

CLIMATE *Policy & Strategy*

Climate Policy & Strategy: Germany
Tracking survey, October 2022



What this is based on

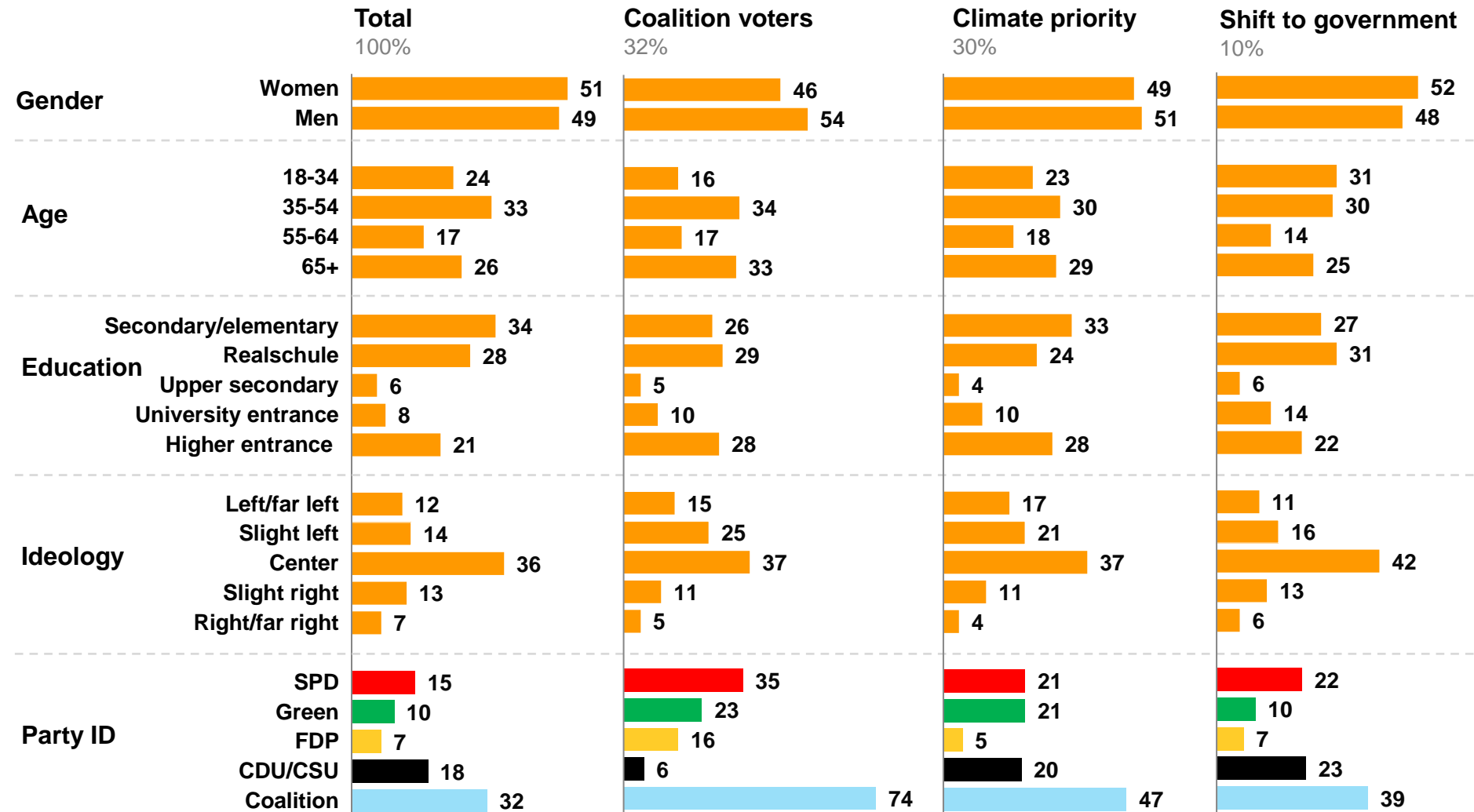
Our poll

- N=2,000 nationally representative survey of Germany
- Fieldwork: October 6-17, 2022
- Online, 20-minute questionnaire
- Weighted to national statistics on gender, age, region, education, employment and past voting behaviour

Political target groups

Target group	Definition
Total	All respondents – represents national 18+ German population
Coalition voters	Voted for one of the coalition parties (SPD, Greens, or FDP) in September 2021 Federal elections
Climate priority	Chose climate as a top priority for government
Shift to government	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>

Political targets: Shift to government are young and secondary educated, support SPD and CDU/CSU



What you need to know

- »»» The energy and inflation crises have led to shifts in people's priorities and feelings about climate and energy. The need for economic relief has jumped to the top, as almost half fear they won't be able to heat their homes in winter.
- »»» But the public is not critical of the ambitious climate goals set out by the new government. In fact, action on climate is still supported by a strong majority across voter groups. The public does not blame climate change measures or government levies for the crisis. Instead, they blame the war and corporate profiteering.
- »»» They believe the government have not done enough to find alternative energy supplies after the Russia cut off and believe they have not done enough or acted fast enough on addressing climate change.
- »»» Climate still is a higher priority than pensions, social programs and housing — issues that topped the election agenda last year. It is fair to say, the public's priorities are economic relief and a faster transition to addressing climate change. That now includes a flip in opinion on nuclear. And even more now think, the cost of this transition is affordable.

What you need to know (2)

- ››› The relief and energy package allows the government to gain higher approval on handling climate change and its handling of price increases.
- ››› There is increased support for the government to back the oil and gas industry, but that falls far behind the desire for greater help for low-carbon sectors. Nuclear now has a very strong reputation and is seen as a sustainable energy investment.
- ››› Proposals from government or opposition to implement a windfall tax and to freeze or reduce energy bills are popular.
- ››› The government struggles with its messaging on climate change: none of them pop. Though it's vulnerable to attacks around reactivating coal power plants and its perceived inaction on the energy price crisis.
- ››› However, the government's messaging and policies achieve a slight uplift in ratings on the economy and climate, and a bigger uplift on handling the energy price crisis.

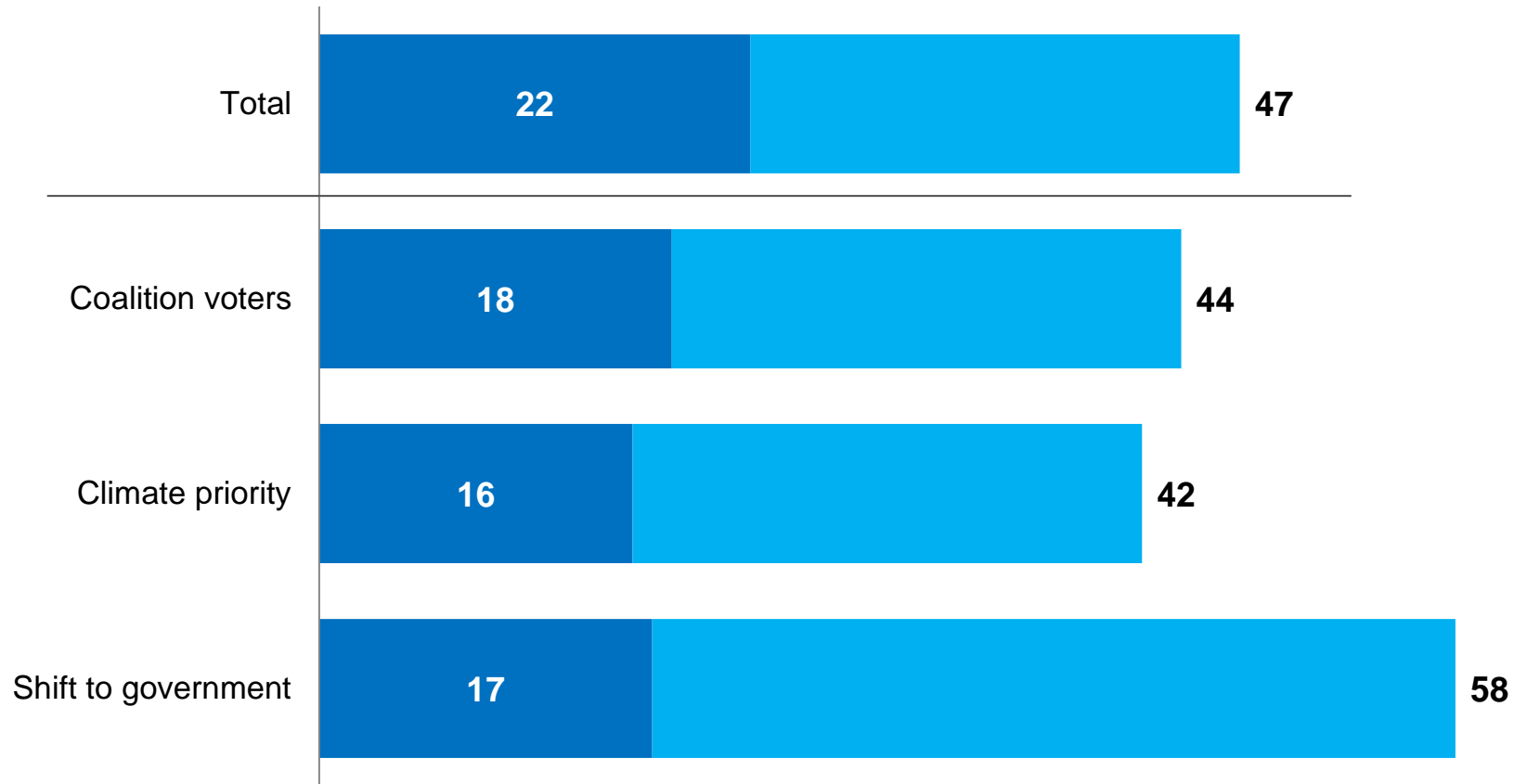
Climate Context



Almost half of Germans are concerned about their ability to heat their home this winter

Ability to heat home this winter, by target

■ Very concerned ■ Quite concerned

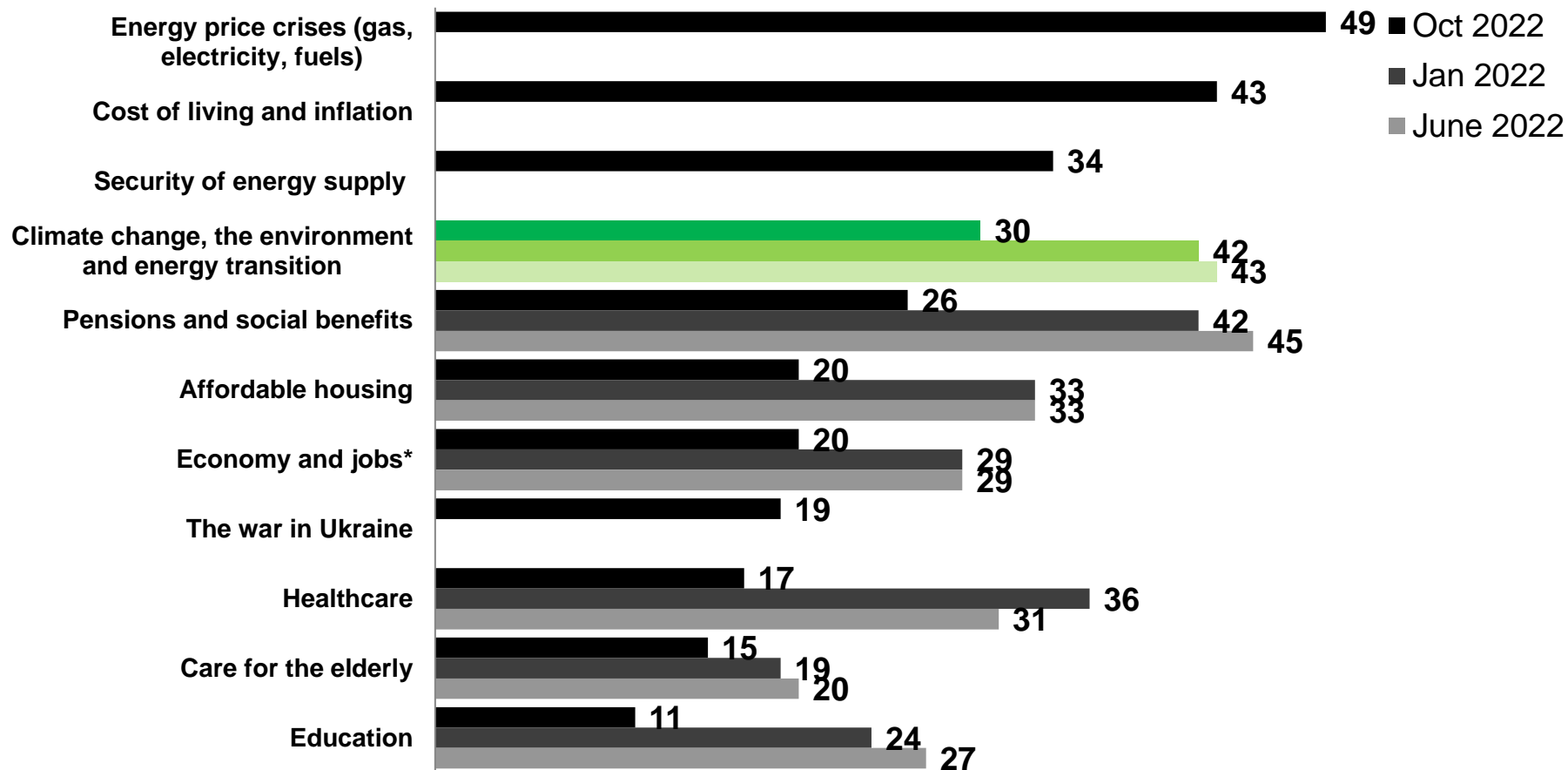


How concerned are you about your family's ability to heat your home this coming winter?

Total, n=2,000

Climate change now a lower concern, behind energy price crises, cost-of- and energy security, but ahead of pensions and social benefits and housing

Priorities for government, total sample

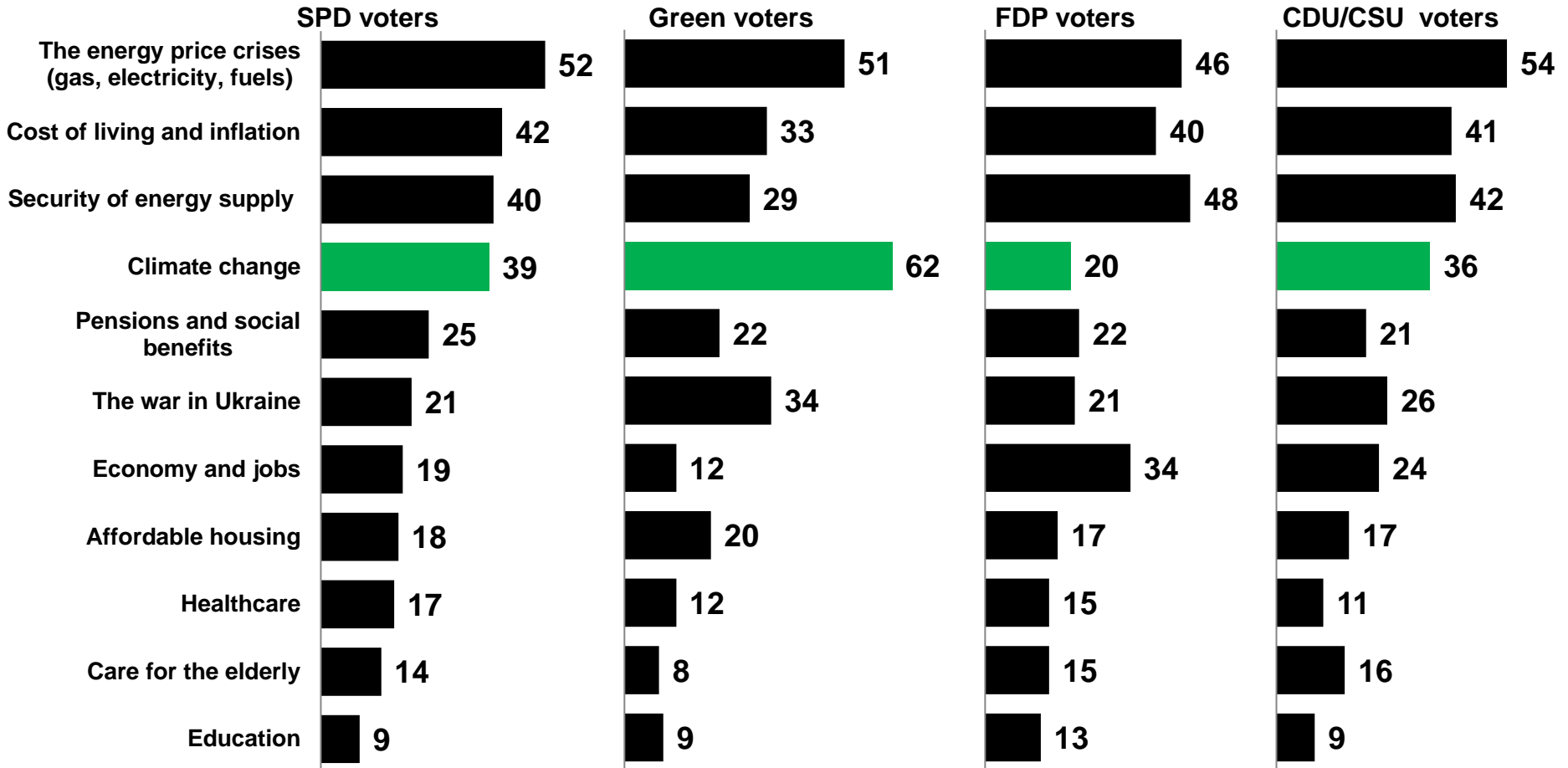


What are the *THREE* issues you think should be the top priorities for government?

