Penta

CAF Public Release Survey:
Key Findings

December 2023

Agenda

1) **Approach & Methodology**

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3) **Context on Issues**

4) **Legislation Deep-Dive**

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Approach and Methodology

Online poll among registered voters in France and Germany with the following specifications:

- Method: online survey

- Length: 10 minutes

- Audience: Registered voters in two countries
  - France (n=1,009)
  - Germany (n=1,001)

- Timeframe: 30 October - 3 November 2023

- Sub quota of "opinion elites" (n=810) across both countries

  - Likely to vote in the next election
  - Interested in public policy
  - Participate in at least one advocacy activity
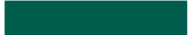
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Key Findings:

Support for strengthening the Ambient Air Quality Directive is currently strong as a majority of voters in each country rank air quality + pollution as a top issue for potential impact on personal health

- **Environmental issues are top-of-mind in both markets**, and registered voters rate air quality as a top issue when it comes to potential impact on personal health

- **Voters know something needs to be done** with a strong majority (79%) supporting the government taking action to regulate air quality

- **Support specifically for strengthening the Ambient Air Quality Directive is currently strong** (73% across both countries)

- **A strong majority (75%) also support Europe-wide limits by 2030** as opposed to allowing individual countries to delay until 2040

- **Learning about the legislation has the potential to mobilize voters in both markets**, with 79% indicating they are more likely to vote for an official that supports the legislation

- **Messaging has the potential to further increase the intensity of support** with +11% indicating they "strongly support" after being exposed to the messages

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Context on Issues

Climate change and environmental issues are a top concern across both countries

French voters are most concerned about cost of living while German voters are most concerned about immigration

| Most important issue facing the country *Net across countries – showing % ranked #1 issue*	France (n=1009)	Germany (n=1001)	Opinion Leaders (n=810)
Cost of living — 27%	30%	23%	22%
Immigration — 23%	16%	30%	24%
Climate change and environment — 20%	17%	23%	22%
Jobs and the economy — 10%	9%	10%	11%
Crime — 9%	15%	3%	9%
Health care — 7%	9%	5%	7%
Political polarization — 3%	1%	4%	4%

Q: Now, which three of these issues are the most important issues facing your country?

Four-in-five registered voters are concerned about environmental issues

Concern is consistent across both countries and among opinion leaders

Concern for environmental issues
(among total registered voters)

■■ Extremely / Not at all
■■ Somewhat / Not very

Concerned: **80%**
- 47%
- 33%

Not concerned: **20%**
- 16%
- 4%
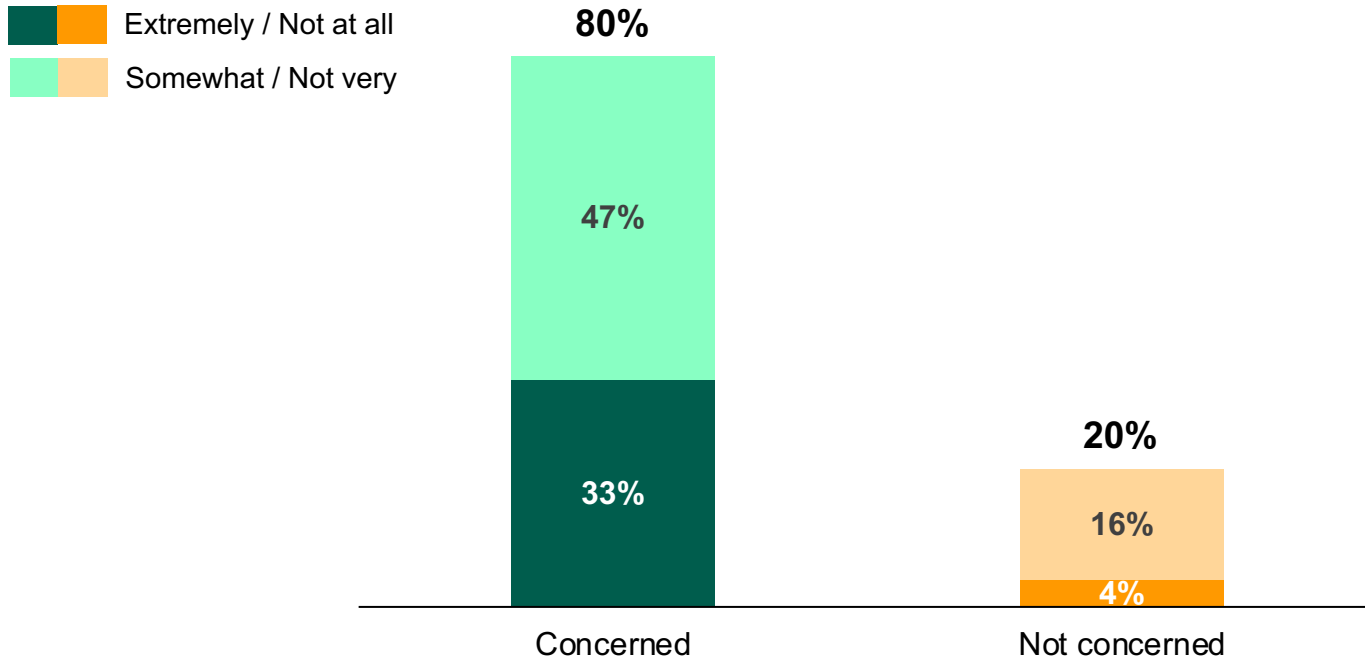
Concern for environmental issues	France (n=1009)	Germany (n=1001)	Opinion Leaders (n=810)
Total Concerned	**80%**	**79%**	**82%**
Total Not Concerned	**20%**	**21%**	**18%**
Extremely concerned	29%	36%	41%
Somewhat concerned	51%	43%	41%
Not very concerned	16%	16%	14%
Not at all concerned	4%	5%	4%

