

Methodology

The data presented in this report have been generated via two survey waves carried out by TNS Kantar in Denmark, Sweden, France, Germany, the UK, Finland and the Netherlands.

First wave

A total of n=7220 adults (16-64) were surveyed in the period 22th November to 2nd December 2019 equally split across the seven countries. The sample in each country has been weighted to represent the adult population aged 16-64. Please note that survey results have been rounded for ease of analysis and reading.

Second wave

A total of n=7291 adults were surveyed in the period 25th to 29th of June 2020 equally split across the seven countries. The sample in each country has been weighted to represent the adult population aged 16-64. Please note that survey results have been rounded for ease of analysis and reading.

Report by Vattenfall

Follow-up study: Climate change remains the most pressing global issue

Comparative Analysis:
December 2019 vs. June 2020



Climate change remains people's greatest concern

When we conducted our original study, climate change was seen not only as being a highly pressing issue, but as the main challenge of our age, ahead of any other global problem. Our latest analysis shows, that this remains the case six months later. While we see a sharp increase in people's concern about epidemics and economic recession - as it can be expected considering the ongoing health crisis - climate change remains the main global issue to address for the largest share of respondents.

The findings are somewhat surprising because of a hypothesis in psychology called the "finite pool of worry," which suggests that when people's level of concern about one issue rises, concern about others tends to fall. We see instead that climate attitudes have not shifted substantially, signifying that climate change has established itself as a durable worry in the mind of European citizens. These results are also in line with the findings of the recently published report Climate

Change in the American Mind by researchers at Yale University and George Mason University that have encountered the same stable trend when it comes to views towards climate change among American citizens.

Another dimension to be taken into account when interpreting the results is the fact that climate change seems to not only have established itself as a durable worry, but also as the key global issue to be tackled via long-term persistent action and commitment by all actors who can affect it: governments, businesses and individuals alike.

All of this gives us a strong basis to conclude that public concern and engagement about climate change are not to be easily eclipsed by other problems in people's minds: rather there is a clear expectation that a long-term meaningful commitment is needed to tackle its consequences.

Our original report executed at the end of 2019 showed that climate change has passed a major tipping point in society. It was then seen as the biggest issue that mankind faces. Six months later we have completed a follow-up study aimed to help us understand if and how views on climate change have evolved. In this document, we present the findings of our most recent research and take the opportunity to draw some comparisons.

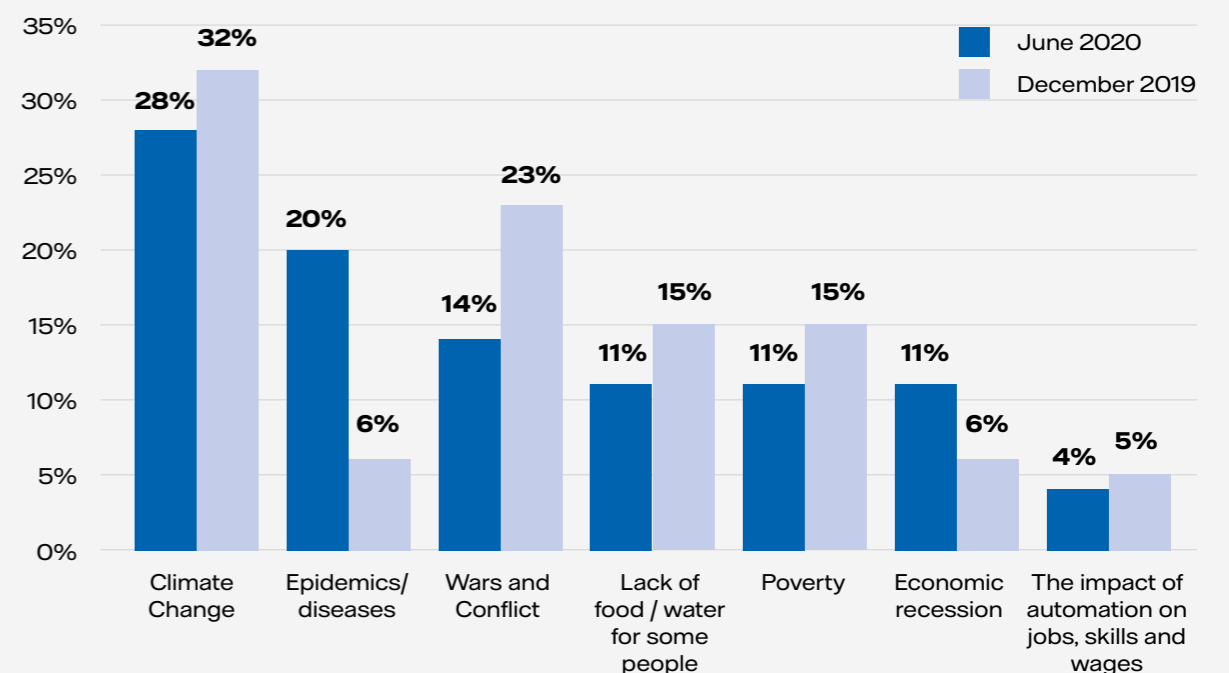
The results are revealing. It is clear that the negative impact on our planet stemming from human activity remains of grave concern: climate change is still the most pressing problem across the seven countries examined. It is also still accompanied by a great feeling of worry shared across all social groups, generations and borders. We also see the same complex mix of emotions - anxiety, anger and hopelessness - dominating people's emotional response. This is not to say that things have remained completely static when it comes to people's priorities - we certainly see issues such as epidemics response and economic recession becoming much more prominent.