Total sample, n=2,000

Green and SPD voters still put climate at or top of priorities for government, and SPD above Ukraine war

Priorities for government, by vote



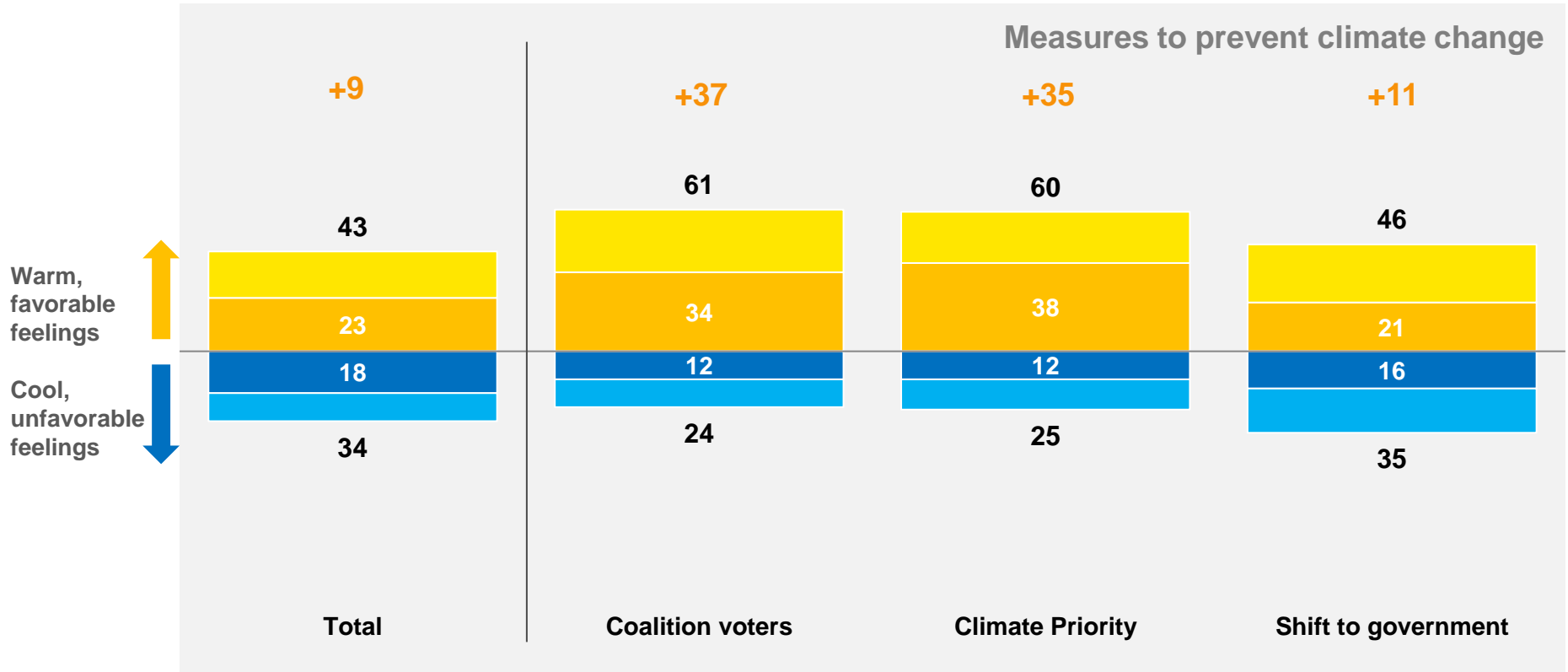
What are the *THREE* issues you think should be the top priorities for government?

SPD voters, n=311; Green voters, n=184; FDP voters, n=138, CDU/CSU voters, n=297

Broad support for measures to prevent climate change

Measures to prevent climate change, by target

- 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, FAVORABLE feeling; zero meaning a VERY COLD, UNFAVORABLE feeling; and fifty meaning not particularly warm or cold.

Total sample, n=2,000; Coalition voters, n=633, Climate priority, n=607; Shift to government, n=208

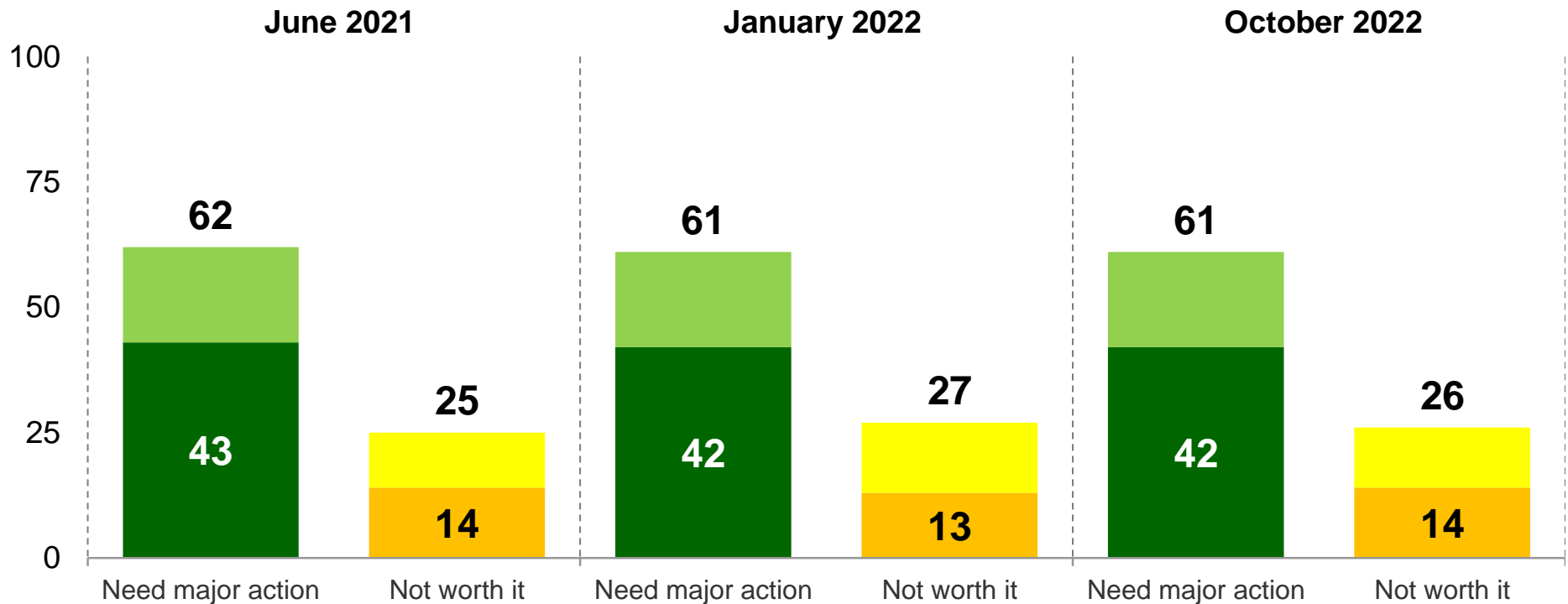
Support for major action on climate continues, even as we highlight the cost

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

2) (2021) The threat of climate change is exaggerated and we are already doing enough.

2) (2022) The threat of climate change is exaggerated and the high cost of fixing it may not be worth it.

■ Statement 1, much closer ■ Statement 1, somewhat ■ 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, n=2,000

A strong majority across all targets still support major climate action

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

■ Statement 1, somewhat

■ Statement 2, much closer

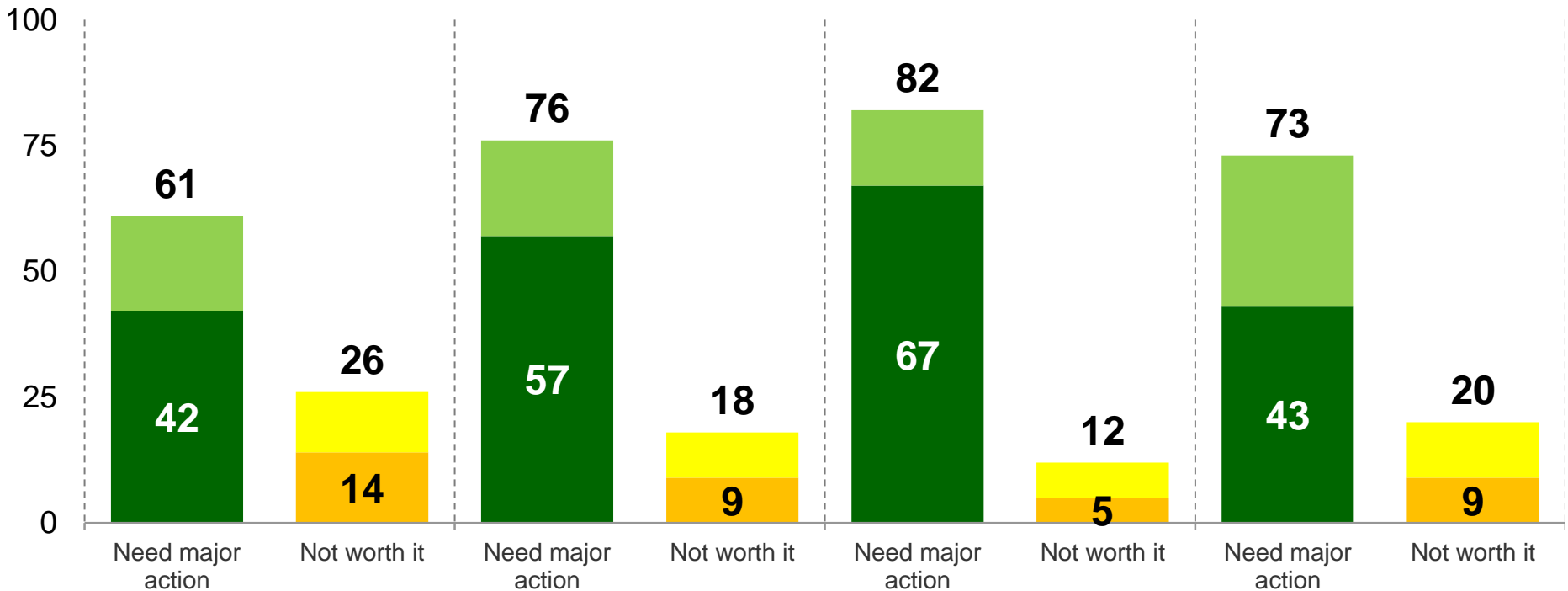
■ Statement 2, somewhat

Total

Coalition voters

Climate priority

Shift to government



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.

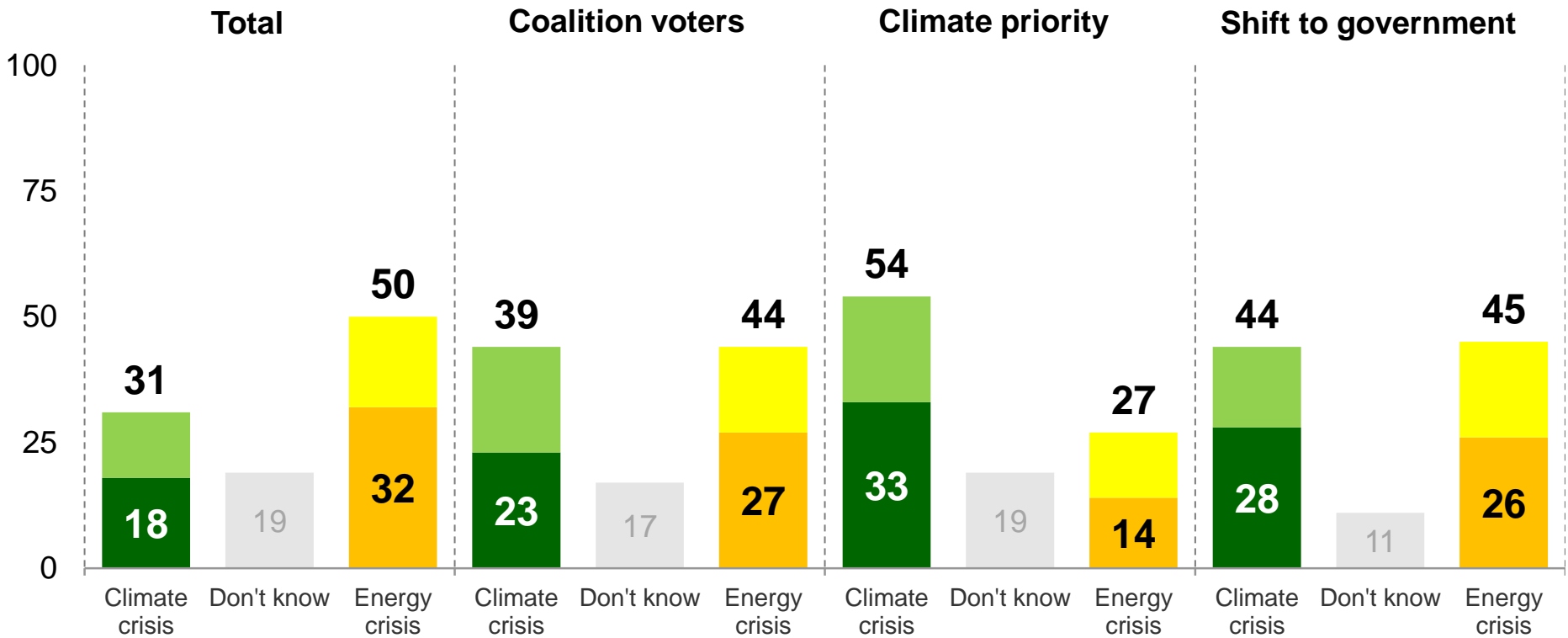
Total sample, n=2,000; Coalition voters, n=633, Climate priority, n=607; Shift to government, n=208

A majority feels the energy crisis is the more fundamental problem, although climate priority say opposite, and one in five likely believe both

1) The climate crisis is the more fundamental problem.

2) The energy crisis is the more fundamental problem.

■ Statement 1, much closer ■ Statement 1, somewhat ■ 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.

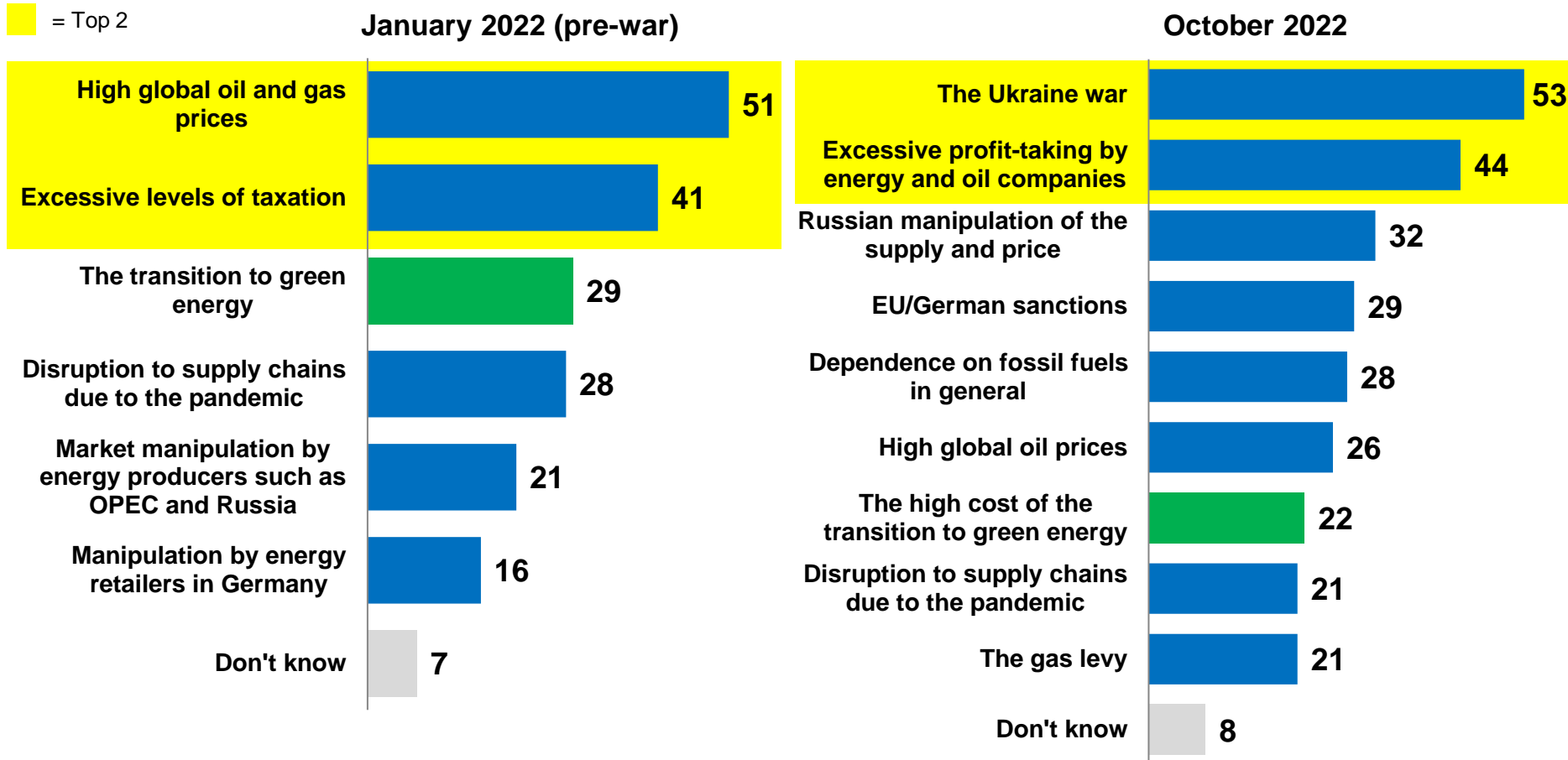
Total sample, n=2,000; Coalition voters, n=633, Climate priority, n=607; Shift to government, n=208

Climate and energy policy



They don't blame the crisis on climate measures or the gas levy: war and profiteering seen as most culpable

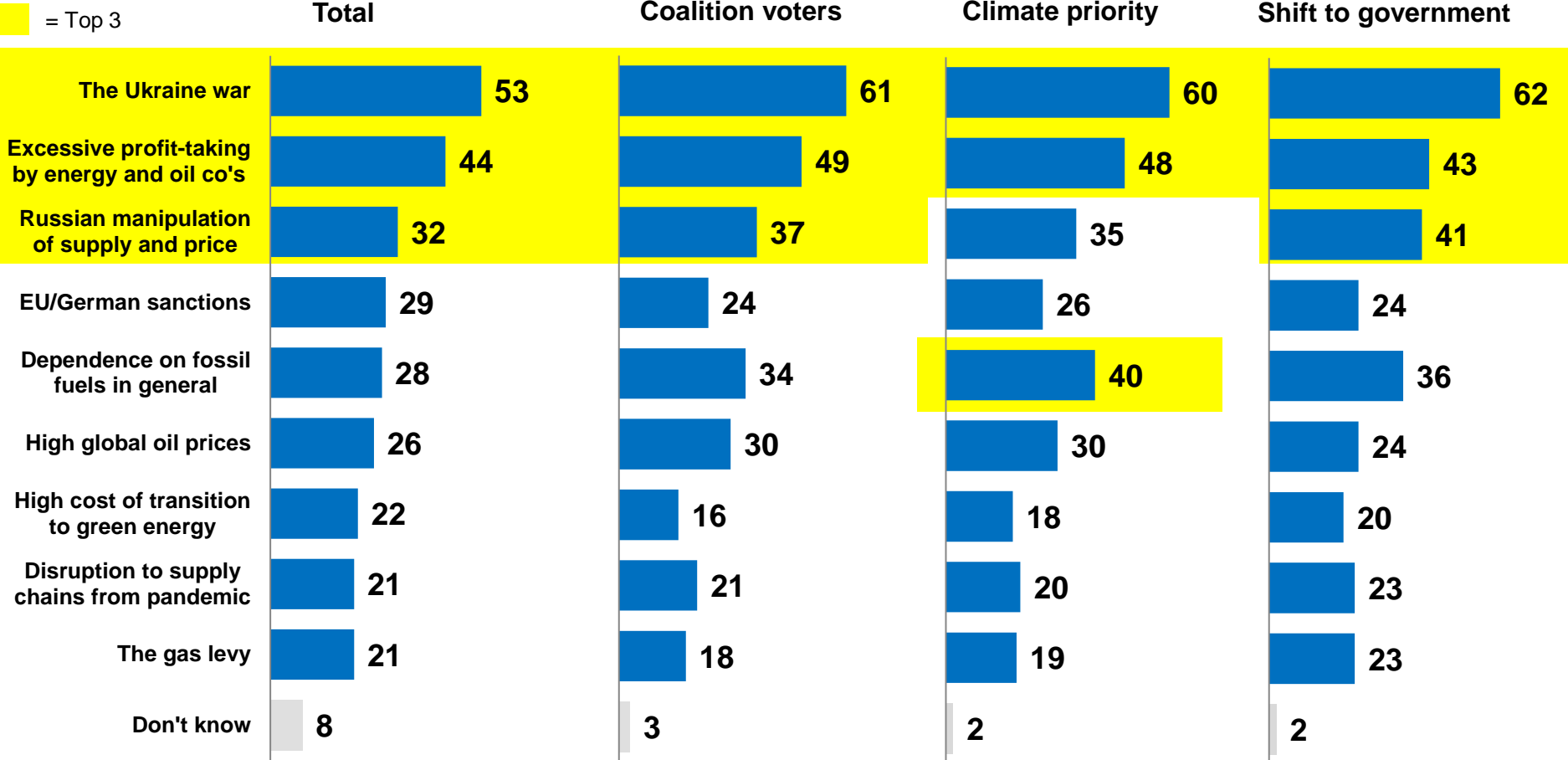
Reasons for increased cost of living, over time, total sample



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 (Jan) / THREE (Oct) most important reasons from the list below.

