

# **CLIMATE** *Policy & Strategy*

Strong climate-focused government and  
new energy price dynamics in Germany  
Post-election survey, January 2022



# What this is based on

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Though this survey was fielded before the Russian invasion, it previews the underlying trends that have guided German policy to date, with a focus on issues like Nord Stream 2 and Germany's use of imported energy. Using this data, we are now able to track German public opinion as it evolves and influences policy decisions, work that will continue with subsequent polls.

## Our poll

- N=2,000 nationally representative survey of Germany
- Fieldwork: 18-21 January 2022
- Online, 20-minute questionnaire
- Weighted to national statistics on gender, age, region, education, employment and past voting behaviour

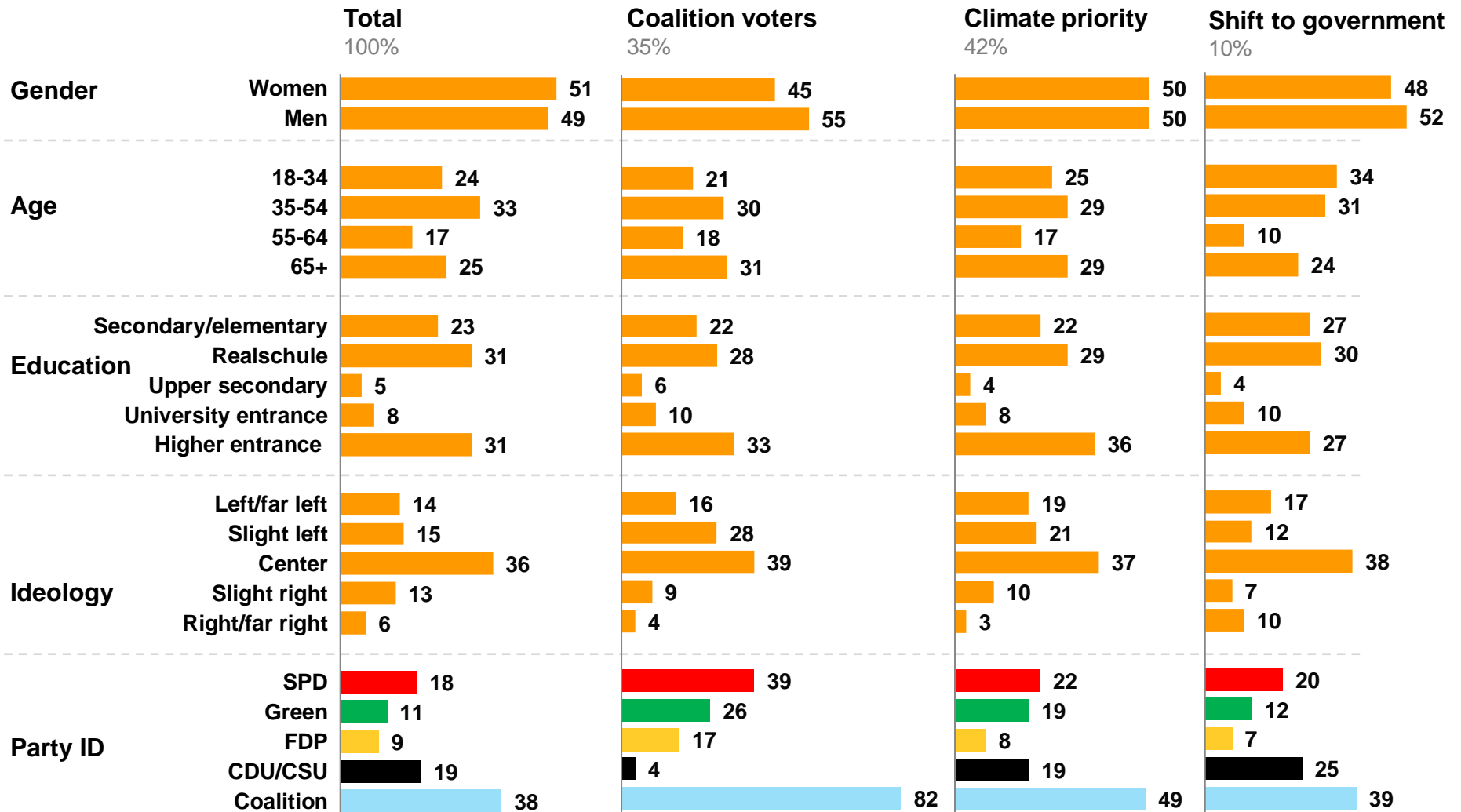
Target groups	Definition
<b>Total</b>	All respondents – represents whole German population
<b>Coalition voters</b>	Voted for one of the coalition parties (SPD, Greens, or FDP) in September 2021 Federal elections
<b>Climate priority</b>	Chose climate as a top priority for government
<b>Shift to government</b>	Initially answer <i>disapprove</i> or <i>don't know</i> on government handling of climate & energy transition, but after balanced messaging, <i>approve</i>

# What you need to know

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- »» The government begins in a strong position on climate change. It is the highest priority of German citizens, and a growing intense majority embraces measures to prevent global warming. The government gets even greater approval after people hear their plans and vision. Germany is one country where the Opposition approves of the government's handling of the issue, and supporters of all parties believe it is a time for bold action.
- »» But the rise in energy prices has changed a lot of thinking and priorities, and most attribute the increased cost of living to oil and gas prices and taxation over the green transition. Still, many think the transition will bring higher costs, which leads people to applaud getting 80% of energy from renewables, limiting flights, helping ordinary people with energy bills, and shifting the renewable energy surcharge to the federal government.
- »» There is a near consensus that Germany must rely on natural gas during the transition, but there is also a majority concerned with Germany's dependence on imported energy and not much enthusiasm for Nord Stream 2. A small majority believe natural gas with carbon capture should be considered sustainable.
- »» There is a clear and growing aversion to putting up carbon taxes on households. People prefer regulation to discourage polluting behavior that they believe saves future costs. There is strong preference for growing regulation, government investment in innovative research, and new incentives to make everyone more energy efficient.
- »» CEOs that say there is a climate crisis and must change the way they do business dramatically raise their standing.

# Political targets: Shift to government are younger and slightly more secondary/elementary and CDU/CSU



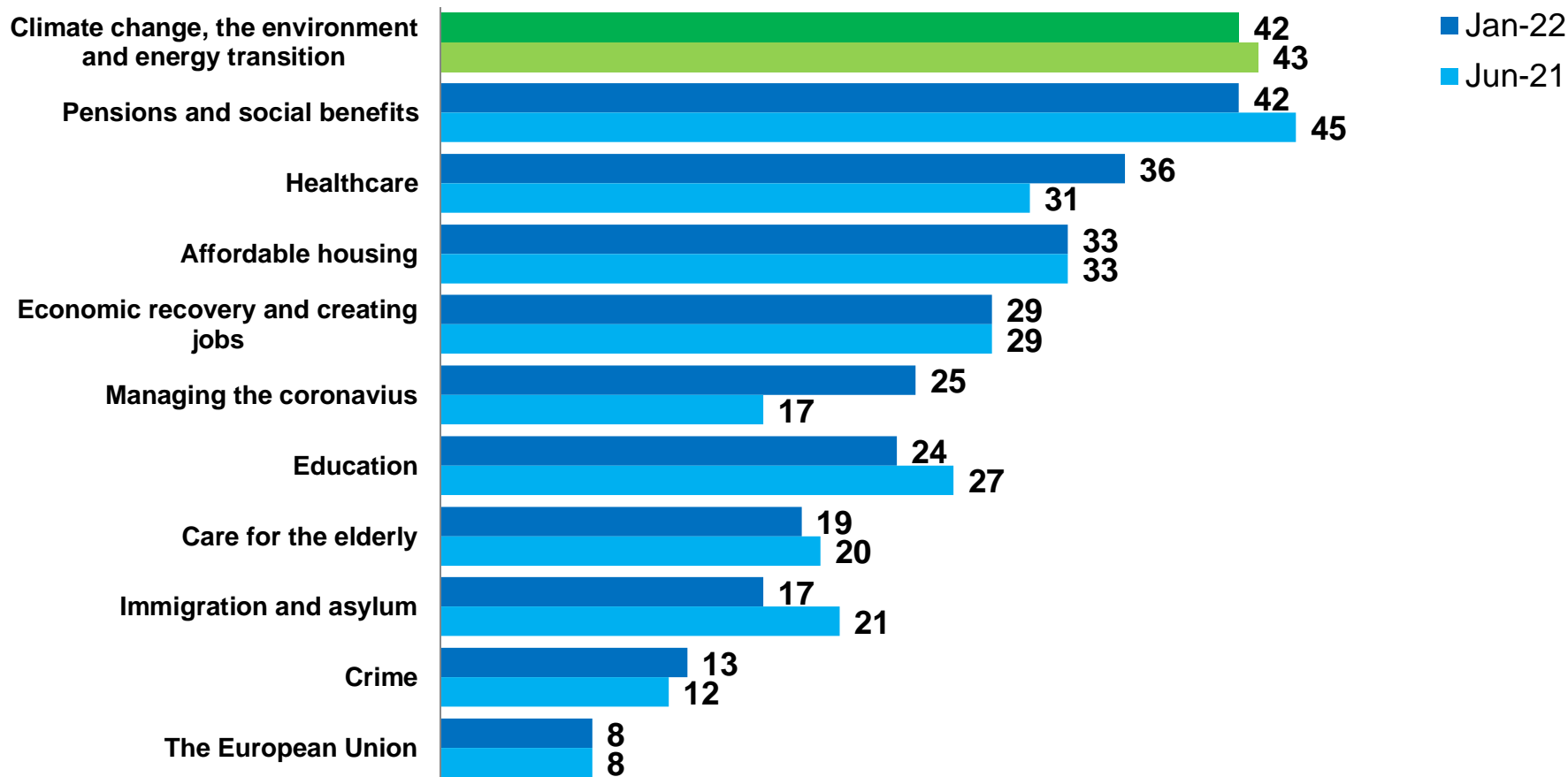
# Climate Context

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# In Germany, “climate change, environment and energy transition” is a top priority for government

Priorities for government, total sample

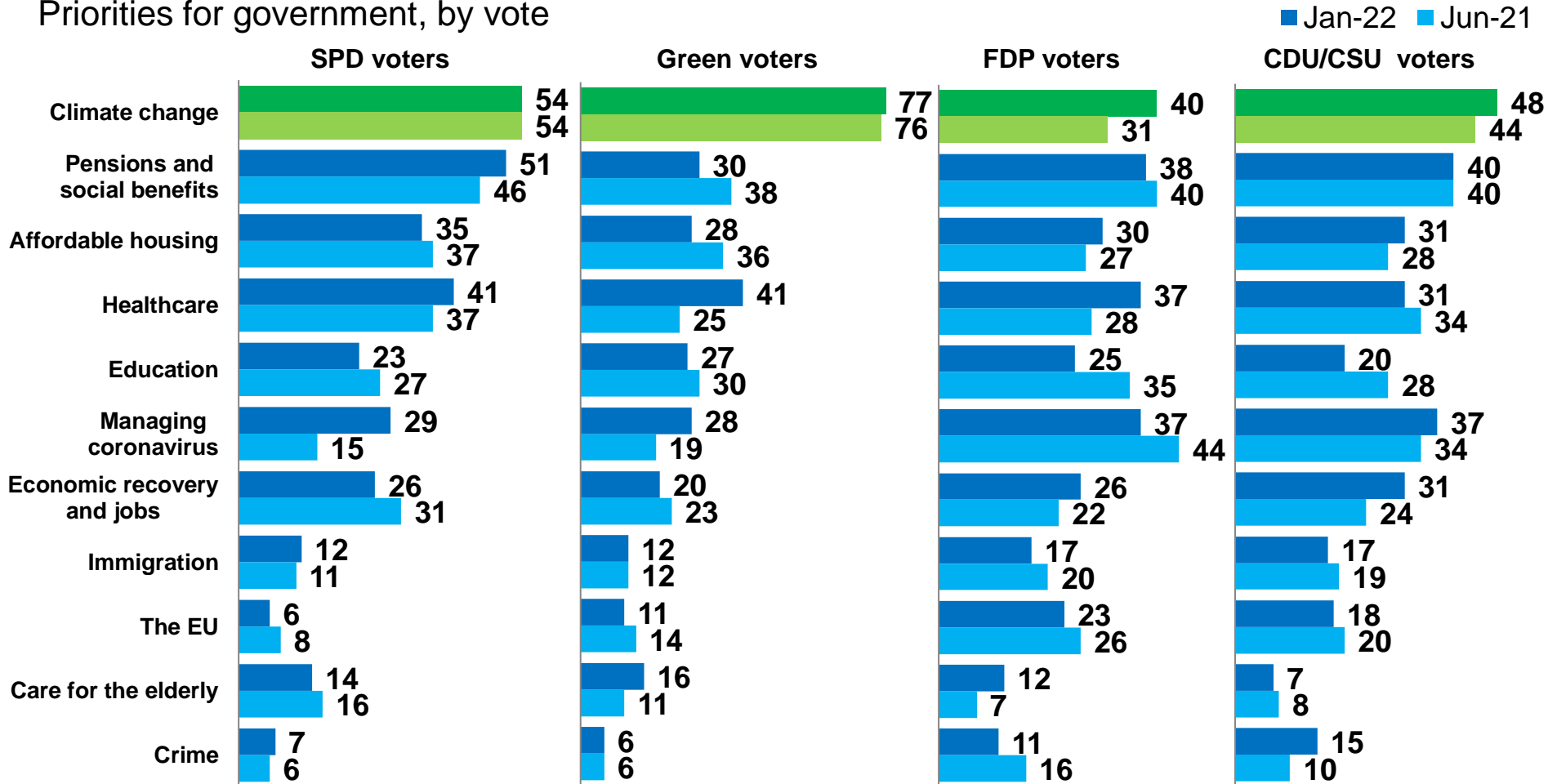


*What are the THREE issues you think should be the top priorities for government?*

**Total sample, n=2,000**

# Climate change is top priority across the political spectrum, including the CDU/CSU; FDP voters move the most

Priorities for government, by vote



What are the *THREE* issues you think should be the top priorities for government?