Q: How concerned are you about environmental issues?

On the surface, air pollution is concerning but falls below global warming, plastic waste, deforestation, and water quality in terms of <u>overall importance</u>

Most important <u>environmental issues</u> facing the country *Net across countries – showing % selected as top 3 environmental issue*		France (n=1009)	Germany (n=1001)	Opinion Leaders (n=810)
Climate change and global warming	55%	56%	54%	55%
Plastic waste and recycling	43%	40%	45%	41%
Deforestation and habitat loss	34%	28%	40%	35%
Water quality and pollution	33%	37%	30%	32%
Air quality and pollution	29%	35%	23%	27%
Biodiversity and species extinction	26%	25%	27%	28%
Renewable energy transition	20%	16%	23%	20%
Chemical pollutants (e.g., PFAS, glyphosate)	17%	20%	14%	16%
Environmental justice and social inequality	15%	13%	17%	17%
Soil degradation and agriculture	11%	17%	5%	10%
Ocean acidification	10%	8%	11%	10%
Overfishing	8%	6%	10%	9%

Q: When thinking about environmental issues, which are most important to you? Please select your top three.

But, when put in terms of <u>potential impact on personal health</u>, air quality, along with water quality and chemical pollutants, are seen as the most important

Environmental issues with <u>highest potential negative impact on personal health</u> *Net across countries – showing % rating 5-7 on a 1-7 scale*	France (n=1009)	Germany (n=1001)	Opinion Leaders (n=810)
Water quality and pollution — 82%	88%	76%	83%
Air quality and pollution — 81%	86%	76%	83%
Chemical pollutants (e.g., PFAS, glyphosate) — 79%	84%	73%	82%
Plastic waste — 74%	78%	71%	77%
Climate change and global warming — 73%	79%	66%	74%
Deforestation and habitat loss — 71%	73%	68%	75%
Soil degradation and agriculture — 69%	80%	58%	72%
Ocean acidification — 67%	70%	63%	70%
Biodiversity and species extinction — 63%	68%	58%	66%
Environmental justice and social inequality — 56%	58%	54%	58%

Q: Thinking about how each of the following environmental issues has the potential to personally impact your health, please rate each on a scale of 1-7 where 7 means very high potential to negatively impact personal health and 1 means no potential to negatively impact personal health.