However, when it comes to people's long-term worries, climate change remains at the fore-front as the most important global issue that needs to be tackled.

Furthermore, we see a very strong demand for climate change commitments to be continued as part of ongoing discussion on the economic relaunch across Europe. This is accompanied by a widespread fear that some of the progress made up-to-date could be compromised in favour of short term economic priorities.

Overall, the findings point to a clear path forward: one that retains climate change at the top of the agenda of governments, businesses and individuals alike. In this context, we believe it is more necessary than ever to speak about specific actions being taken to achieve this goal and engagingly showcase how change in the right direction is happening on a macro level. This will serve as a reminder to all of us that together we can continue to inspire change and enable our belief that the problem ahead is still solvable.

Most pressing global issues: December 2019 vs June 2020



Graph. % of respondents who have selected the item as the "most serious problem" in the world today (All Respondents, All Countries)

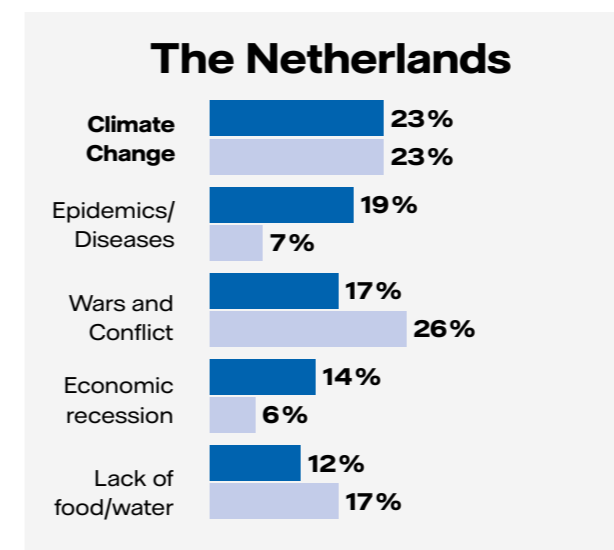
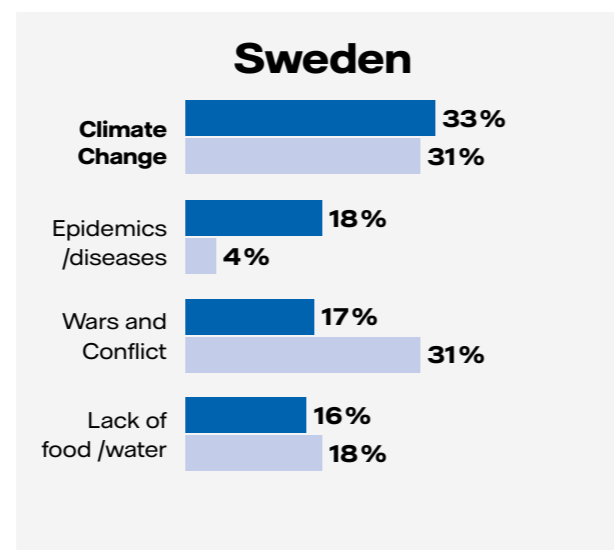
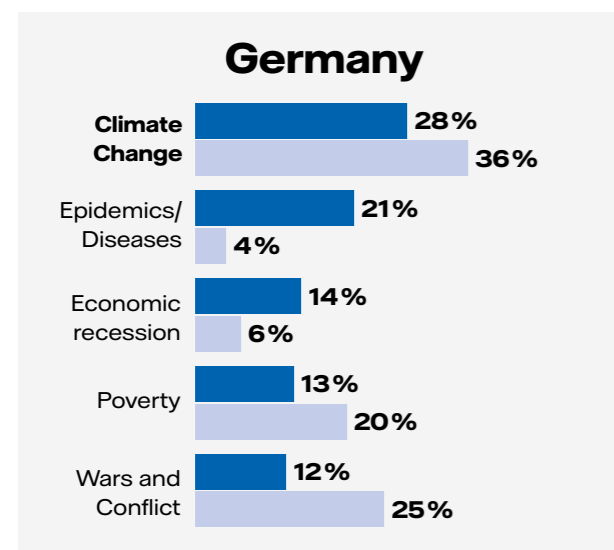
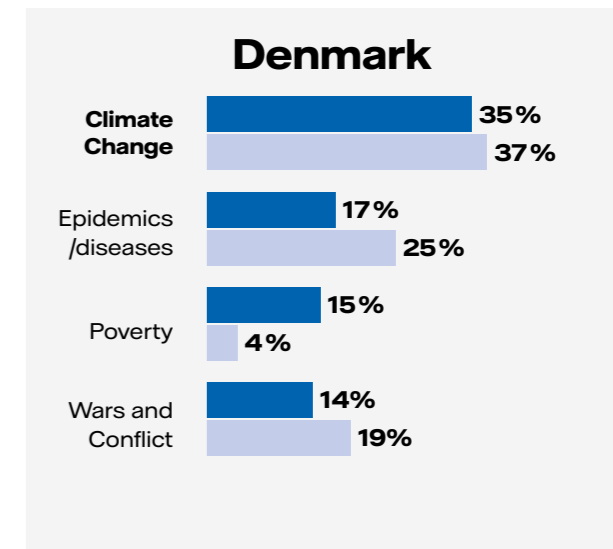
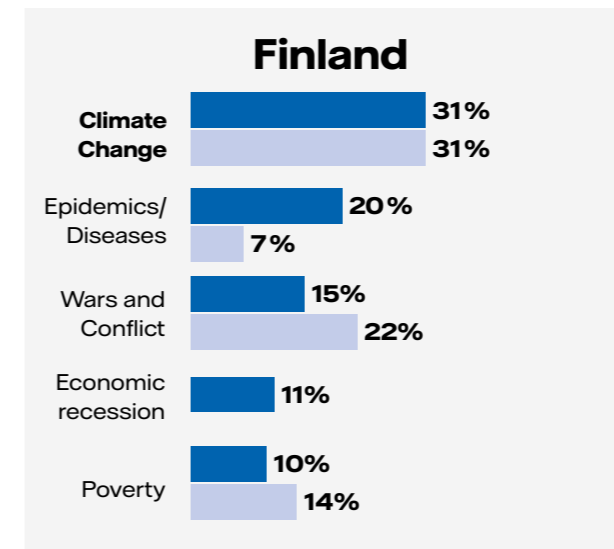
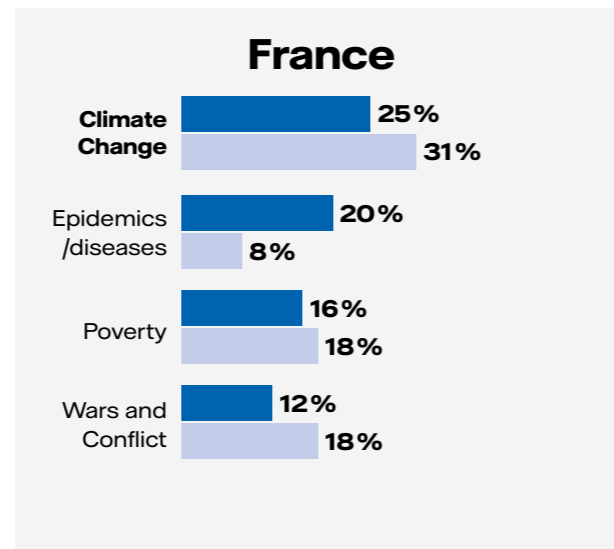
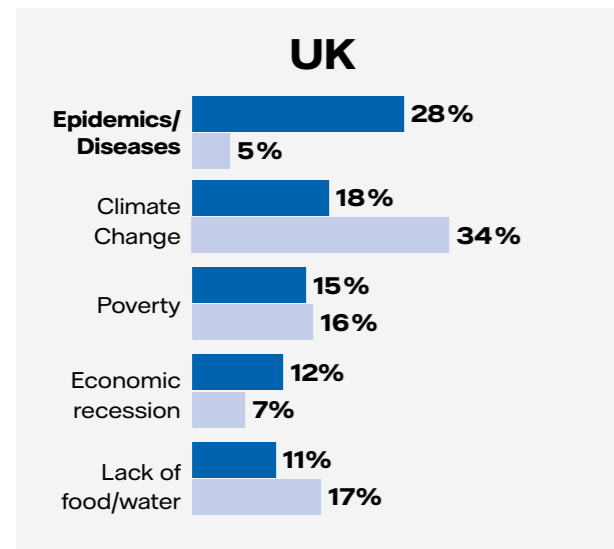
Country-level results