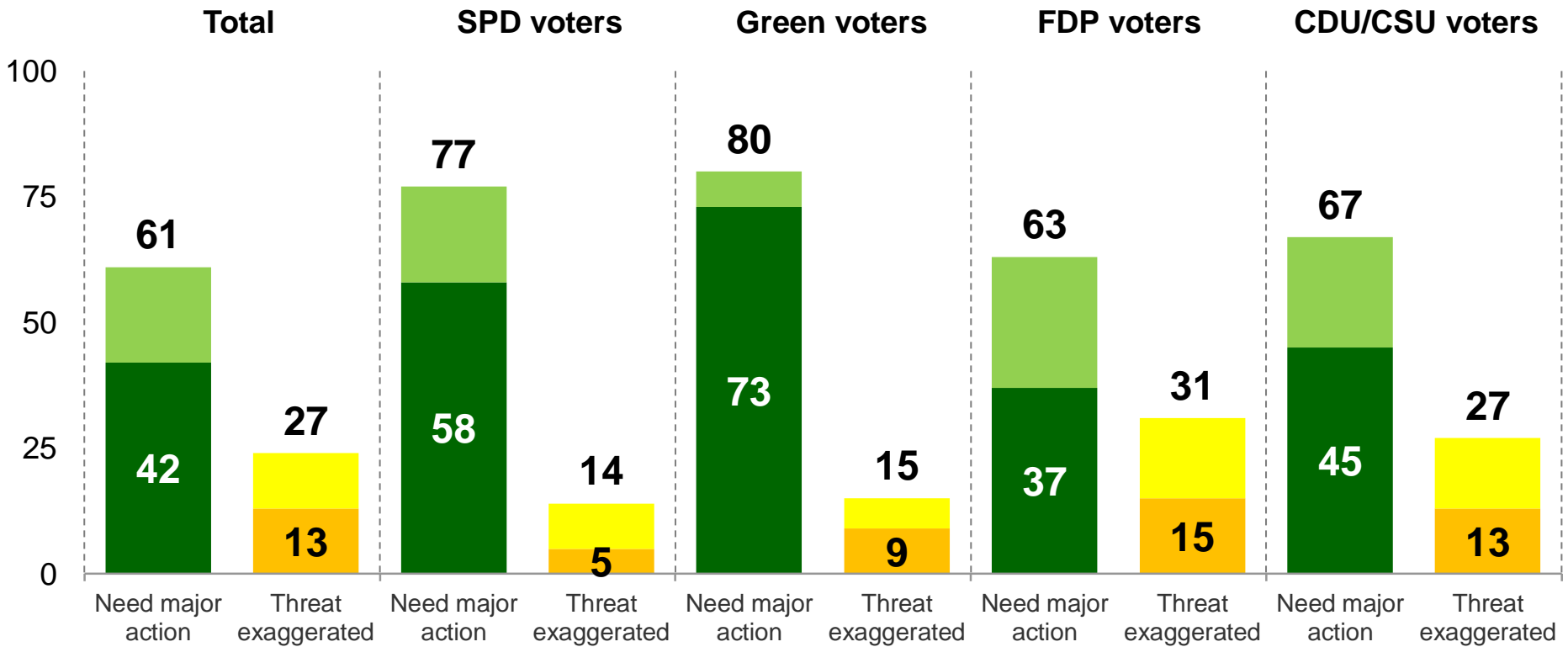
SPD voters, n=343; Green voters, n=198; FDP voters, n=154, CDU/CSU voters, n=321

# Across all parties, two-to-one majorities say climate change is a major threat, and it is worth the cost to fix it

1) Climate change is a threat and we need major action to combat it.

2) The threat of climate change is exaggerated and the high cost of fixing it may not be worth it.

■ Statement 1 much closer to my views ■ Statement 1 somewhat closer ■ Statement 2 much closer ■ Statement 2 somewhat



On the following pages are some pairs of statements. For each, please indicate whether the FIRST statement or the SECOND statement comes closer to your views, even if neither is exactly right.

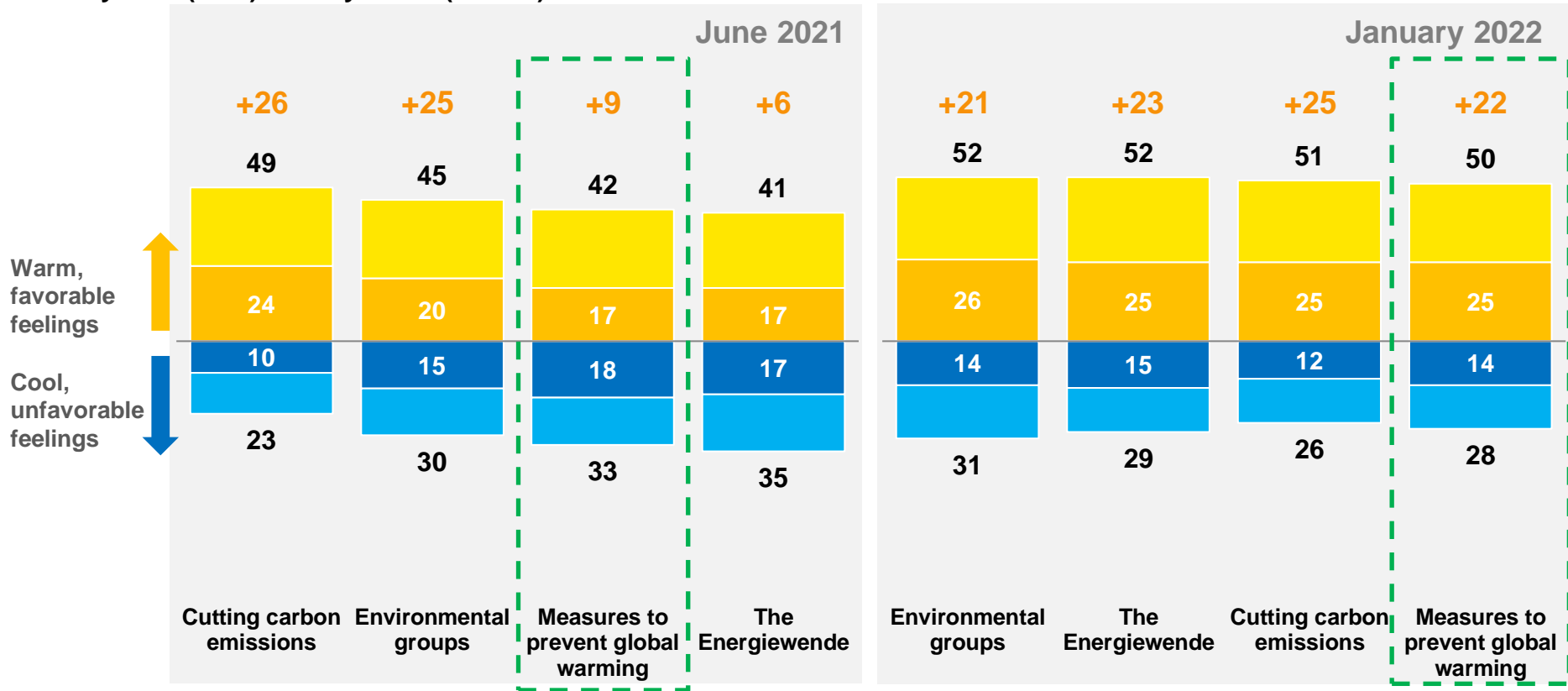
Total sample, n=2,000; SPD voters, n=343; Green voters, n=198; FDP voters, n=154; CDU/CSU voters, n=321



# Big gain in warm feelings for environmental forces, but particularly measures to “prevent global warming”

Feelings toward environmental issues and groups, total sample

■ Cool (26-49)    ■ Warm (51-74)  
■ Very cool (0-25)    ■ Very warm (75-100)



Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVOURABLE feeling; zero meaning a VERY COLD, UNFAVOURABLE feeling; and fifty meaning not particularly warm or cold.

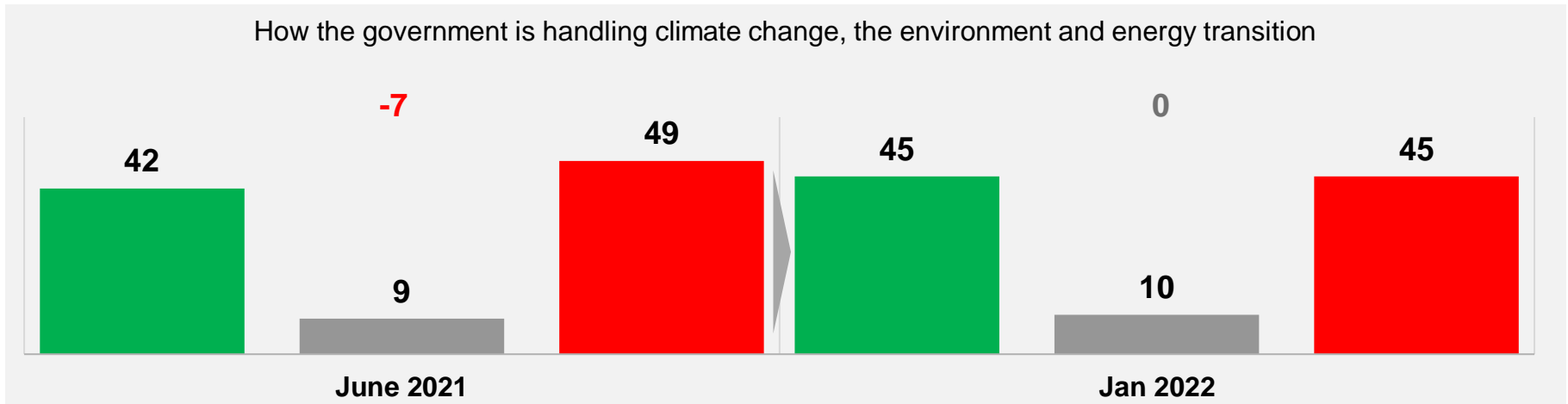
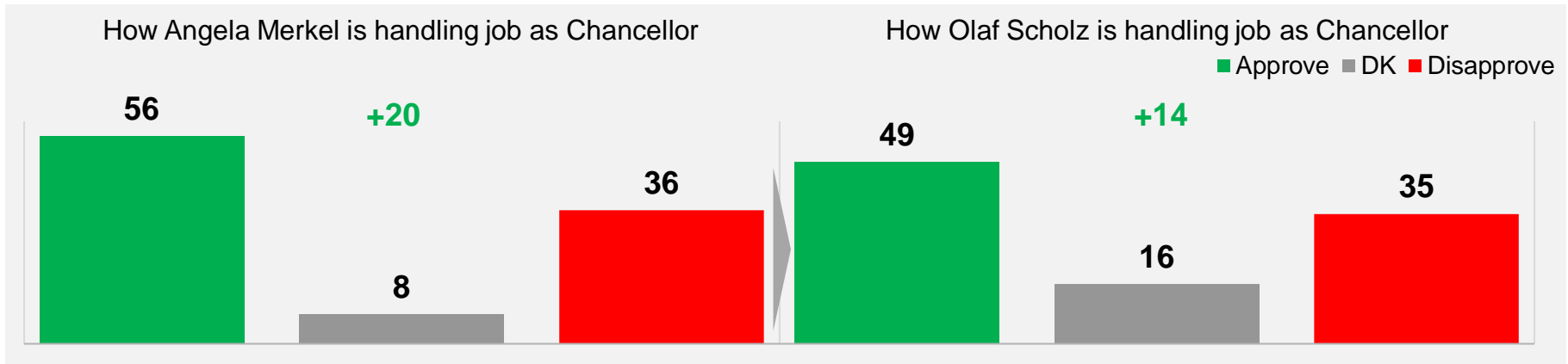
Total sample, n=2,000



