

Savanta:

Fern /
Mighty Earth /
DUH / Zero

Environmental Polling

Draft Report

October 2024

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Make Better Decisions

Contents

03

Background and Methodology

05

Demographics

14

Results

33

Executive Summary

Background and Methodology

Background and Methodology

This report seeks to help Fern and Mighty Earth understand public attitudes towards environmental regulations, deforestation, and the impact of fake news and misinformation on these topics.

This full report expands on the initial headline report shared which focused solely on country differences. This report also includes these differences as an area of focus but also looks into overall differences based on gender, age, income as well as other demographic and psychographic criteria.

The responses of n=14,528 adults in the EU were collected across 7 markets (Austria, Finland, France, Germany, Poland, Portugal, and Spain) with at least 2000 responses collected in each market.

The reported data has been weighted in each country to be nationally representative in terms of gender, age and region. Countries have also been weighted such that each country has equal weight compared to another, meaning that overall results are not reflective of the different demographics that exist between the surveyed countries.

Fieldwork took place between 18th September and 2nd October 2024.

Significant difference checks are done for each country against all other countries but not against the overall average. These significant differences are not charted for each figure on each chart to improve the readability, significant differences are instead typically shown for the figure to the right of the chart. Differences mentioned in the sub analysis are always to be considered significant unless otherwise specified.

Results will be given at an overall level meaning they are aggregated results from each country surveyed unless otherwise specified.

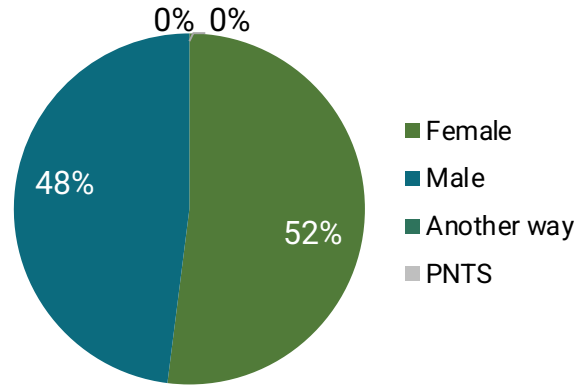
Demographics



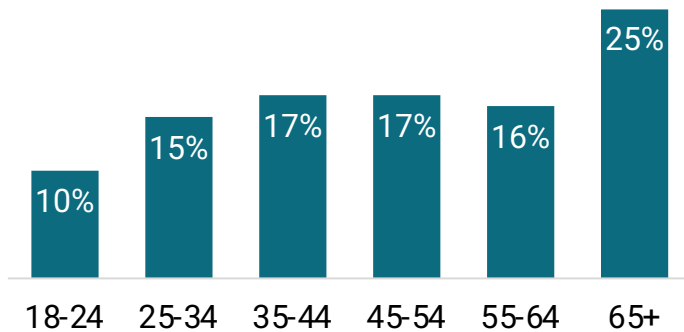
Demographics - Total



Gender



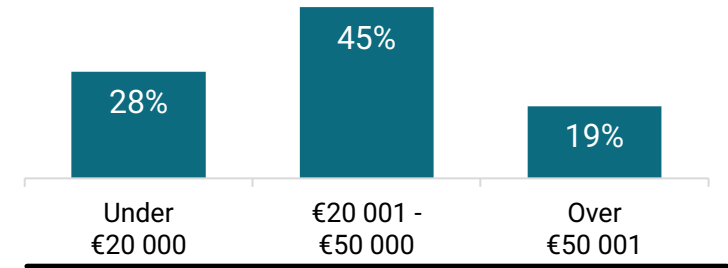
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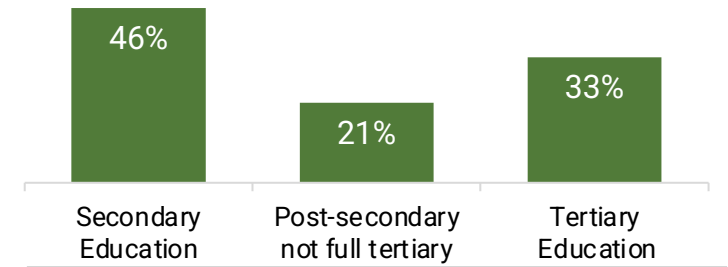
Countries



