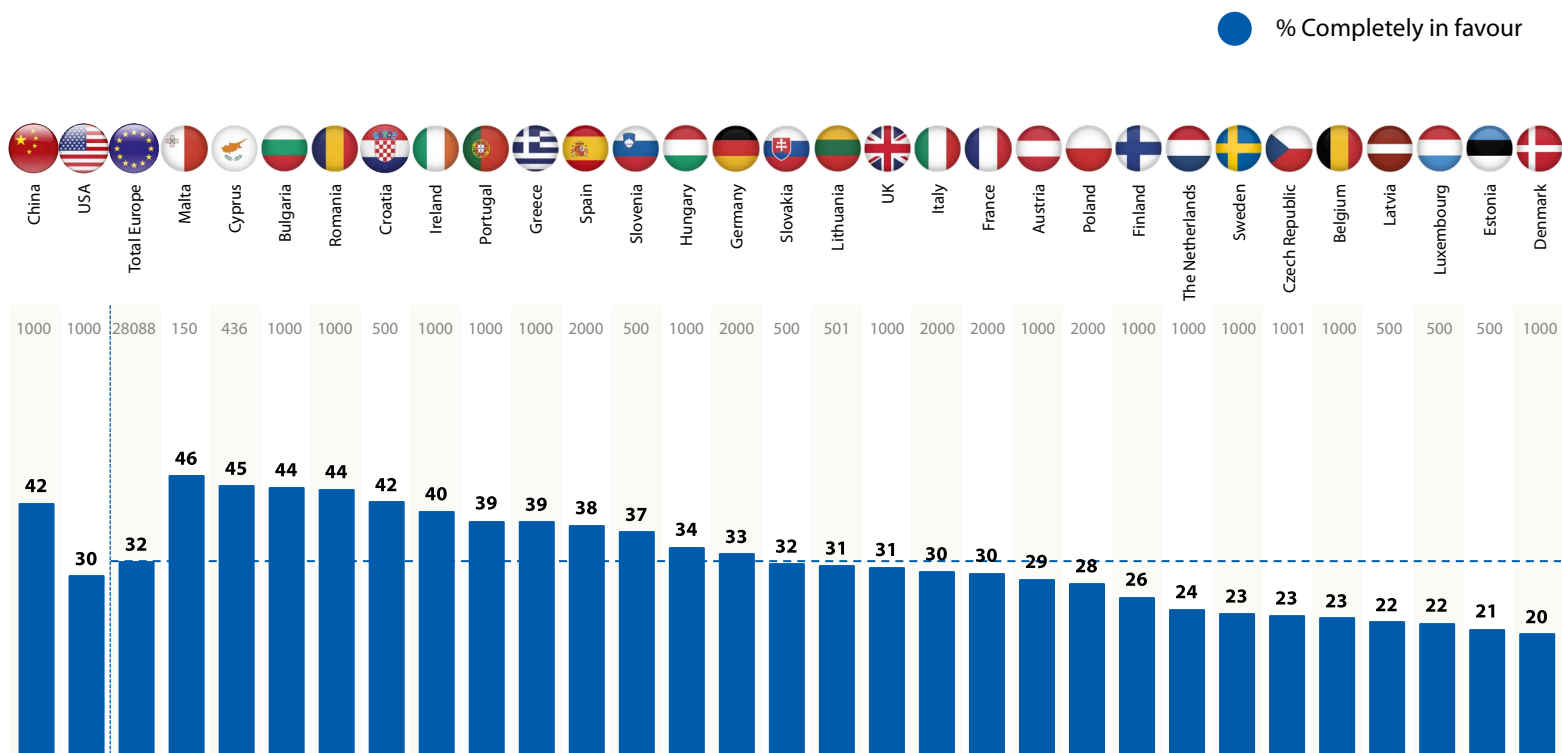
Are you in favour of a ban on short-haul flights to fight climate change?

● % Completely in favour



SUPPORT FOR FINANCIAL HELP FOR THOSE MOST AFFECTED BY THE ENERGY TRANSITION, BY COUNTRY

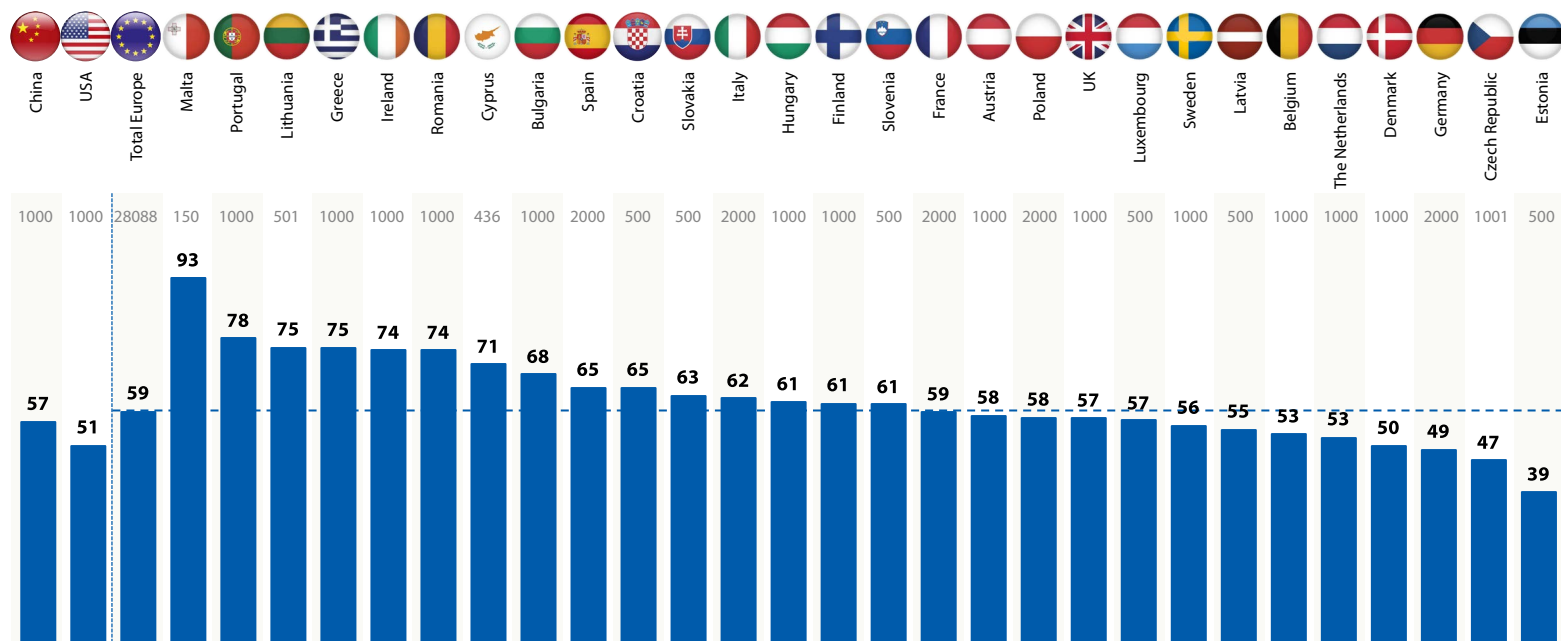
Are you in favour of financial support for communities and workers who will suffer most from the energy transition to fight climate change?



SUPPORT FOR TEACHING ABOUT CLIMATE CHANGE AND WASTE SORTING IN SCHOOLS, BY COUNTRY

Are you in favour of teaching about climate change and waste sorting (e.g. recycling) at school to fight climate change?

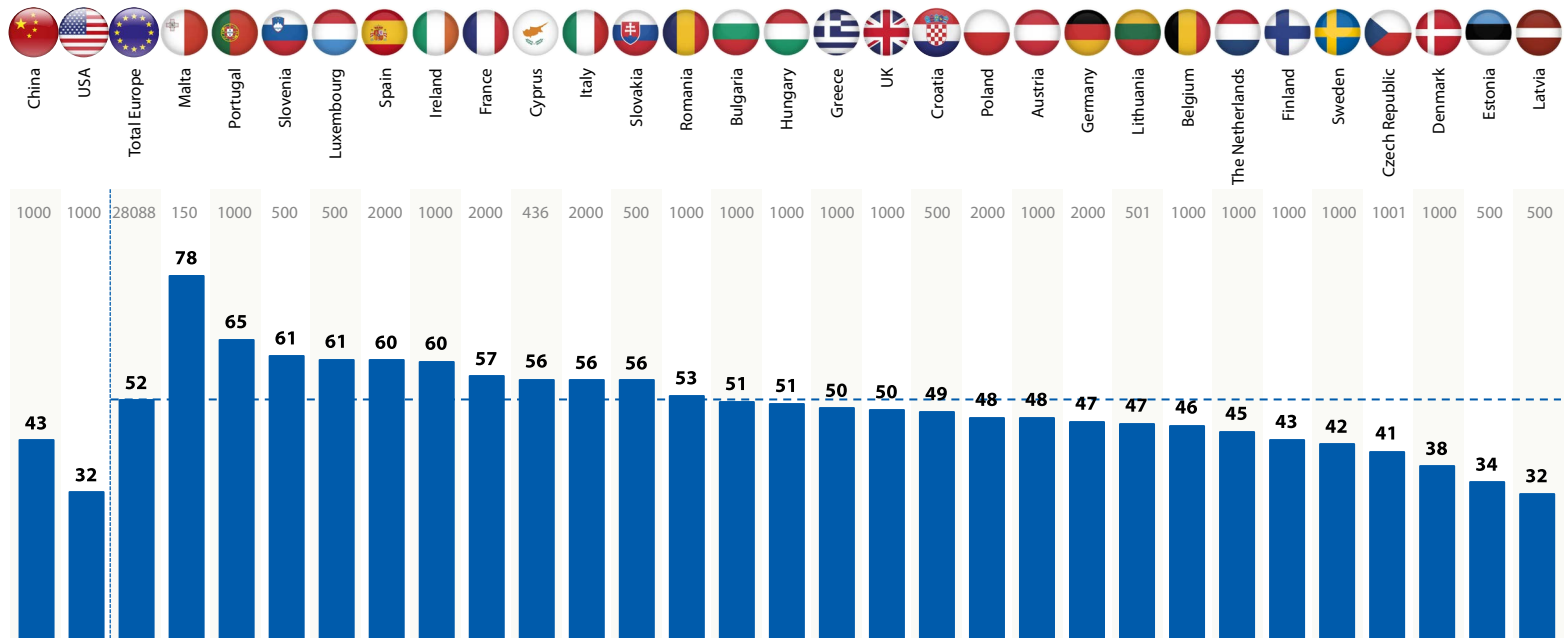
● % Completely in favour



SUPPORT FOR BANNING SINGLE-USE PLASTICS, BY COUNTRY

Are you in favour of a ban on single-use plastics (e.g. straws, cutlery, Q-tips, etc.) to fight climate change?