**Government standing and climate**

# Scholz begins with high standing as Chancellor, and with much higher approval on climate change than Merkel

How the government is handling..., total sample

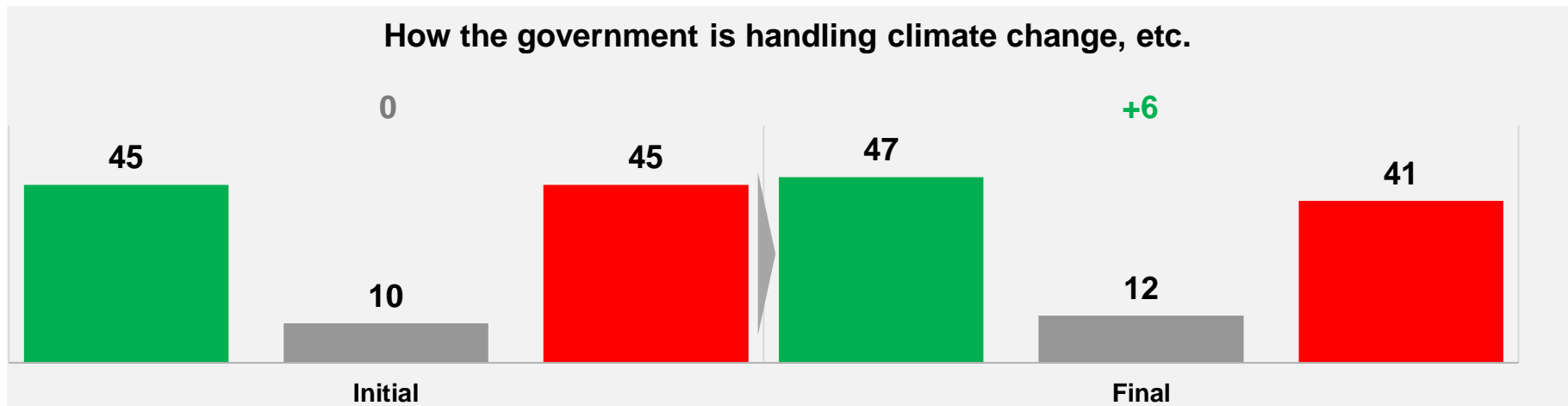
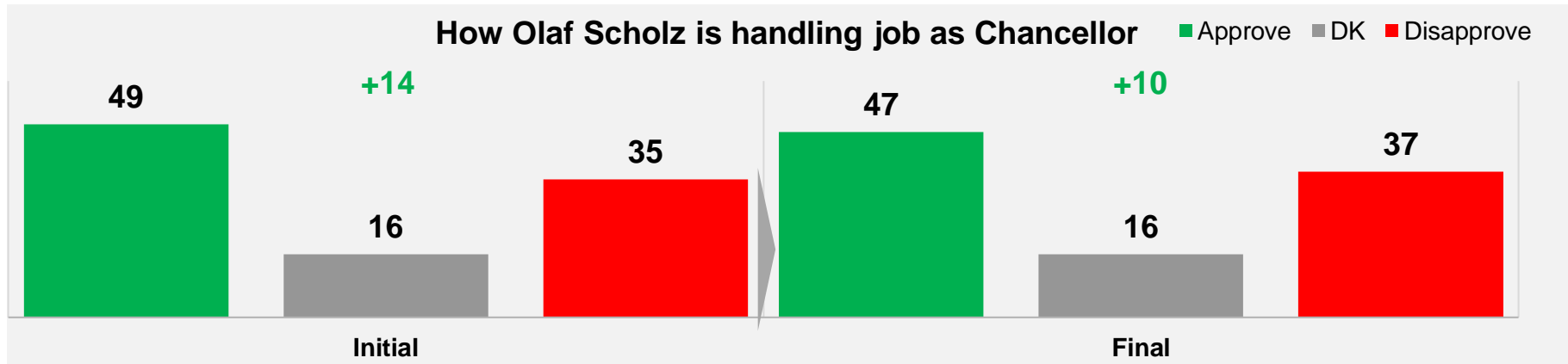


How much do you approve or disapprove of each of the following?

Total sample, n=2,000

# Hearing the government's agenda and vision raises government rating on climate at end of survey

Impact of policies and messaging on leader and government approval, total sample



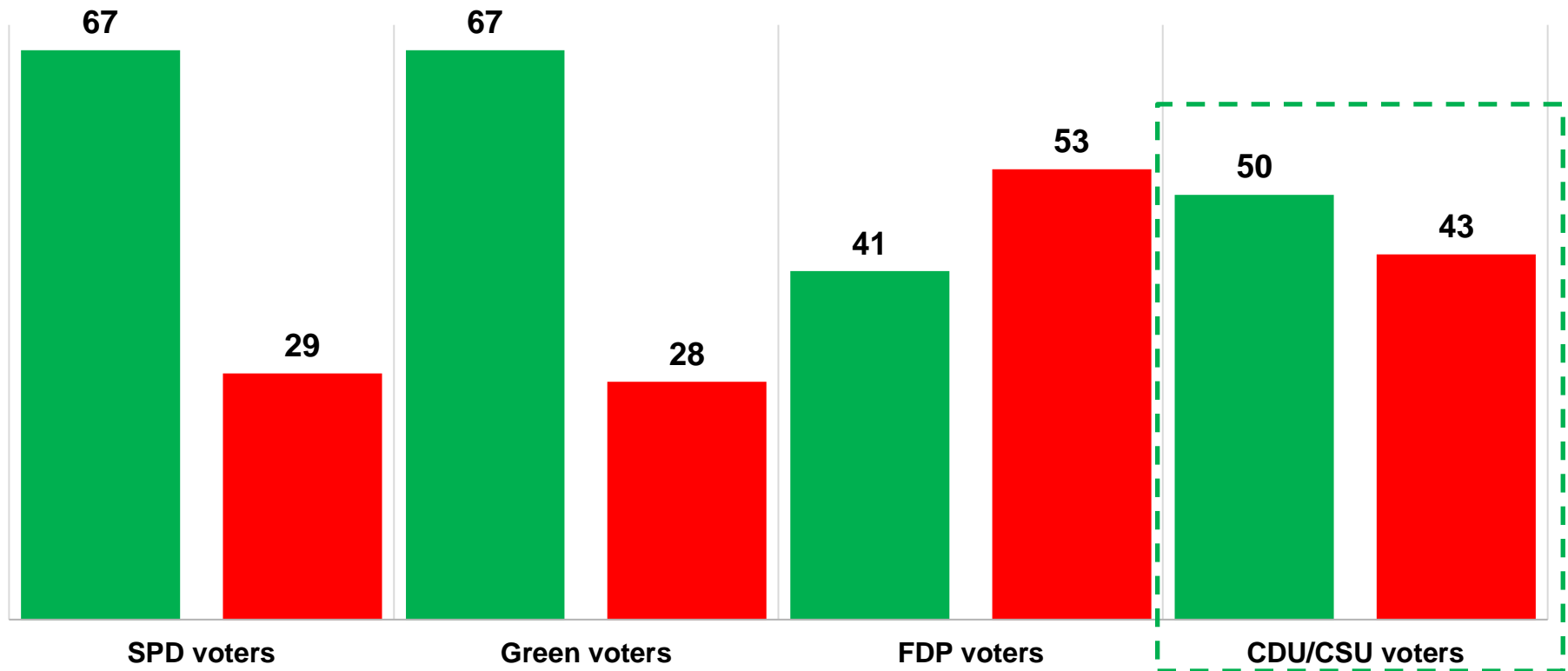
*How much do you approve or disapprove of each of the following?*

**Total sample, n=2,000**

# Government has high approval with SPD and Green base, but surprisingly, also with a majority of CDU/CSU voters; FDP voters are the least supportive

How the government is handling climate change, by vote

■ Approve ■ Disapprove

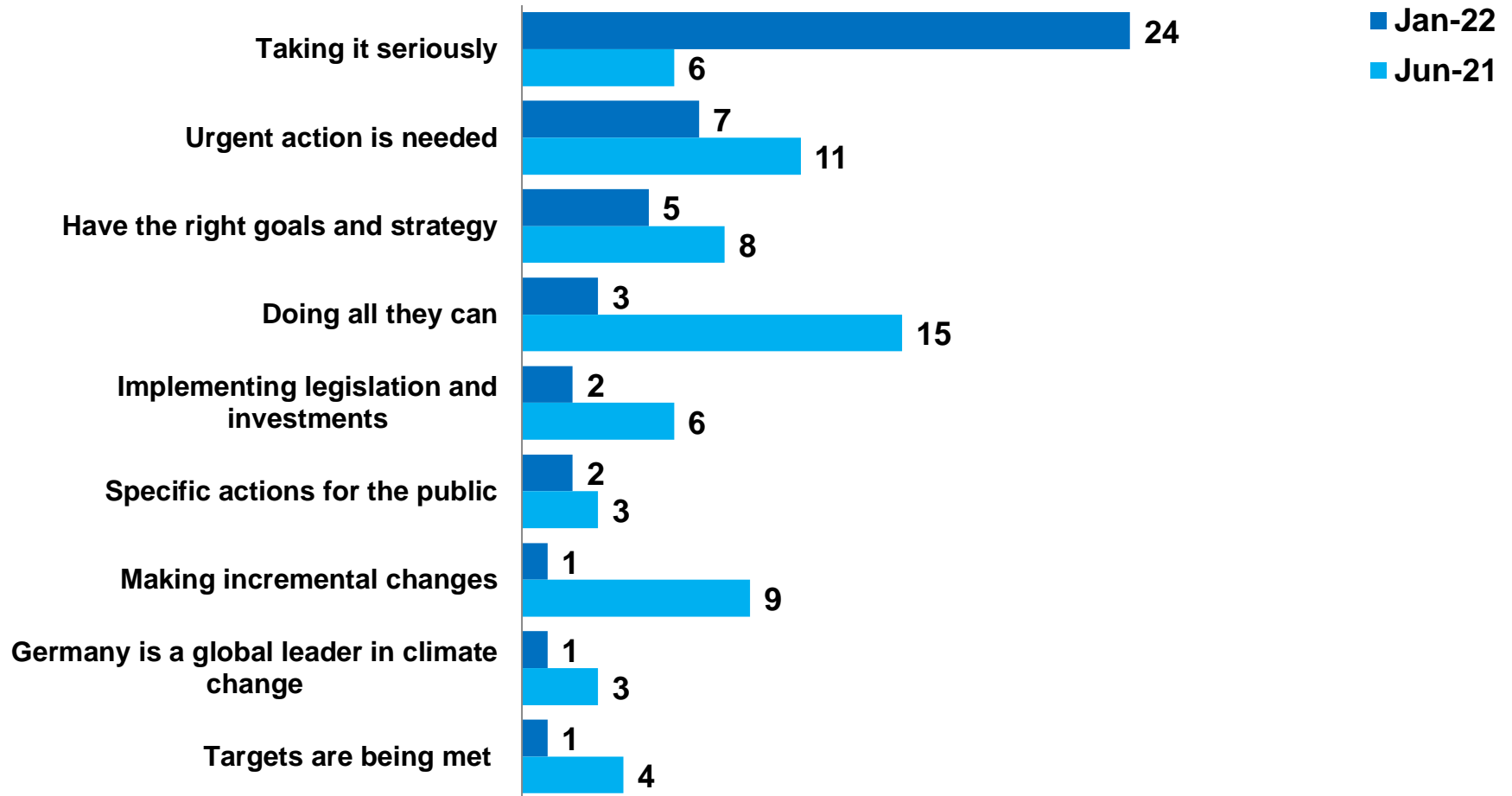


How much do you approve or disapprove of each of the following?

SPD voters, n=343; Green voters, n=198; FDP voters, n=154, CDU/CSU voters, n=321

# Those approving of government performance on climate see them “taking it seriously,” much more so than previous government

Reasons for approval, total sample

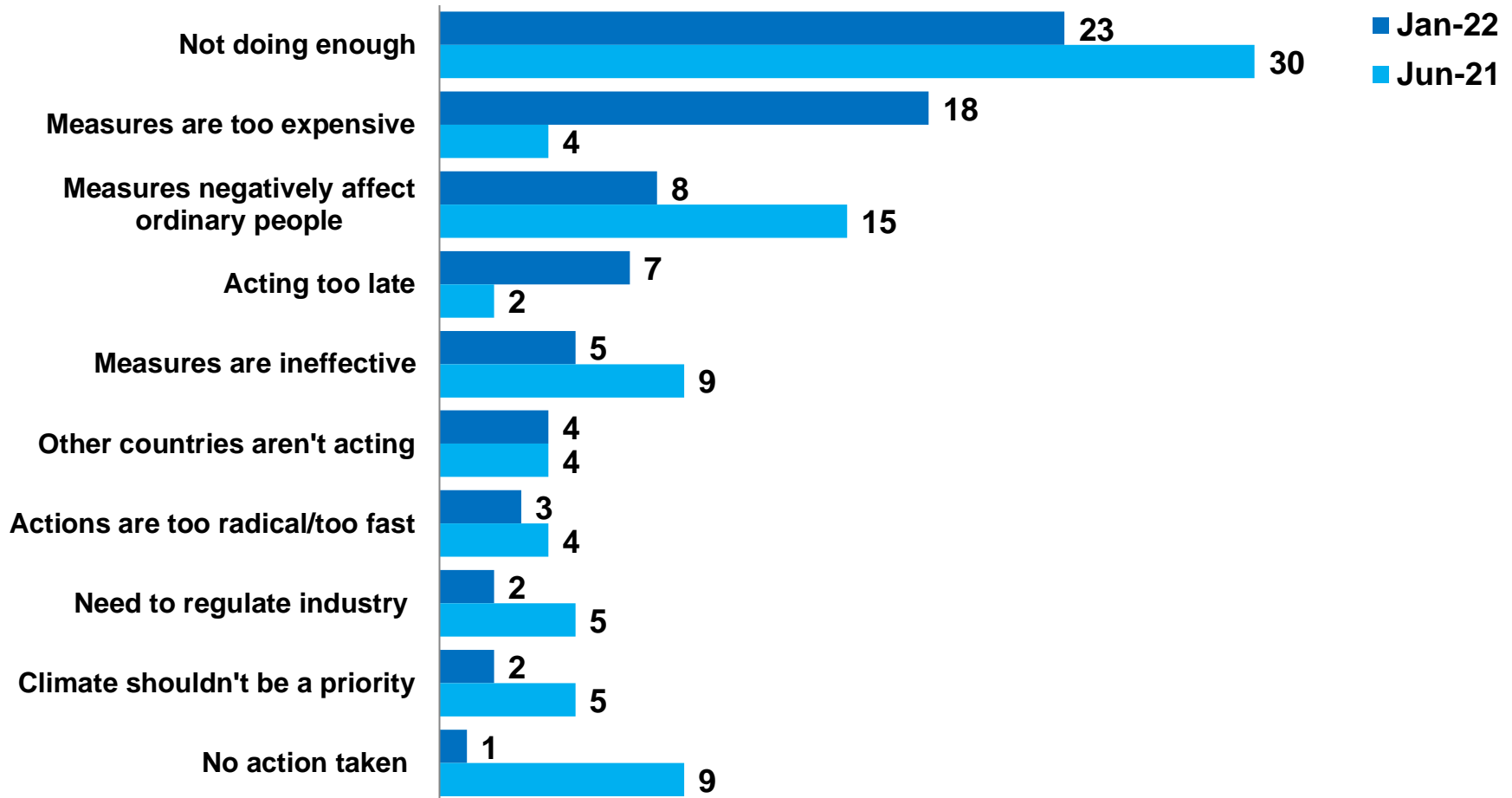


*Why do you approve of how the government is addressing climate change, the environment and energy transition?*