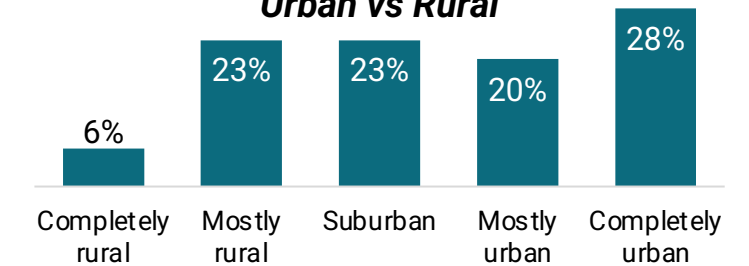
Income



Education



Urban vs Rural

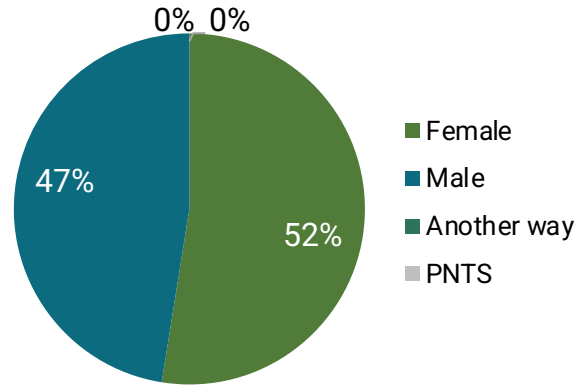




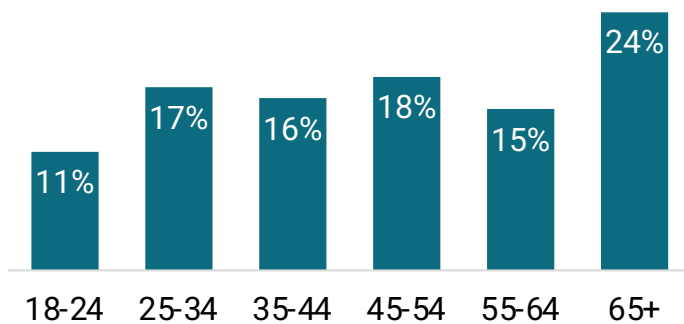