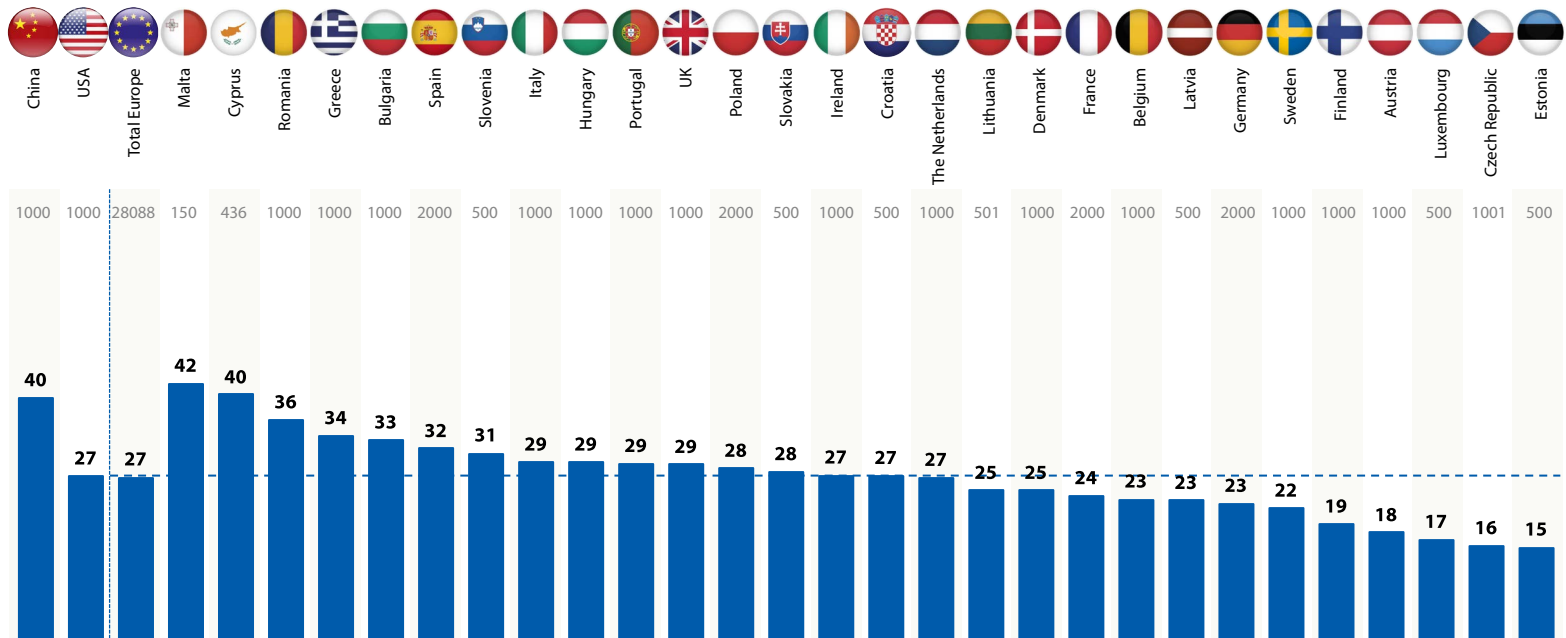
● % Completely in favour



SUPPORT FOR A PROGRESSIVE BAN ON DIESEL CARS, BY COUNTRY

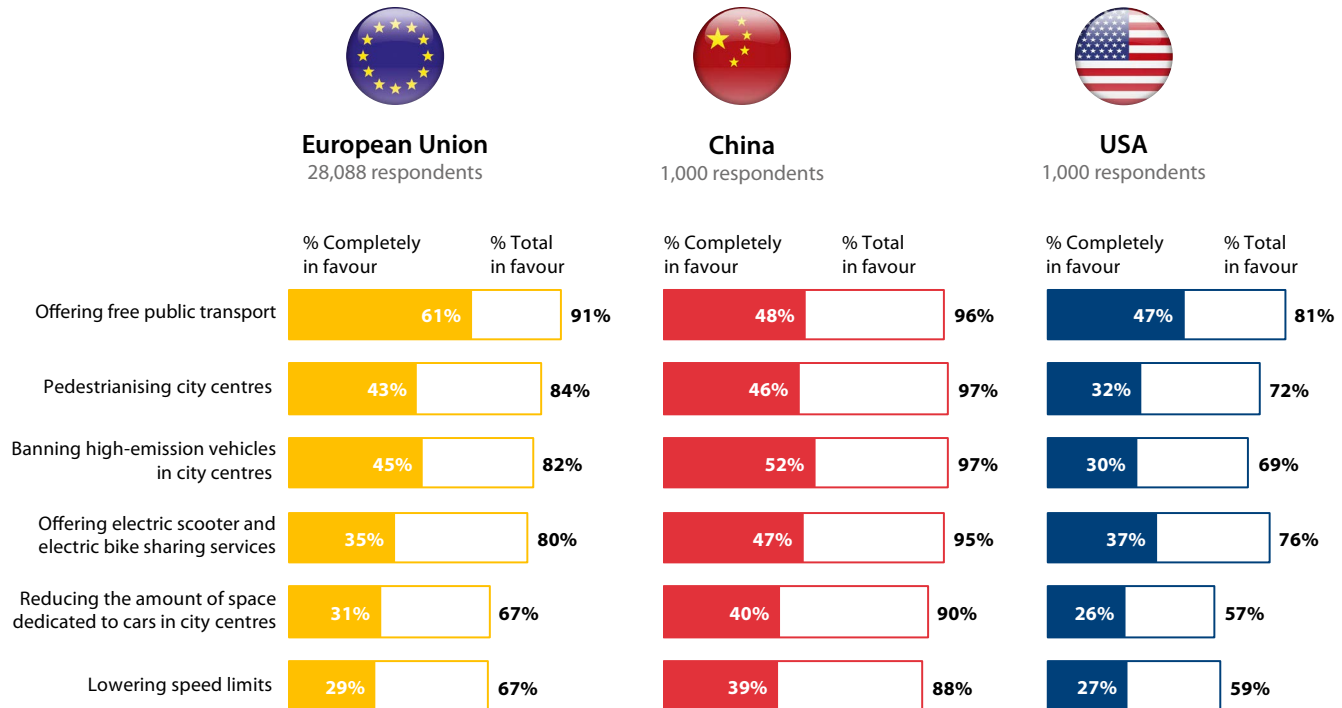
Are you in favour of a progressive ban on diesel cars to fight climate change?

● % Completely in favour



EUROPEANS AND AMERICANS ARE LESS IN FAVOUR OF PENALISING CARS THAN CHINESE CITIZENS

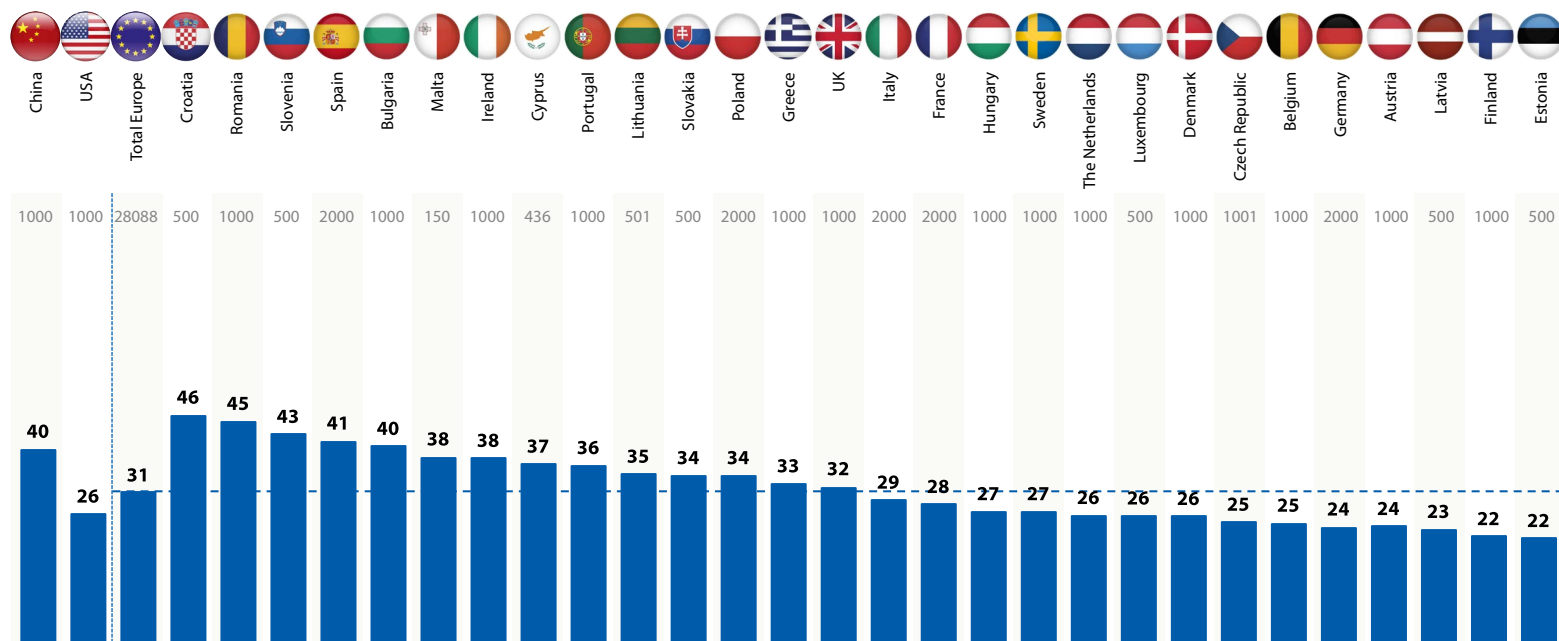
For trips within cities, are you in favour of the following steps to fight climate change?



SUPPORT FOR REDUCING SPACE FOR CARS IN CITY CENTRES, BY COUNTRY

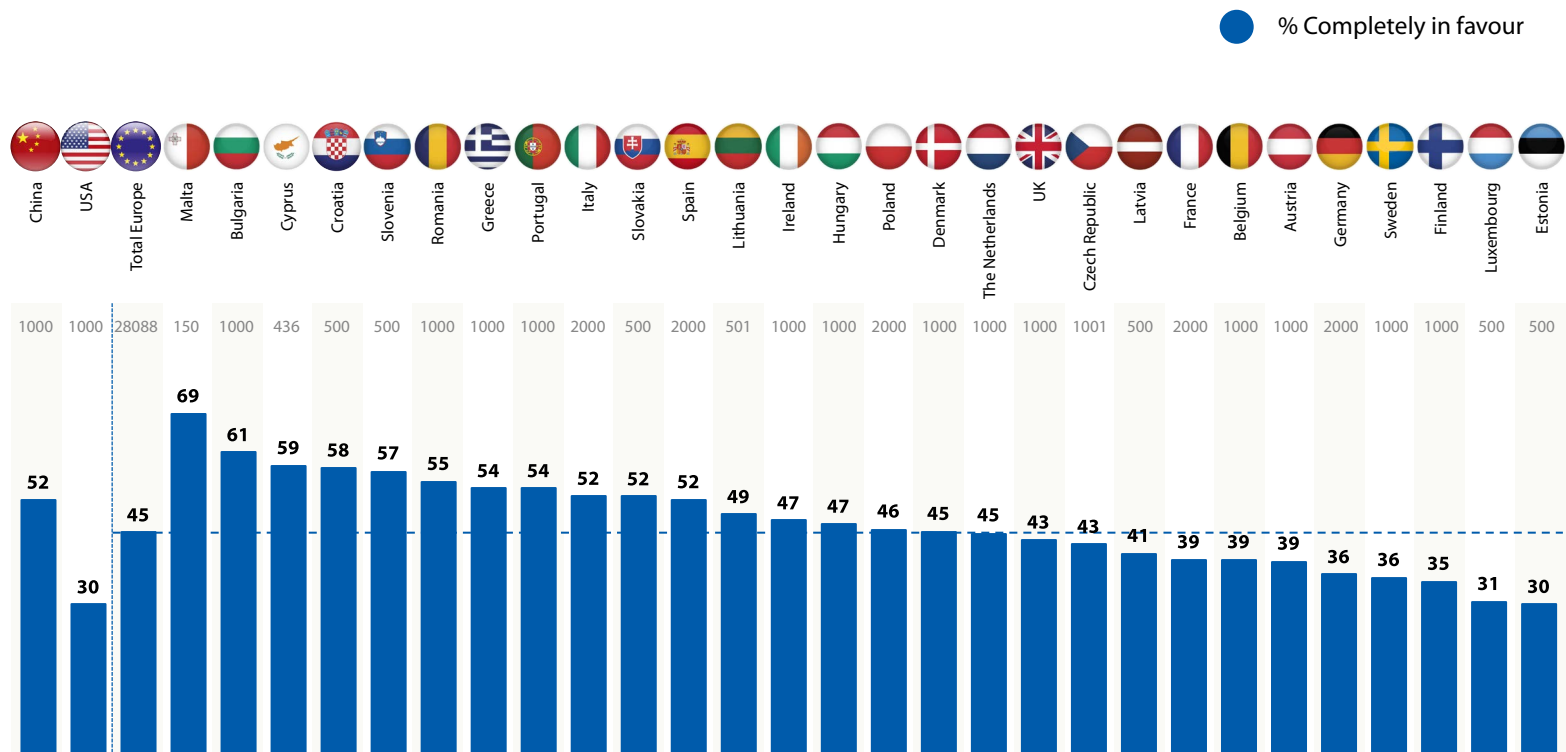
For trips within cities, are you in favour of the reducing the space dedicated to cars in city centres to fight climate change?

● % Completely in favour



SUPPORT FOR BANNING HIGH-EMISSION VEHICLES IN CITY CENTRES, BY COUNTRY

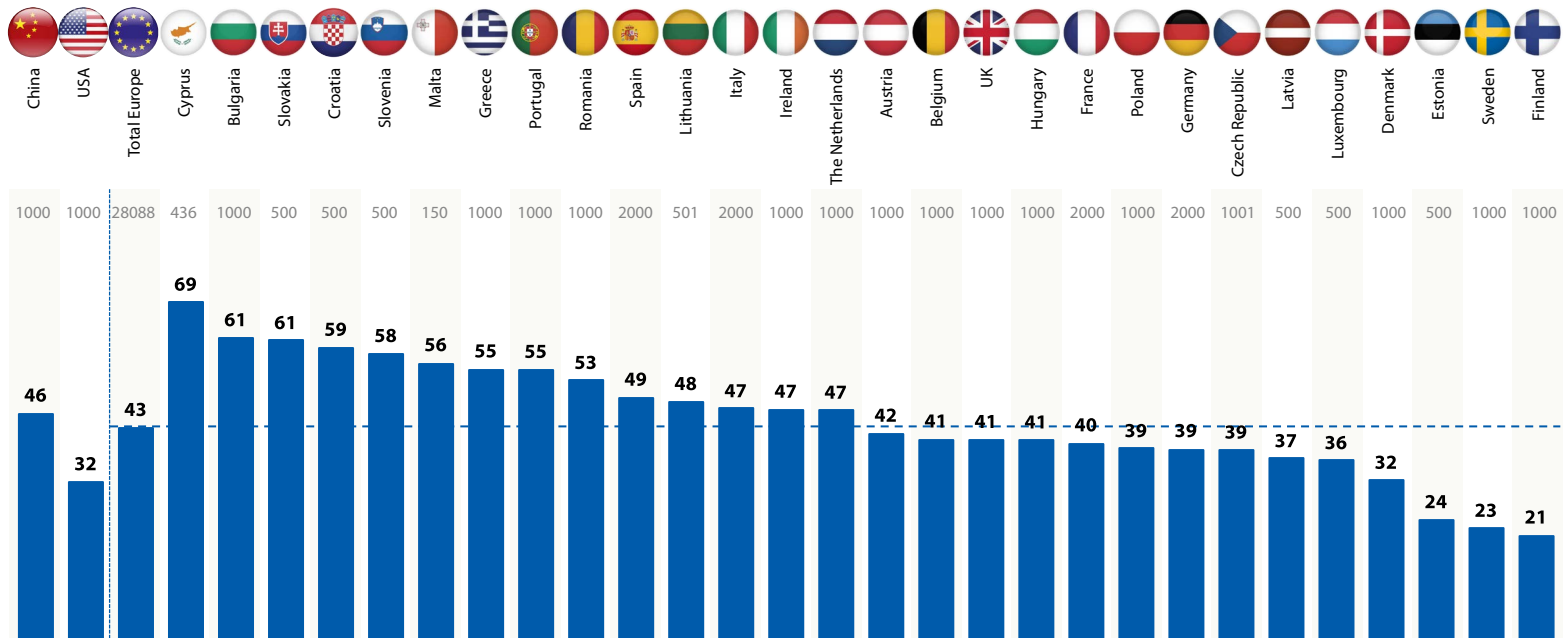
For trips within cities, are you in favour of banning high-emission vehicles in city centres to fight climate change?