War and profit-taking key across all targets, though dependence on fossil fuels emerging too

Reasons for increased cost of living, by target

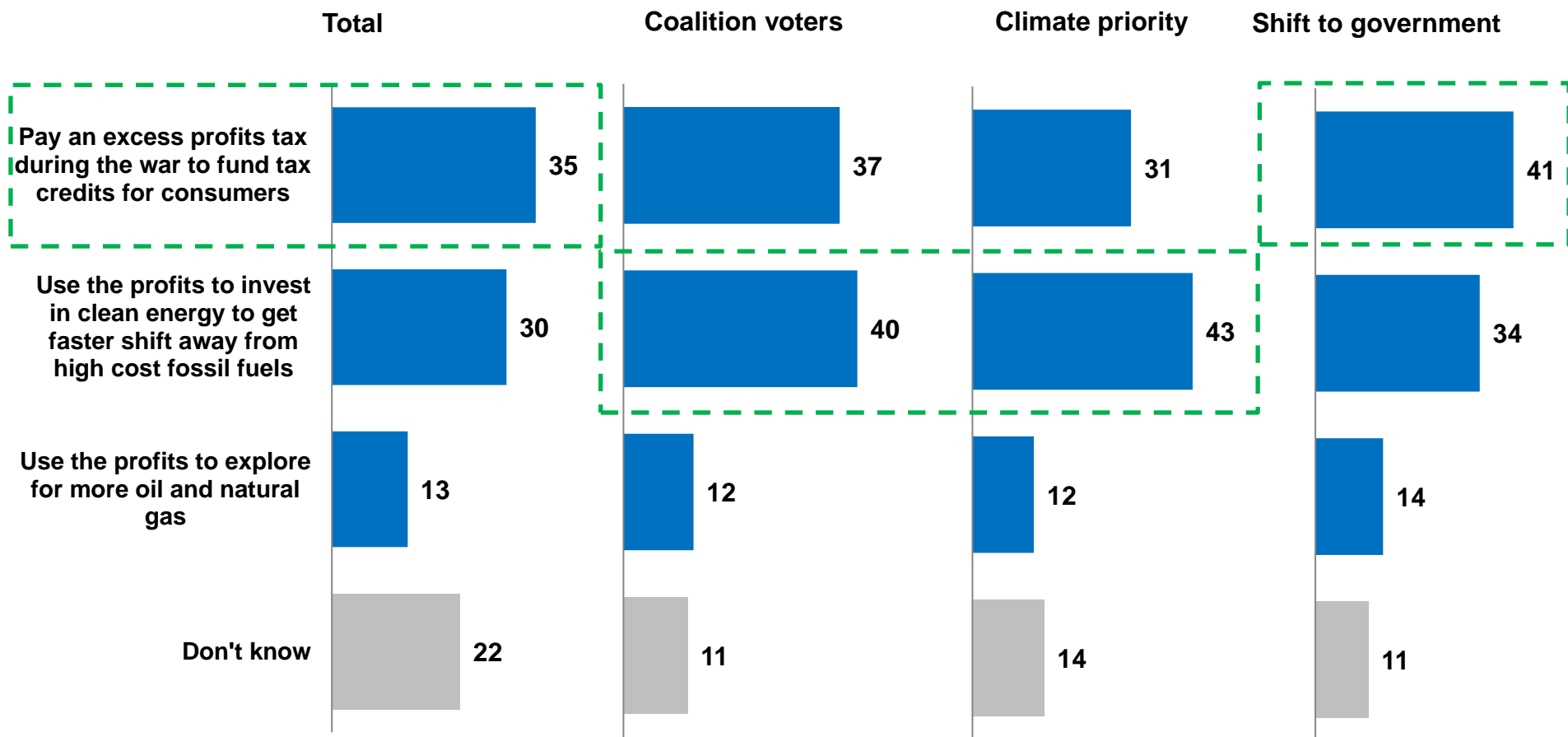


You may have noticed increased prices recently, particularly for energy and food. Why do you think energy prices are high today? Please select the THREE most important reasons from the list below.

Total sample, n=2,000; Coalition voters, n=633, Climate priority, n=607; Shift to government, n=208

In this crisis, people want financial relief and faster transition to clean energy, with little interest in using profits to explore for more oil & gas

Approach to oil and energy companies, by target



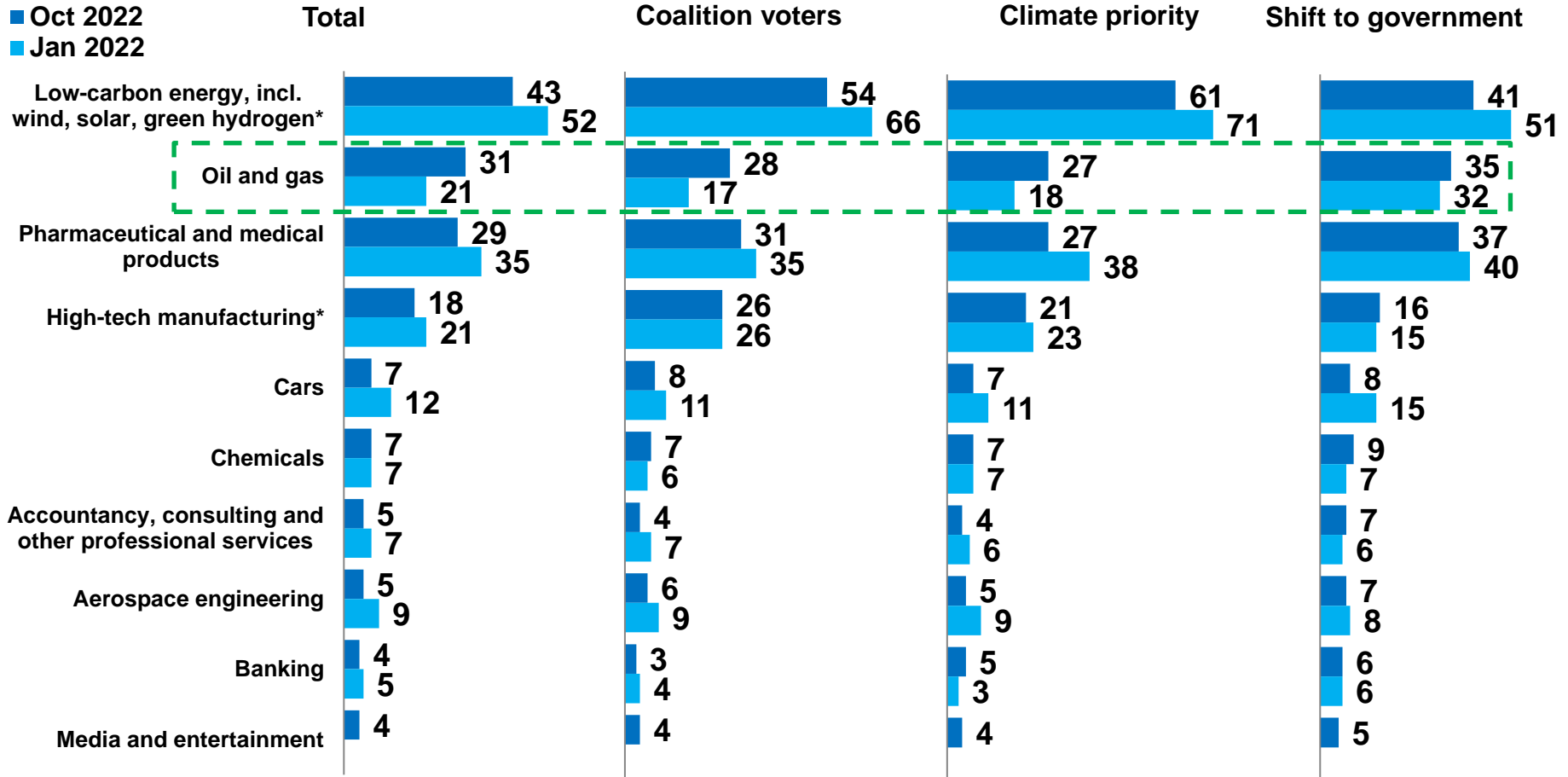
Which ONE is the right approach to oil and energy companies during the energy crisis?

Total sample, n=2,000; Coalition voters, n=633, Climate priority, n=607; Shift to government, n=208

Jump in support for government helping the oil and gas sector, although low-carbon power still top priority by far

Industries that government should support, by target

■ Oct 2022
■ Jan 2022



Which of these industries would you MOST want the government to support and champion? Please choose two.

* Previously: - Green hydrogen & low-carbon energy tech, incl. wind / solar
- Machinery and high-tech manufacturing

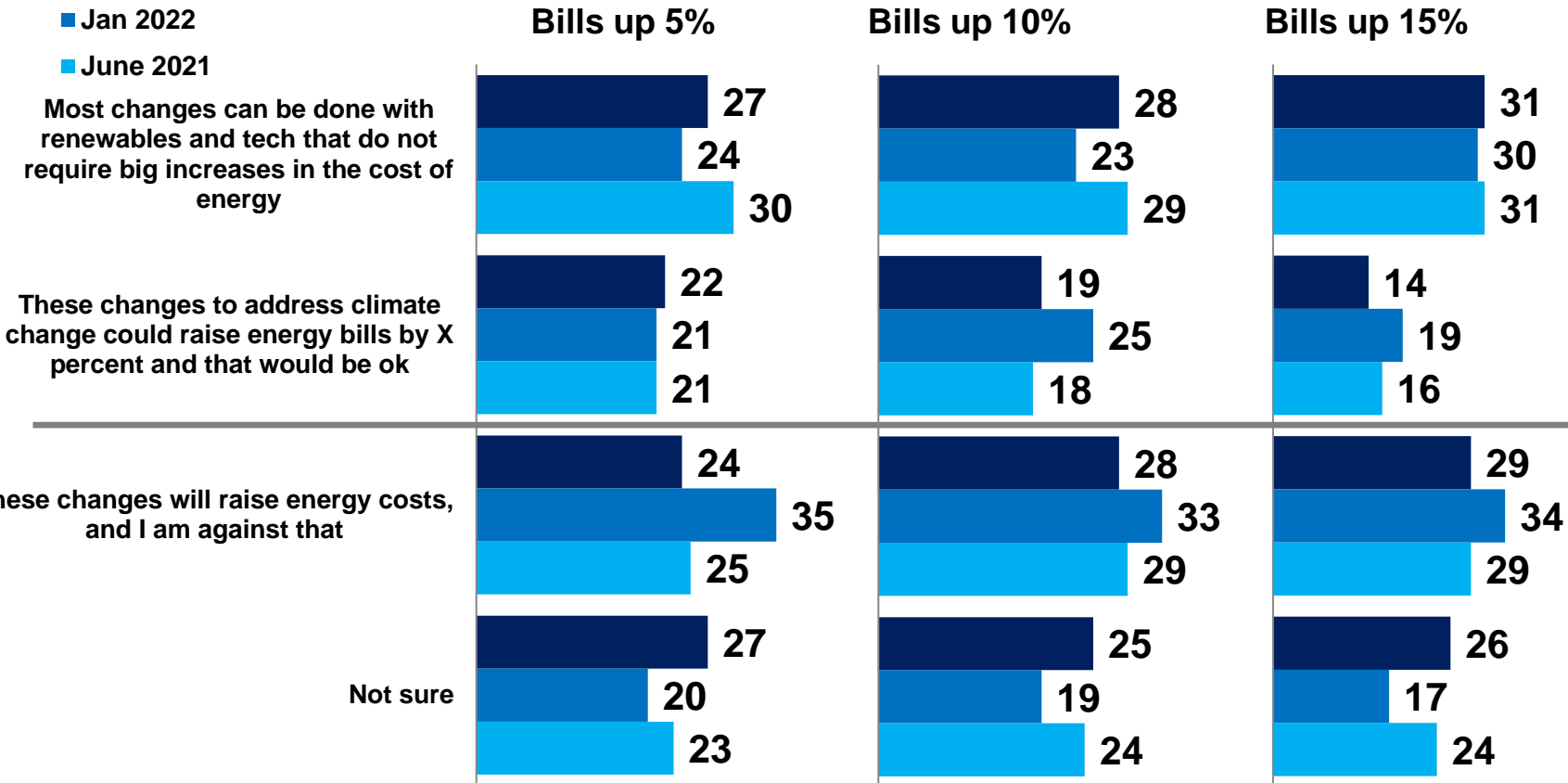
Surprisingly, even fewer think energy transition will bring higher energy costs, because fossil fuel high-cost option

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

■ Oct 2022

■ Jan 2022

■ June 2021



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

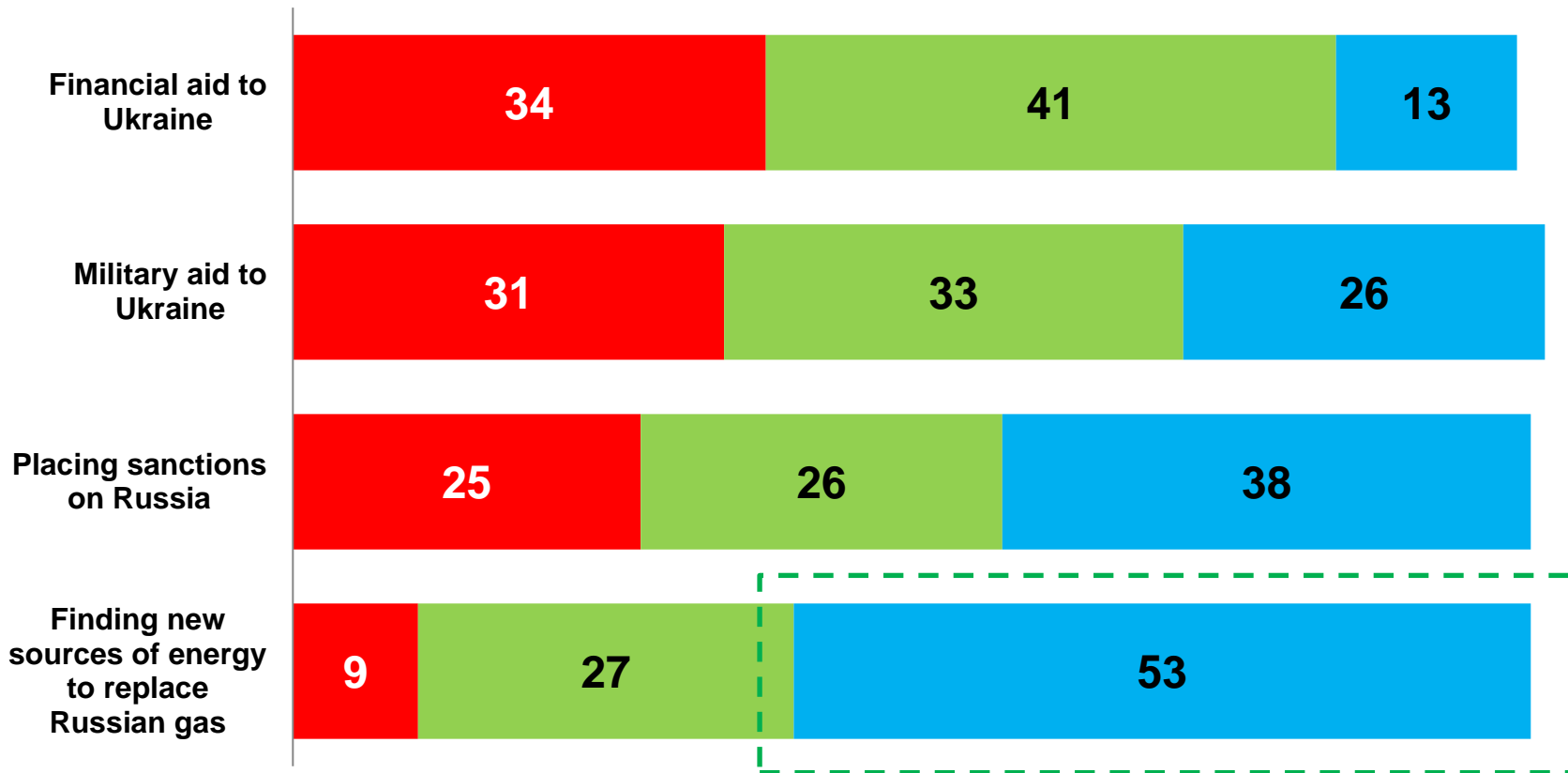
A photograph of an industrial facility, likely a gas processing plant, featuring a long, receding line of blue valves with red handwheels connected to yellow pipes. The scene is brightly lit, and the perspective is from a low angle, looking down the length of the equipment. A green horizontal line is positioned below the text overlay.

Ukraine war and end of Russian energy

A majority say government has done too little to find energy sources to replace Russian gas

Reactions to German response to war in Ukraine, total sample

■ Too much ■ The right amount ■ Too little



Do you think the German government has done too much, too little, or about the right amount on each of the following?