Female and younger (18-34 years old) respondents are more concerned with the potential of air quality and pollution to negatively impact their health

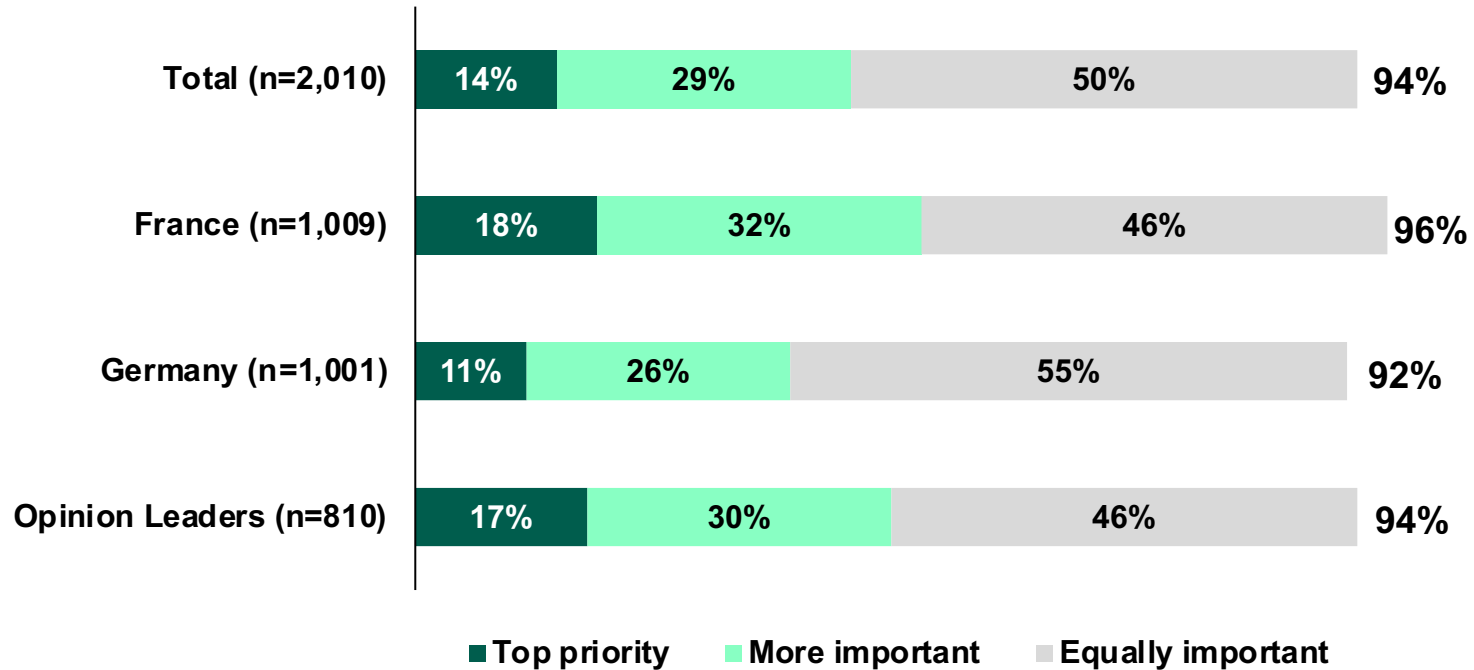| Environmental issues with highest potential negative impact on personal health *Net across countries – showing % rating 5-7 on a 1-7 scale*	Male (962)	Female (n=1001)	18-34 (n=452)	35-54 (n=669)	55+ (n=889)
Water quality and pollution — 82%	80%	84%	82%	82%	82%
Air quality and pollution — 81%	78%	**84%**	**83%**	80%	80%
Chemical pollutants (e.g., PFAS, glyphosate) — 79%	75%	82%	78%	79%	79%
Plastic waste — 74%	73%	75%	75%	76%	73%
Climate change and global warming — 73%	71%	74%	77%	72%	71%
Deforestation and habitat loss — 71%	70%	71%	71%	71%	70%
Soil degradation and agriculture — 69%	67%	72%	72%	70%	67%
Ocean acidification — 67%	64%	69%	72%	67%	64%
Biodiversity and species extinction — 63%	62%	63%	63%	66%	60%
Environmental justice and social inequality — 56%	55%	57%	62%	57%	52%

Q: Thinking about how each of the following environmental issues has the potential to personally impact your health, please rate each on a scale of 1-7 where 7 means very high potential to negatively impact personal health and 1 means no potential to negatively impact personal health.