**Total sample, n=2,000**

# Those who disapprove are concerned government isn't doing enough, but now, many worry measures are too expensive

Reasons for disapproval, total sample

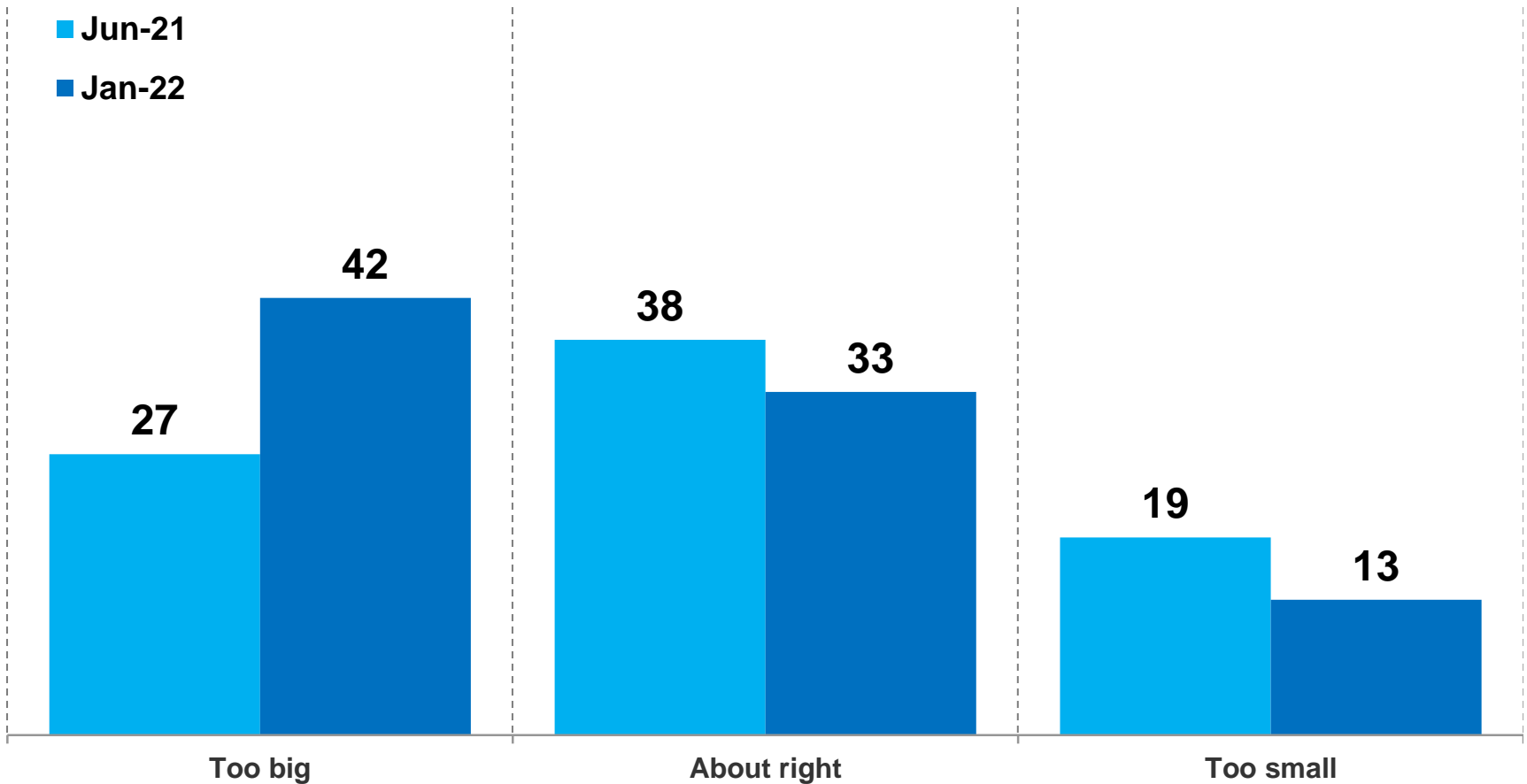


*Why do you disapprove of how the government is addressing climate change, the environment and energy transition?*

**Total sample, n=2,000**

# More think government climate targets too big – yet plurality says about right or too small

Approval of government climate targets, total sample



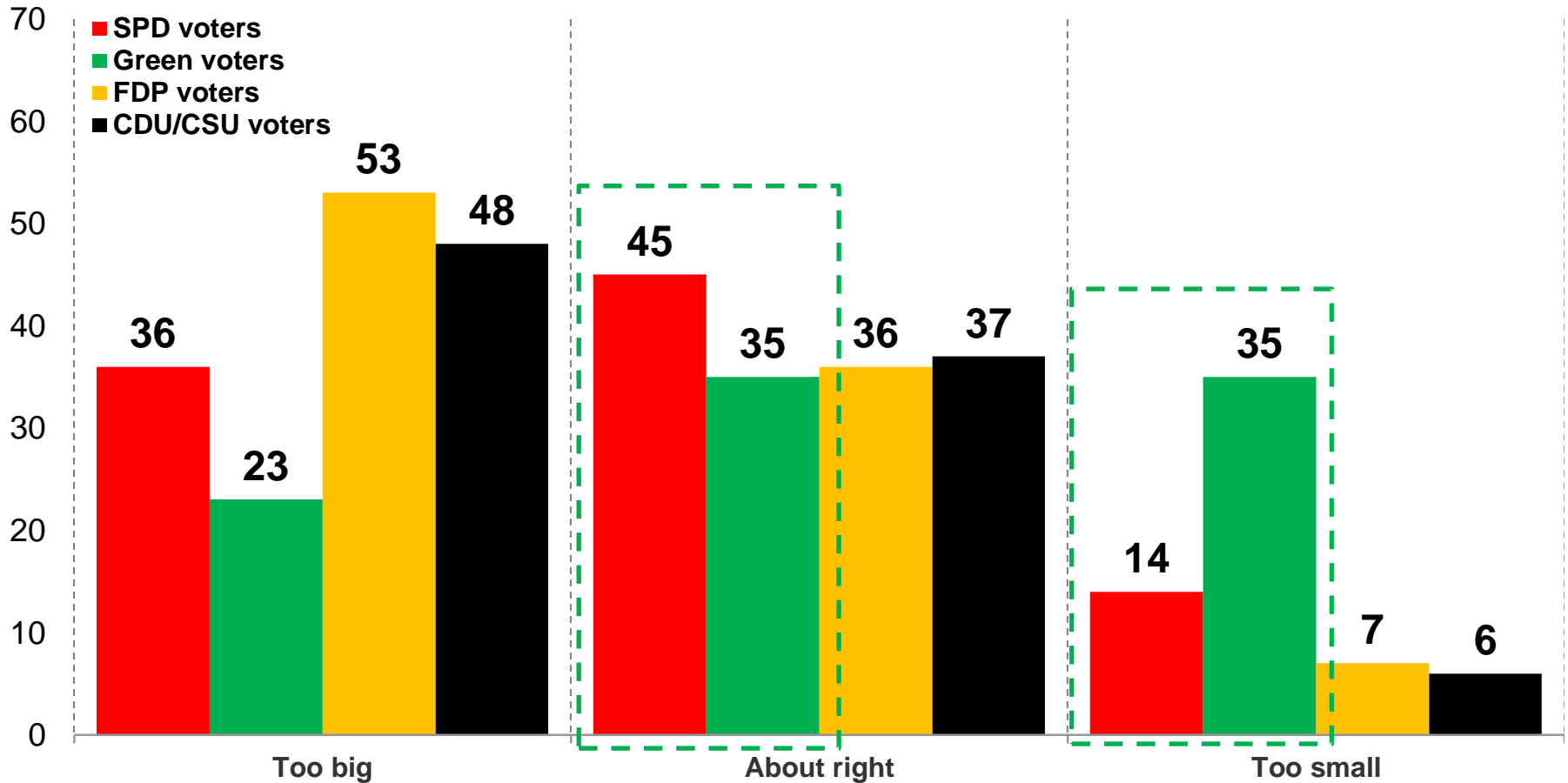
*What do you think about the new target of a 65 percent reduction in greenhouse gas emissions, compared to their level in 1990, by 2030? Is the cut in emissions too big, about right, or too small?*

Total sample, n=2,000



# SPD and Greens think the target is about right or too small; FDP and CDU/CSU voters think target too ambitious

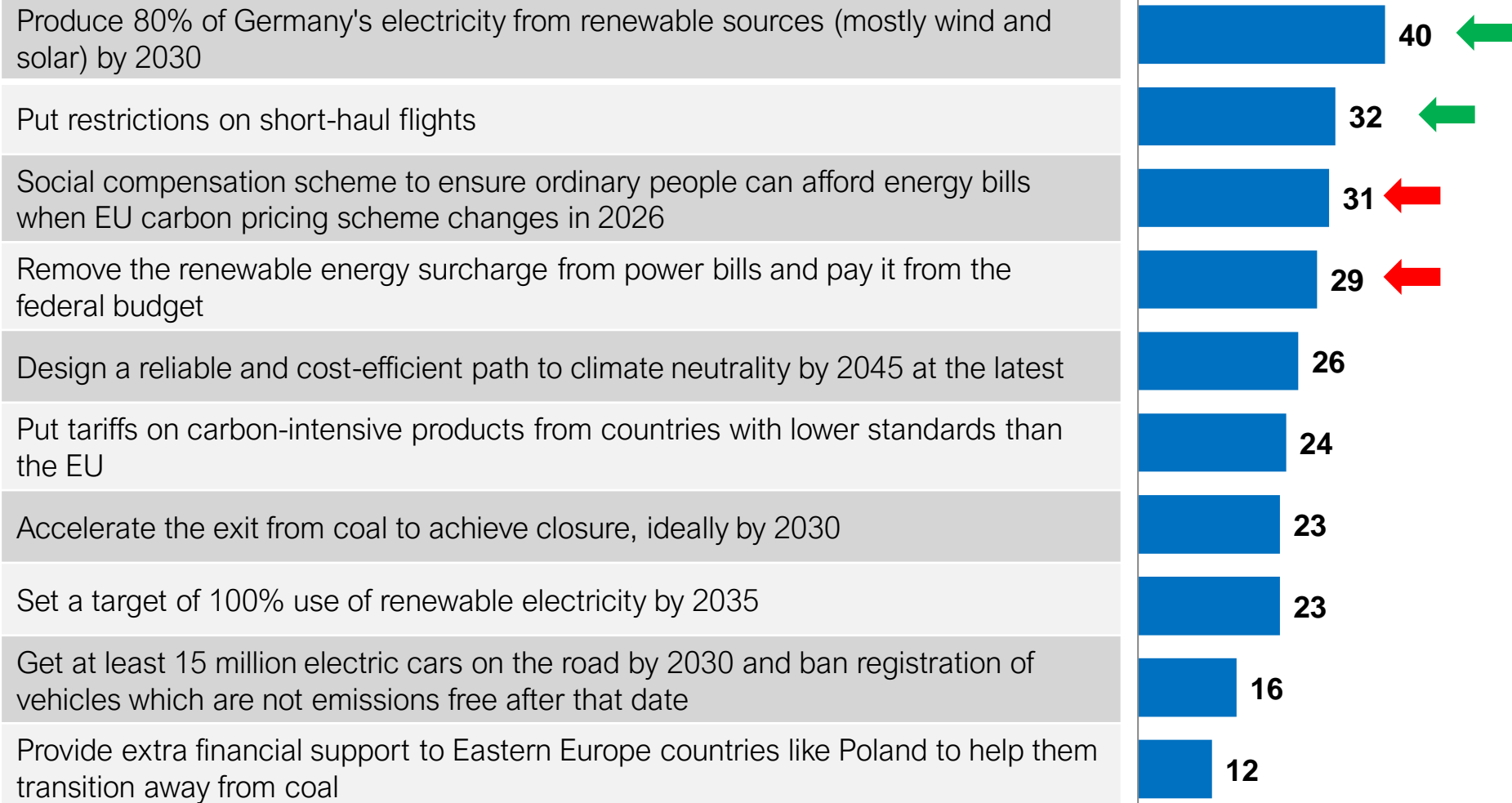
Approval of government climate targets, by vote



What do you think about the new target of a 65 percent reduction in greenhouse gas emissions, compared to their level in 1990, by 2030? Is the cut in emissions too big, about right, or too small?

# Top government climate policies: 80% renewables by 2030 and restricting short-haul flights, but also strong support for helping with energy costs

Importance of climate policies proposed by **the government**, total sample



# NGOs' push to get coal off the grid, replacing flights with rail, and trade restrictions are popular

## Importance of climate policies proposed by **other organizations**, total sample



# Political Messaging on Climate

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# Political messages from the government: full wording

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## International leadership for climate neutrality

Progress for a better world is a goal that no country can achieve alone. It can only be attained if the international community works together. For a period of a year beginning tomorrow, Germany is assuming the presidency of the G7, the group of seven economically strong democratic countries. We will use our presidency to trailblaze for a climate neutral economy and for a just world.