When examining the results at a country-level, we do see some interesting variations. We see that the UK is a clear outlier and the only country where concern over epidemics has surpassed climate change as the most pressing problem. While in all other countries climate change has remained the biggest priority, there are variable degrees of intensity. We see for example some drop in the share of respondents who have indicated it's their biggest concern in France (from 31% to 25%)

and Germany (from 36% to 28%), while in some other countries it has remained stable (Finland, Denmark, Netherlands) and in Sweden it has slightly increased (from 31% to 33%). These variations certainly reflect differing attitudes when it comes to climate change, but possibly reflect also the complex interplay of national priorities discussed as part of ongoing recovery plan debates.



Most pressing global issues per country



■ June 2020
 ■ December 2019

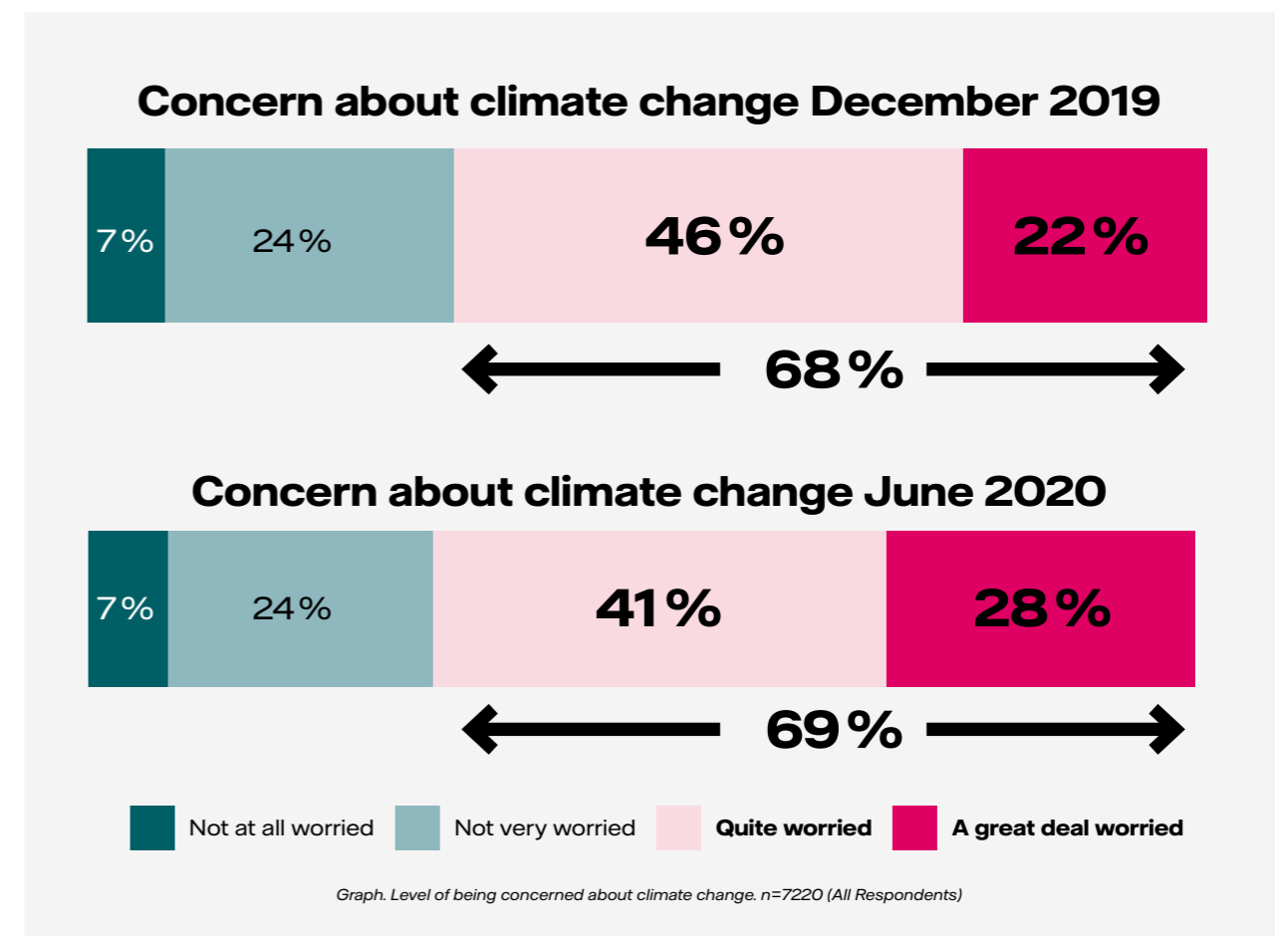
Graph. % of respondents who have selected the item as the "most pressing problem" per country. N=1018 - 1055 per country (All Respondents)