SUPPORT FOR PEDESTRIANISING CITY CENTRES, BY COUNTRY

For trips within cities, are you in favour of pedestrianising city centres to fight climate change?

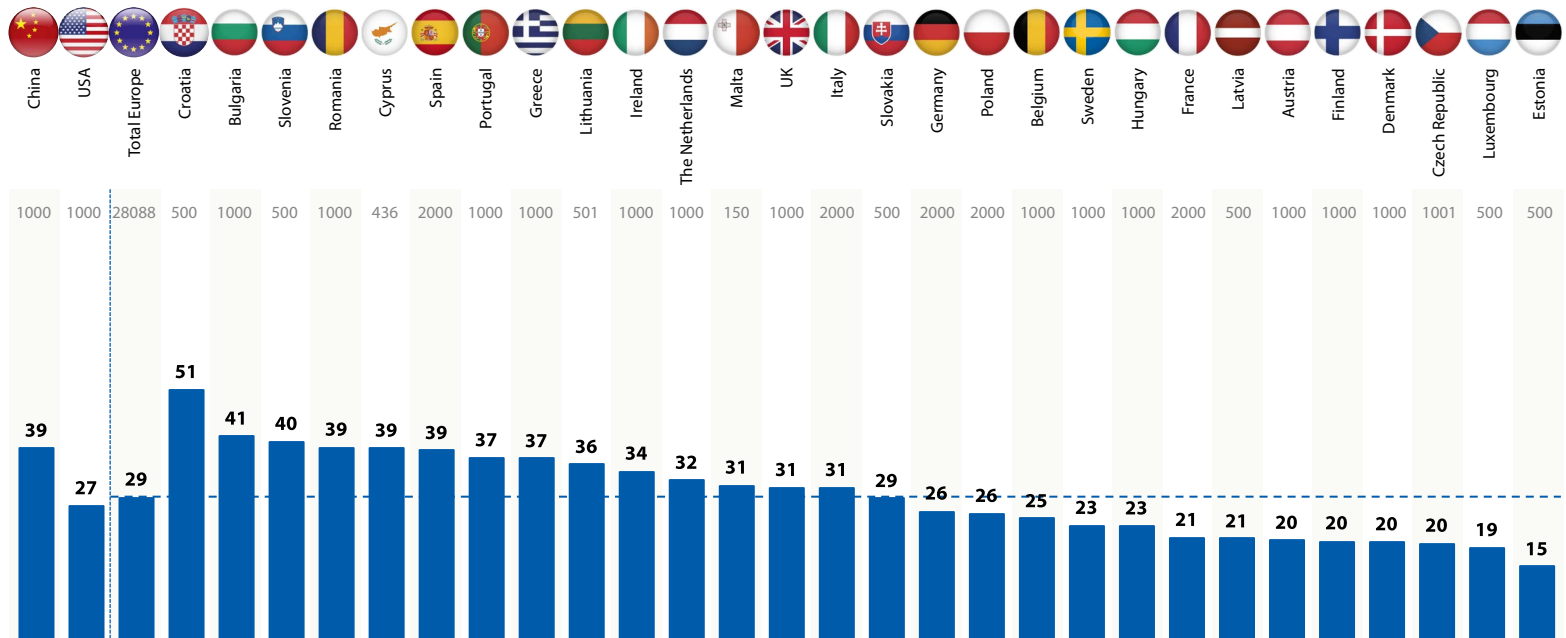
● % Completely in favour



SUPPORT FOR LOWERING SPEED LIMITS, BY COUNTRY

For trips within cities, are you in favour of lowering speed limits to fight climate change?

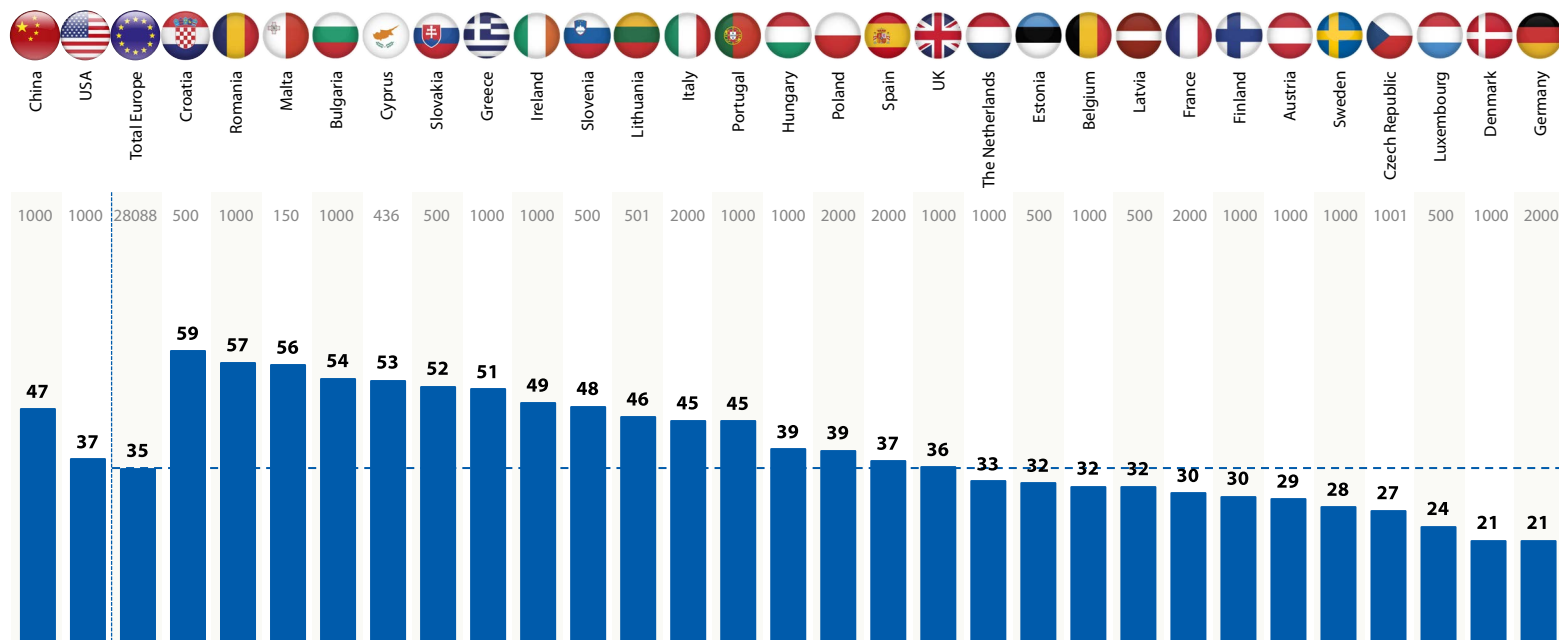
● % Completely in favour



SUPPORT FOR ELECTRIC SCOOTER AND BICYCLE SHARING SERVICES, BY COUNTRY

For trips within cities, are you in favour of offering electric scooter and electric bike sharing services to fight climate change?

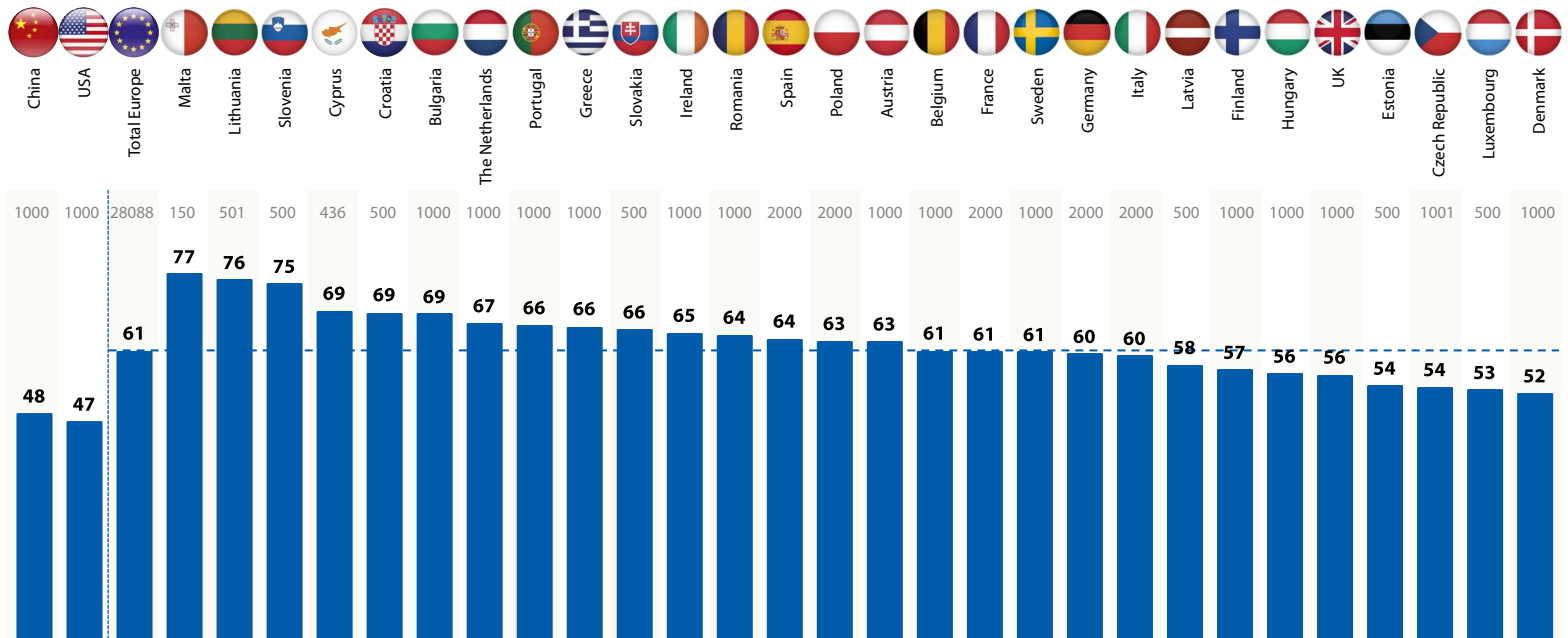
● % Completely in favour



SUPPORT FOR FREE PUBLIC TRANSPORT, BY COUNTRY

For trips within cities, are you in favour of free public transport to fight climate change?

● % Completely in favour



MORE THAN 9 IN 10 CHINESE CITIZENS AND 7 IN 10 EUROPEAN AND AMERICAN CITIZENS WOULD BE WILLING TO ALLOCATE TO A TAX TO FIGHT CLIMATE CHANGE

Let's imagine that every citizen in your country had to pay an extra tax to fight climate change, proportional to his or her income. Let's also imagine this tax was formally proven to solve the problem of climate change within 30 years. Would you be ready to allocate to this new tax per year?