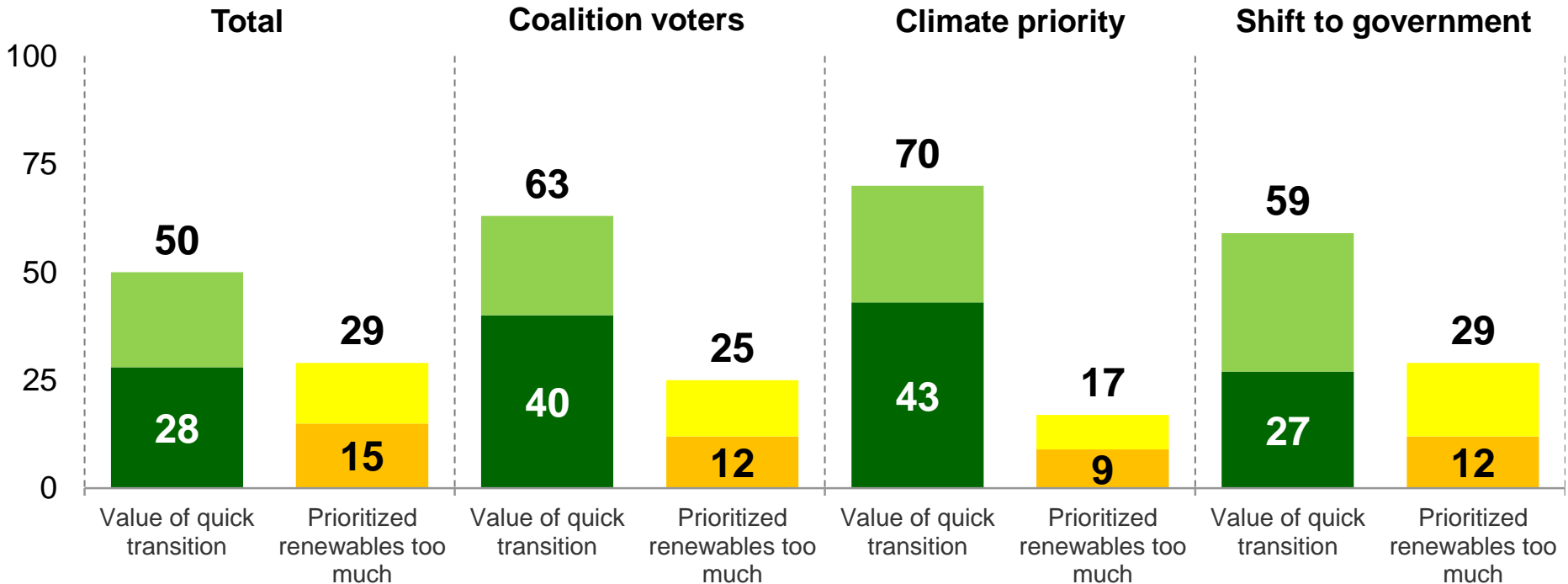
Total, n=2,000

Majorities say the crisis showed the value of transitioning quickly to renewables, for energy security and independence

1) The Russian invasion of Ukraine will mean western democracies working to get energy security and independence from Russia. It also showed the value of transitioning as quickly as possible to clean, renewable energy.

2) The Russian invasion of Ukraine will mean the western democracies working together to get energy security and independence from Russia. It also showed we prioritized renewable energy too much.

■ Statement 1, much closer ■ Statement 1, somewhat ■ Statement 2, much closer ■ Statement 2, somewhat

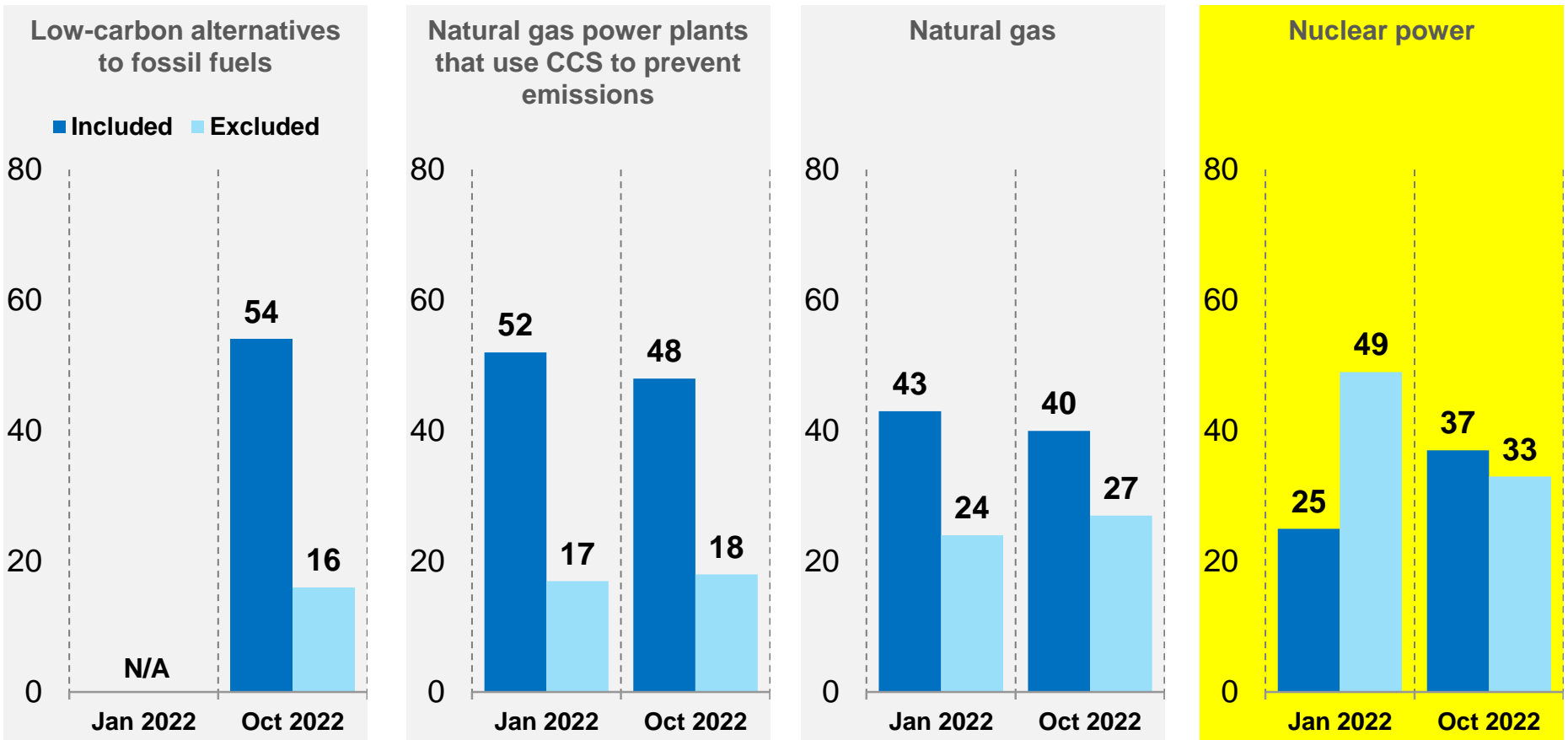


On the following pages are some pairs of statements. For each, please indicate whether the FIRST statement or the SECOND statement comes closer to your views, even if neither is exactly right.

Total sample, n=2,000; Coalition voters, n=633, Climate priority, n=607; Shift to government, n=208

Since January, views on nuclear power as a “sustainable investment” have flipped

What should be included in definition of “sustainable investments”, total sample

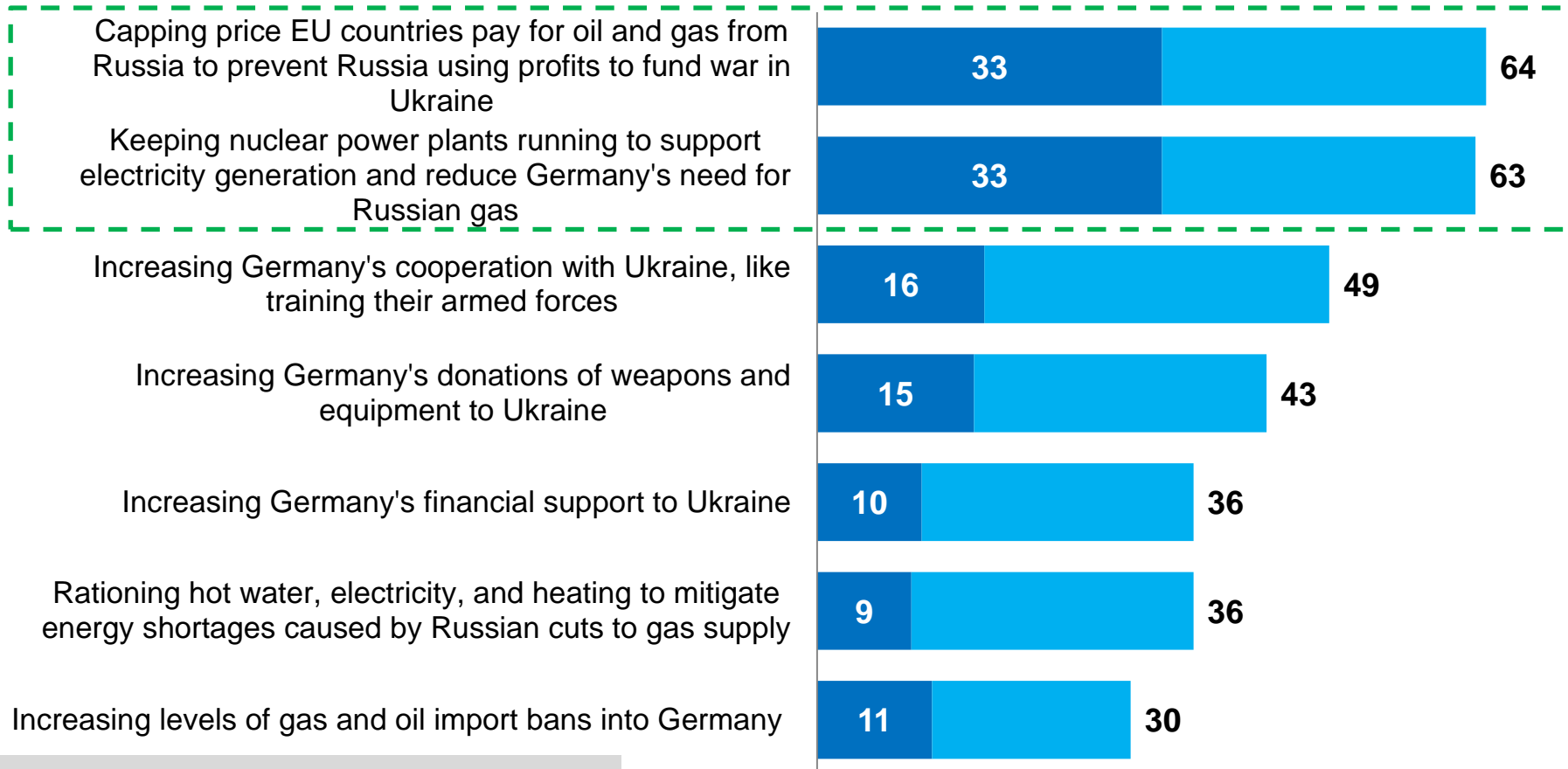


The European Union is making rules on the type of investments that are considered sustainable. For each of the following, do you think Germany should propose they are INCLUDED in the list of sustainable investments, or EXCLUDED?

Two in three support price caps on Russian oil and gas imports and continuation of nuclear power

Support for government response to war in Ukraine, total sample

■ Strongly support ■ Support somewhat



Do you support or oppose each of the following?

Strong support, particularly among coalition voters, for no German investment in Russia

1) We should not put money into countries that launch wars of aggression. German companies should be banned from investing in Russia.

2) German companies should be free to make investments as they see fit, it's not the government's place to tell them what to do with their money.

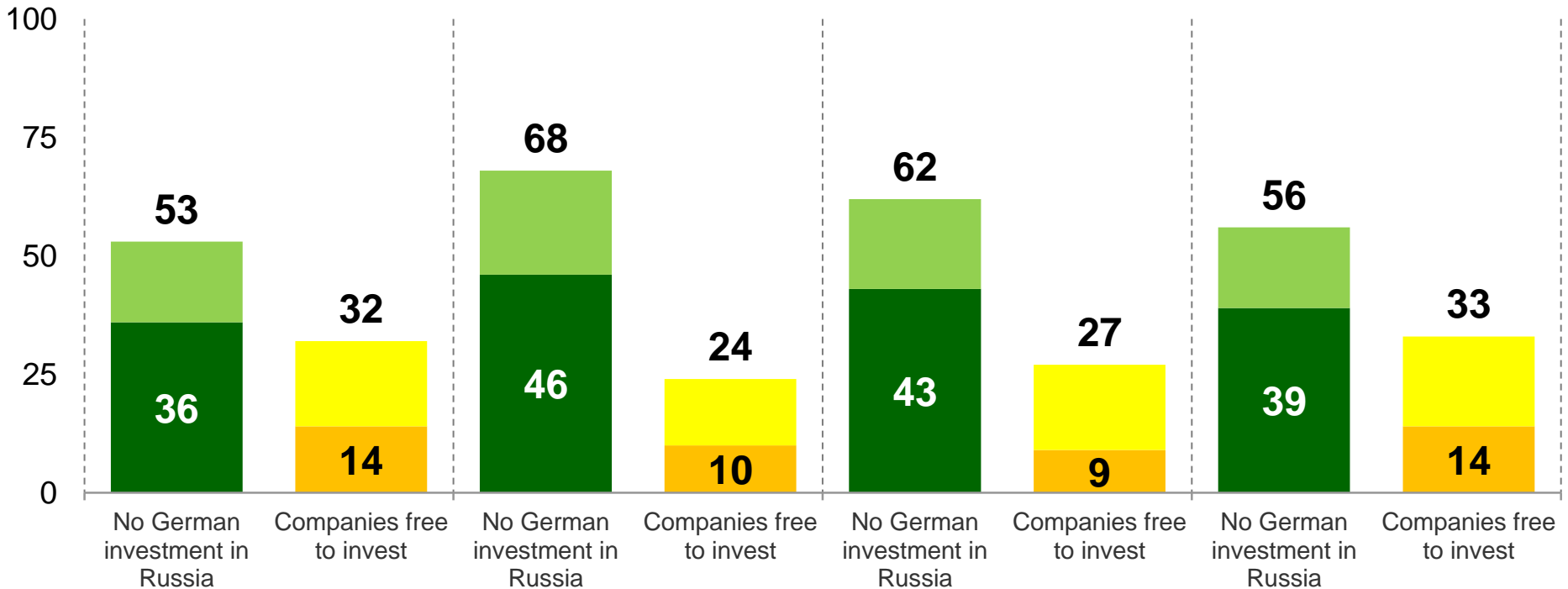
■ Statement 1, much closer ■ Statement 1, somewhat ■ Statement 2, much closer ■ Statement 2, somewhat

Total

Coalition voters


Climate priority

Shift to government



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; Coalition voters, n=633, Climate priority, n=607; Shift to government, n=208

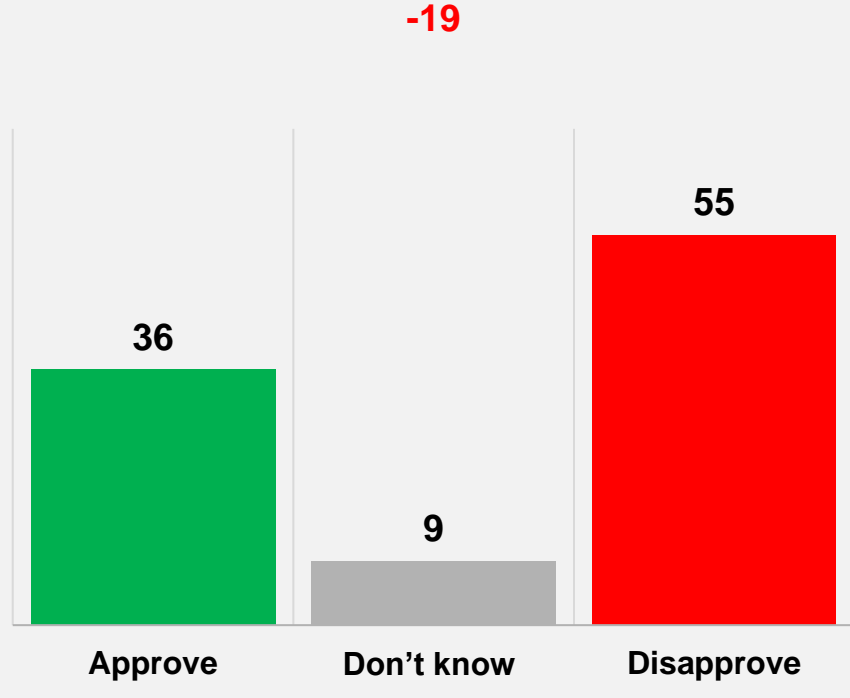
A photograph of four government officials walking outdoors on a paved street. From left to right: a woman in a blue suit, a man in a dark suit and white shirt, a man in a dark suit and red tie, and a man in a dark suit and striped tie. They are all smiling and looking towards the camera. The background is slightly blurred, showing buildings and a car.