The widespread feeling of worry about climate change persists ...accompanied by a more general worry about the future as a whole

Another dimension that we set our mind to explore in our original study was the extent to which the consensus over the seriousness of the problem translates in a feeling of widespread worry about climate change and how it will affect the planet as a whole and our immediate environment. Such enquiry was particularly important to explore, considered recent reports and debate over the rising phenomenon of 'eco-anxiety', first defined by the American Psychological Association in 2017 as "a chronic fear of environmental doom".

We see that six months later the share of people who express a feeling of worry remains unchanged, with a resounding 69% of people describing themselves as "quite" or "a great deal" worried about climate change (compared to 68% in December 2018). We believe this is important, as it demonstrates that not only do Europeans consider climate change a pressing global issue, but that this has a direct effect on the way they feel about the future.

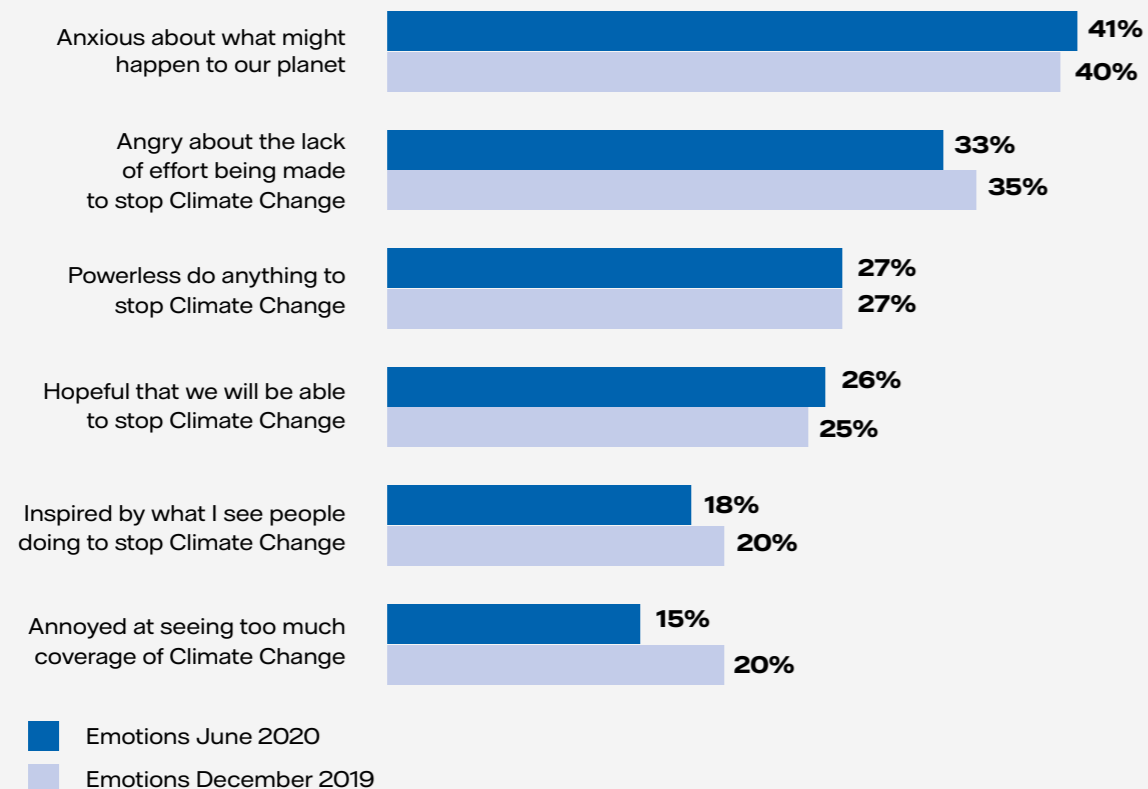


Emotions felt about Climate Change

We have also looked in more depth at the question of emotions associated with climate change to determine if this has changed over the last six months. We see that just as the overall feeling of worry, the emotional response to the topic has also remained stable. We see, in fact, that 41% of respondents say that climate change made them feel 'anxious about what might happen to our planet' (compared to 40% six months ago) - hence, this remains the most commonly felt