92%

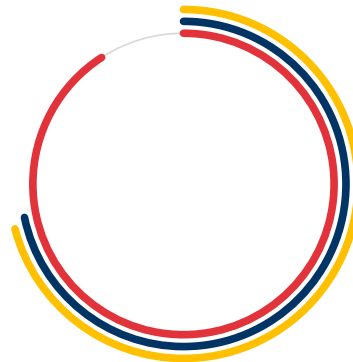


71%



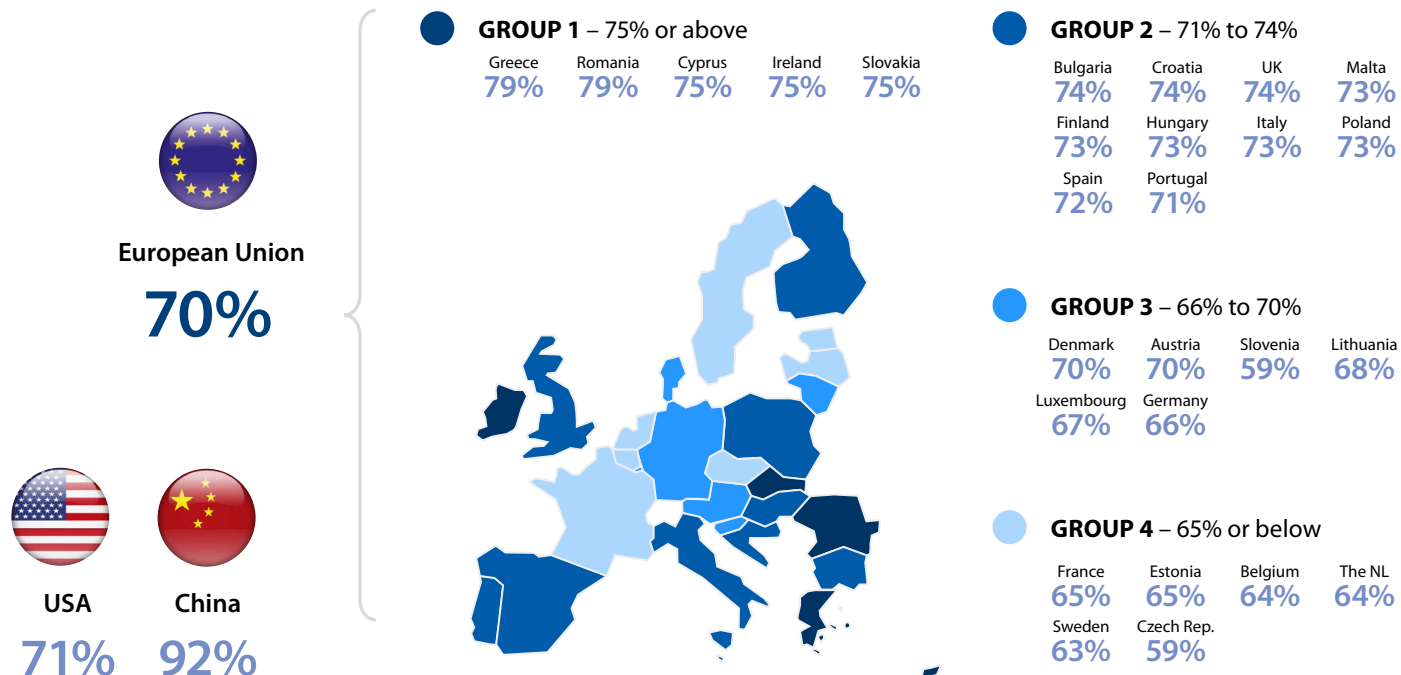
70%

Willing to allocate to the tax



SOUTHERN AND EASTERN EUROPEAN COUNTRIES ARE MORE LIKELY TO BE WILLING TO ALLOCATE TO THE TAX

Let's imagine that every citizen in your country had to pay an extra tax to fight climate change, proportional to his or her income. Let's also imagine this tax was formally proven to solve the problem of climate change within 30 years. Would you be ready to allocate to this new tax per year?

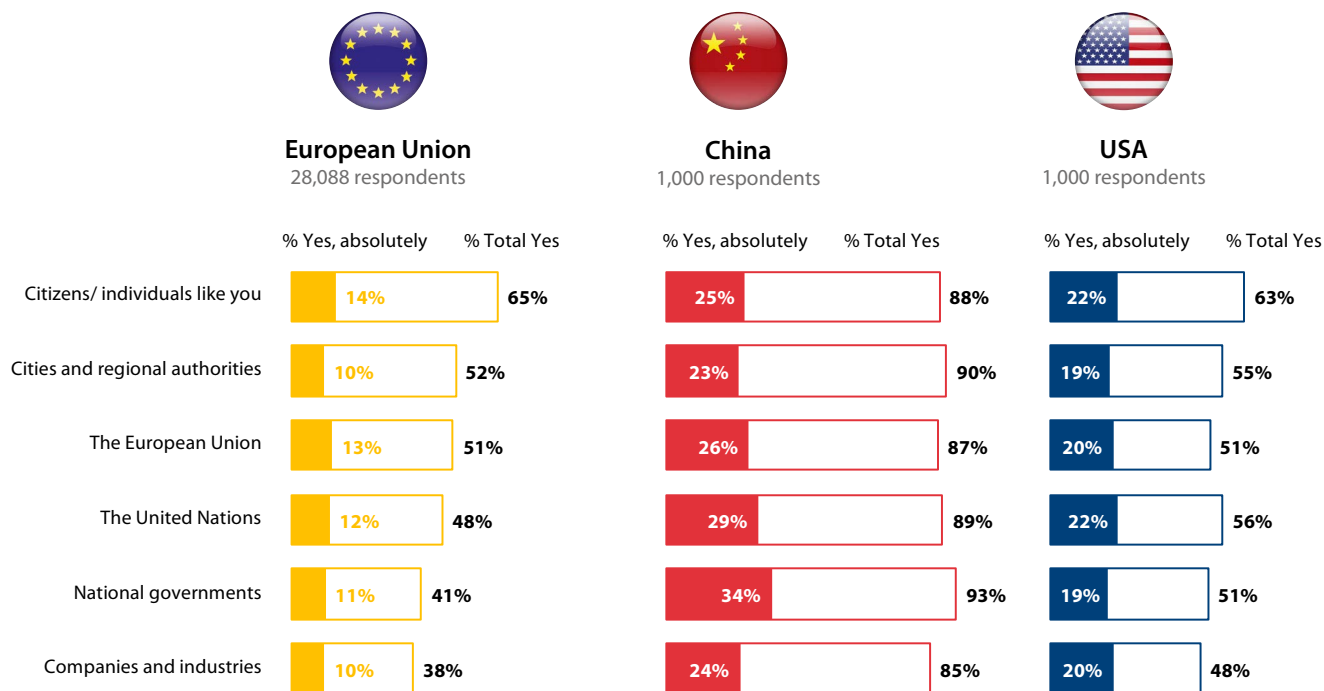


WHO IS RESPONSIBLE FOR TACKLING CLIMATE CHANGE?



CHINESE CITIZENS HAVE BROADER, DEEPER TRUST IN VARIOUS ACTORS' EFFICIENCY IN FIGHTING CLIMATE CHANGE

Would you say that the following are taking sufficient action in the fight against climate change?

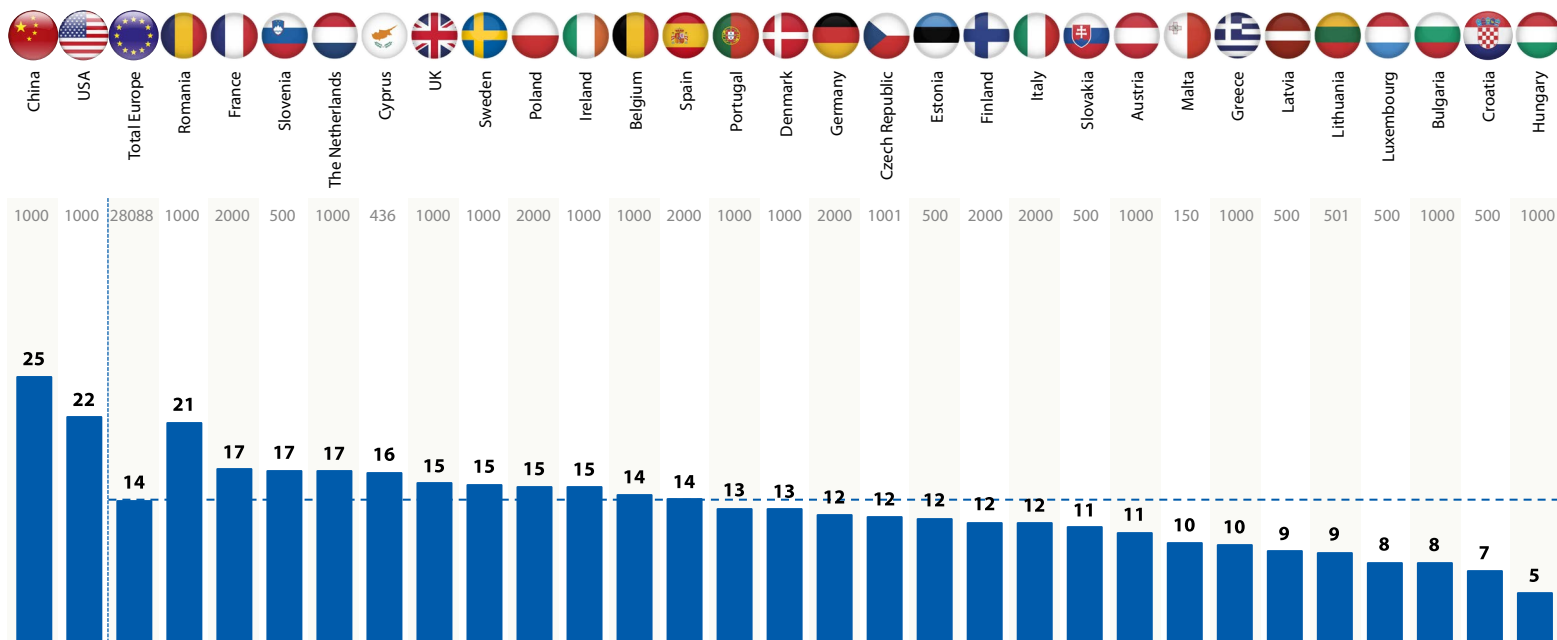


Total higher than 100% because more than one answer was possible

BELIEF THAT INDIVIDUALS ARE TAKING SUFFICIENT ACTION IN FIGHTING CLIMATE CHANGE

Would you say that individuals are taking sufficient action in the fight against climate change?

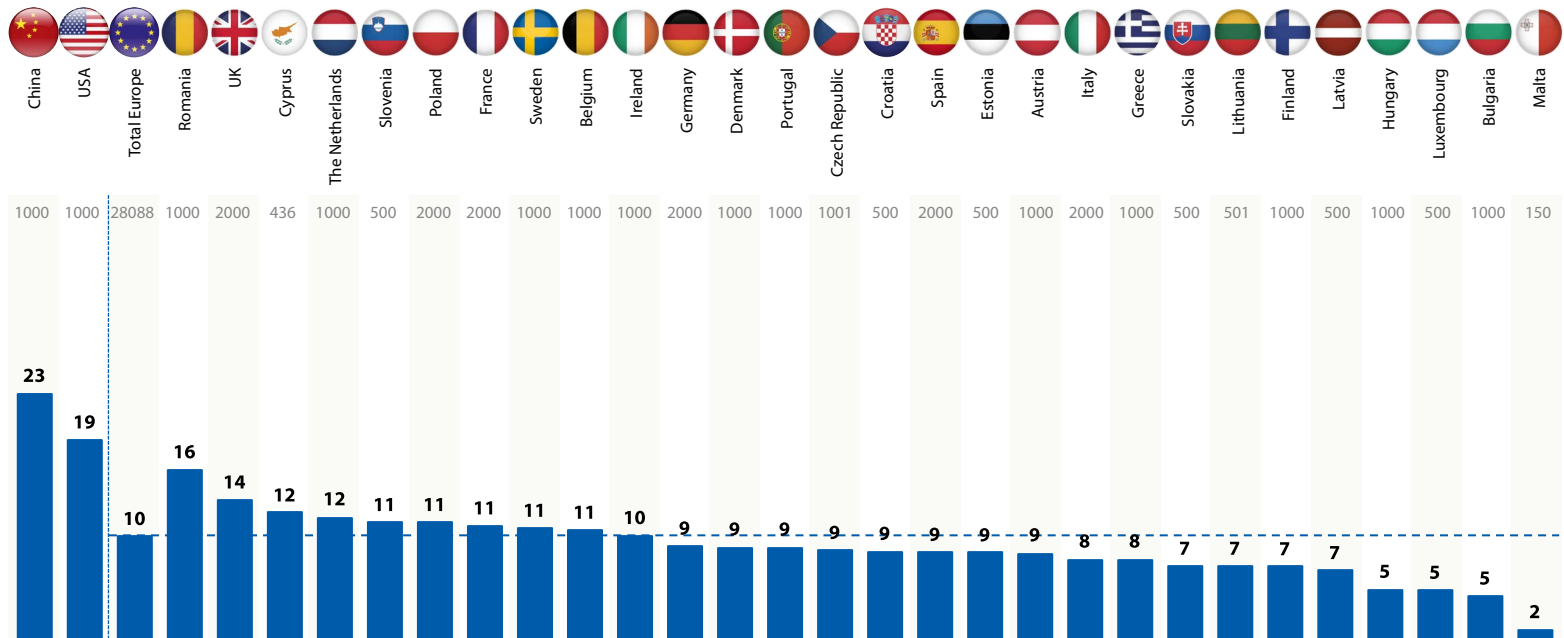
● % Yes, absolutely



BELIEF THAT CITIES AND REGIONAL AUTHORITIES ARE TAKING SUFFICIENT ACTION IN FIGHTING CLIMATE CHANGE

Would you say that cities and regional authorities are taking sufficient action in the fight against climate change?