Demographics - Austria



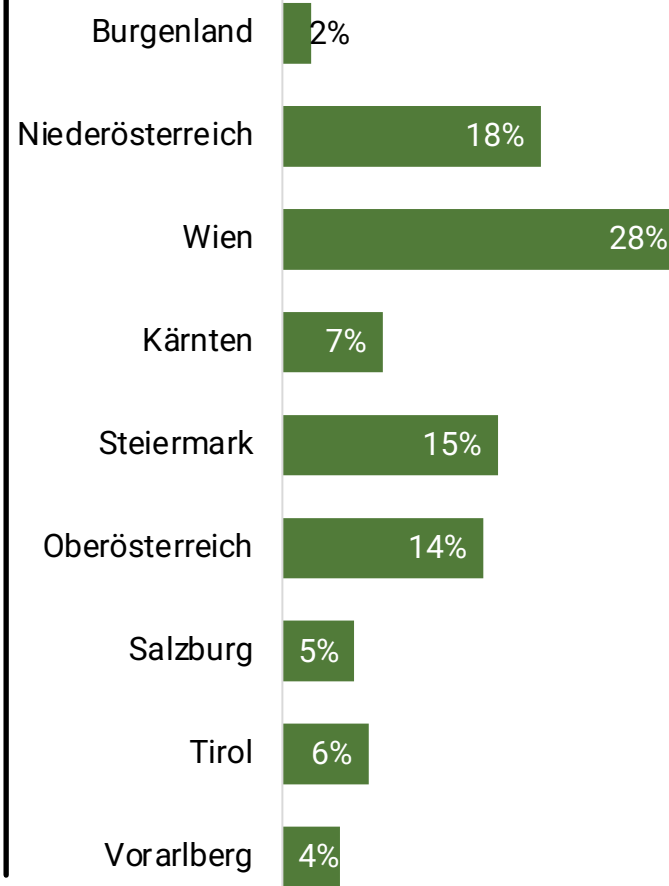
Gender



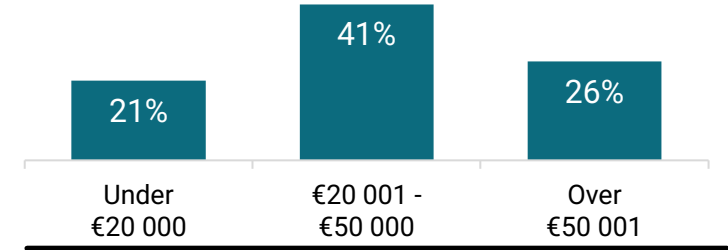
Age



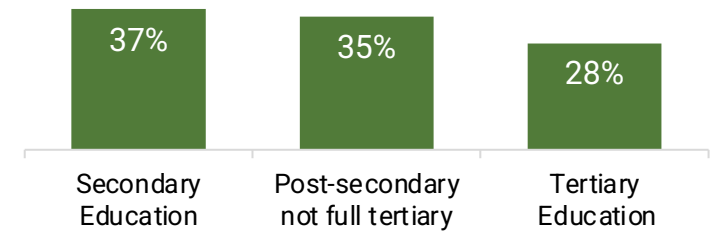
Region