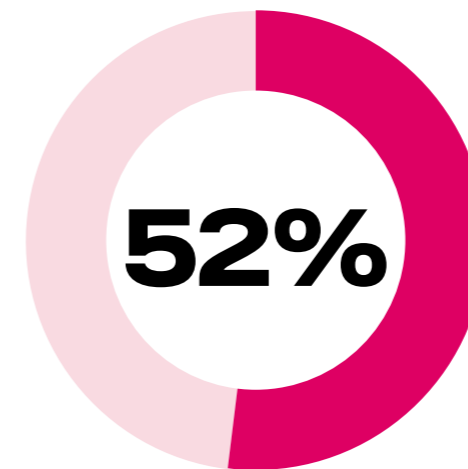
emotion. Other emotions on the spectrum including anger 'about the lack of effort being made to stop climate change' and 'powerless to do anything to stop climate change' have remained remarkably constant. More positively, also the share of those who report feeling 'hopeful that we will be able to stop climate change', and 'inspired by what I see people doing to stop climate change' remains almost unchanged.

Emotions around climate change debate: December 2019 vs. June 2020

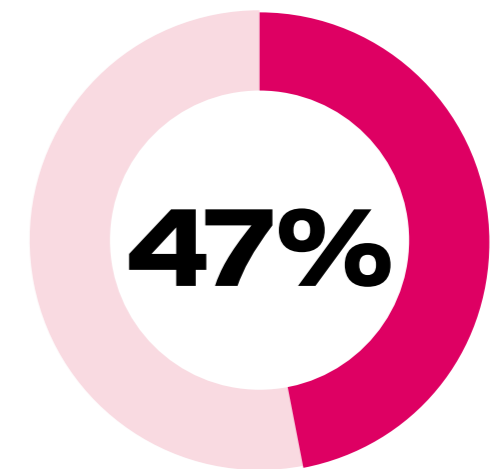


Graph. % of respondents who feel a certain emotion around climate change. n=7220 (All Respondents)

% of respondents say they worry about...

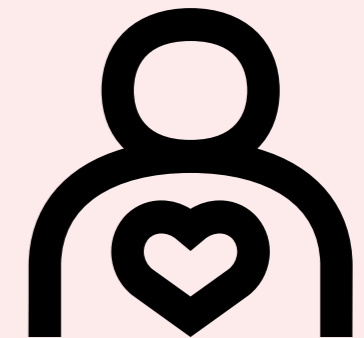


...the future of humanity



...their personal future

In addition to the widespread worry and the complex emotional response to climate change which seems unchanged over the last six months, we have also enquired in our latest research about a broader feeling of worry people might feel. These new results reveal a very pervasive broader sense of uncertainty, with around one out of two respondents declaring they worry about the future of humanity and their personal future. While we cannot compare these results with a previous baseline, they unequivocally indicate a pervasive sense of worry today that serves as a frame for some of the more concrete concerns people have around climate change, epidemics, economic recession and other global problems.