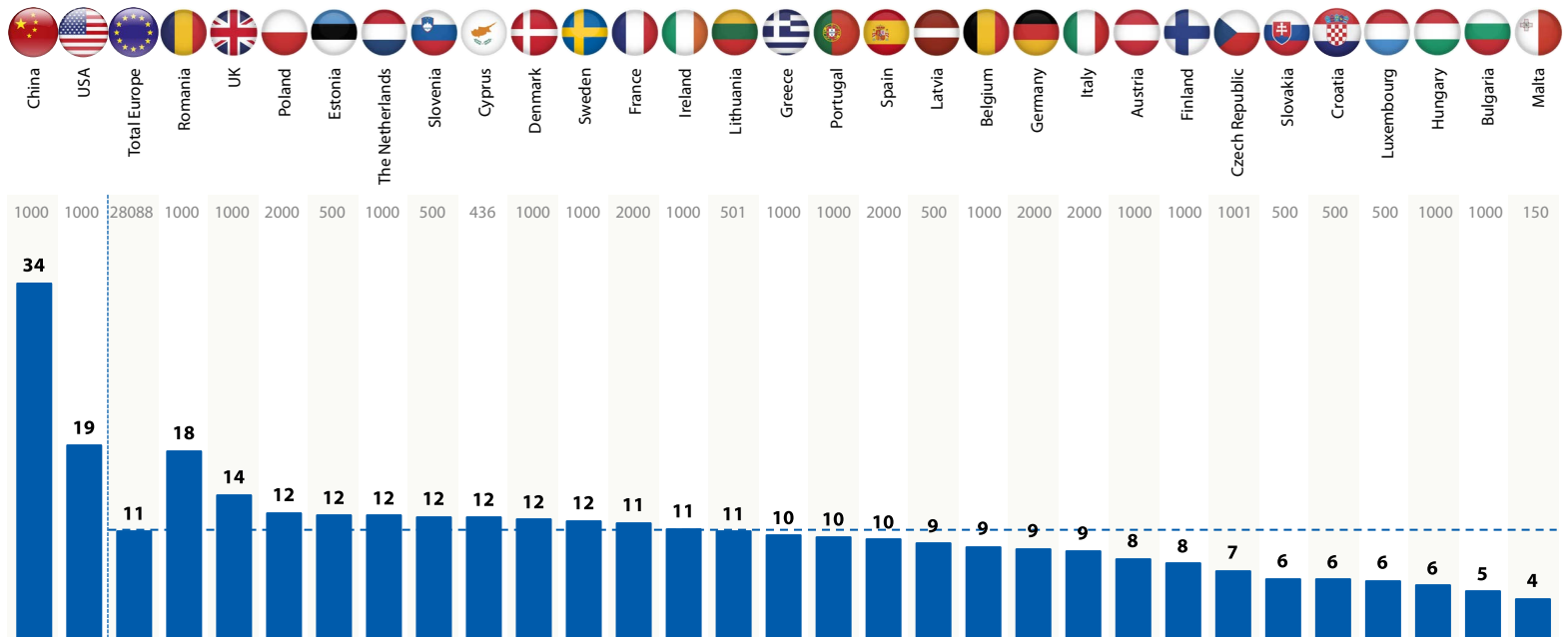
● % Yes, absolutely



BELIEF THAT NATIONAL GOVERNMENTS ARE TAKING SUFFICIENT ACTION IN FIGHTING CLIMATE CHANGE, BY COUNTRY

Would you say that national governments are taking sufficient action in the fight against climate change?

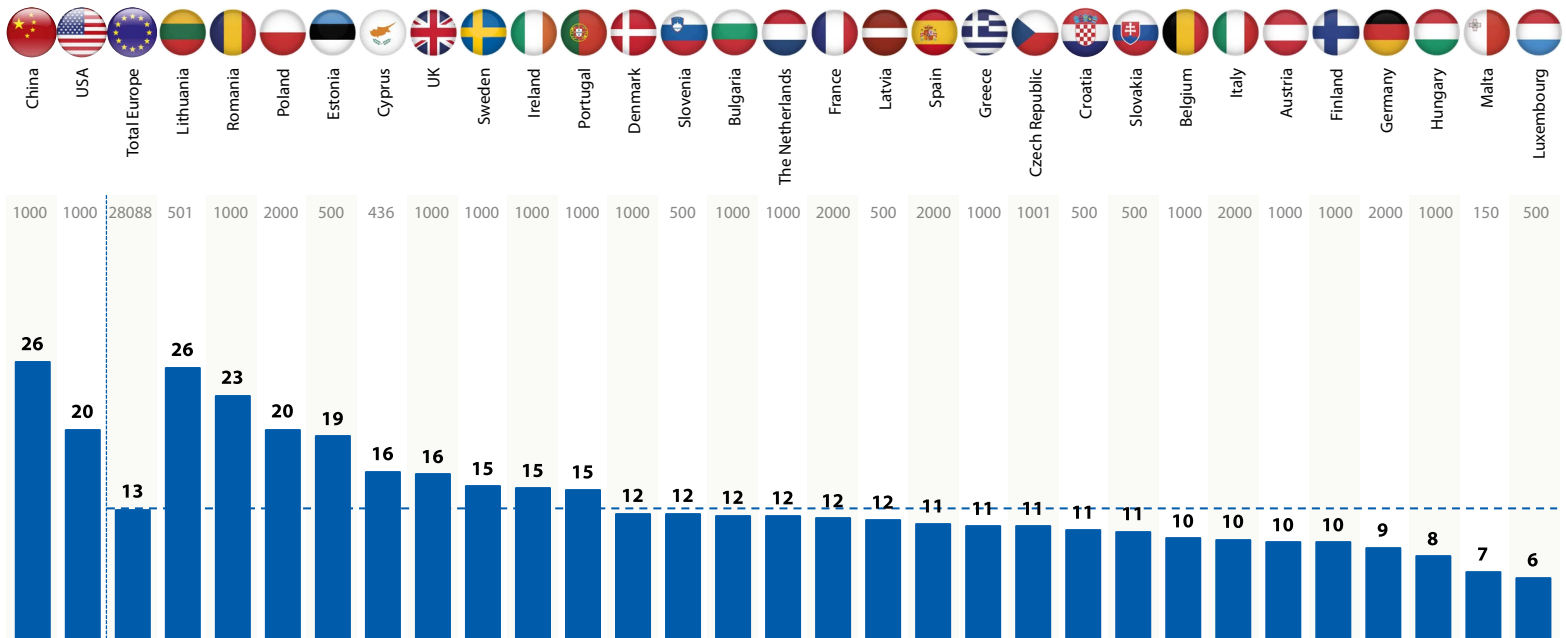
● % Yes, absolutely



BELIEF THAT THE EUROPEAN UNION IS TAKING SUFFICIENT ACTION IN FIGHTING CLIMATE CHANGE

Would you say that the European Union is taking sufficient action in the fight against climate change?

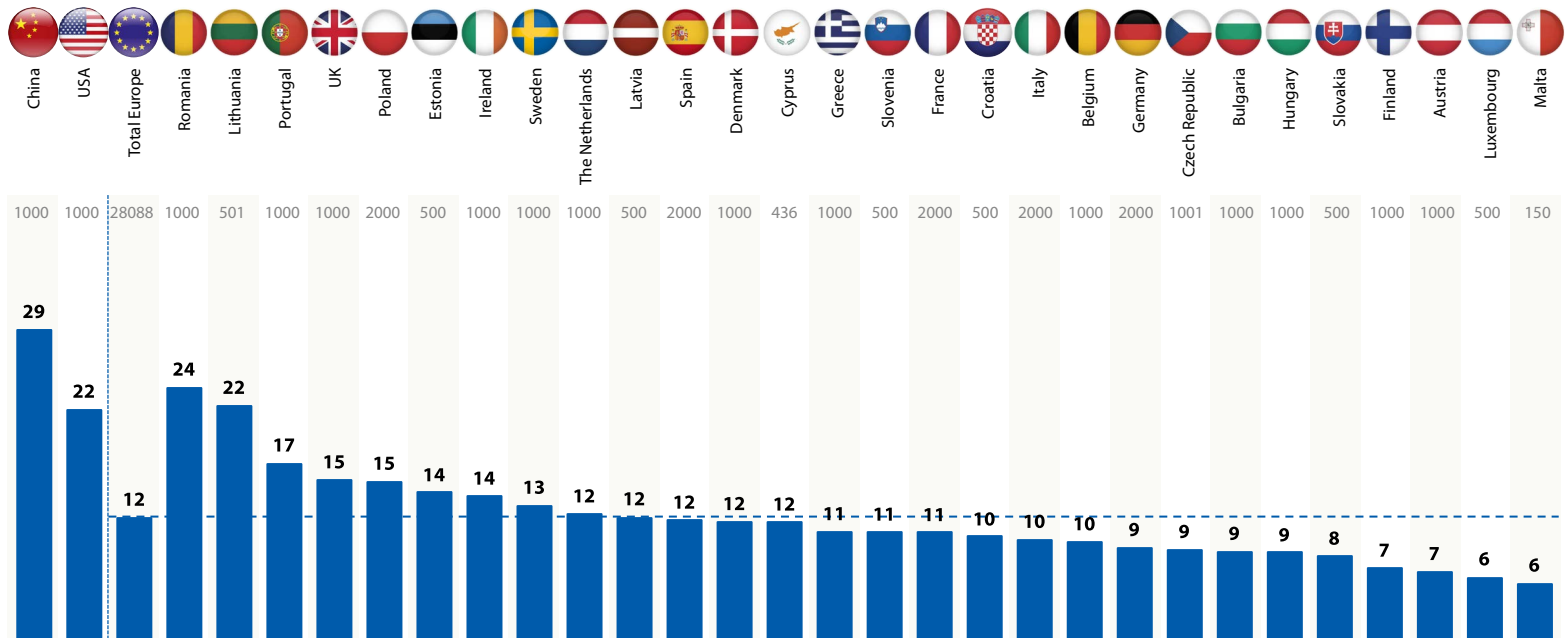
● % Yes, absolutely



BELIEF THAT THE UN IS TAKING SUFFICIENT ACTION IN FIGHTING CLIMATE CHANGE

Would you say that the United Nations is taking sufficient action in the fight against climate change?