## Modern technology to achieve climate targets

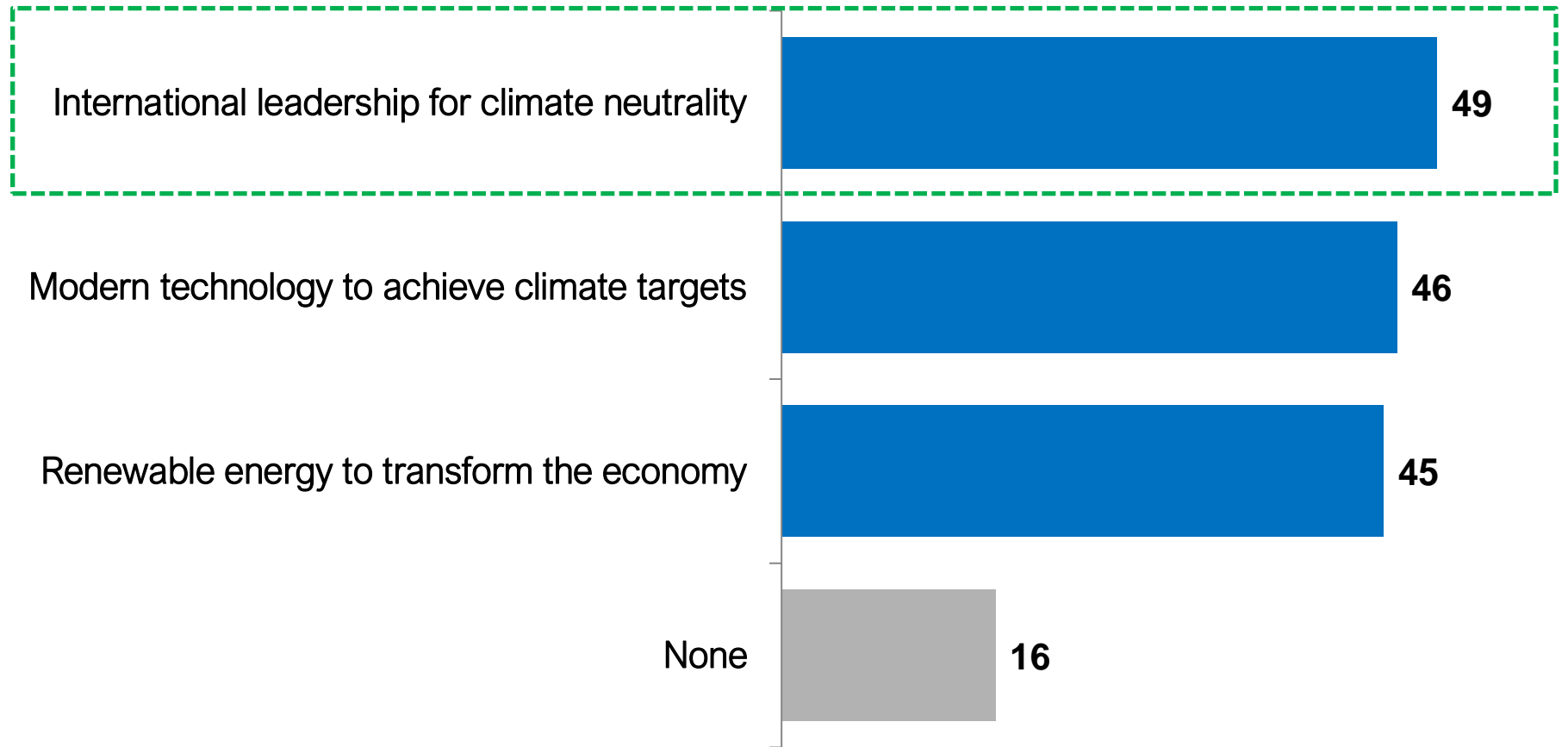
We will achieve our climate targets as a modern industrialized nation. And our technologies will remain at the global forefront. I am confident of this because we have everything we need: well-trained skilled workers, knowledgeable engineers, and active craft enterprises and businesses. By working together, we will be able to master the major changes of our era.

## Renewable energy to transform the economy

We are moving forward with the greatest transformation our economy has seen in more than a century. We will achieve independence from coal, oil and gas; and we will generate at least twice as much electricity from wind, solar power and other renewable energy sources as we do today. We are investing in power grids, in charging stations, in wind turbines, and rail lines. This will create new prosperity and good jobs.

# Scholz climate messages all viewed similarly, with slight preference for international leadership

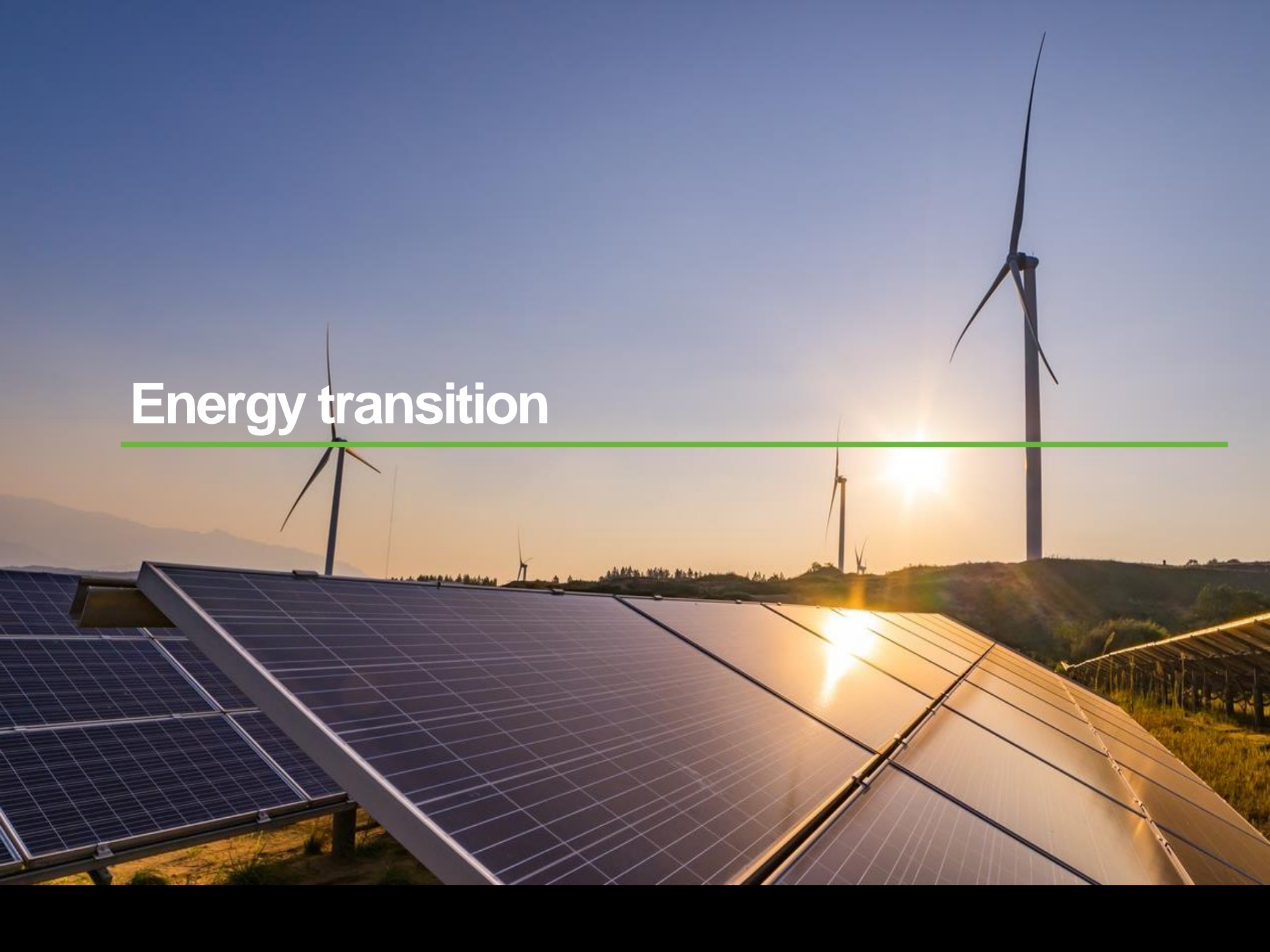
Government messages, total sample



*Below are some statements from the government supporting its plans on climate change. Which TWO do you find most CONVINCING?*

# Energy transition

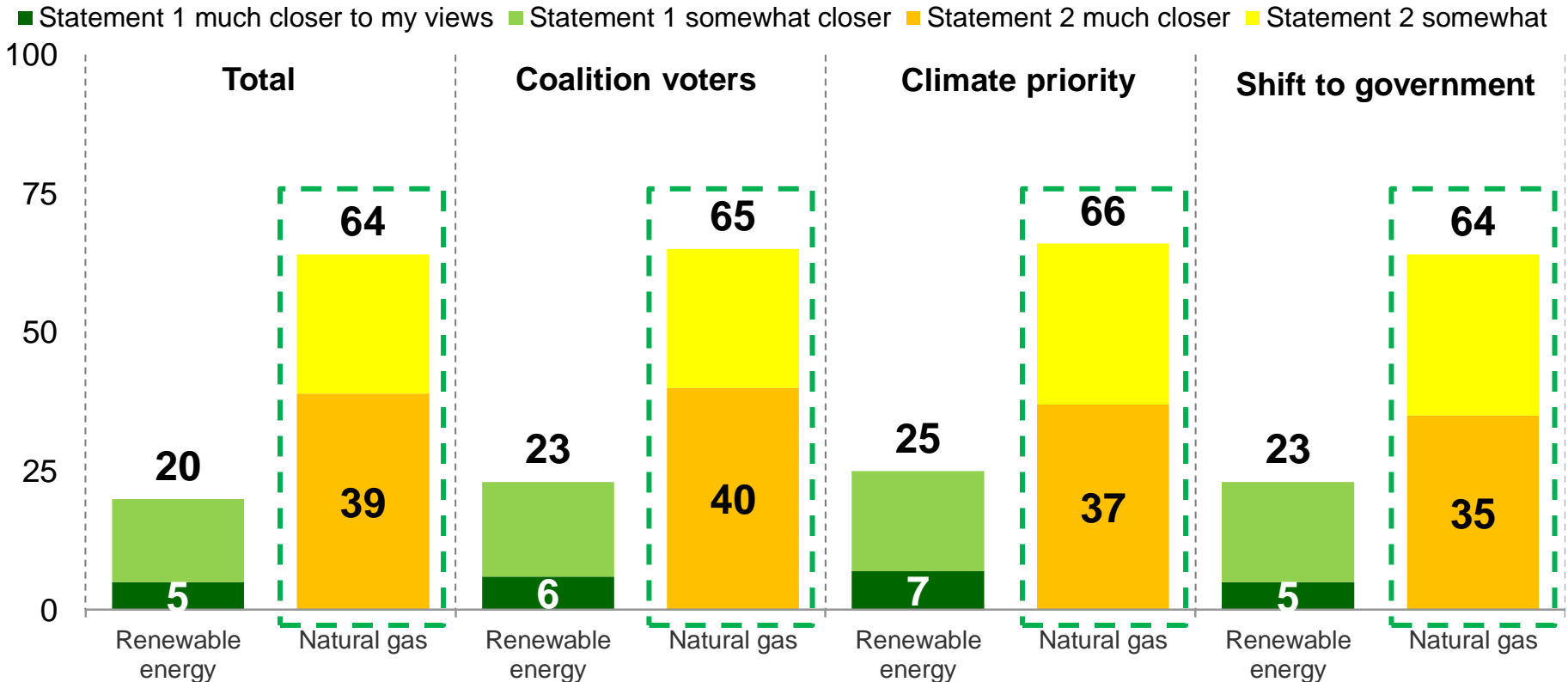
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# Consensus that natural gas will be key to transition

1) Germany can phase out coal-fired power stations by switching directly to renewable energy sources such as green hydrogen.

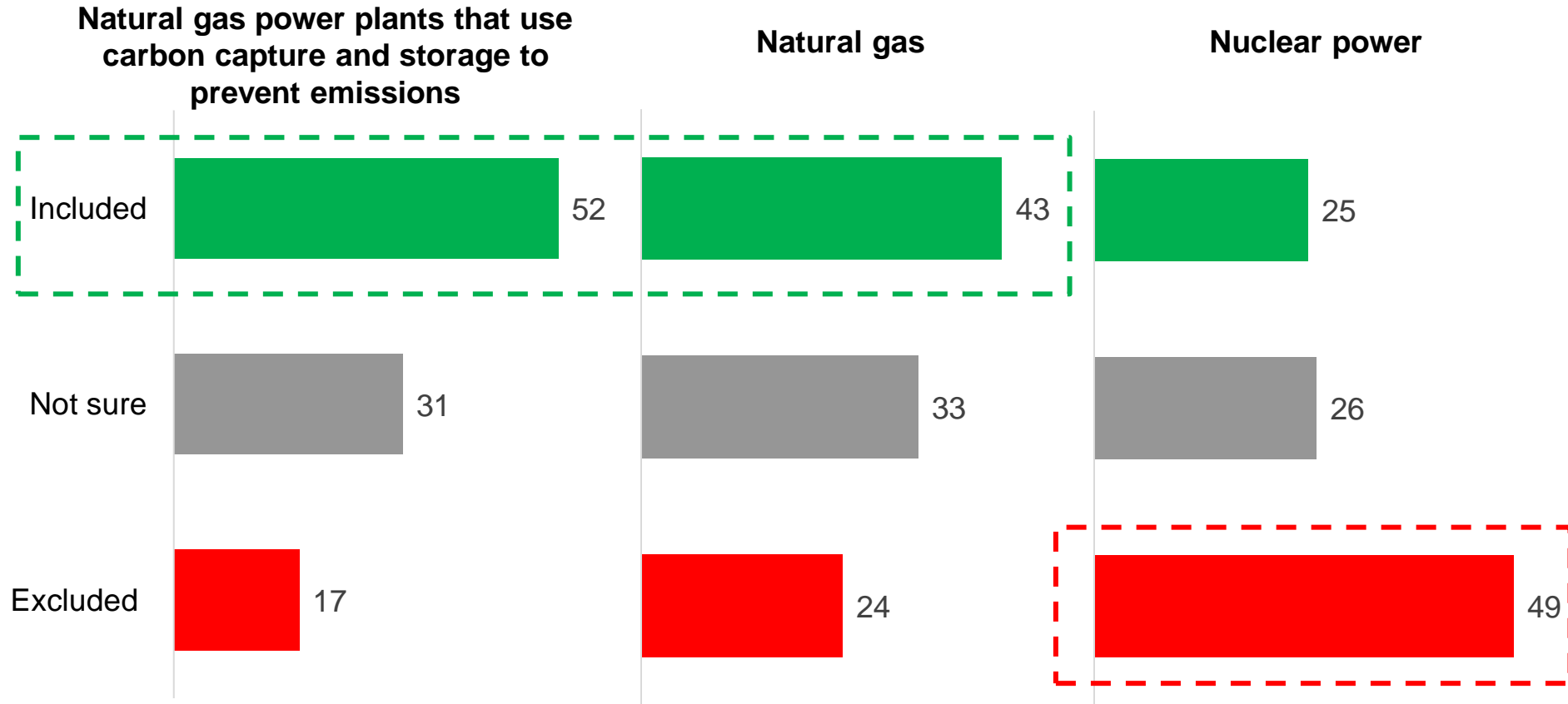
2) As Germany phases out coal-fired power it will need a range of new energy sources including natural gas power stations because clean sources like green hydrogen are not ready to meet all our power needs yet.