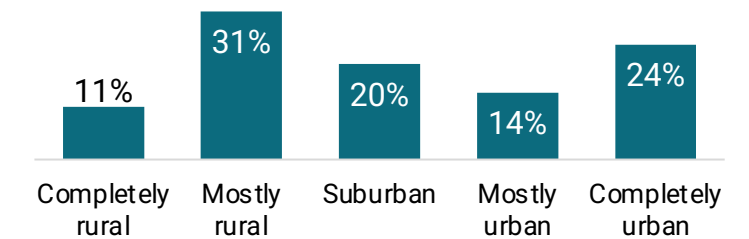
Income



Education

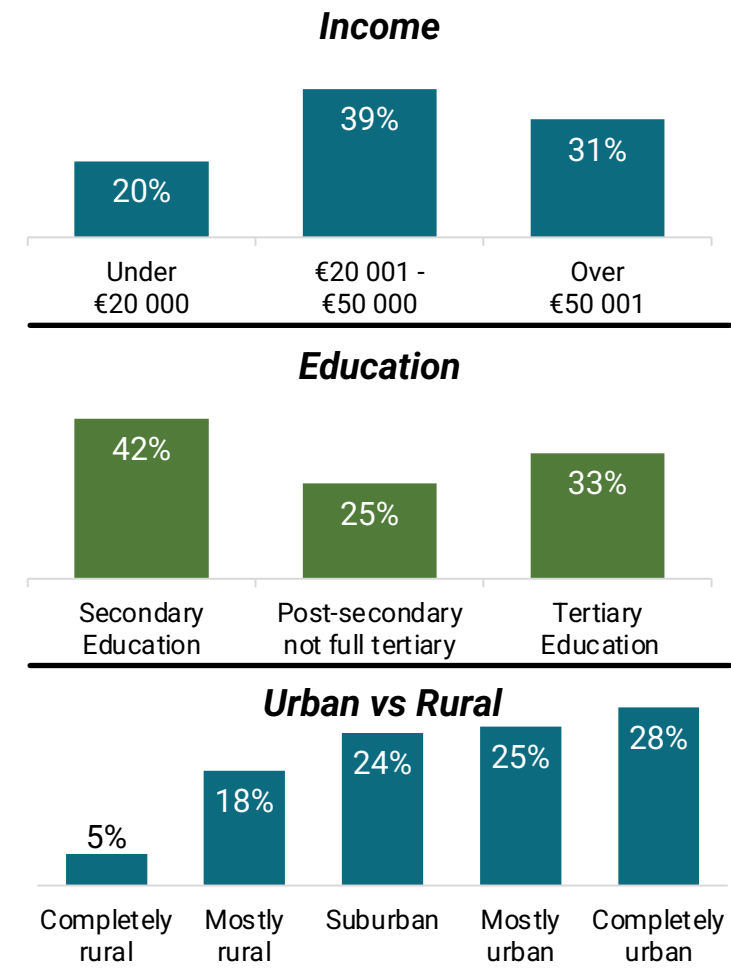
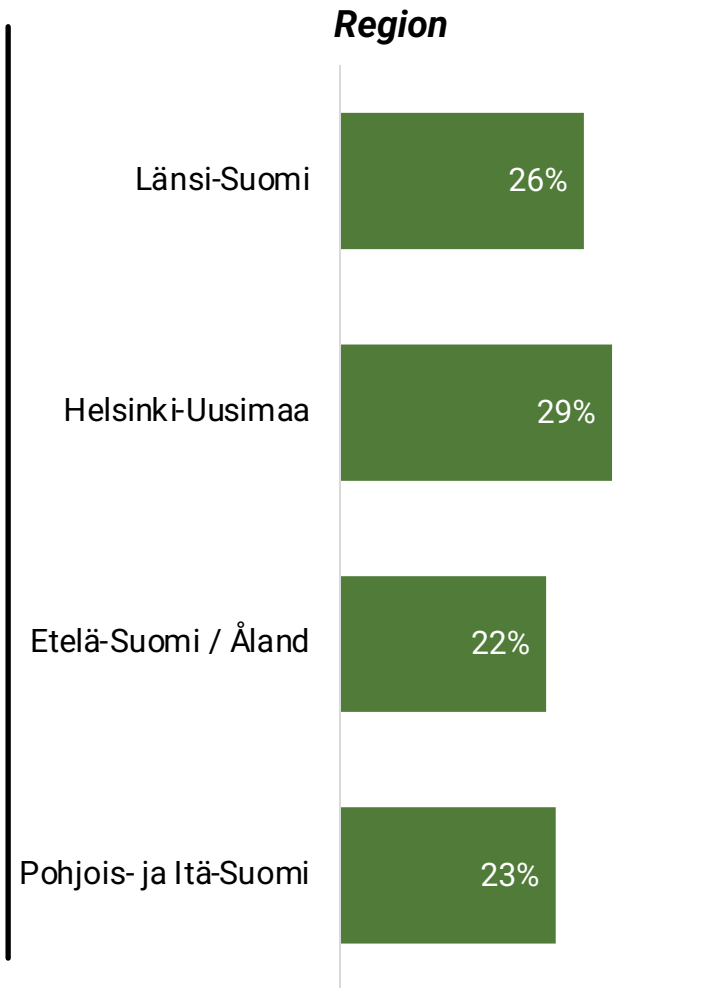
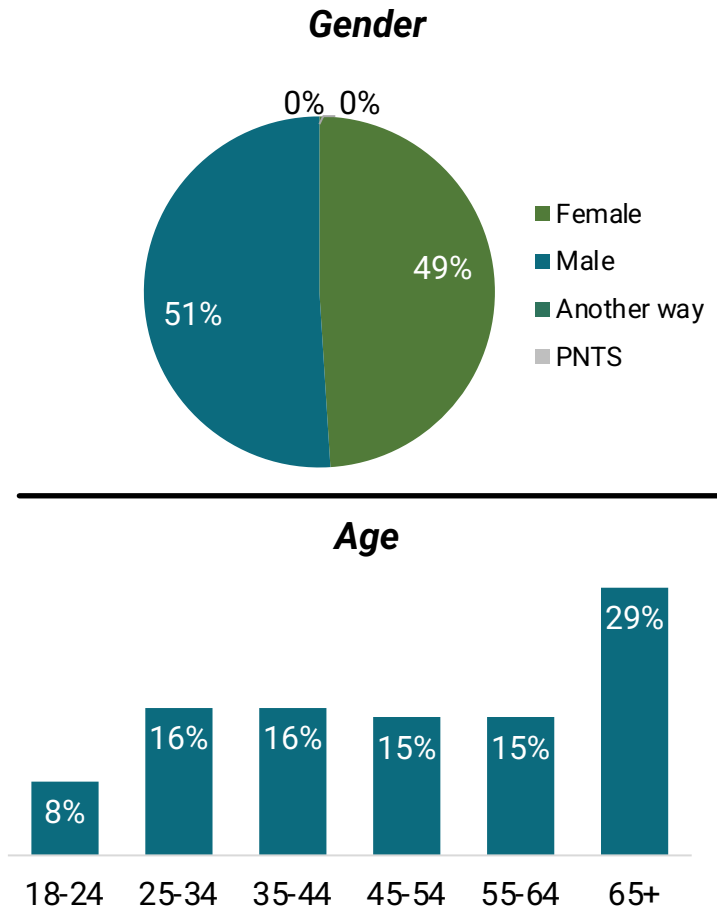