Nearly all voters, in both countries, believe air quality is at least equally as important as other environmental issues

**Importance of air quality in relation to other environmental issues
(among total registered voters)**

	Top priority	More important	Equally important	
Total (n=2,010)	14%	29%	50%	94%
France (n=1,009)	18%	32%	46%	96%
Germany (n=1,001)	11%	26%	55%	92%
Opinion Leaders (n=810)	17%	30%	46%	94%

■ Top priority　　■ More important　　■ Equally important

Q: How would you rank the importance of air quality in relation to other environmental issues?

Voters in both countries believe that pollution from cars is how they are primarily exposed to air pollution

German voters and opinion leaders are significantly more likely to believe they have been exposed to burning of waste

Pollution <u>personally experienced</u> in the past 12 months *Net across countries – showing % selected*	France (n=1009)	Germany (n=1001)	Opinion Leaders (n=810)
Pollution from cars 46%	48%	43%	53%
Burning of waste (Incineration) 16%	11%	21%	21%
Emission from burning wood 14%	12%	17%	19%
Pollution from burning coal 11%	9%	12%	14%
Pollution from burning agriculture crops 9%	9%	9%	12%
Ammonia emission from agriculture waste 8%	7%	8%	10%
None of the above 40%	40%	40%	30%

Q: Have you personally experienced any of the following types of air pollution in the past 12 months?

Voters across both countries primarily blame automobiles for poor air quality followed by industry emissions from burning waste

Responsible for poor air quality in your area *Net across countries – showing % selected as responsible*		France (n=1009)	Germany (n=1001)	Opinion Leaders (n=810)
Automobile emissions	59%	62%	56%	63%
Industry emissions from burning waste	41%	40%	42%	43%
Home heating	22%	22%	23%	27%
Agriculture emissions	22%	22%	22%	25%
Other	4%	3%	4%	4%
Don't know/Not sure	18%	17%	19%	11%

Q: What do you believe is responsible for poor air quality in your area?

A strong majority of voters across both countries support the government taking action to regulate air quality

Only a small fraction of voters (13%) oppose regulation

Support for air quality regulation
(among total registered voters)