Government climate policies

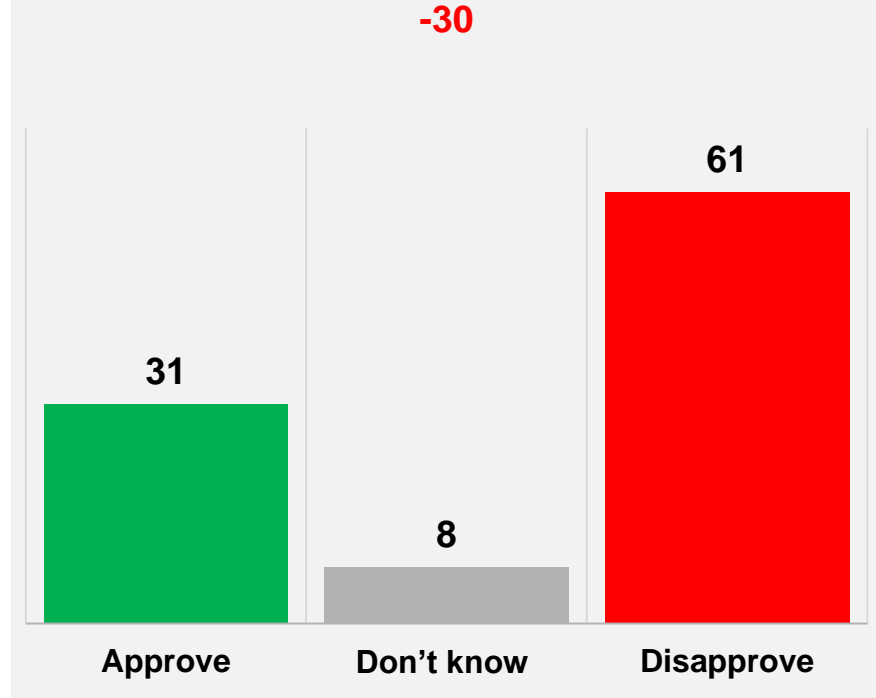
Clear majority disapprove of government on climate and energy price crises

Approval of government on climate and energy, total sample

How the government is handling climate change, the environment and energy transition



How the government is handling the energy price crises in gas and power

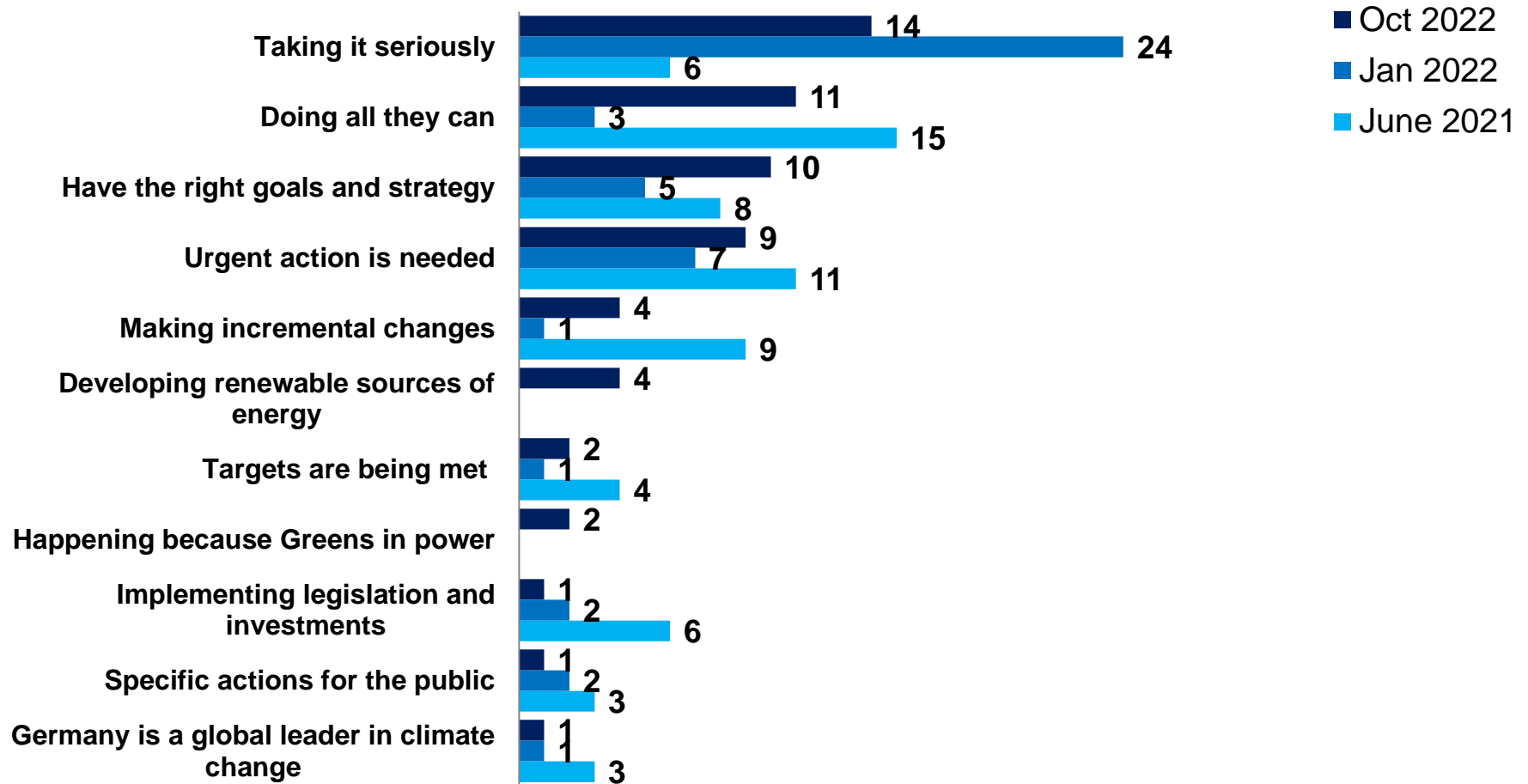


How much do you approve or disapprove of each of the following

Total, n=2,000

Those approving of government performance on climate see them taking it seriously, doing all they can, with the right goals in place

Reasons for approval, total sample

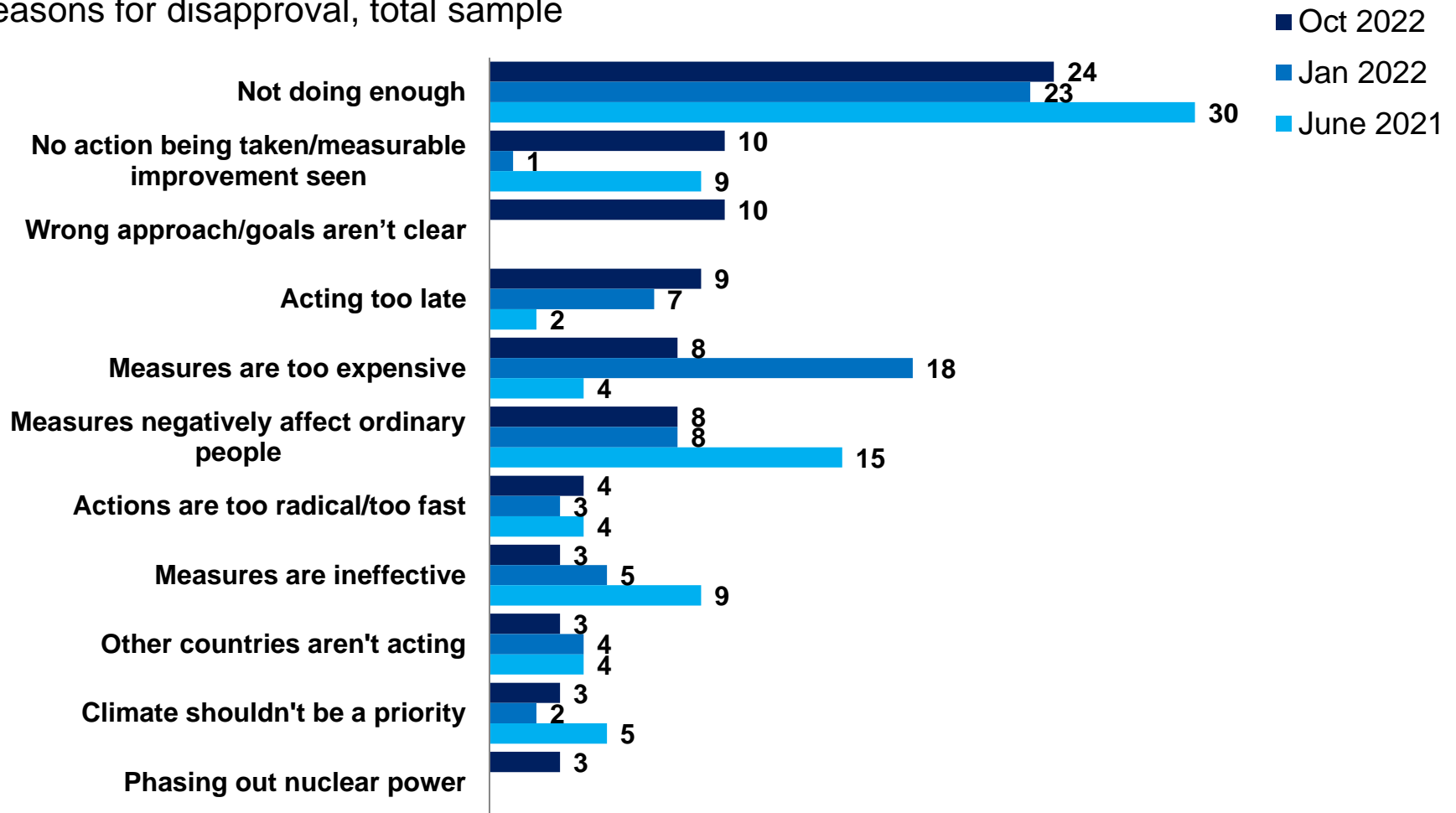


Why do you approve of how the government is addressing climate change, the environment and energy transition?

Total sample, n=2,000

About half of government disapproval is for “not doing enough,” “no action taken” & “acting too late”

Reasons for disapproval, total sample



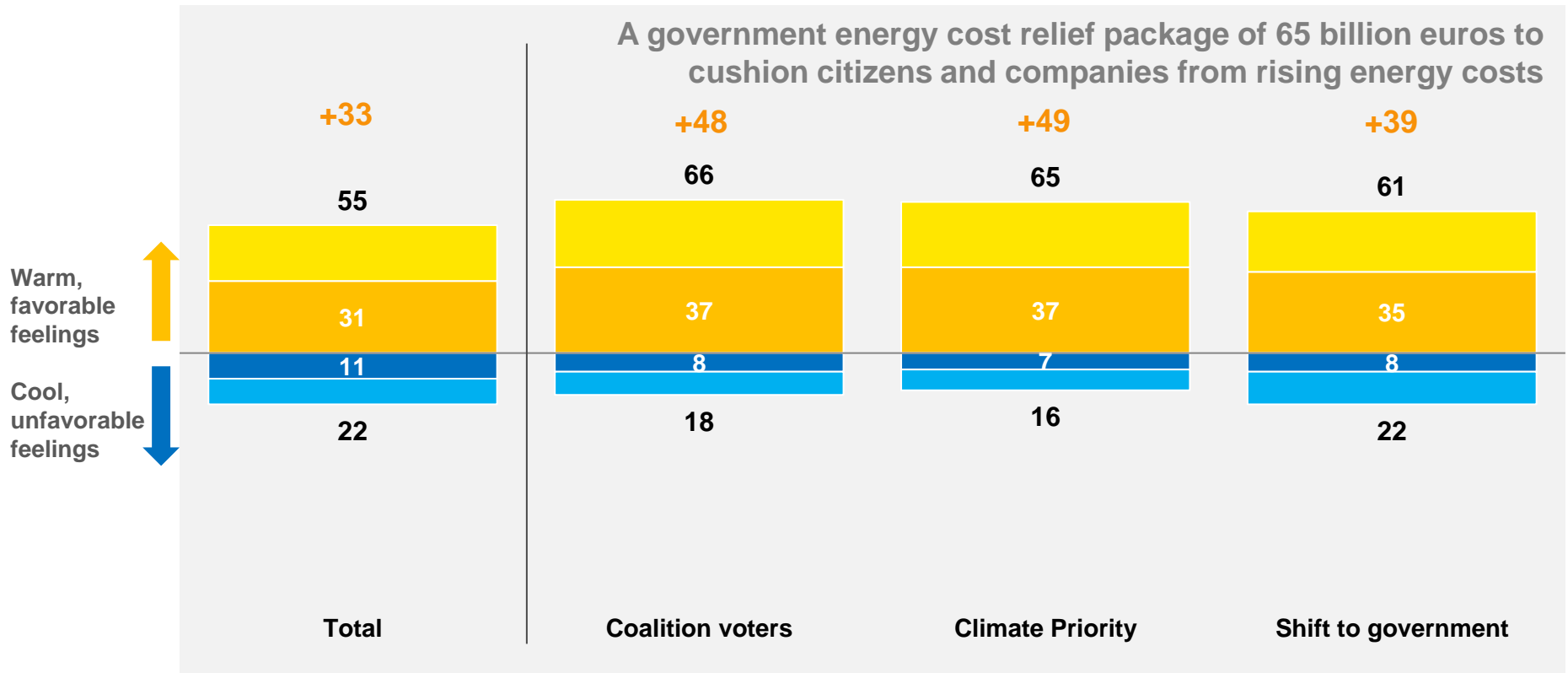
Why do you disapprove of how the government is addressing climate change, the environment and energy transition?

Total sample, n=2,000

The government's energy relief package gets broad support

Feelings toward government energy cost relief package, by target

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



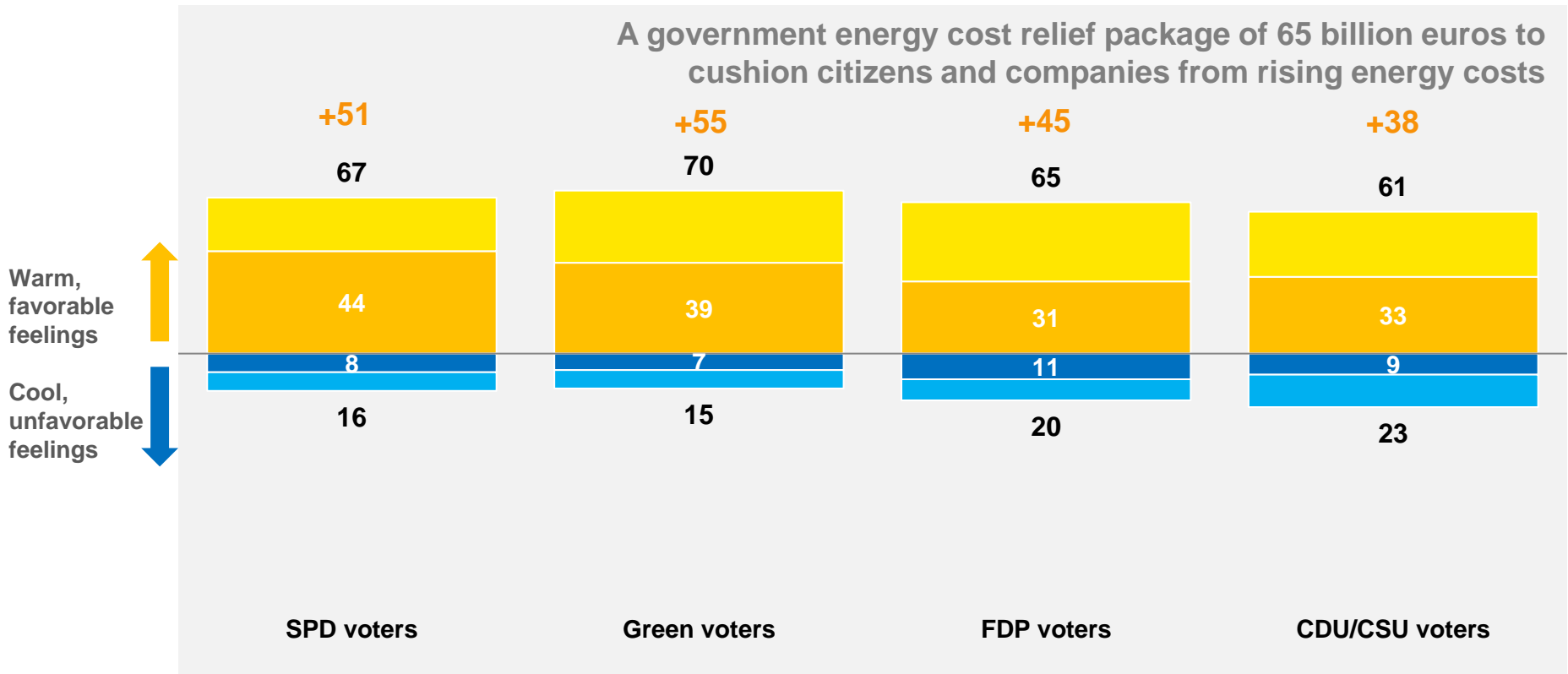
Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVORABLE feeling; zero meaning a VERY COLD, UNFAVORABLE feeling; and fifty meaning not particularly warm or cold.

Total sample, n=2,000; Coalition voters, n=633, Climate priority, n=607; Shift to government, n=208

Center-right voters strongly support government relief package too

Feelings toward government energy cost relief package, by vote

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



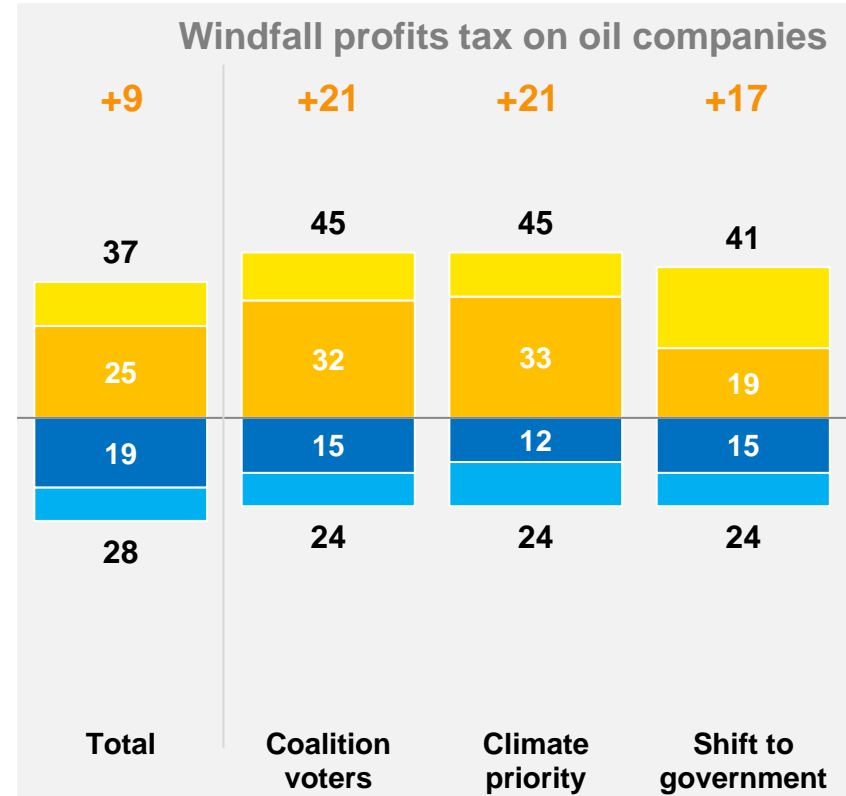
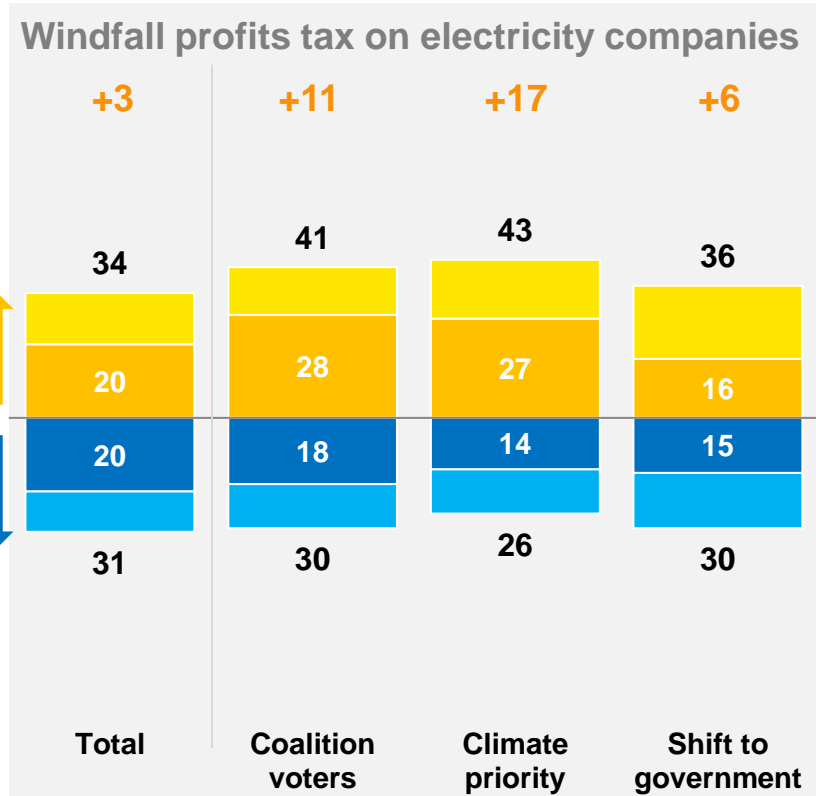
Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVORABLE feeling; zero meaning a VERY COLD, UNFAVORABLE feeling; and fifty meaning not particularly warm or cold.