# Small majority says natural gas with carbon capture is sustainable, but not nuclear power

Defining EU sustainable investments, total sample

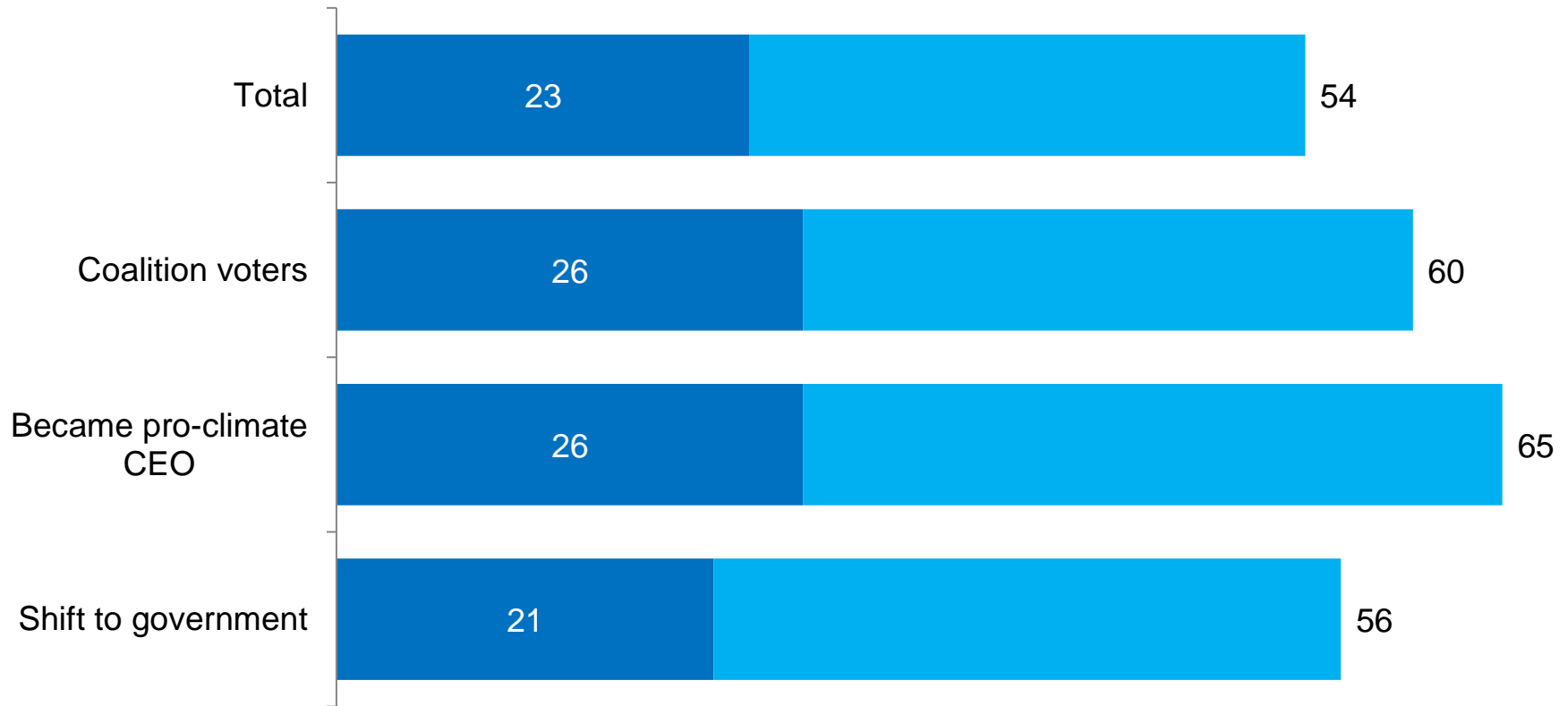


*The European Union is making rules on the type of investments that are considered sustainable. For each of the following, do you think Germany should propose they are INCLUDED in the list of sustainable investments, or EXCLUDED?*

# Majorities are concerned about Germany's dependence on imported energy

Concern about Germany's dependence on imported energy, by target

- Very concerned
- Quite concerned



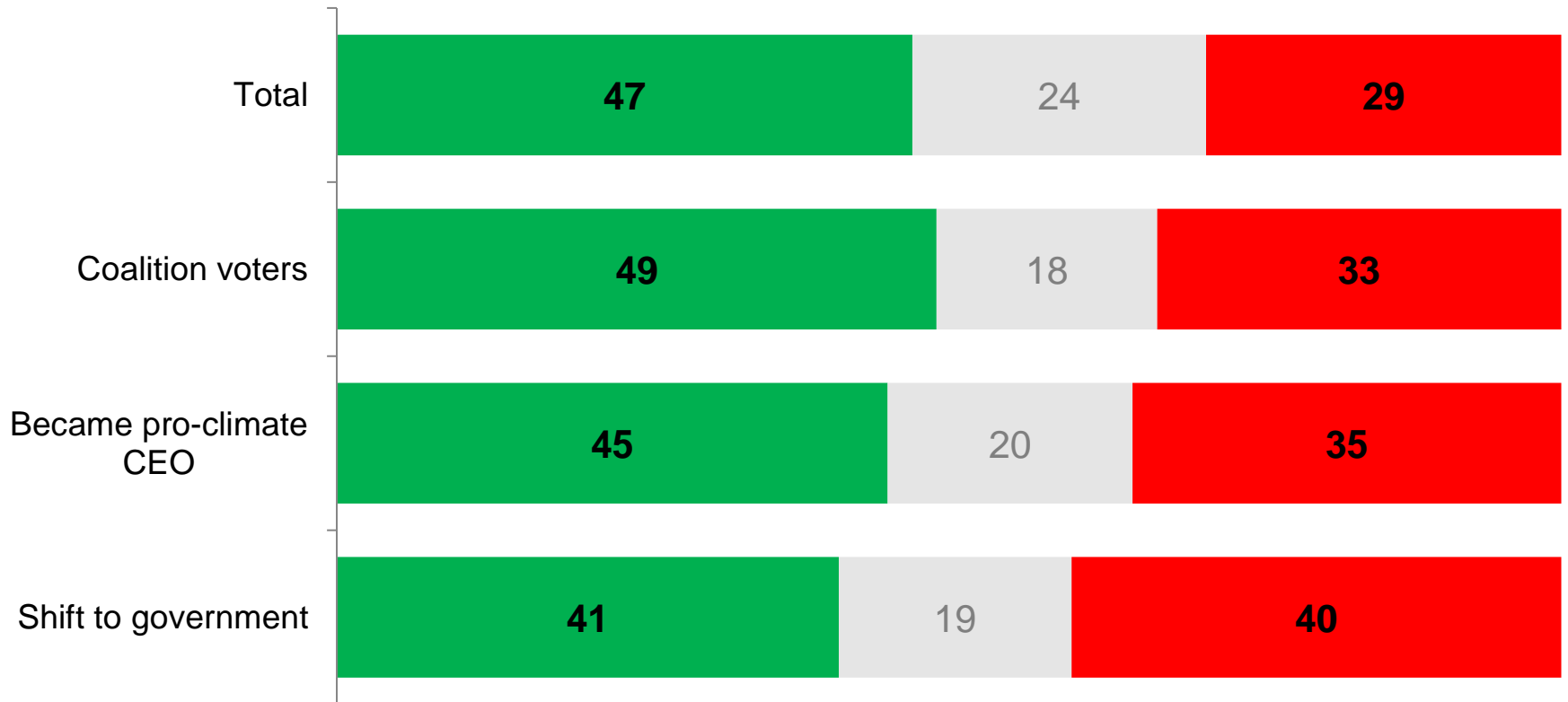
*How concerned are you about Germany's dependence on imported energy, especially natural gas from Russia?*

**Total sample, n=2,000; Coalition voters, n=694; Became pro-climate CEO, n=413; Shift to government, n=208**

# Nord Stream 2 is not particularly popular

Support for Nord Stream 2, by target

- Should definitely/probably go ahead
- Don't know
- Should definitely/probably be stopped



*What is your view on the Nord Stream 2 pipeline project, should it go ahead, or be stopped?*

**Total sample, n=2,000; Coalition voters, n=694; Became pro-climate CEO, n=413; Shift to government, n=208**

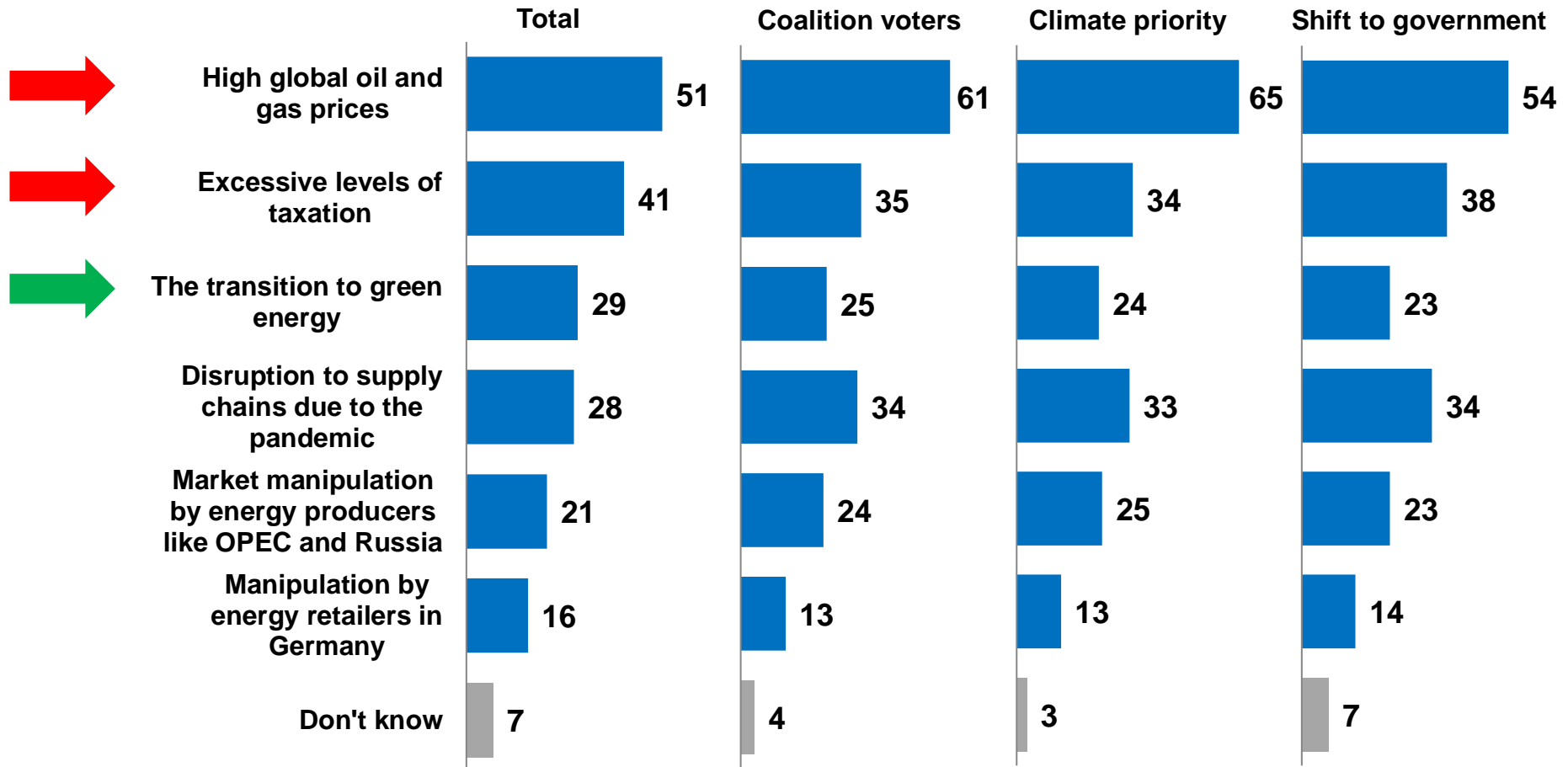
# Energy price increases

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# Oil and gas prices and tax seen as main driver of increased cost of living, not the green transition

Reason for increased cost of living, by target



You may have noticed increased prices recently, particularly for energy and food. Why do you think energy prices are high today? Please select the TWO most important reasons from the list below.