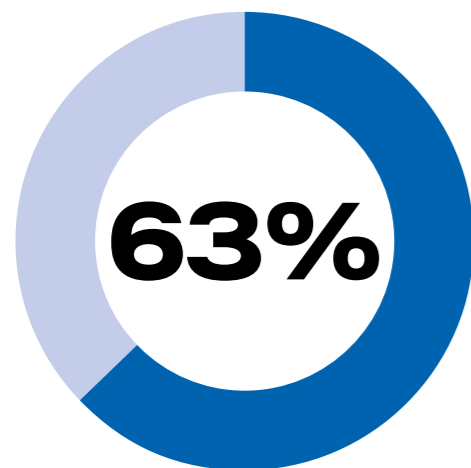


Views on the balance between economy and climate change

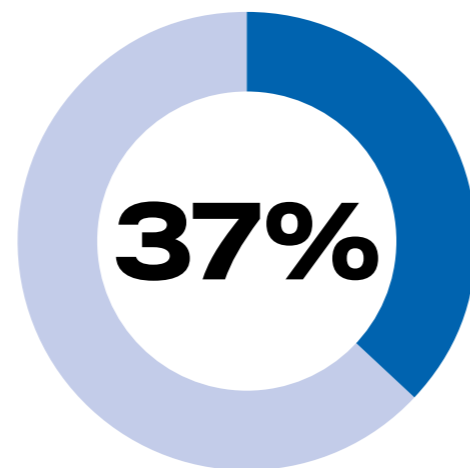
In addition to the comparative results presented above which aim to capture the change in attitudes that has occurred over the last six months when it comes to climate change, we also wanted to capture people's views when it comes to the ongoing debate on the balance between economic and climate priorities in national and European level relaunch plans.

The results of our study show that when asked to weigh the different paths ahead and make a choice, a significant majority of respondents across the seven countries affirm that the highest priority should be given to continuing (or increasing) climate change commitments, even if it slows down the economy. We believe this sends a strong signal to governments and businesses.

Views on the economy relaunch plans



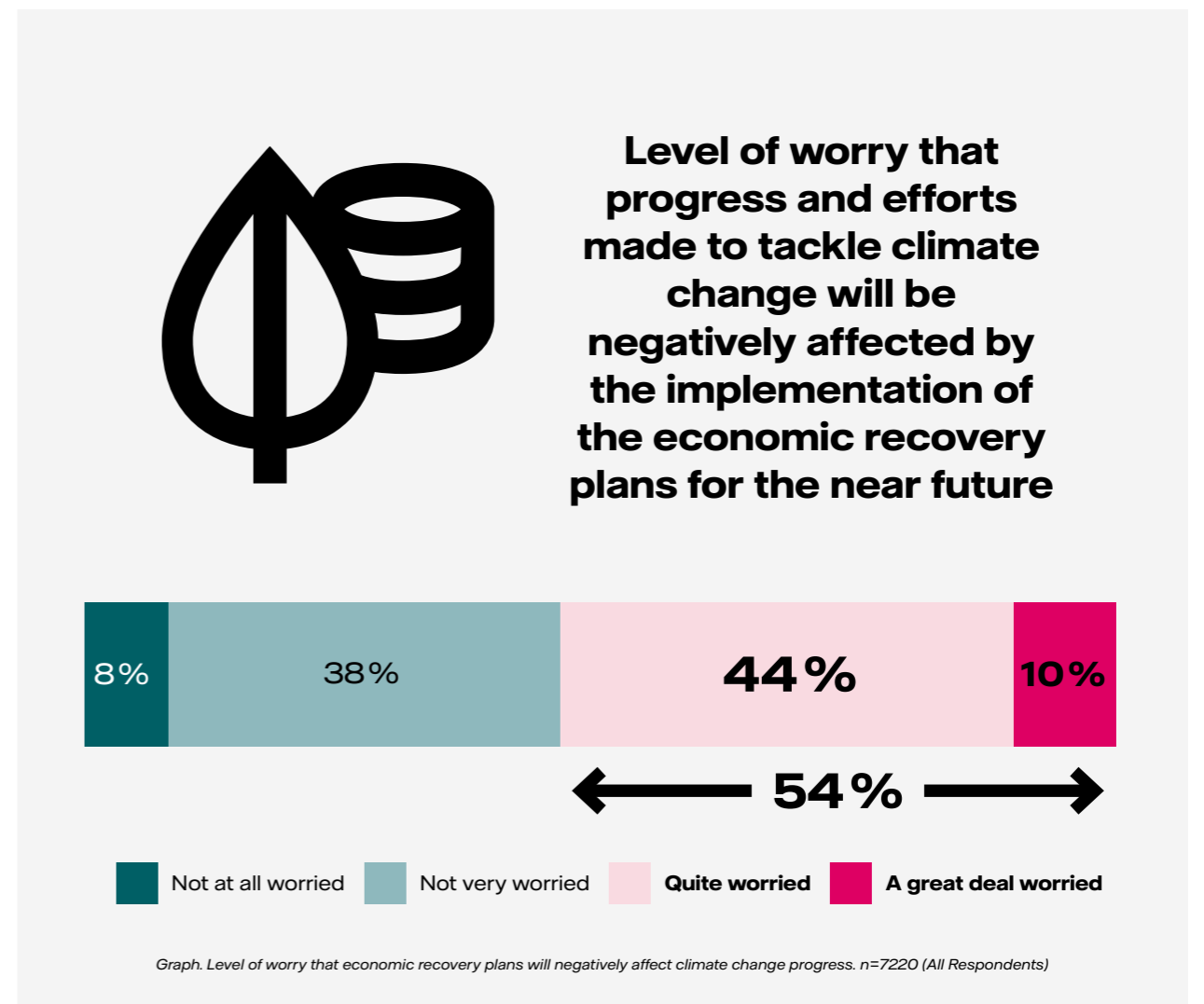
The highest priority should be given to continuing (or increasing) climate change commitments, even if it slows down the economy