SPD voters, n=311; Green voters, n=184; FDP voters, n=138, CDU/CSU voters, n=297

Pluralities support windfall profit tax, particularly on oil companies

Feelings toward windfall taxes, total sample

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

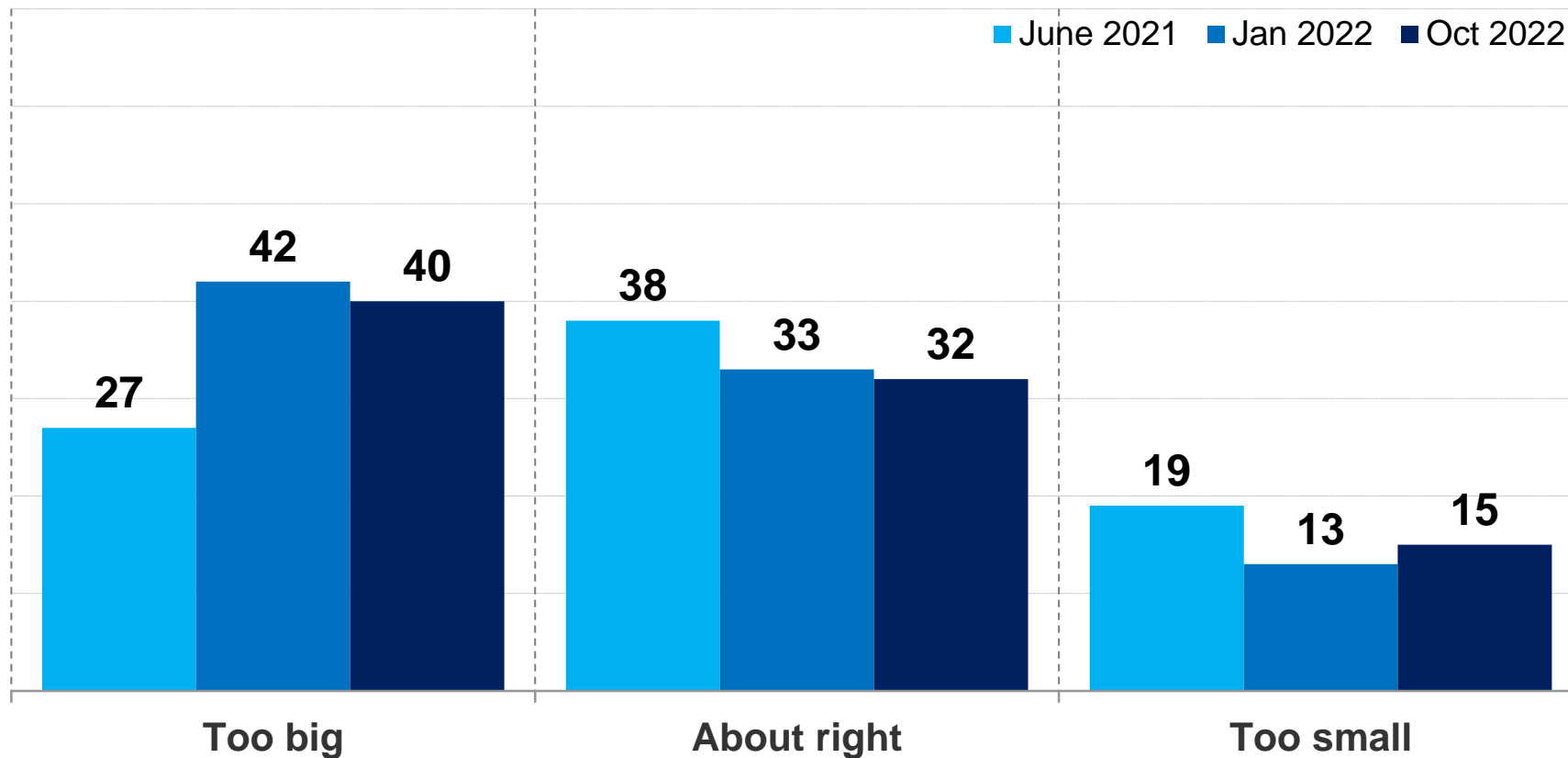


Please rate your feelings toward some people, organisations and activities, with one hundred meaning a VERY WARM, FAVORABLE feeling; zero meaning a VERY COLD, UNFAVORABLE feeling; and fifty meaning not particularly warm or cold.

Total, n=2,000; items shown to ½-sample splits

Public views of government GHG reduction targets amazingly stable, given events

Approval of government climate targets, total sample

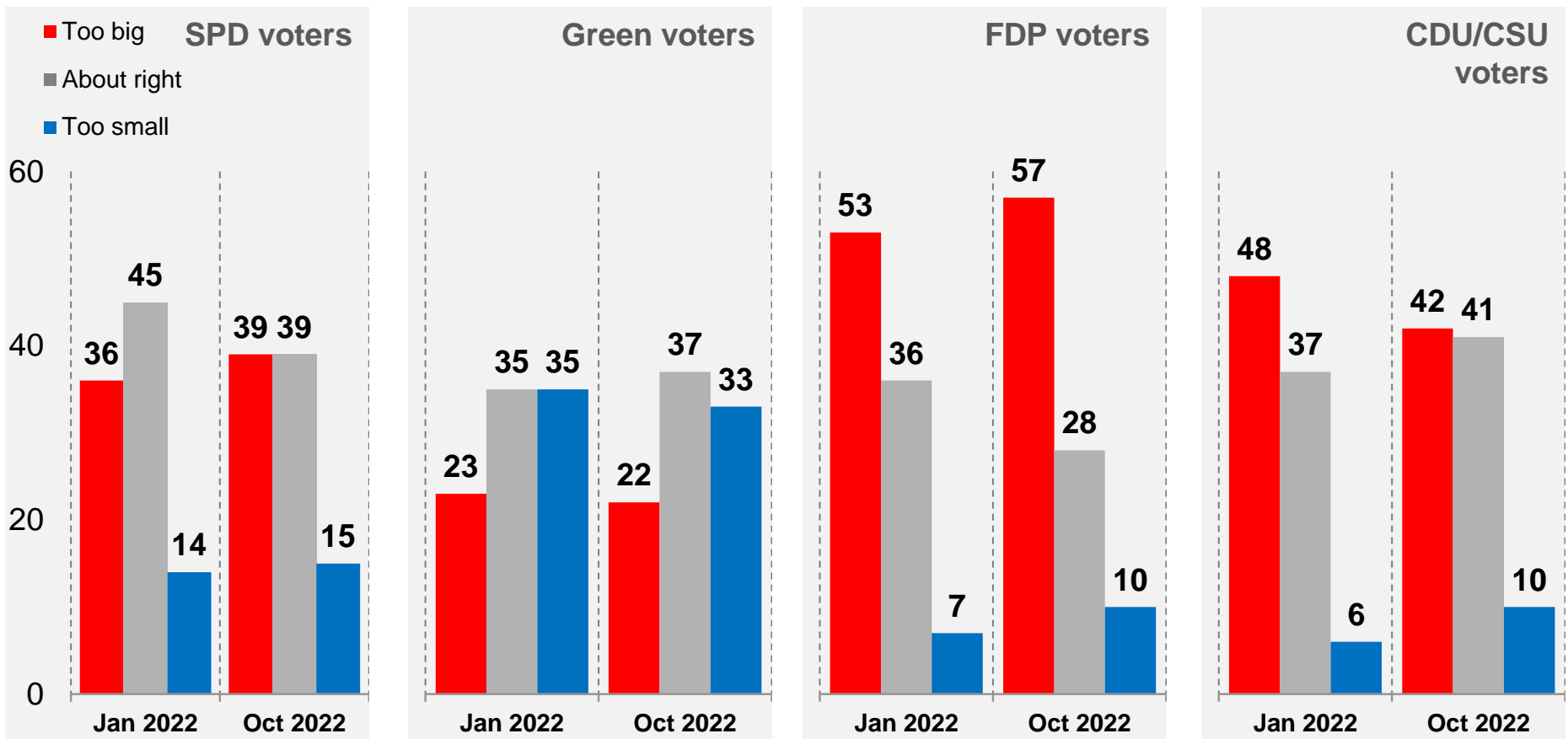


What do you think about the new target of a 65 percent reduction in greenhouse gas emissions, compared to their level in 1990, by 2030? Is the cut in emissions too big, about right, or too small?

Total sample, n=2,000

SPD and FDP voters shifting slightly toward view that the target is too big, but CDU/CSU to about right

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?

SPD voters, n=311; Green voters, n=184; FDP voters, n=143, CDU/CSU voters, n=353

Most important government policies are price brake on energy costs, reduction of VAT on natural gas

Importance of government climate policies, total sample (1)

A "price brake" on energy costs, offering a to-be determined amount of energy to all at a lower rate

49

A temporary reduction of VAT on natural gas from 19 to 7 percent to relieve gas customers struggling with rapidly rising prices

40

Use income from windfall taxes on electricity producers to reduce consumer prices for gas, coal and oil

34

Rapidly accelerate the expansion of solar power capacity by introducing a bundle of laws that ease tax regulation for roof-mounted solar power installations

32

Nationalize energy companies in cases where energy security is threatened

23

Lowest support for EV purchase subsidy

Importance of government climate policies, total sample (2)

Subsidize energy costs for big businesses that are heavily dependent on energy, and for all small and medium-sized businesses

22

Remove regulatory hurdles to an increase of domestic biogas production to save natural gas ahead of possible winter shortages

22

Suspend increase of domestic carbon price for one year or more

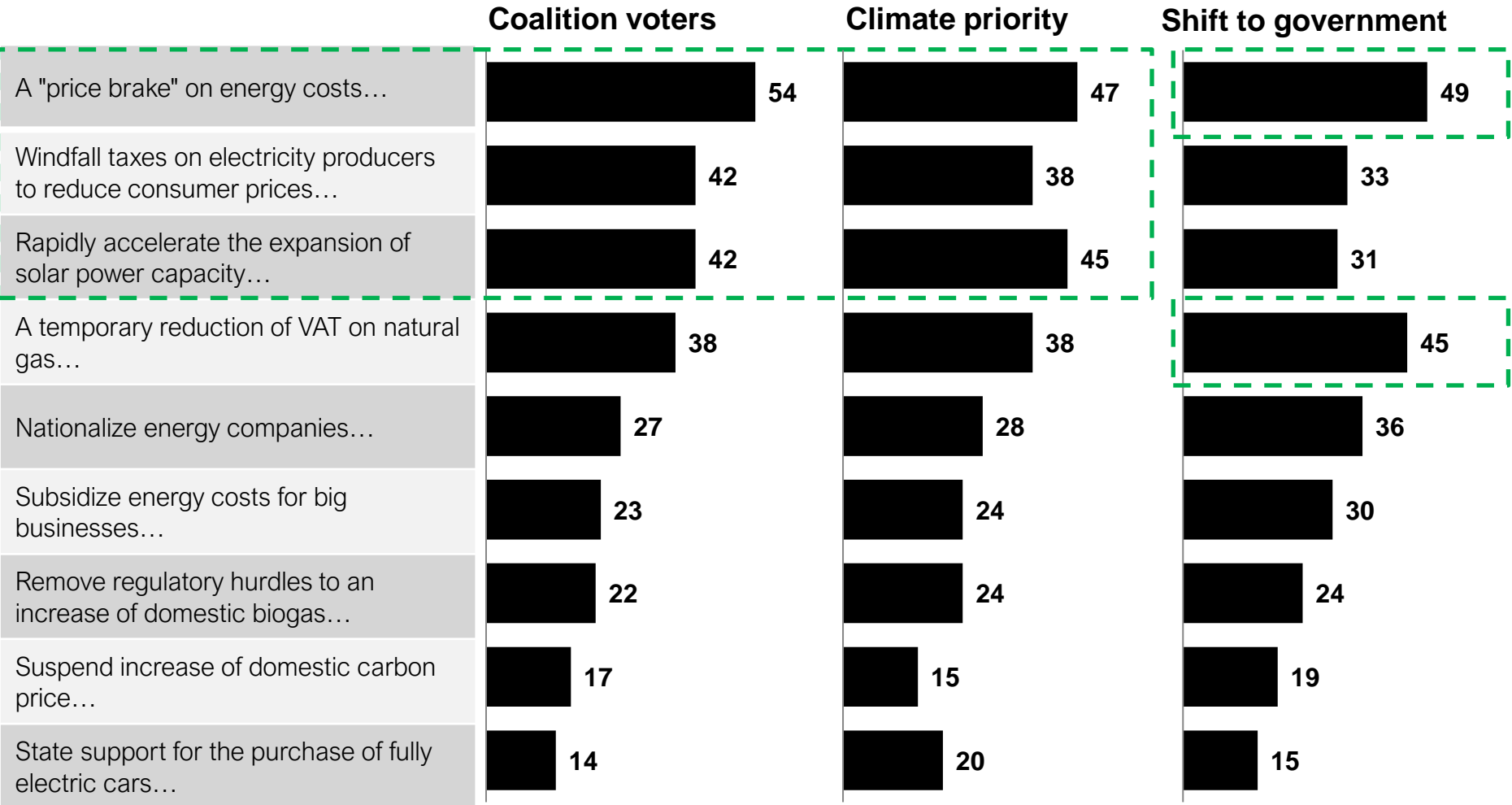
21

State support for the purchase of fully electric cars, ending subsidies for plug-in hybrids

14

Price brake on energy costs, windfall tax, and expansion of solar strong with targets; VAT reduction on natural gas does well with government shifters

Importance of government climate policies, by target



Coalition voters, n=633, Climate priority, n=607; Shift to government, n=208

Only policy that pops from other organizations is price cap on energy costs

Importance of policies from other organizations reacting to energy price crisis, total sample

Introduce a price cap on electricity and gas for private households

37

Introduce an excess profits tax on energy companies

31

The continued operation of all three German nuclear power plants beyond the end of the year

28

Government support of 125 euros per month to households with low and middle incomes, plus 50 euros inflation allowance for each additional household member

27

Reduce energy taxation on fuels (currently 100-120% of wholesale price)

25

Political Messaging on Climate



Political messages from the government: full wording

Gas stores and hydrogen boom

We knew our solidarity with Ukraine would have consequences, but Germany has filled its gas stores to 88% capacity to get through winter, and we are looking to more sustainable long-term solutions. To diversify our energy sources away from Russian gas, we will trigger a big boom in the hydrogen industry, the gas of the future.

Relieving burden on citizens

We are facing great challenges as a result of Putin's war. But we are prepared: We ensure more renewable energies, liquid gas, full gas storage and noticeable relief, especially for those who have little. Despite the continued rise of energy prices, we are relieving the burden on citizens with a 65-billion-euro support package. Germans won't have to face higher costs alone.

Modern energy creating prosperity

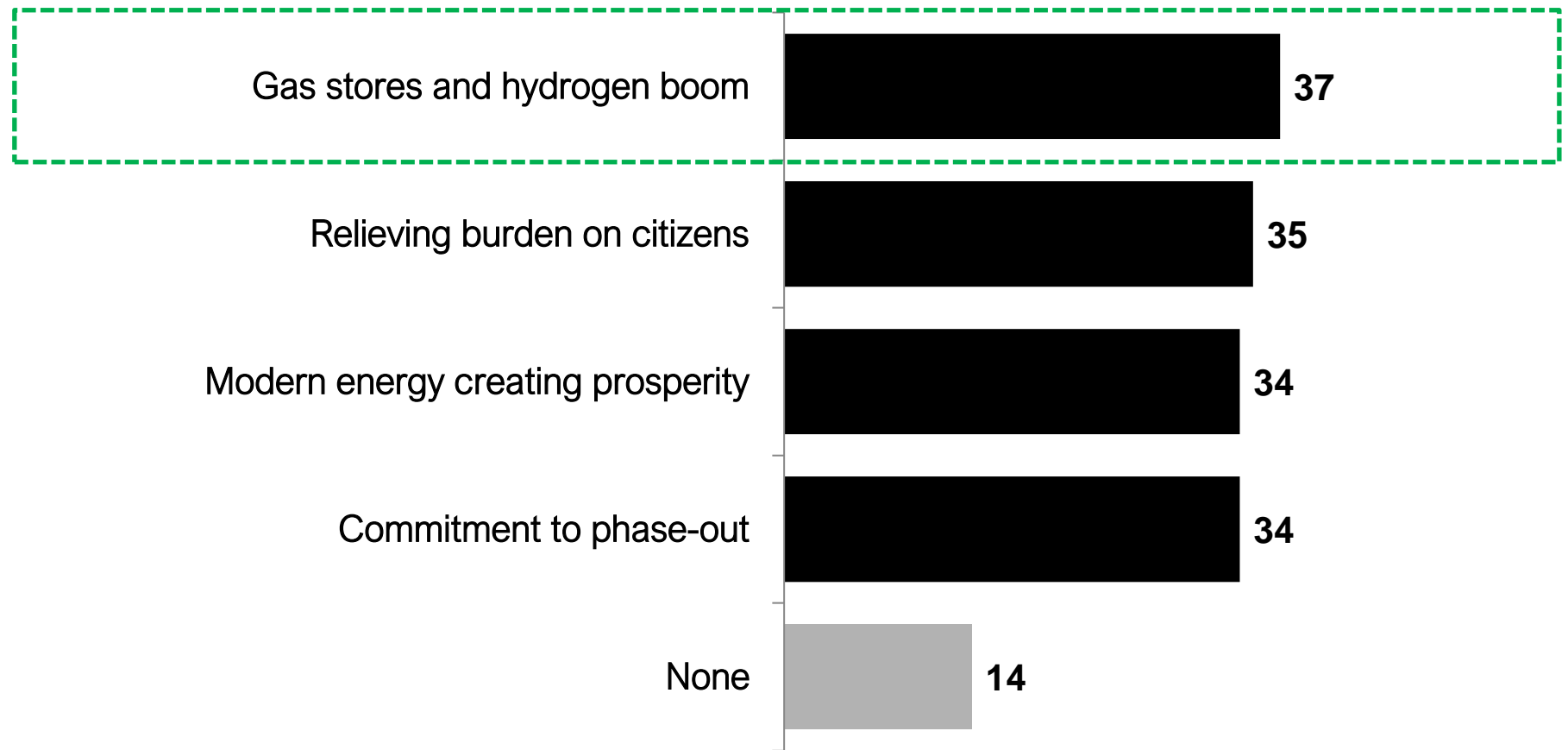
Climate action will only succeed if it brings tangible improvements to our lives, with a modern, affordable energy supply. The challenge ahead of us is to rev up climate action while safeguarding and creating prosperity. By 2045, we want to be one of the first climate-neutral industrial countries.

Commitment to phase-out

Putin's use of energy as a weapon reinforces our commitment to climate neutrality. No one can be pleased that coal-fired power generation is rising in response to bottlenecks in gas supplies. This is an emergency measure imposed for a limited period, which does not detract from our climate targets. We need to phase out coal, oil and gas - and go at it full throttle.