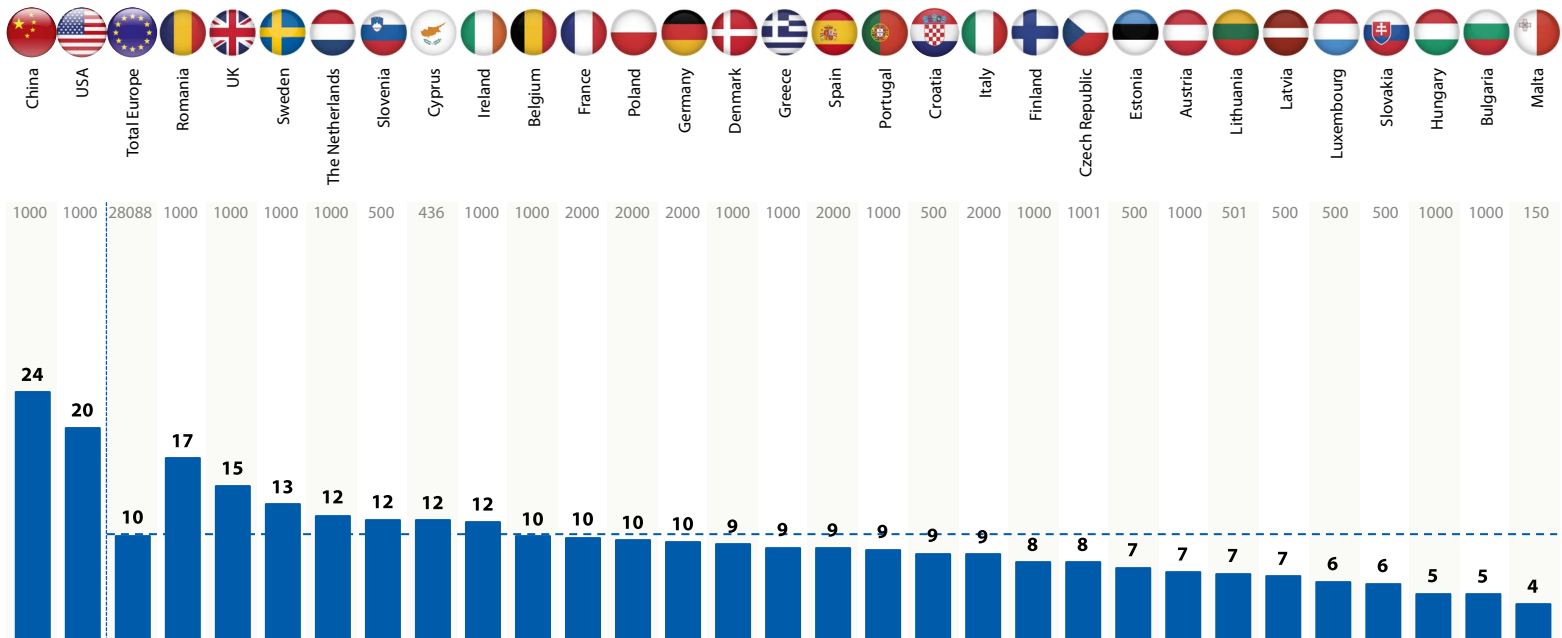
● % Yes, absolutely



BELIEF THAT COMPANIES AND INDUSTRIES ARE TAKING SUFFICIENT ACTION IN FIGHTING CLIMATE CHANGE

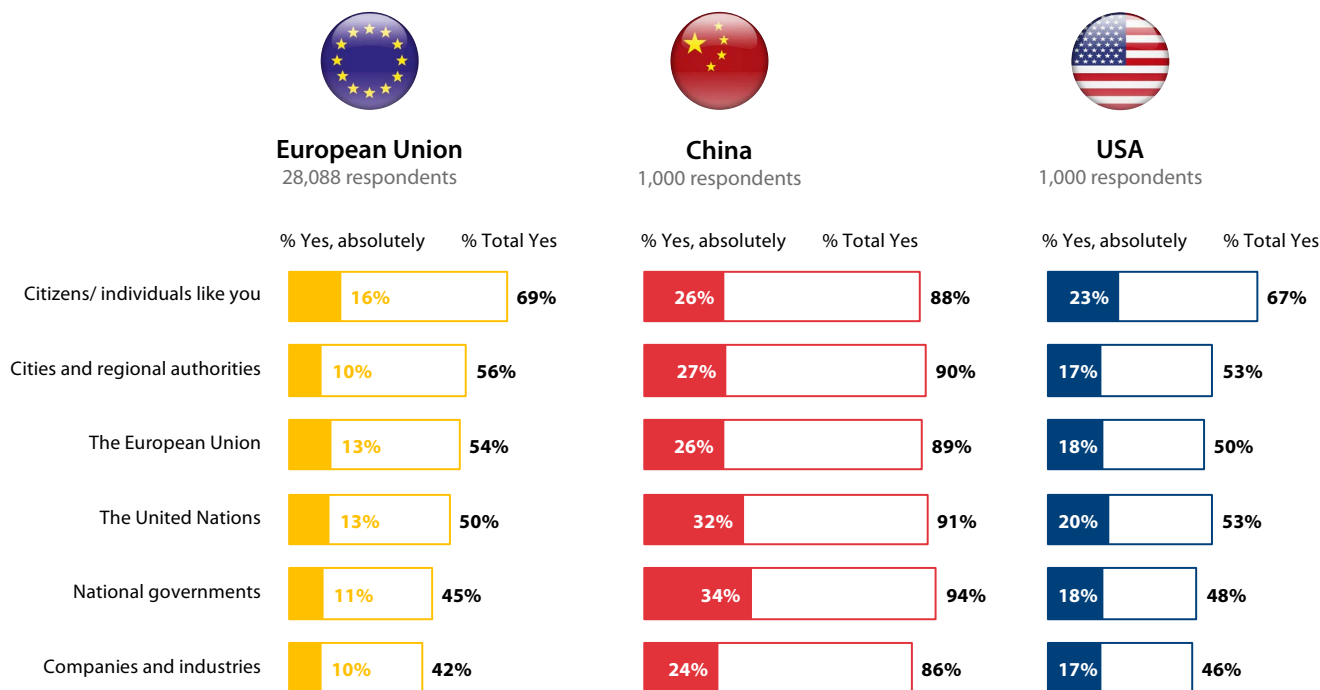
Would you say that companies and industries are taking sufficient action in the fight against climate change?

● % Yes, absolutely



CHINESE CITIZENS ARE MORE TRUSTING OF VARIOUS ACTORS' TACKLING OF CLIMATE CHANGE

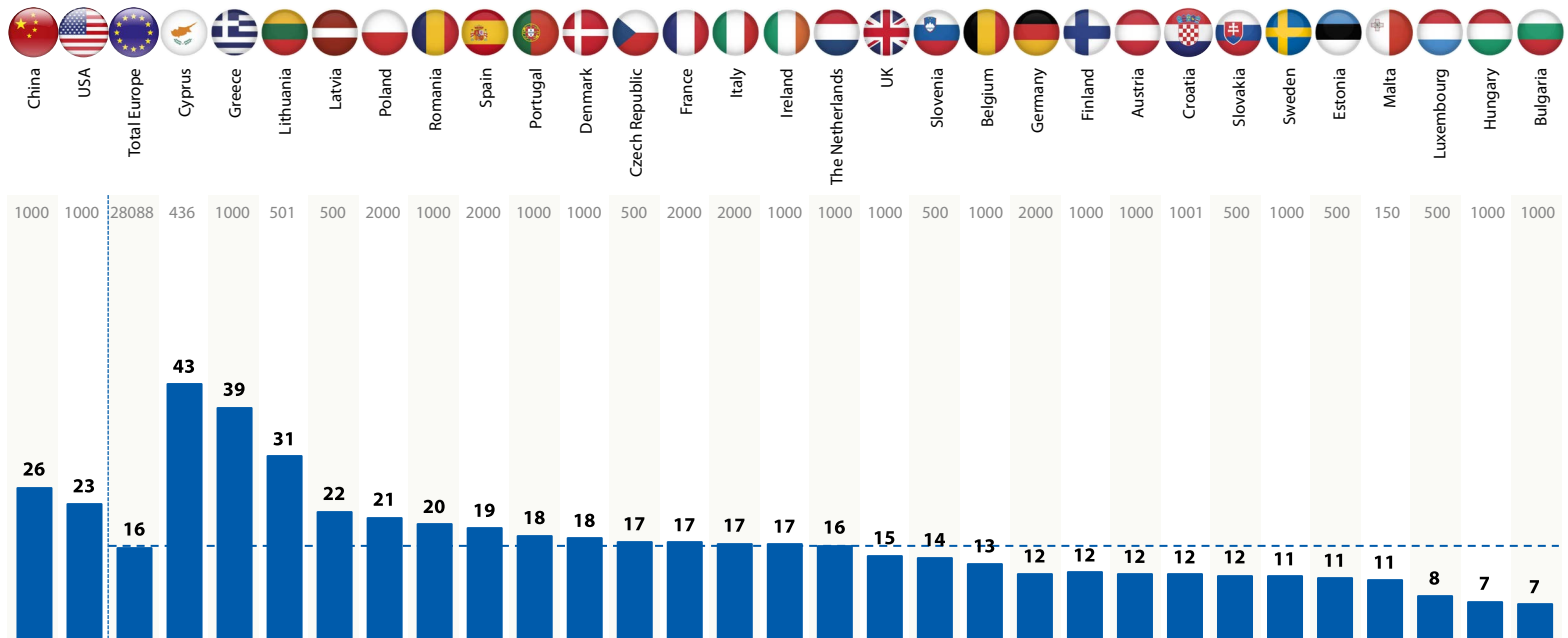
Do you trust each of the following to effectively fight climate change?



SHARE OF THE POPULATION TRUSTING CITIZENS TO EFFECTIVELY FIGHT CLIMATE CHANGE, BY COUNTRY

Do you trust individuals like you to effectively fight climate change?

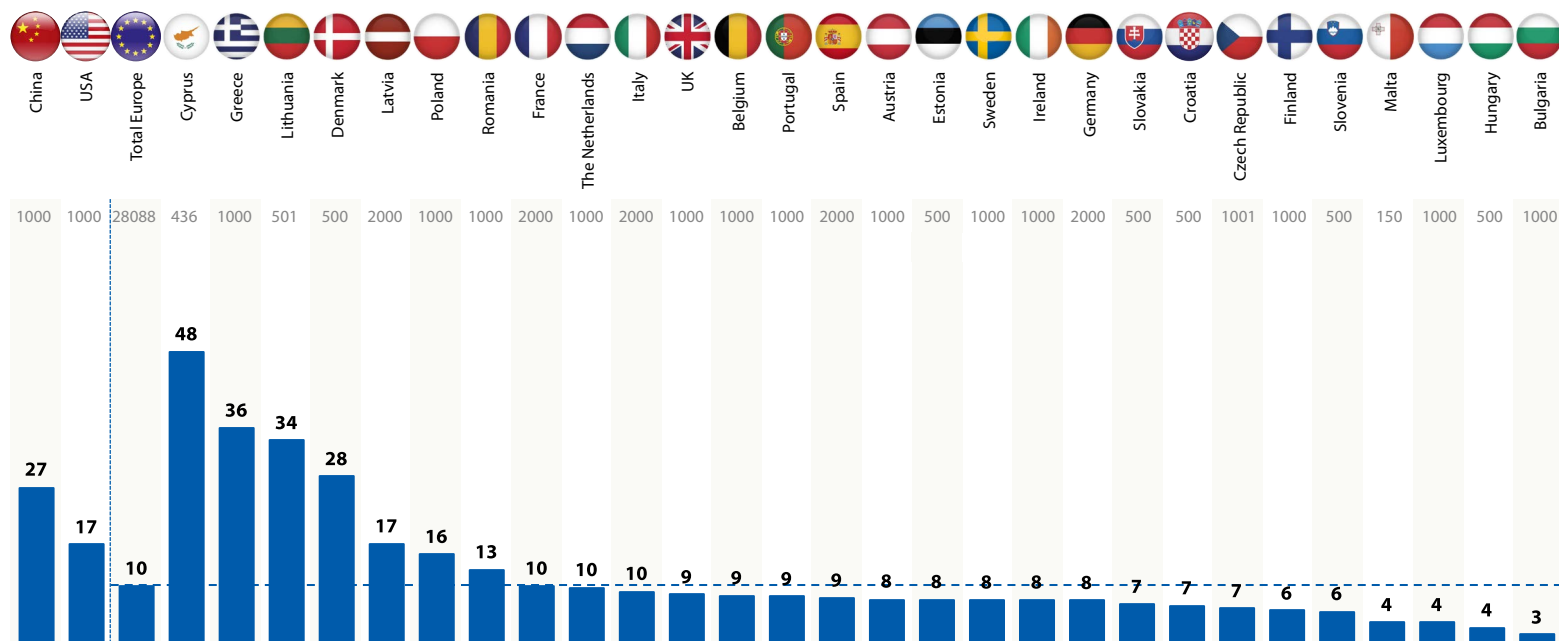
● % Yes, trust absolutely



SHARE OF THE POPULATION TRUSTING CITIES AND REGIONAL AUTHORITIES TO EFFECTIVELY FIGHT CLIMATE CHANGE, BY COUNTRY

Do you trust cities and regional authorities to effectively fight climate change?

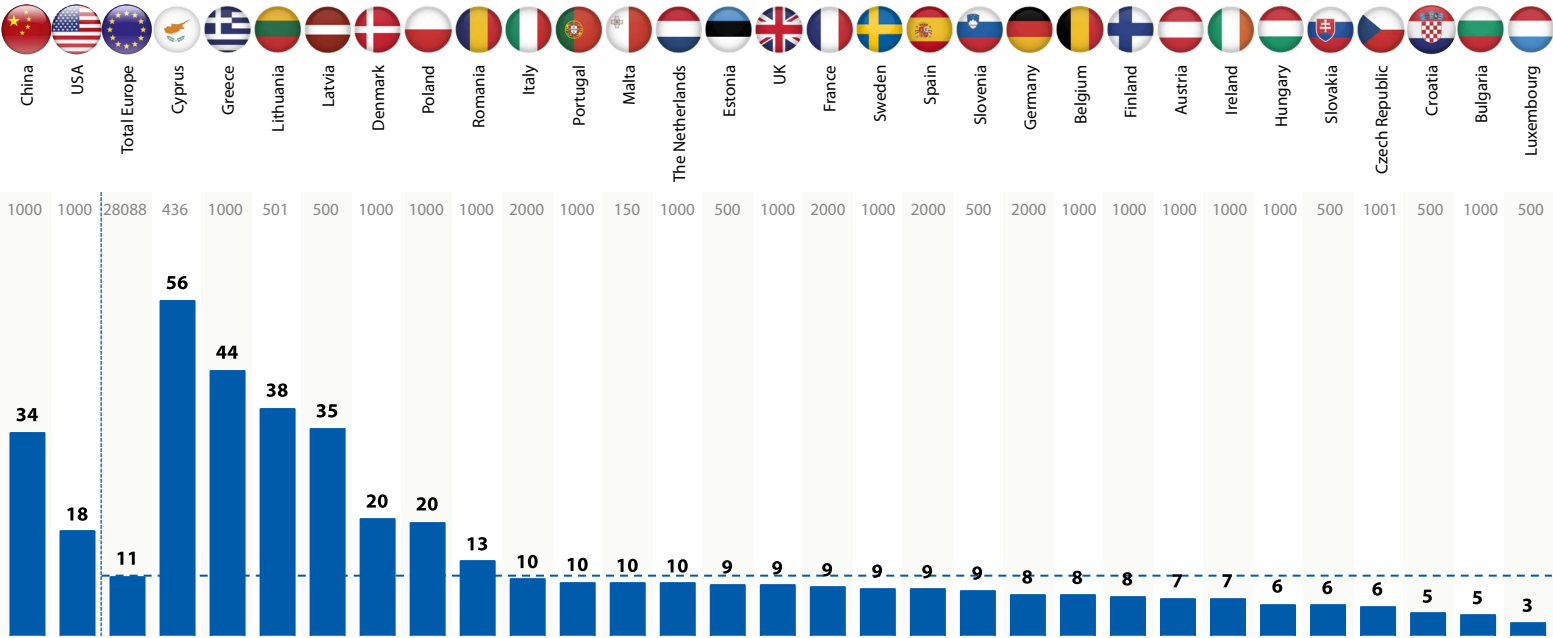
● % Yes, trust absolutely



SHARE OF THE POPULATION TRUSTING NATIONAL GOVERNMENTS TO EFFECTIVELY FIGHT CLIMATE CHANGE, BY COUNTRY

Do you trust national governments to effectively fight climate change?