Urban vs Rural





Demographics - Finland

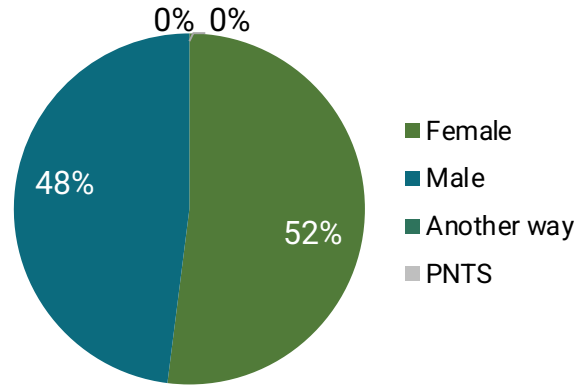




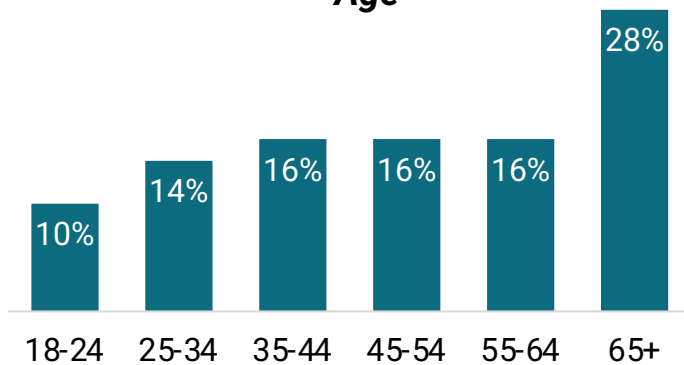
Demographics - France