Government has message problem: none of them pop

Government messages, total sample

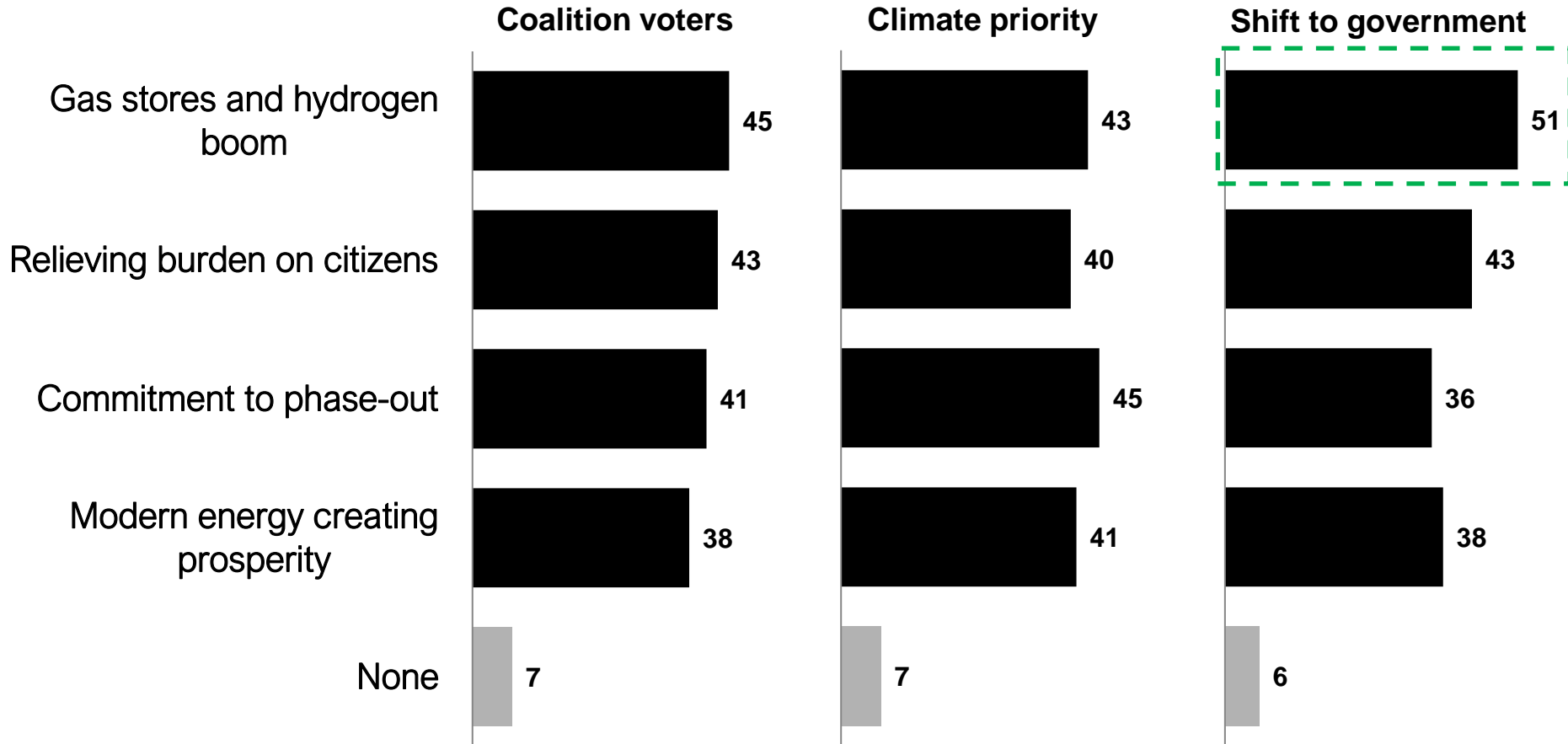


Below are some statements from the government supporting its plans on climate change. Which TWO do you find most CONVINCING?

Total sample, n=2,000

Shift to government target picks out the gas stores and hydrogen boom message

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=633, Climate priority, n=607; Shift to government, n=208

Pro-climate political messages opposing the government: full wording

Emissions from coal power plants

Germany is now reactivating some coal power plants, which is very bad news. Though these short-term moves do not undermine targets to phase out coal completely by 2030, they still pose a big risk due to the environmental impact and cost of coal. Coal is the most emissive, polluting source of energy, and Germany should be leading the way by phasing it out.

Public ownership of energy companies

Energy services do not belong in the hands of private corporations, but under democratic control. Instead of having the majority of people pay for the mistakes of others with the gas levy, companies that can no longer fulfil their social mission should be taken over by the public sector.

Government inaction

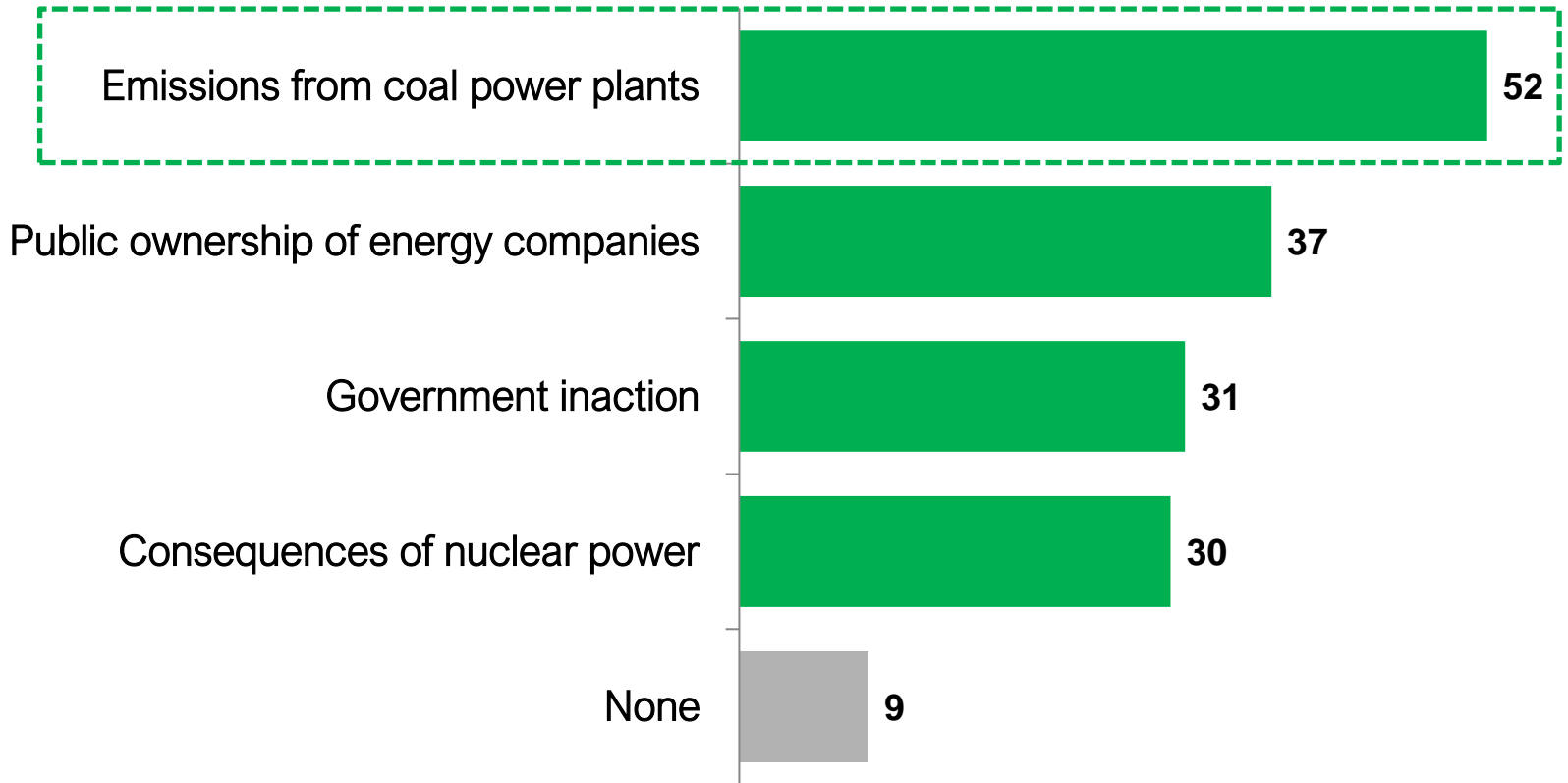
The prices for electricity and gas are exploding, and the federal government is just watching, leaving people who urgently need support out in the cold. Through measures such as the gas levy, the traffic light coalition is actively participating in the impoverishment of the population. At the same time, energy companies are making huge profits on the backs of consumers.

Consequences of nuclear power

It is clear that a debate about extending the service life of nuclear power plants will continue to hinder real solutions to problems. This tramples on the years of efforts of young climate activists and the interests of an entire generation. Even in emergency reserve, nuclear power can only reduce the impact of the crisis minimally and the consequences will be passed on to future generations.

Government vulnerable to attacks around reactivating coal power plants, a majority are worried by this

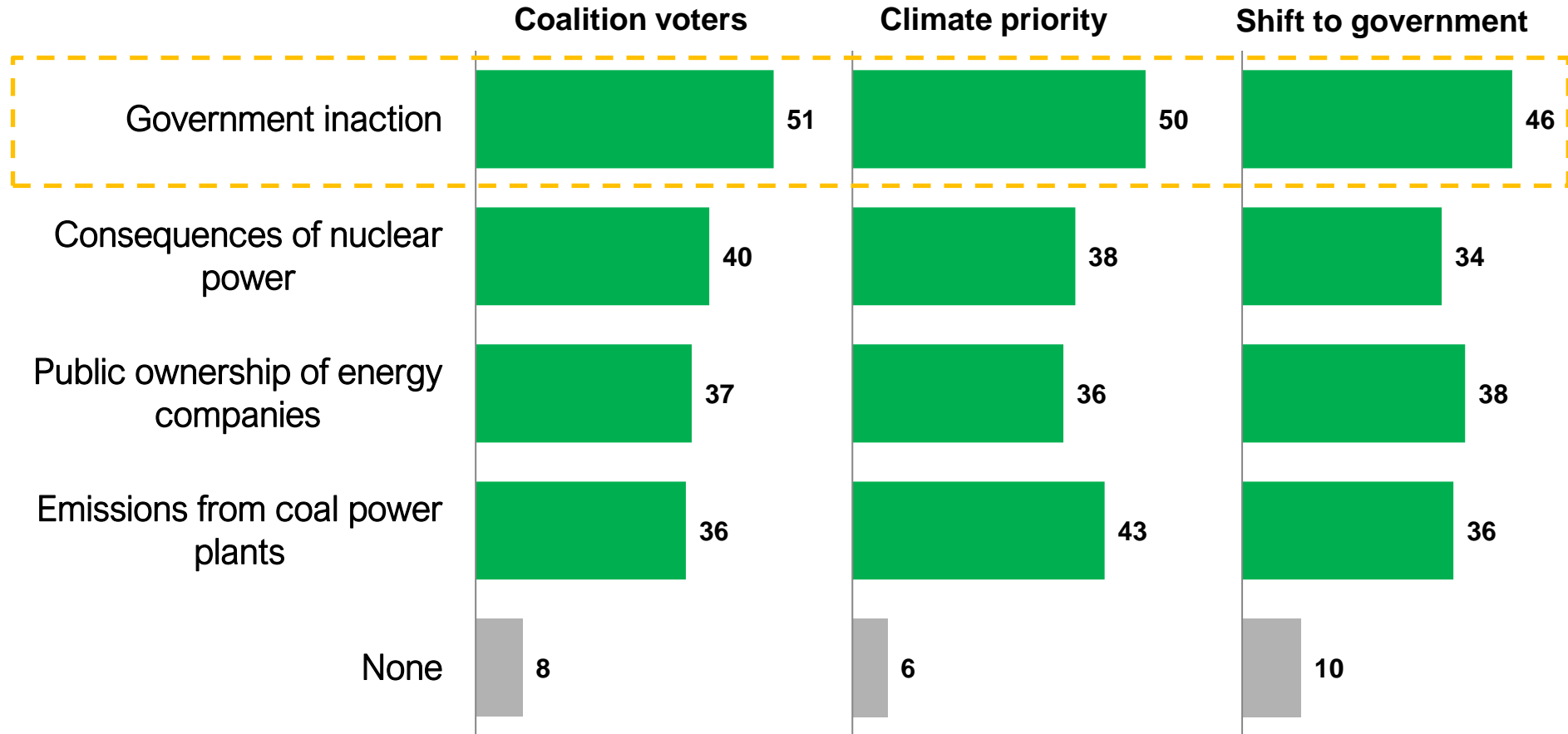
Pro-climate messages opposing government policy, total sample



Below are some statements from organizations opposing the government's plans on climate change. Which TWO make you most WORRIED about these plans?

Among target groups, government is most vulnerable to attacks around government inaction

Pro-climate messages opposing government policy, by target



Below are some statements from organizations opposing the government's plans on climate change. Which TWO make you most WORRIED about these plans?

Coalition voters, n=633, Climate priority, n=607; Shift to government, n=208

Climate-skeptical political messages opposing the government: full wording

Security of energy supply

The fatal effects of irrational energy policies are becoming ever clearer. The energy crisis is gripping Germany. Citizens and companies pay the highest electricity prices in the world. The security of supply is dwindling.

Gas surcharge burden

The federal government lacks the ability to think politically and strategically in economic policy. The gas surcharge will fuel inflation, burden millions of households and cause millions of euros in additional costs for companies.

Environmental lobbyists

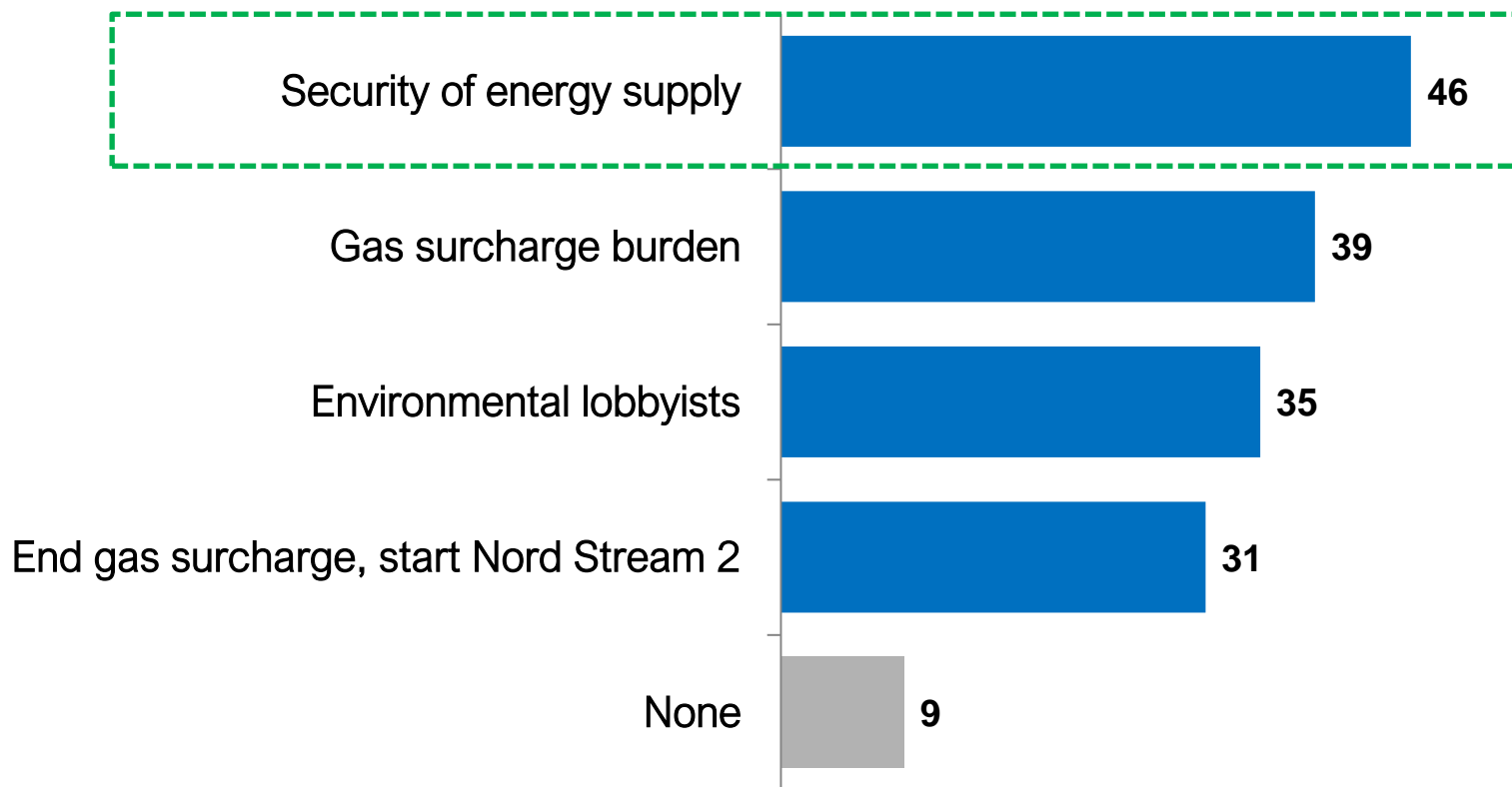
The government is pandering to environmental lobbyists and squandering the chance to find solutions to the energy crisis by refusing to allow Germany's three remaining nuclear power stations to continue operation. We are heading toward an energy supply crisis. Responsibility no longer lies with Putin, but with the federal government.

End gas surcharge, start Nord Stream 2

The government must stop the gas surcharge, put Nord Stream 2 into operation, lift the sanctions against Russia and rely on a secure supply through the use of various technologies and a diverse energy mix.