The highest priority should be given to short term economic considerations such as growth and jobs, even if it hurts climate change action

The below graph shows in addition that the majority of respondents across the seven countries surveyed say they are 'quite' or 'a great deal worried' that progress and efforts made to tackle climate change will be negatively affected by the implementation of the

economic recovery plans for the near future. This sends a strong signal to those in charge of drafting such plans not to make any sacrifices when it comes to climate change for short term economic gains.





Most visible actors when it comes to climate change action

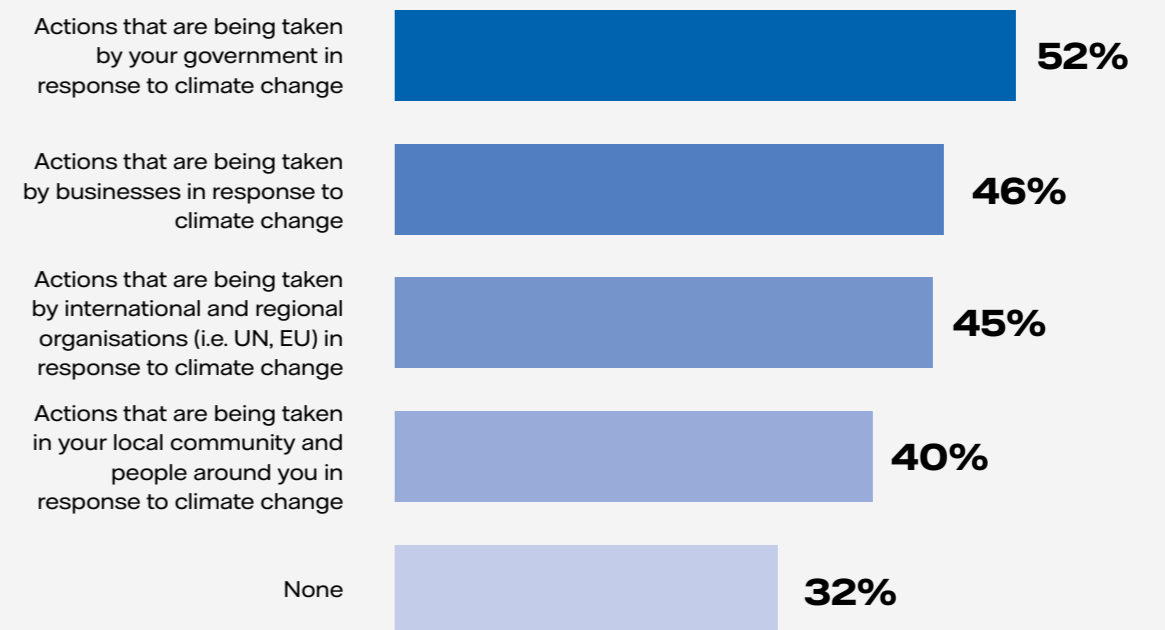
Lastly, as part of our latest research, we wanted to understand which actors are most visible when it comes to tackling climate change. Our original report demonstrated that examples of leadership on climate change - from businesses, governments and individuals - have the opportunity to encourage action among individuals and lead them to feel inspired to act by the examples they see from others. Therefore, we believe it is important to get an accurate picture of the degree to which actions in response to climate change undertaken by different actors have reached citizens across the seven countries surveyed.

regional organisations. At the same time, however, we see there is one out of three respondents who hasn't come across any actions in response to climate change. This suggests that there is still space to share stories of positive progress and government, international organisations and business who have been able to develop and implement successful climate-friendly actions, should not be reluctant to trumpet their actions on the wider international stage and in the media, as this can help demonstrate that a genuine determination to act can have an impact on slowing down climate change.

The results show that the largest share of respondents have come across actions undertaken by governments, closely followed by businesses and international and

Most visible actors

% of respondents who have seen actions from the specific actors



Graph. % of respondents who have seen actions being taken.