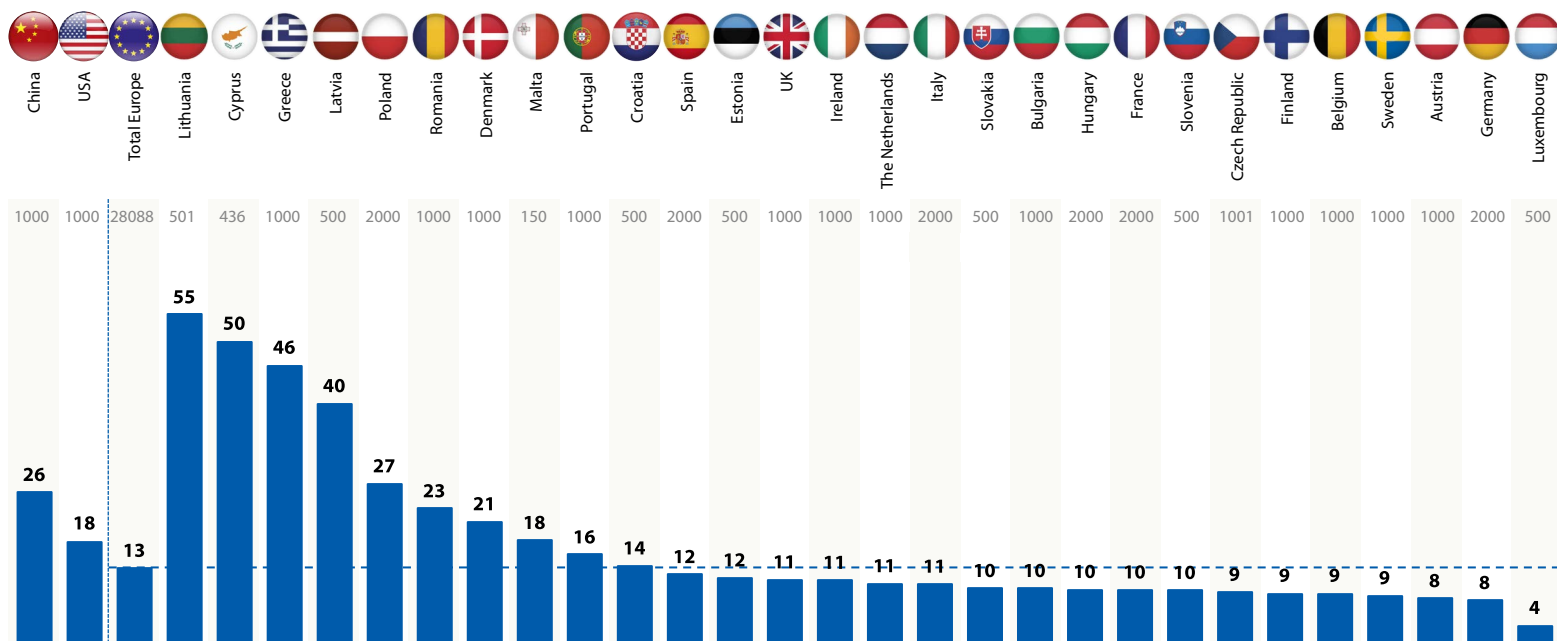
● % Yes, trust absolutely



SHARE OF THE POPULATION TRUSTING THE EU TO EFFECTIVELY FIGHT CLIMATE CHANGE, BY COUNTRY

Do you trust the European Union to effectively fight climate change?

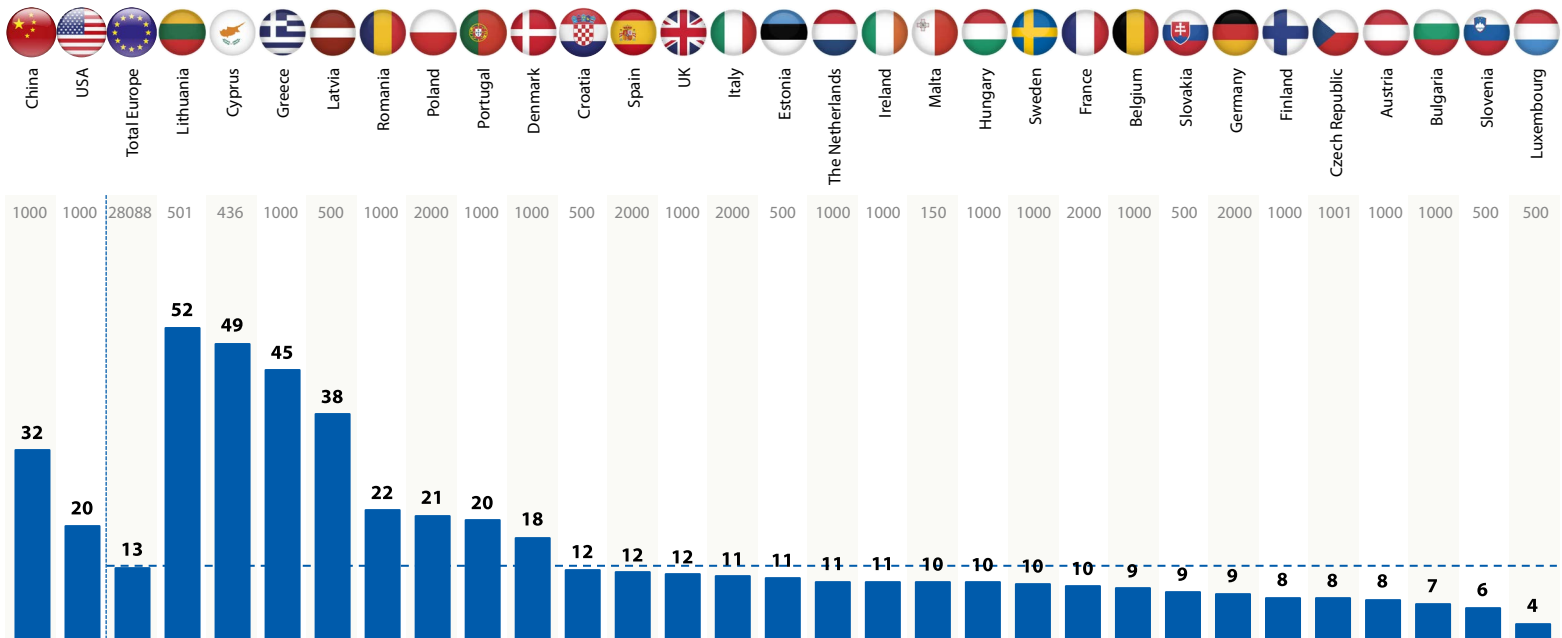
● % Yes, trust absolutely



SHARE OF THE POPULATION TRUSTING THE UN TO EFFECTIVELY FIGHT CLIMATE CHANGE, BY COUNTRY

Do you trust the United Nations to effectively fight climate change?

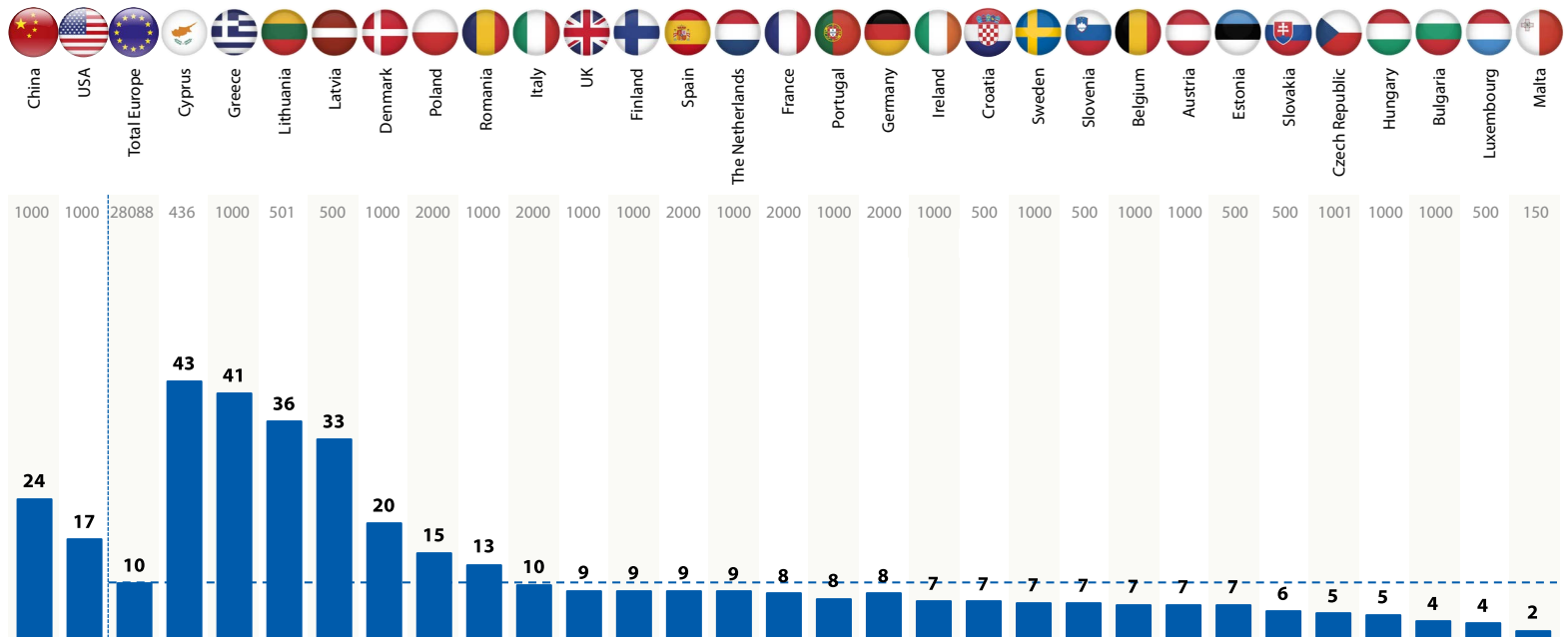
● % Yes, trust absolutely



SHARE OF THE POPULATION TRUSTING COMPANIES AND INDUSTRIES TO EFFECTIVELY FIGHT CLIMATE CHANGE, BY COUNTRY

Do you trust companies and industries to effectively fight climate change?

● % Yes, trust absolutely



CHINESE CITIZENS ARE FAR MORE LIKELY TO TRUST AND BELIEVE IN VARIOUS ACTORS' EFFICIENCY IN TACKLING CLIMATE CHANGE

Would you say that the following are taking sufficient action in the fight against climate change?
Do you trust each of the following to effectively fight climate change?