Strongest climate-skeptical message is on security of energy supply

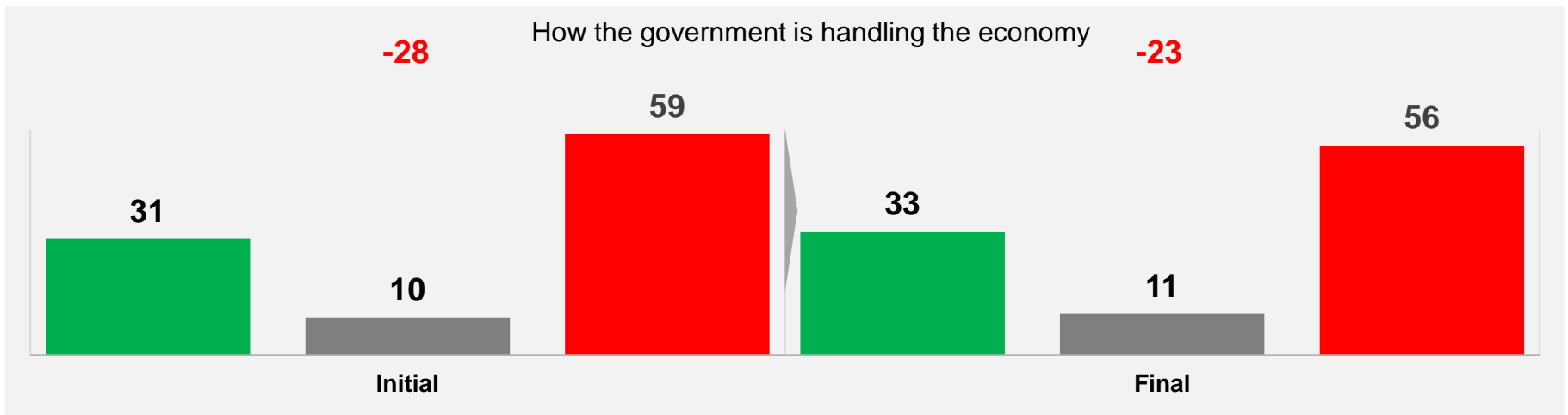
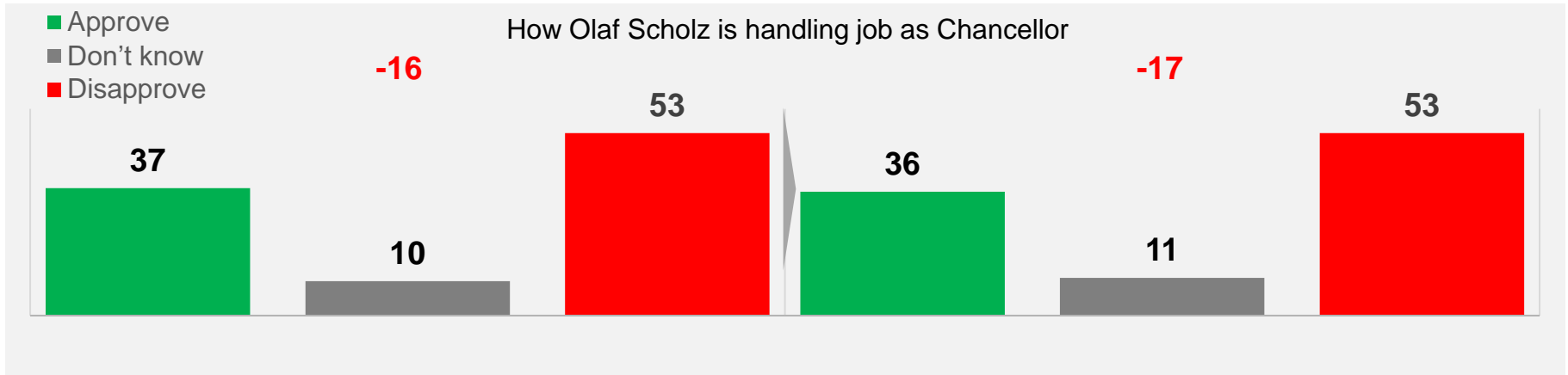
Climate-skeptical messages opposing government policy, total sample



Below are some statements from organizations opposing the government's plans on climate change. Which TWO make you most WORRIED about these plans?

Messaging improves government rating on the economy, little movement on overall job approval for Scholz

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

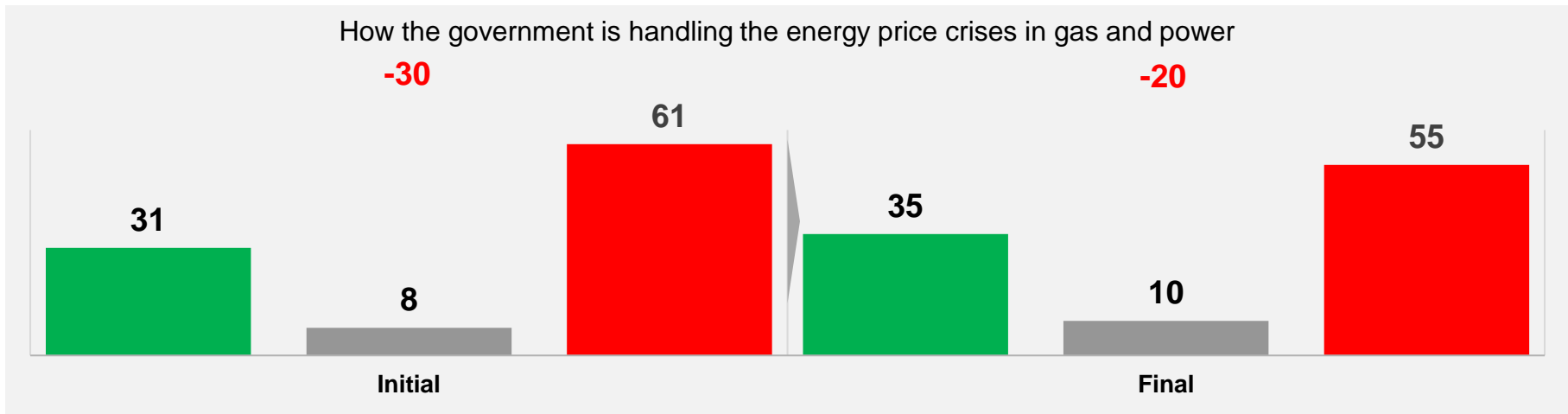
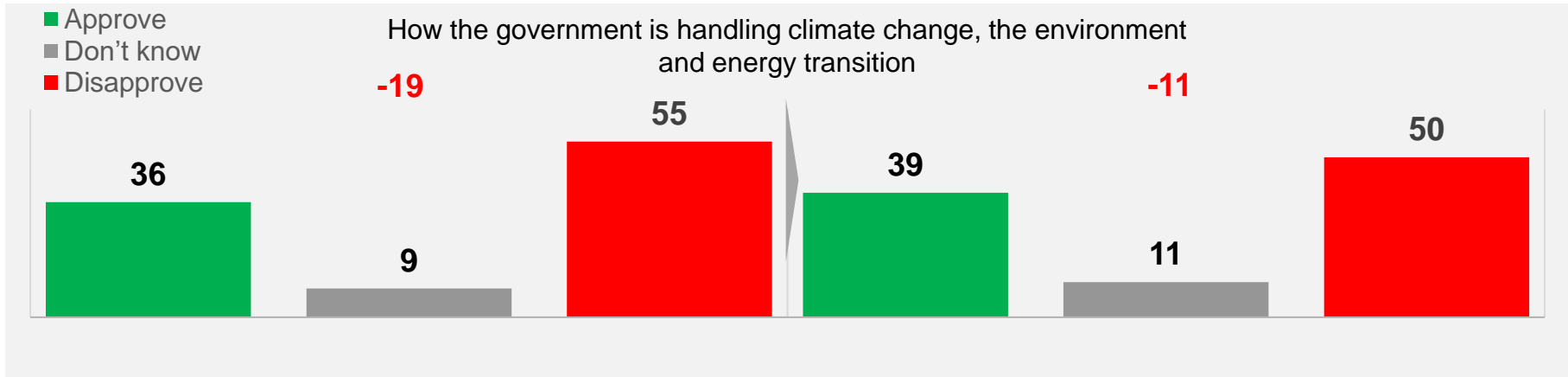


Do you approve or disapprove of the job Olaf Scholz is doing as Chancellor?

Total, n=2,000

And messaging improves government rating on climate and dramatically so on handling energy price crisis

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

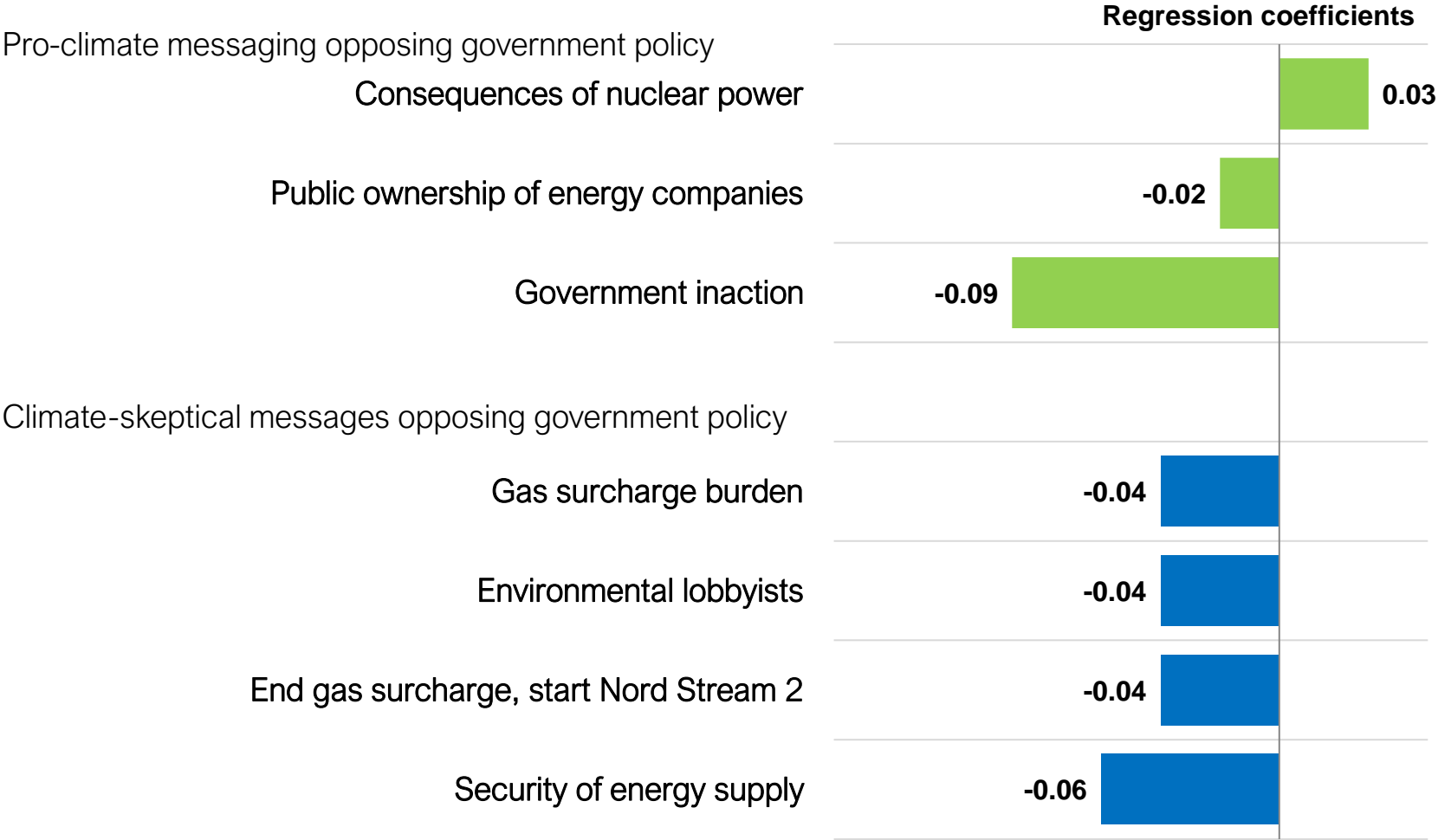


How much do you approve or disapprove of each of the following?

Total, n=2,000

The most potent attacks on the Chancellor are from the pro-climate side on government inaction, and from the other side on energy security

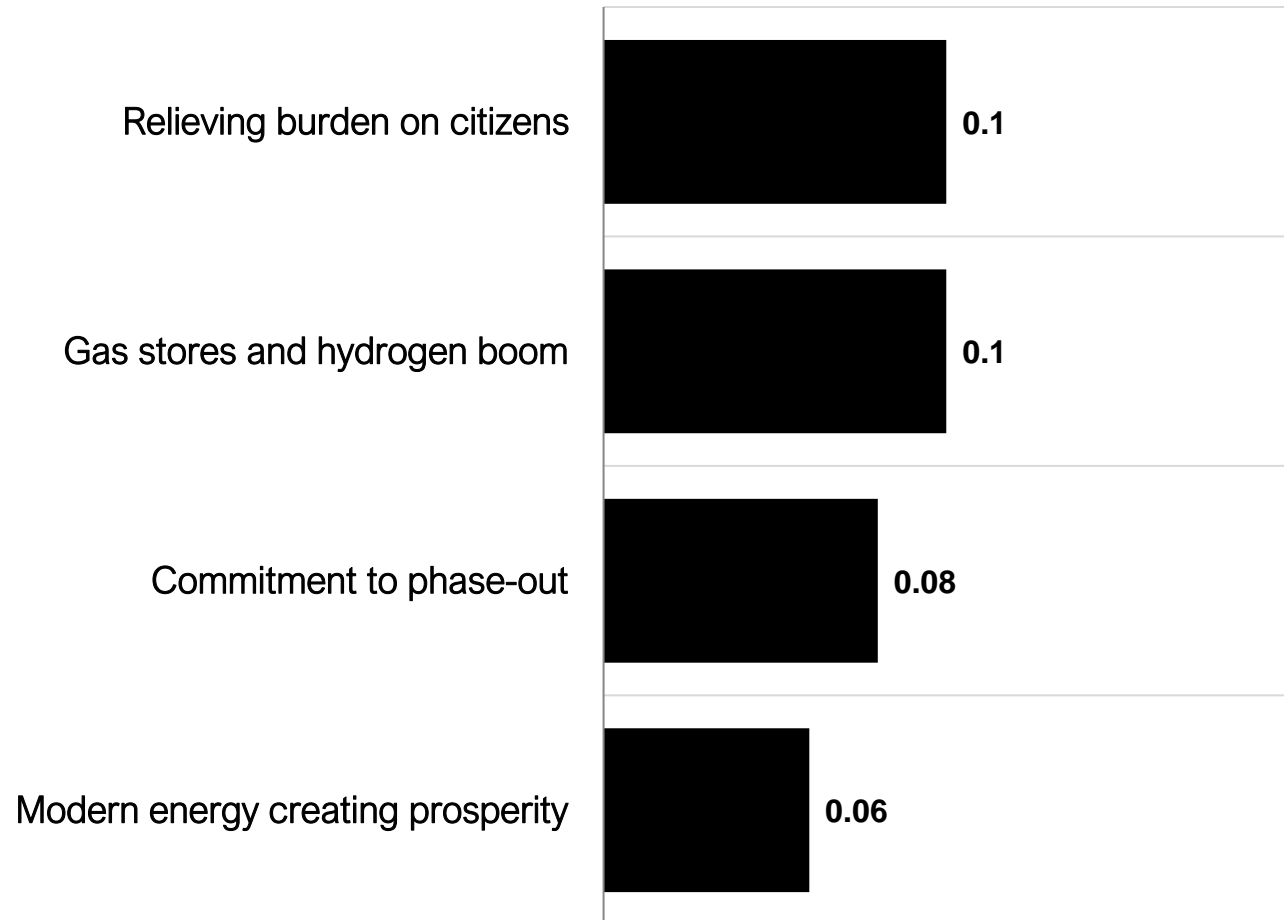
Impact of government climate policies on Scholz's approval as Chancellor, reask, total sample



Scholz's most effective messages at boosting his reputation are relieving the burden on citizens and on gas stores and hydrogen

Impact of government messages on Scholz's approval as Chancellor, reask, total sample

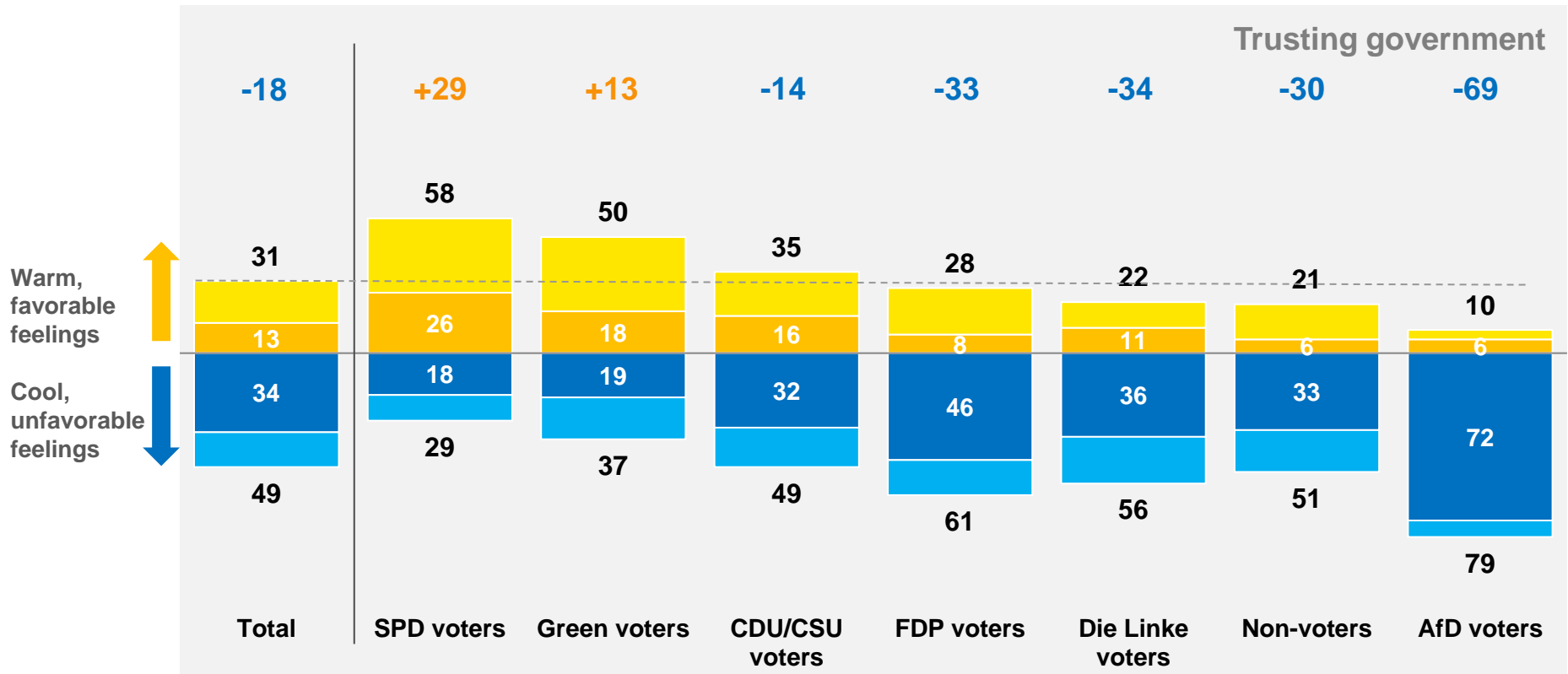
Regression coefficients



And the backdrop are the ½ that feel distrust of government, highest with FDP, Die Linke and AfD voters

Trusting government, by vote

- 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, FAVORABLE feeling; zero meaning a VERY COLD, UNFAVORABLE feeling; and fifty meaning not particularly warm or cold.

Total, n=2,000; SPD voters, n=311; Green voters, n=184; FDP voters, n=138, CDU/CSU voters, n=297; Die Linke voters, n=81; Non-voters, n=588; AfD voters, n=124

CLIMATE *Policy & Strategy*

Climate Policy & Strategy: Germany
Tracking survey, October 2022