Strongly

Somewhat

79%

43%

36%

13%

10%

3%
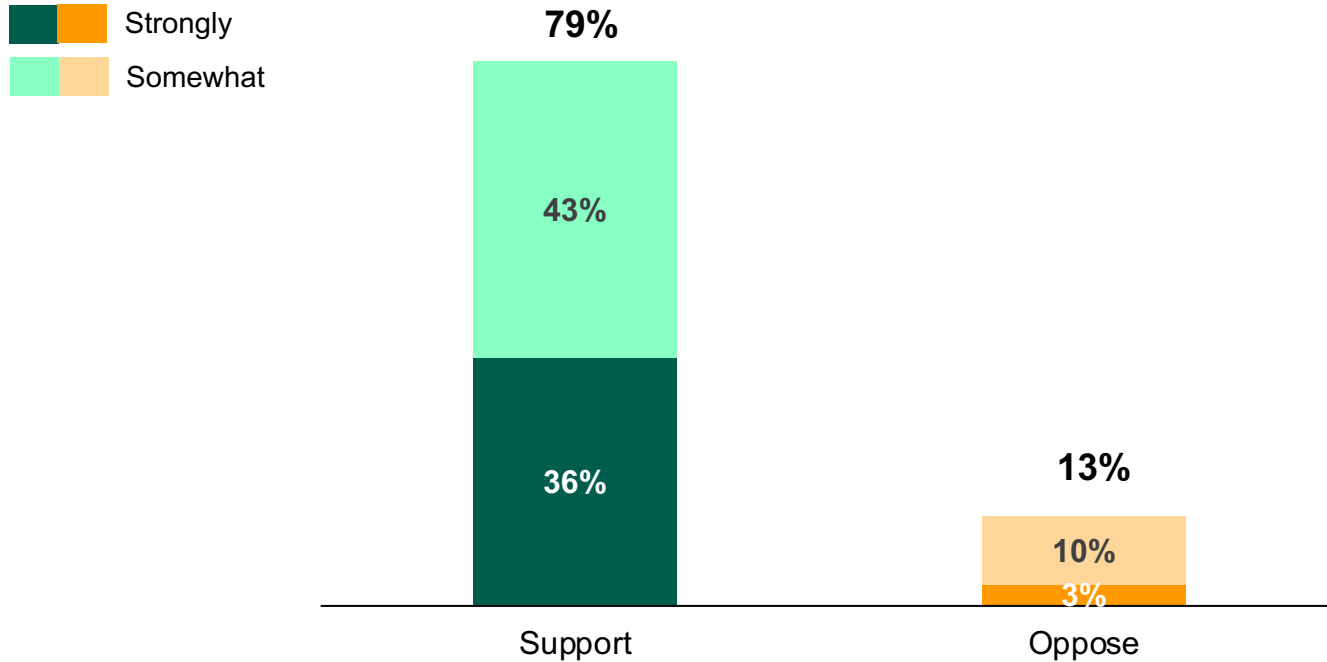
Support

Oppose

Support / oppose government regulation on air quality	France (n=1009)	Germany (n=1001)	Opinion Leaders (n=810)
Total Support	85%	74%	82%
Total Oppose	10%	16%	14%
Strongly support	39%	33%	43%
Somewhat support	46%	41%	39%
Somewhat oppose	8%	12%	10%
Strongly oppose	2%	4%	3%
Unsure	5%	10%	4%

Q: Do you support or oppose the government taking action to regulate air quality?

And a strong majority are more likely to believe that the government has a responsibility to regulate air quality to ensure health and safety of citizens

Responsibility of the government to regulate air quality
(among total registered voters)

	Government has responsibility	Does not have responsibility
Total (n=2,010)	75%	25%
France (n=1,009)	78%	22%
Germany (n=1,001)	72%	28%
Opinion Leaders (n=810)	75%	25%
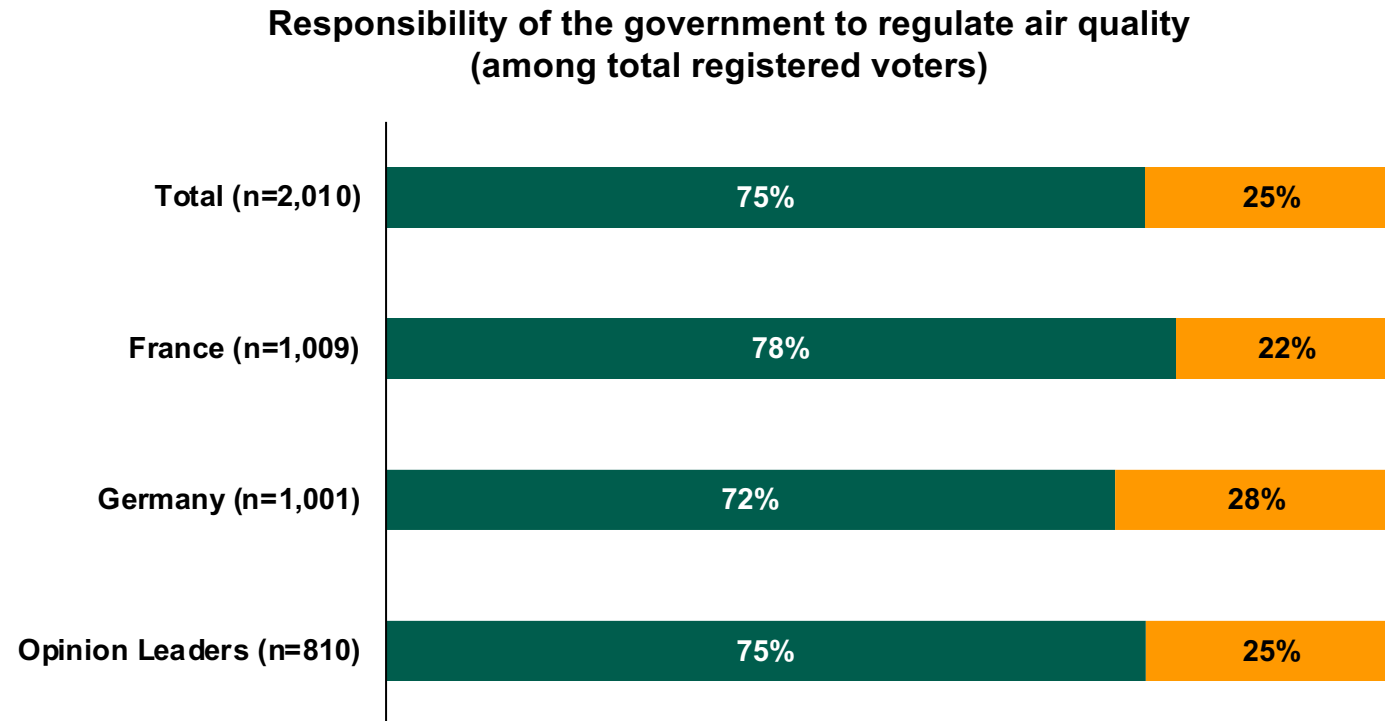
■ The government has a responsibility to regulate air quality to ensure the health and safety of citizens