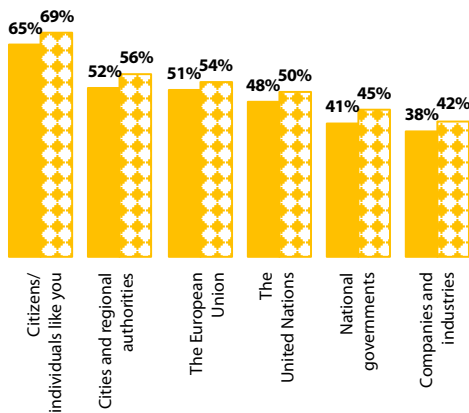
% are taking sufficient action in the fight against climate change



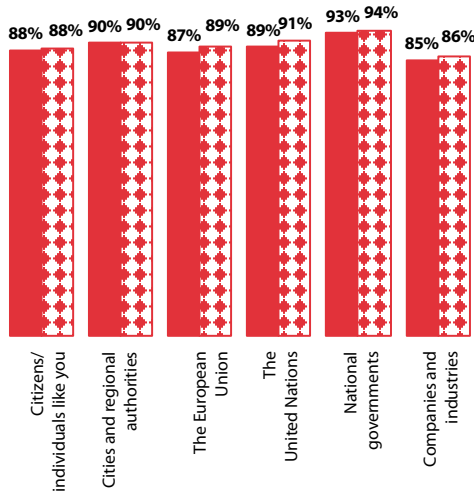
% Yes, trust absolutely



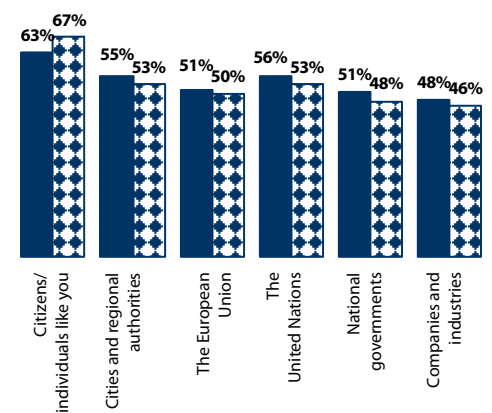
European Union
28,088 respondents



China
1,000 respondents

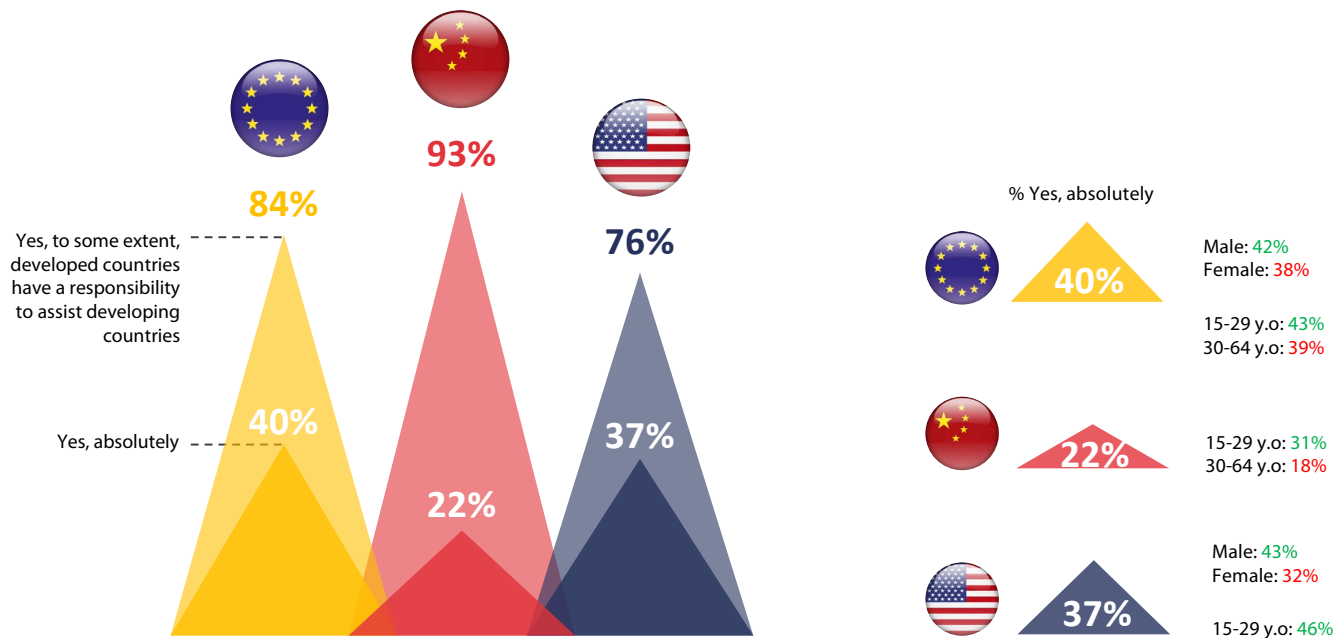


USA
1,000 respondents



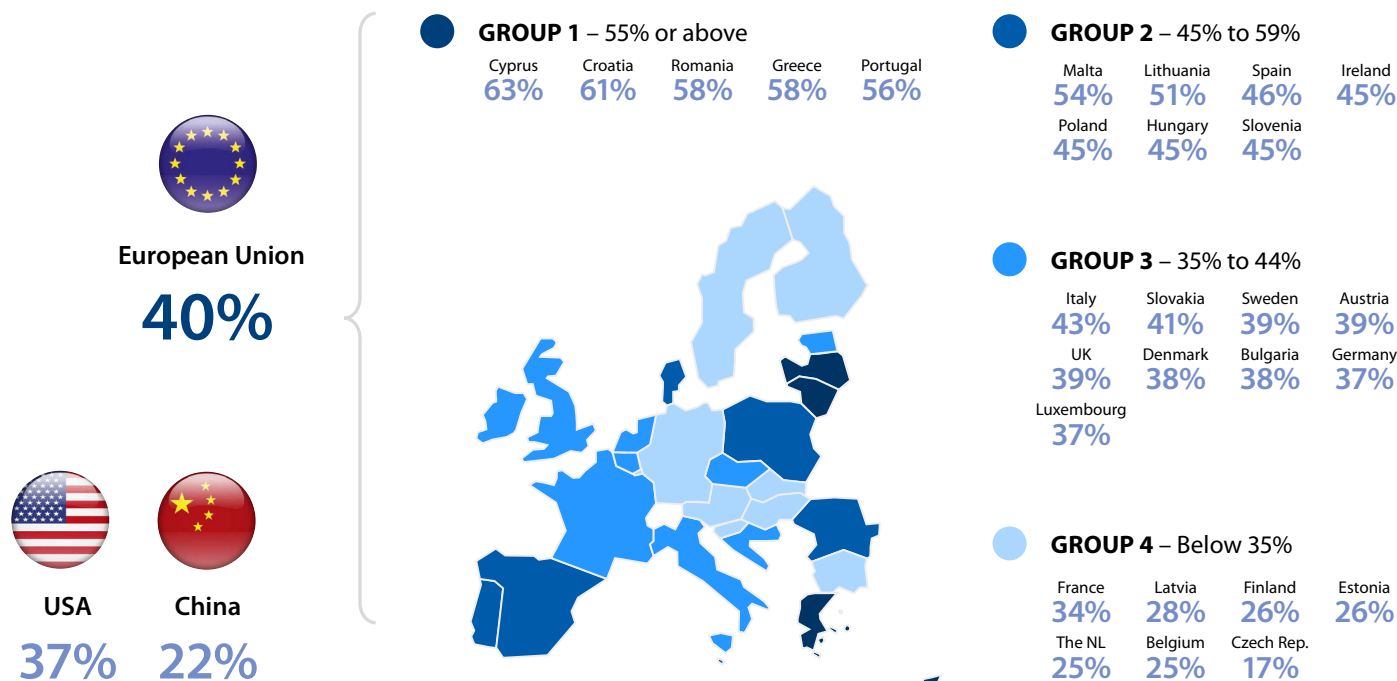
YOUNG PEOPLE ARE MORE LIKELY TO BE CONVINCED OF DEVELOPED COUNTRIES' RESPONSIBILITY TO AID DEVELOPING COUNTRIES IN THEIR CLIMATE TRANSITION

Do you think developed countries have a responsibility to assist developing countries in the shift to carbon-free energy (including with financing or direct funding)?



BELIEF THAT DEVELOPED COUNTRIES HAVE A RESPONSIBILITY TO AID DEVELOPING COUNTRIES IN THEIR CLIMATE TRANSITION, BY COUNTRY

Do you think developed countries have a responsibility to assist developing countries in making the shift to carbon-free energy (including with financing or direct funding)?



AFTERWORD

By Emma Navarro, Vice-President, European Investment Bank

Climate change is one of the most pressing priorities of our era. Even in the time of the coronavirus pandemic and its accompanying economic and social privations, we cannot forget the urgent threat to humanity posed by global warming. This is a major and long-term problem, for which we must build a joint response and in which every win is a planet-wide gain. There is just one climate, after all.

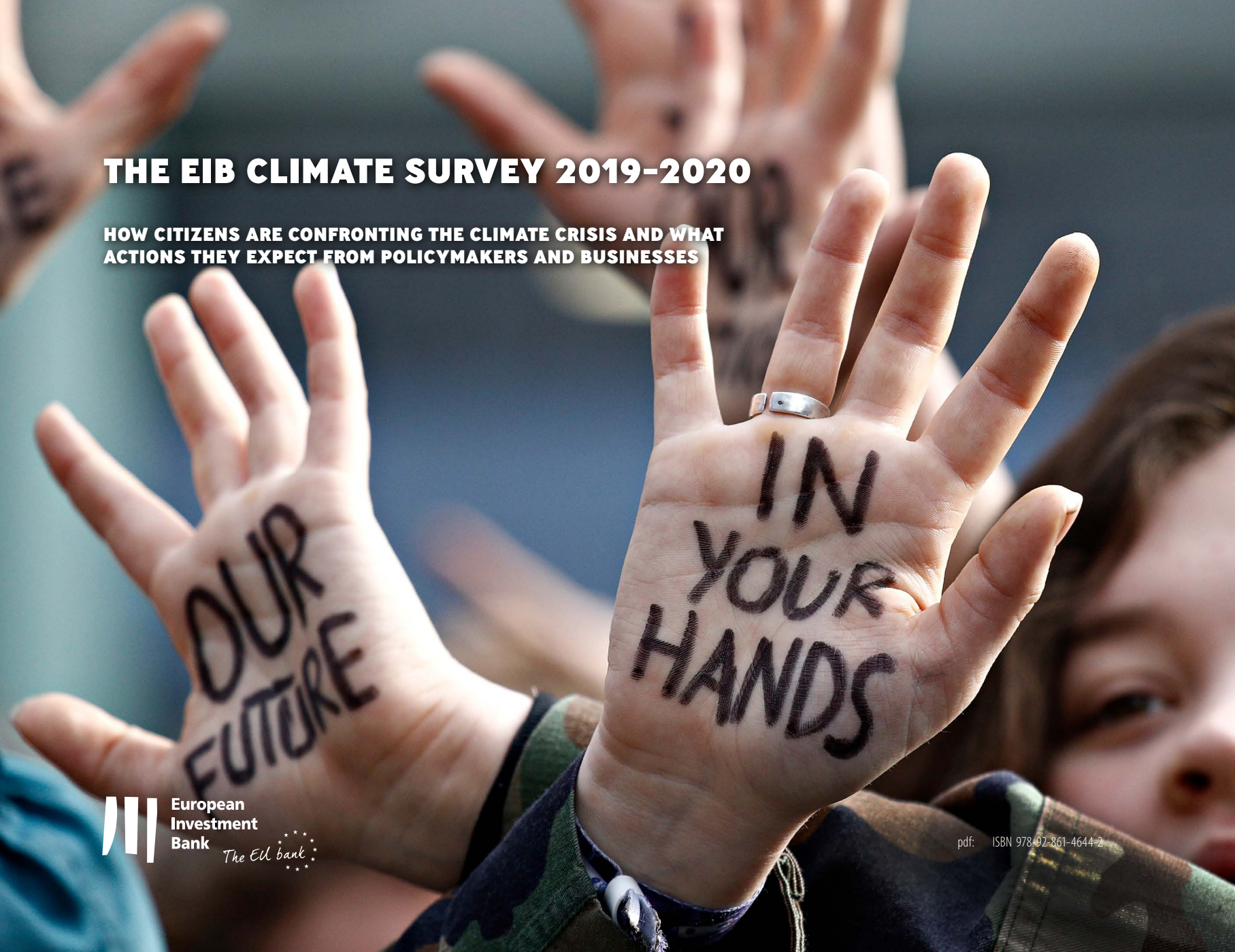
All too often, people think about climate action solely in terms of government intervention. However, companies have a key role to play too. The results of the European Investment Bank's Climate Survey 2019-2020 show that citizens expect companies to be more committed to fighting climate change. To achieve this, we need to be aware that climate action is good business and can deliver real benefits for economic growth and job creation. We therefore need a mix of incentives, regulatory intervention and investment to create the low-carbon economy of the future. Citizens want to buy from green companies. Businesses will find a growing market. Our survey findings make that clear.

The results in these pages also stress the high expectations that citizens have of the European Union in the fight against climate change. This, of course, confirms the leading role that the European Investment Bank has to play and its responsibility – as the EU climate bank and the largest multilateral financier of climate action projects worldwide. We will continue to step up our investments and crowd in private finance to speed up our society's transformation towards greener growth models and to help deliver on the Paris Agreement.

The survey data make clear that climate change is among the main concerns of European citizens. It shows that while people expect governments and companies to take action to reduce carbon emissions and improve environmental protection, they are prepared to make sacrifices to fight global warming and to live in a more sustainable way. My personal reaction to these results is to be thrilled at the level of commitment of European citizens. It is encouraging to see how they are embracing climate action and making it a real part of their lives. Individual climate actions set the social and economic trends of our societies.

A survey like ours is vital, as listening to people's attitudes is key to ensuring we address their concerns and that we leave no-one behind. We can only succeed if we are all in this together. The European Investment Bank is firmly committed to continue providing all the means at its disposal to empower citizens in their fight for a more sustainable future.

Thank you to all who have participated in our last climate survey. Looking ahead, we encourage you all to participate in the next European Investment Bank Climate Survey 2020-2021.

A background image showing several children's hands raised in the air. The palms of the hands in the foreground have black ink written on them: 'OUR FUTURE' on the left and 'IN YOUR HANDS' on the right. The child on the right is wearing a silver ring on their ring finger. The overall tone is hopeful and emphasizes the role of young people in addressing climate change.

THE EIB CLIMATE SURVEY 2019-2020

**HOW CITIZENS ARE CONFRONTING THE CLIMATE CRISIS AND WHAT
ACTIONS THEY EXPECT FROM POLICYMAKERS AND BUSINESSES**