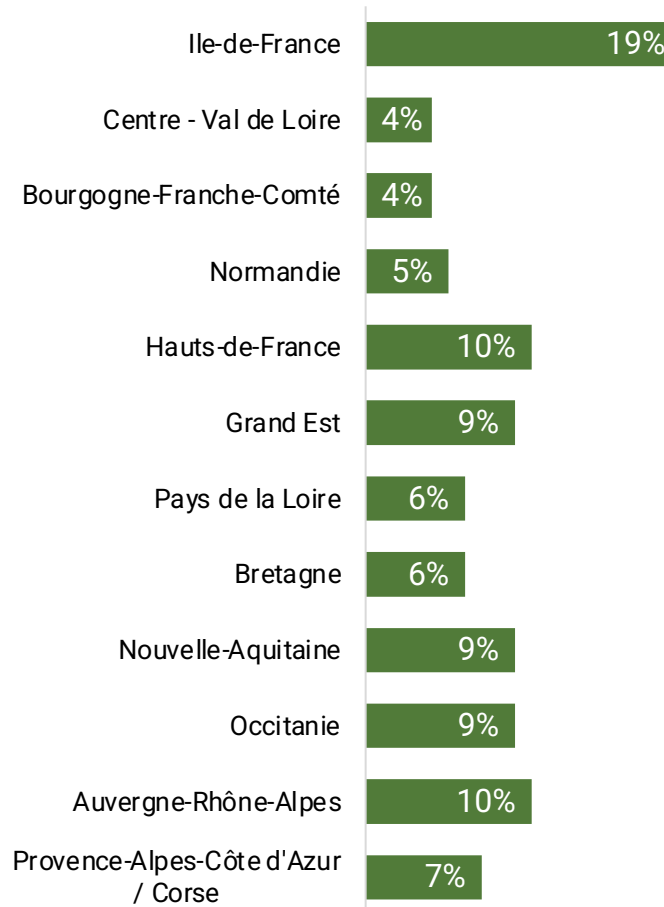
Gender



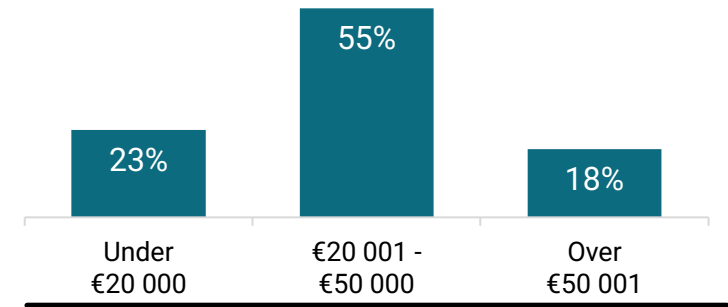
Age



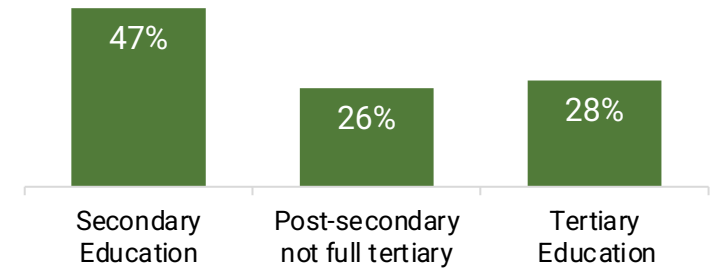