■ The government does not have a responsibility to regulate air quality and it should be up to individual companies to self-regulate their impact on air quality

Q: Which of the following statements do you agree with more even if you do not fully agree with either?

A majority of voters across both countries do not believe that wealthier regions should breathe cleaner air than poorer regions by 2030

Should wealthier regions breathe cleaner air?
(among total registered voters)
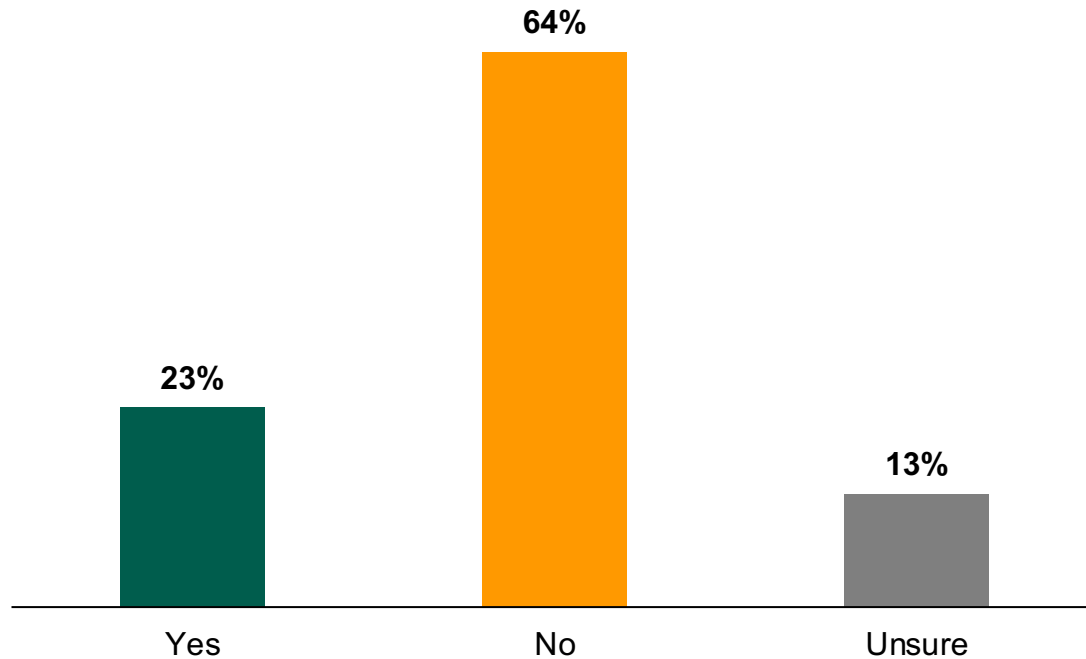
Should wealthier regions breathe cleaner air?	France (n=1009)	Germany (n=1001)	Opinion Leaders (n=810)
Yes	26%	20%	29%
No	56%	73%	62%
Unsure	18%	8%	9%

Q: Do you believe that by 2030, people in wealthier regions in Europe should breathe cleaner air than in poorer regions?