Total sample, n=2,000; Coalition voters, n=694, Climate priority, n=847; Shift to government, n=208

# Since June, there is increased opposition to all rises in energy bills

Sensitivity to the cost of an energy transition, by how much bills would rise

■ January 2022

■ June 2021

Bills up 5%

Bills up 10%

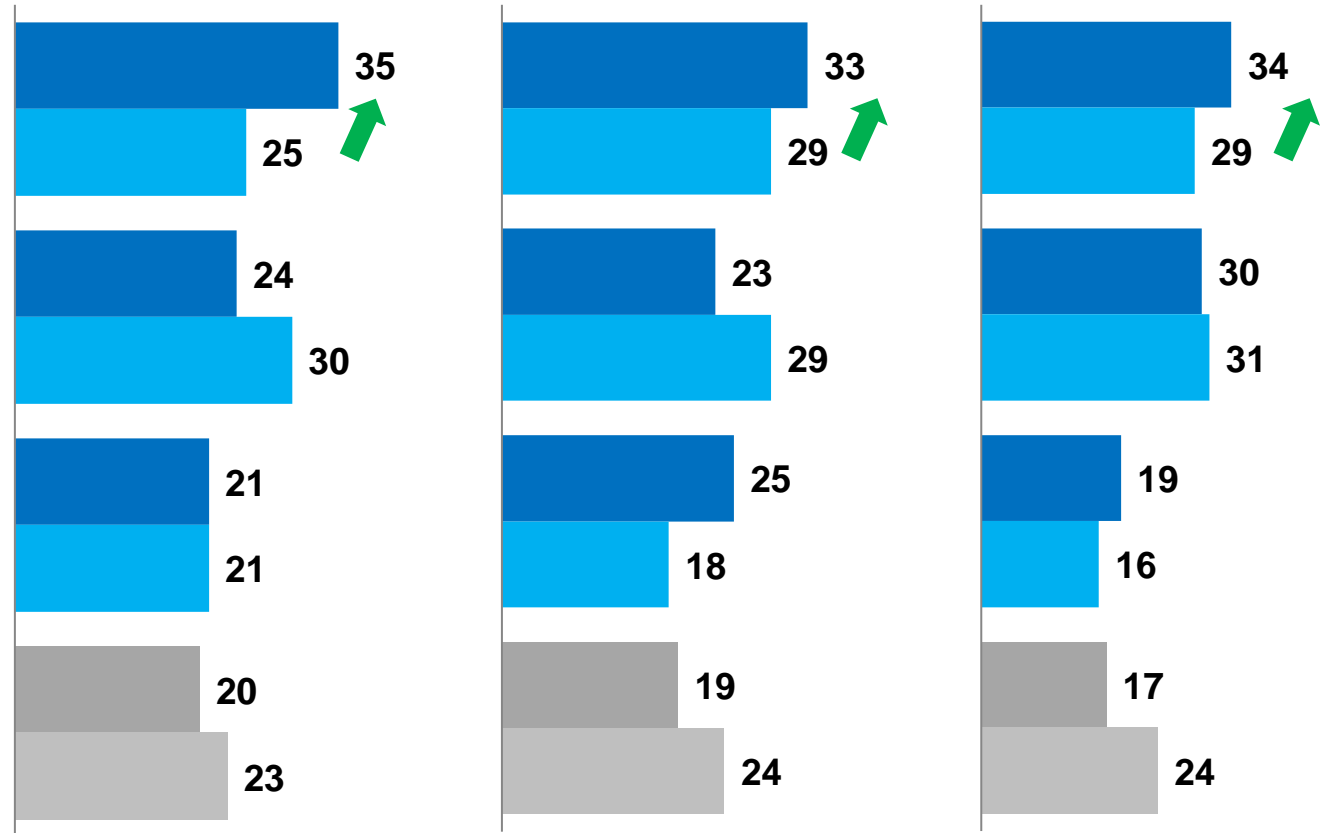
Bills up 15%

These changes will raise energy costs, and I am against that

Most changes can be done with renewables and tech that do not require big increases in the cost of energy

These changes to address climate change could raise energy bills by X percent and that would be ok

Not sure



Which ONE of the following is true about the cost of these proposals to address climate change?

Total, n=2,000; each potential rise in bills shown to 1/3-sample splits

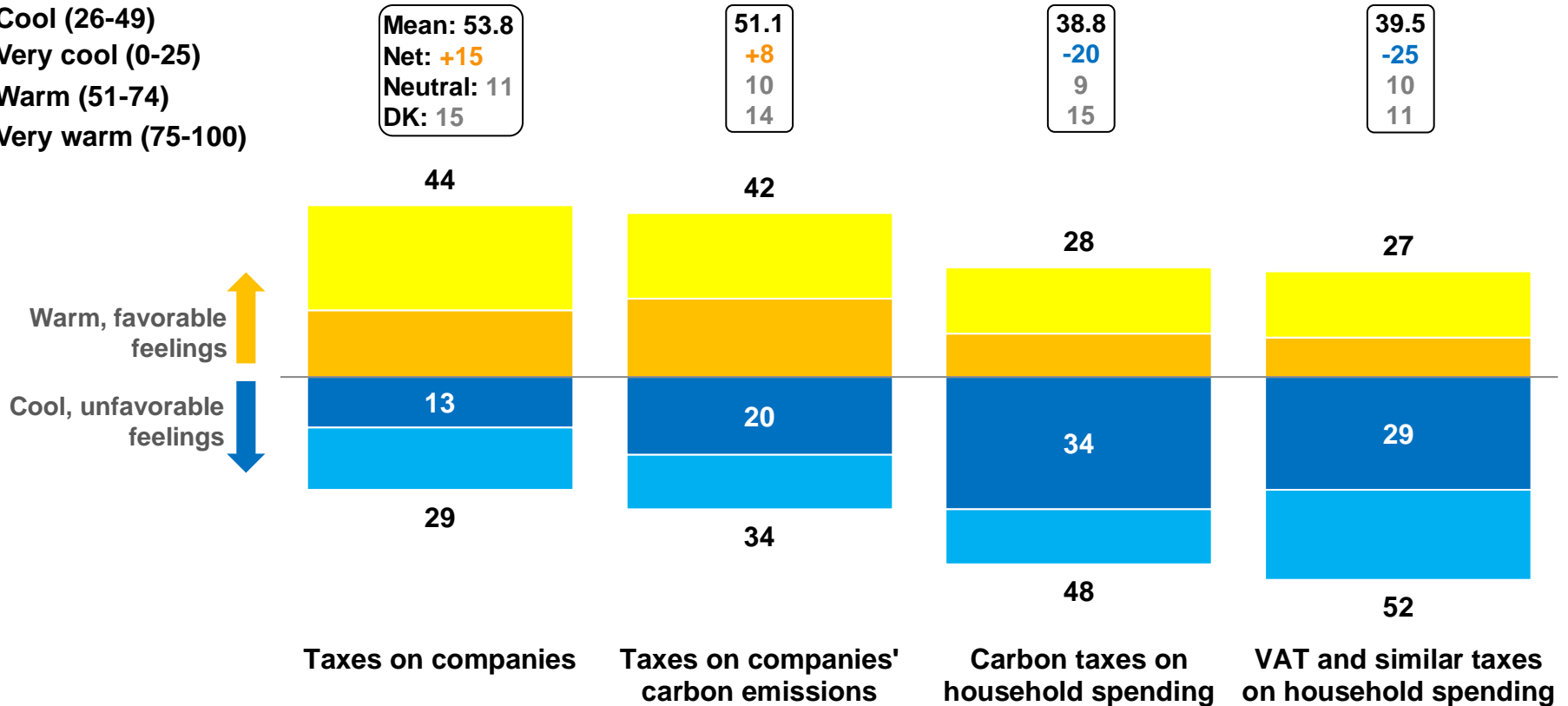
A photograph of several white offshore wind turbines in a blue ocean. The turbines are spaced out across the water, with one in the foreground and others receding into the distance. The sky is a clear, light blue. The text 'Sensitivity to taxation and fees' is overlaid in white, bold font, underlined with a green line.

# **Sensitivity to taxation and fees**

# Public positive about taxing companies, including on carbon emissions; deep opposition to carbon tax on household spending

Feelings toward household and corporate tax, total sample

- Cool (26-49)
- Very cool (0-25)
- Warm (51-74)
- Very warm (75-100)



Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVOURABLE feeling; zero meaning a VERY COLD, UNFAVOURABLE feeling; and fifty meaning not particularly warm or cold.



# Dominant view is that government should regulate and invest – little support for taxing fuel

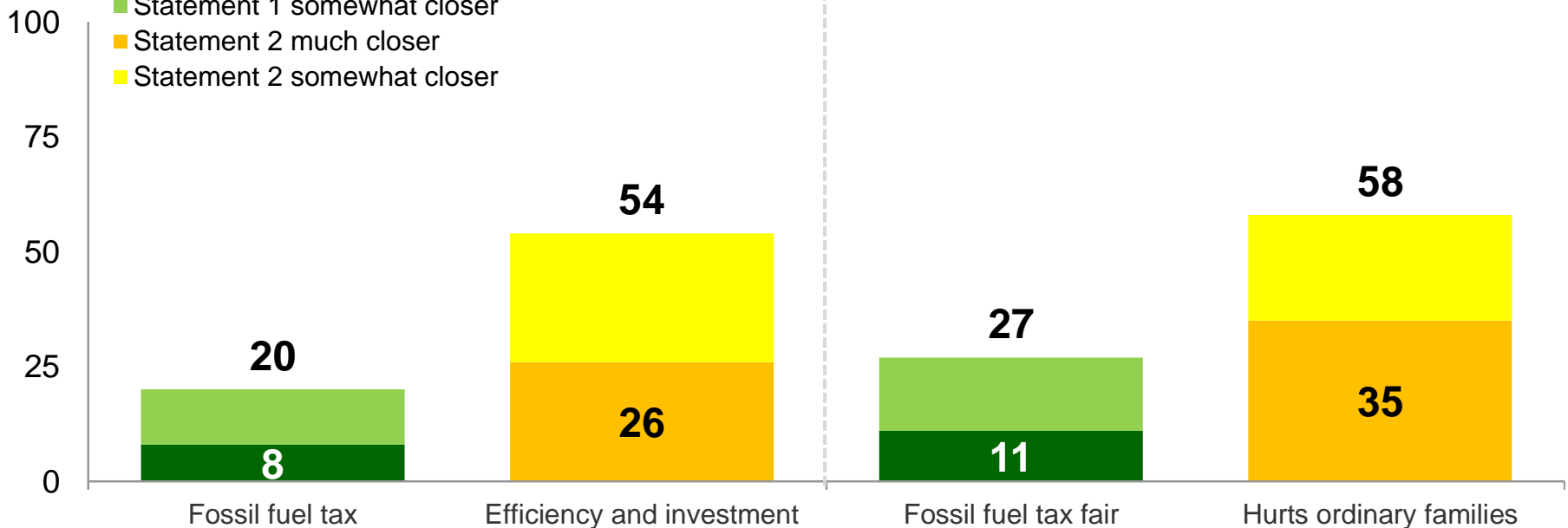
1) The best way to make this transition is to put up taxes and fees on fossil fuels, like oil, natural gas and coal and use the revenue to fund the development of renewables and a sustainable economy.

2) The government must now take the lead in creating the framework to address the climate emergency. It should be setting regulations to make everyone energy efficient and invest in the innovative research to enable us to make the transition to a low carbon economy.

1) A tax on burning coal, oil and natural gas would be a fair and efficient way of encouraging people to switch to lower-carbon ways of living.

2) Even if the government tries to fully refund any tax revenue back to families, a tax on burning coal, oil and natural gas would end up hurting ordinary people.

- Statement 1 much closer to my views
- Statement 1 somewhat closer
- Statement 2 much closer
- Statement 2 somewhat closer



# Germans favor prohibiting polluting activity to reduce emissions, rather than taxing it

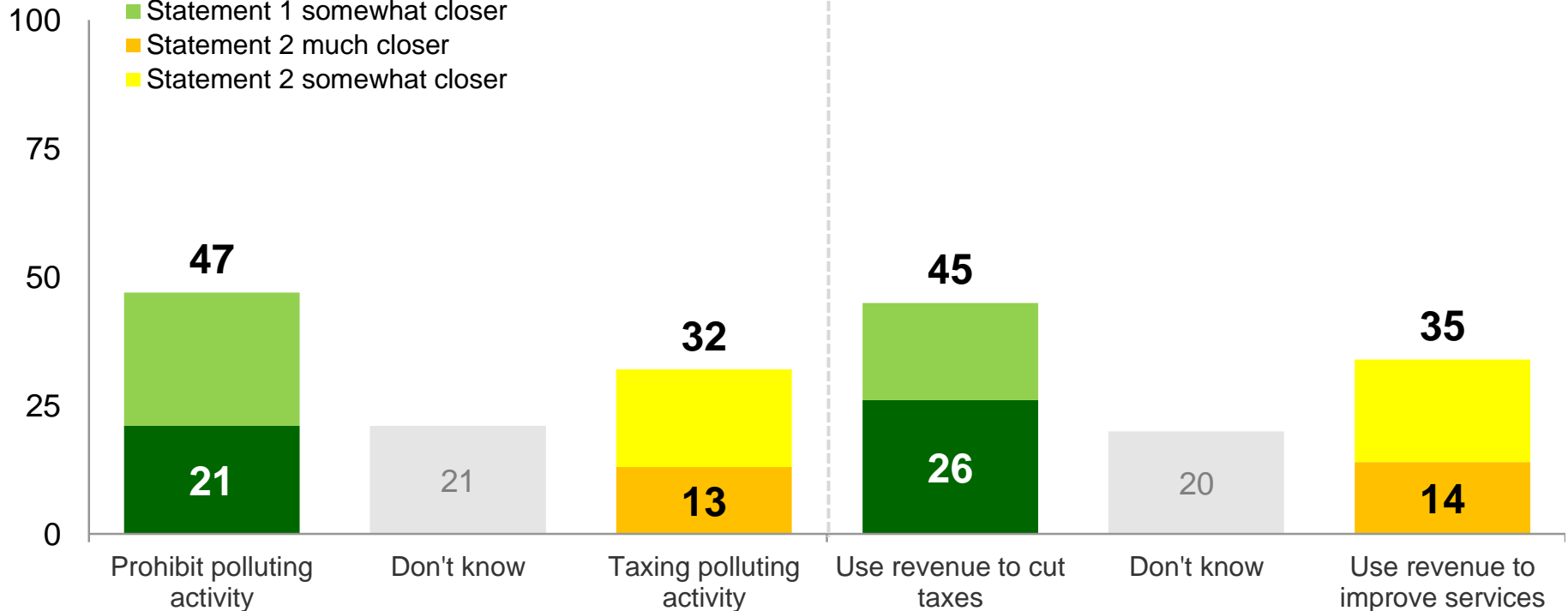
1) Governments should reduce greenhouse gas emissions by prohibiting polluting activity.