A strong majority of voters across both countries believe it is unfair if wealthier countries breathe cleaner air than less developed countries

Fair or unfair that wealthier countries breathe cleaner air (assuming it were the case)
(among total registered voters)
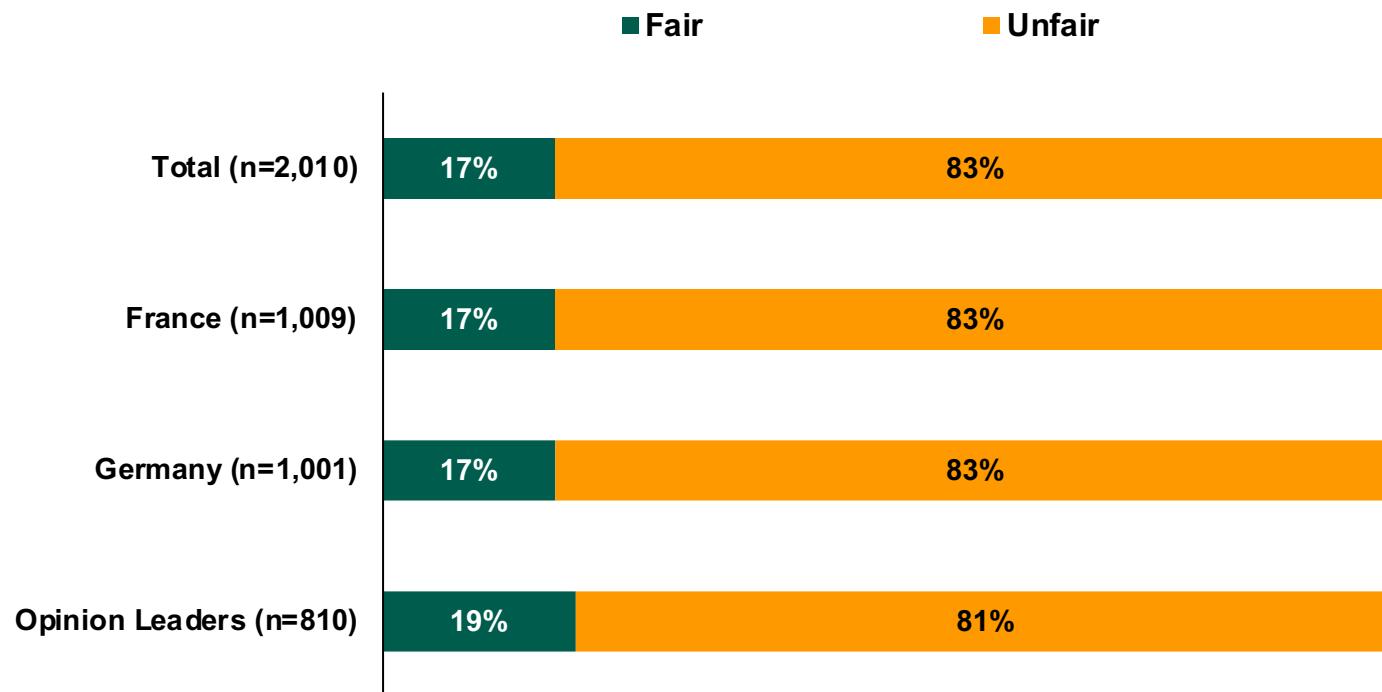
Q: Assuming that people in wealthier countries in 2030 breathe cleaner air than less developed countries, do you believe that is fair or unfair?

Legislation Deep-Dive

While awareness of the European Green Deal is high, almost no voters (4%) say they are very familiar with it

Familiarity with European Green Deal	Total (n=2,010)	France (n=1009)	Germany (n=1001)	Opinion Leaders (n=810)
Total Aware	**69%**	**70%**	**68%**	**81%**
Very familiar	4%	3%	4%	7%
Somewhat familiar	25%	25%	24%	36%
Heard of, but know almost nothing	40%	41%	40%	39%
Have never heard of it	31%	30%	32%	19%

Q: How familiar are you with the European Green Deal? Would you say you are…

Similarly, while more than half of voters are aware of the Ambient Air Quality Directive, almost no one is very familiar with it

While familiarity is still very low, awareness in France is notably higher than Germany

Familiarity with Ambient Air Quality Directive	Total (n=2,010)	France (n=1009)	Germany (n=1001)	Opinion Leaders (n=810)
Total Aware	**55%**	**72%**	**38%**	**65%**
Very familiar	3%	4%	2%	6%
Somewhat familiar	19%	26%	12%	26%
Heard of, but know almost nothing	33%	42%	24%	34%
Have never heard of it	45%	28%	62%	35%

Q: And how familiar are you with the Ambient Air Quality Directive

Voters were provided the following explanation of the Ambient Air Quality Directives

As part of the European Green Deal's zero pollution ambition, on 26 October 2022 the Commission tabled a proposal for a revision of the Ambient Air Quality Directives. The proposed directive would set air quality standards for 2030 that are more closely aligned with the Word Health Organization's recommendations, as updated in 2021. The legislation is being reviewed because the European Commission found that the existing legislation was only 'partially successful' in reducing harmful air pollution. Compared with WHO recommendations, 96% of Europeans living in towns and cities breathe harmful air pollution every day, and as result, more than 300,000 people die prematurely in Europe every year as a result of air pollution, with over 40,000 in **France/Germany** alone.

A strong majority of voters across both countries support strengthening the Ambient Air Quality Directive

Only a small fraction of voters (13%) voice opposition to the legislation

Support for strengthening the Ambient Air Quality Directive
(among total registered voters)
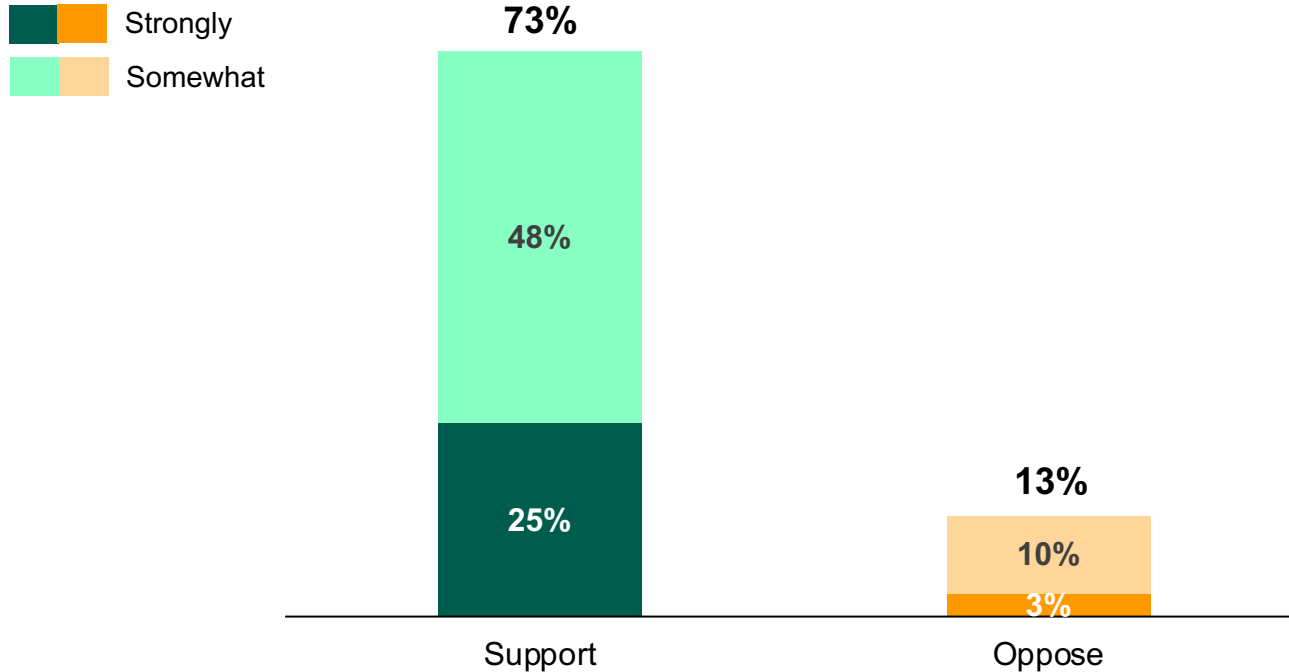
Strongly

Somewhat

Support / oppose Ambient Air Quality Directive	France (n=1009)	Germany (n=1001)	Opinion Leaders (n=810)
Total Support	**75%**	**70%**	**76%**
Total Oppose	**13%**	**14%**	**15%**
Strongly support	25%	25%	30%
Somewhat support	50%	45%	46%
Somewhat oppose	10%	10%	11%
Strongly oppose	3%	4%	4%
Unsure	12%	16%	9%

Q: Again thinking about what you just read, please indicate if you support or oppose these potential new regulations.