2) Governments should reduce greenhouse gas emissions by taxing polluting activity.

1) If governments get more revenue from carbon taxes, they should use it to cut other taxes.

2) If governments get more revenue from carbon taxes, they should use it to improve public services.

- Statement 1 much closer to my views
- Statement 1 somewhat closer
- Statement 2 much closer
- Statement 2 somewhat closer



# Belief regulation saves future costs provides strong support for regulation

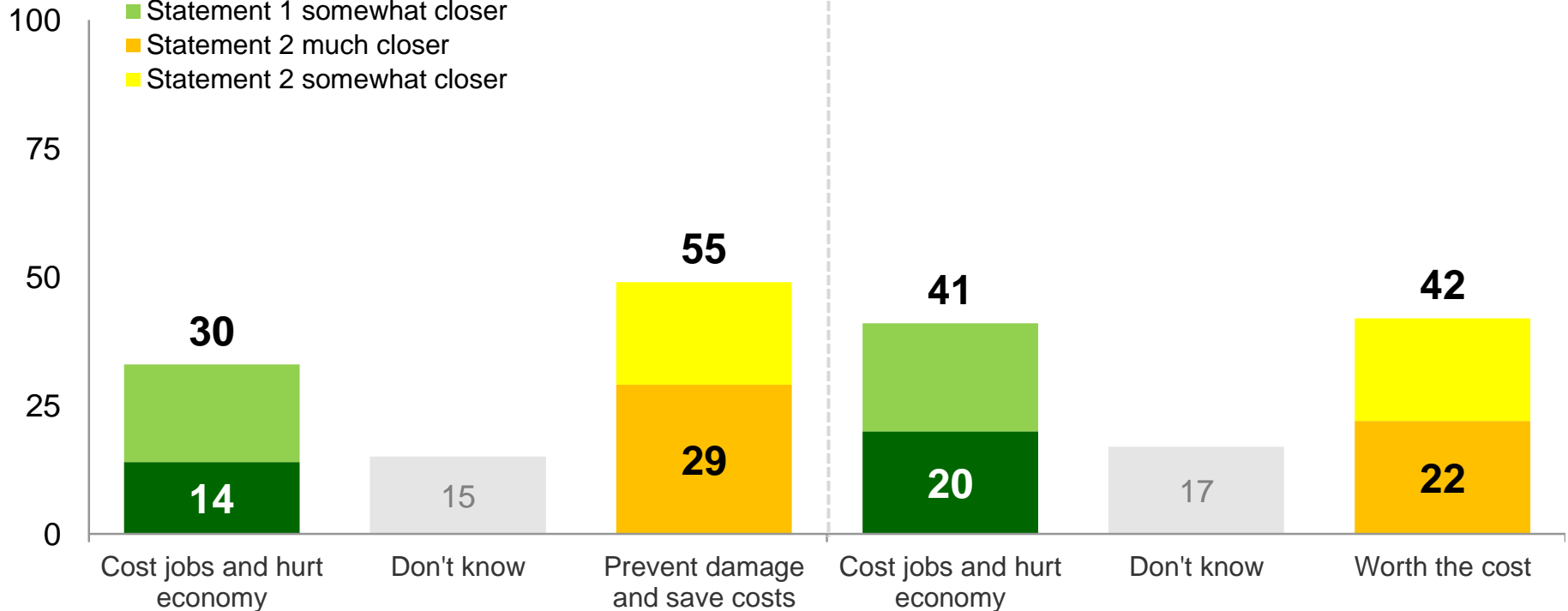
1) Stricter environmental laws and regulations cost too many jobs and hurt the economy.

2) Stricter environmental laws and regulations are worth it because they prevent damage to the environment, saving us future costs.

1) Stricter environmental laws and regulations cost too many jobs and hurt the economy.

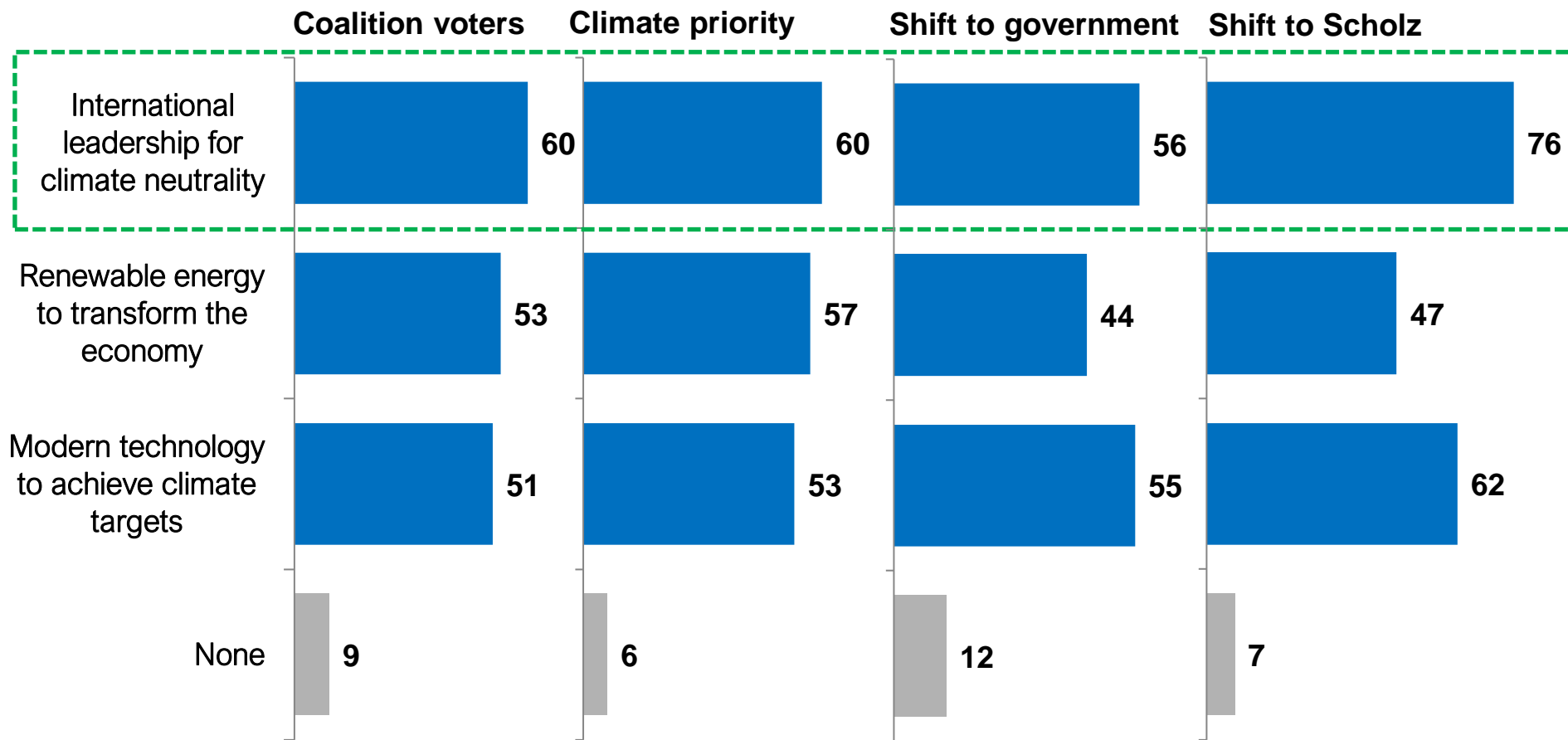
2) Stricter environmental laws and regulations are worth the cost.

- Statement 1 much closer to my views
- Statement 1 somewhat closer
- Statement 2 much closer
- Statement 2 somewhat closer



# Modern technology message also significant for people shifting to Scholz and the government

Government messages, by target



*Below are some statements from the government supporting its plans on climate change. Which TWO do you find most CONVINCING?*

**Coalition voters, n=694; Climate priority, n=847; Shift to government, n=208; Shift to Scholz, n=67**

# Perceptions of business

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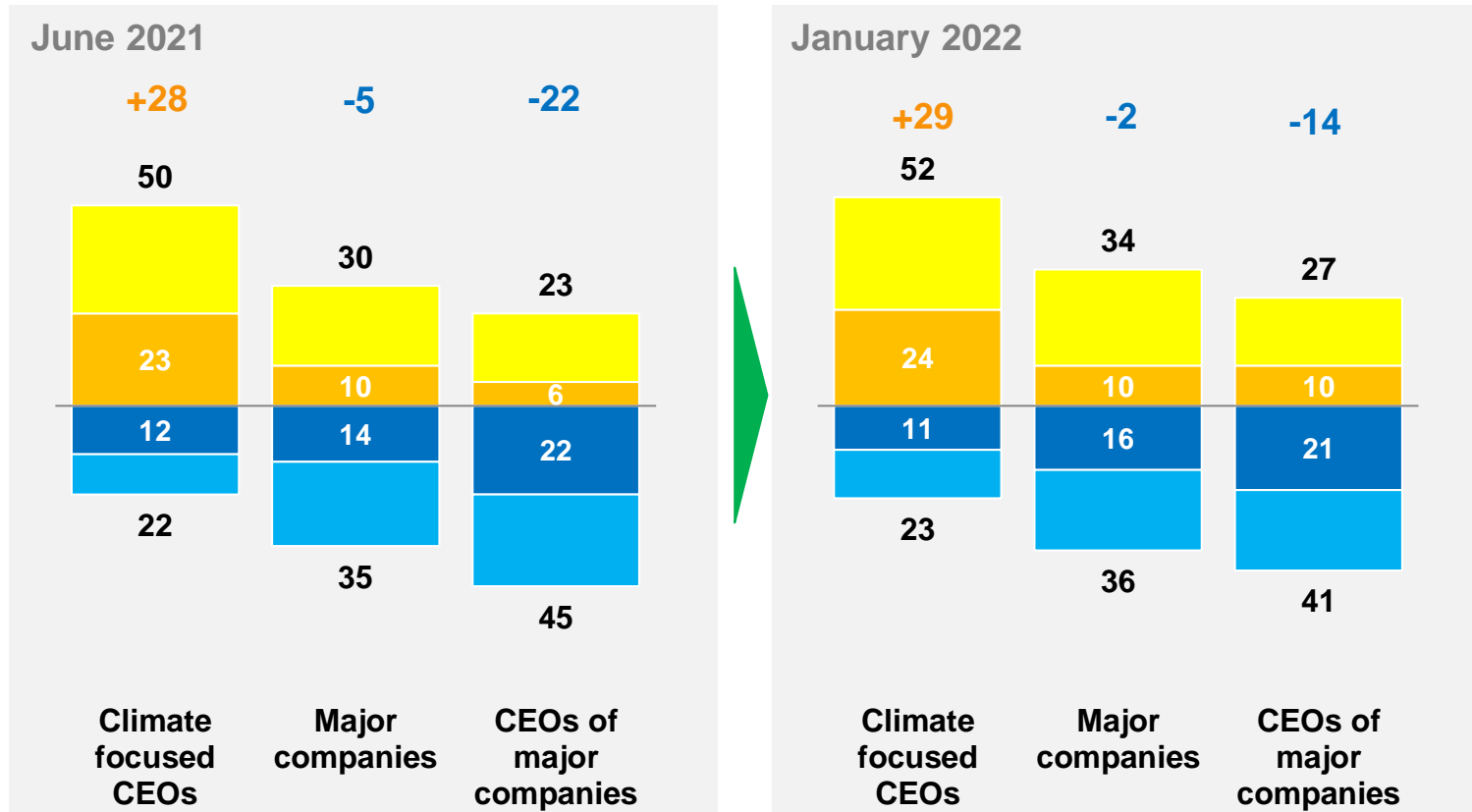
# Slight improvements to reputations of CEOs and companies since June; boldness on climate is still transformative

Feelings toward CEOs and corporations, total sample

*Climate focused CEOs* = “CEOs of major companies who say climate change is a crisis and companies must change the way they do business”

- Cool (26-49)
- Very cool (0-25)
- Warm (51-74)
- Very warm (75-100)

Warm, favorable feelings ↑  
Cool, unfavorable feelings ↓



Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVOURABLE feeling; zero meaning a VERY COLD, UNFAVOURABLE feeling; and fifty meaning not particularly warm or cold.

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new energy price dynamics in Germany  
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