Region



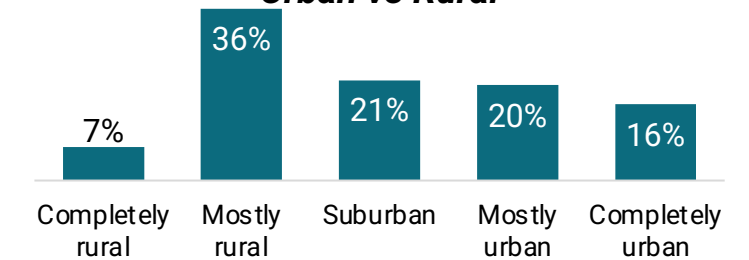
Income



Education

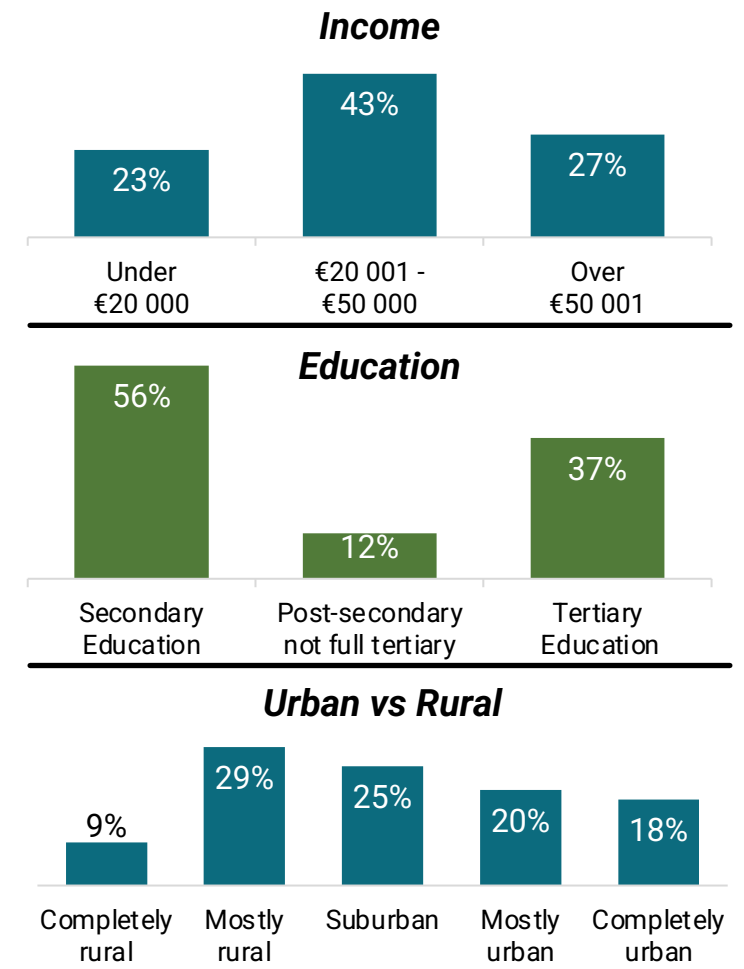
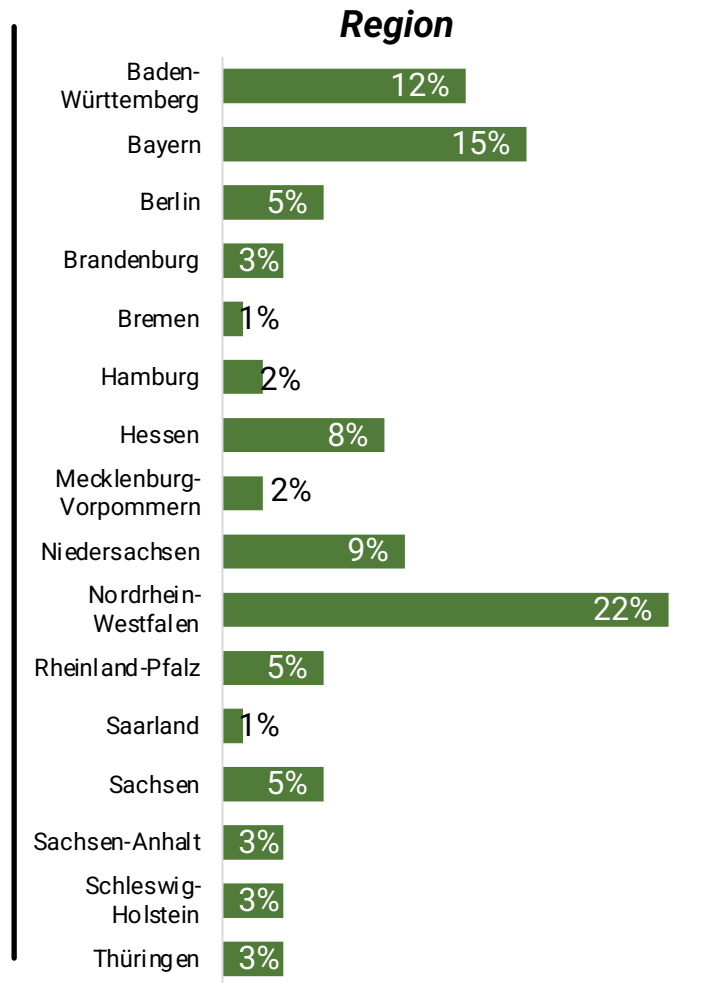
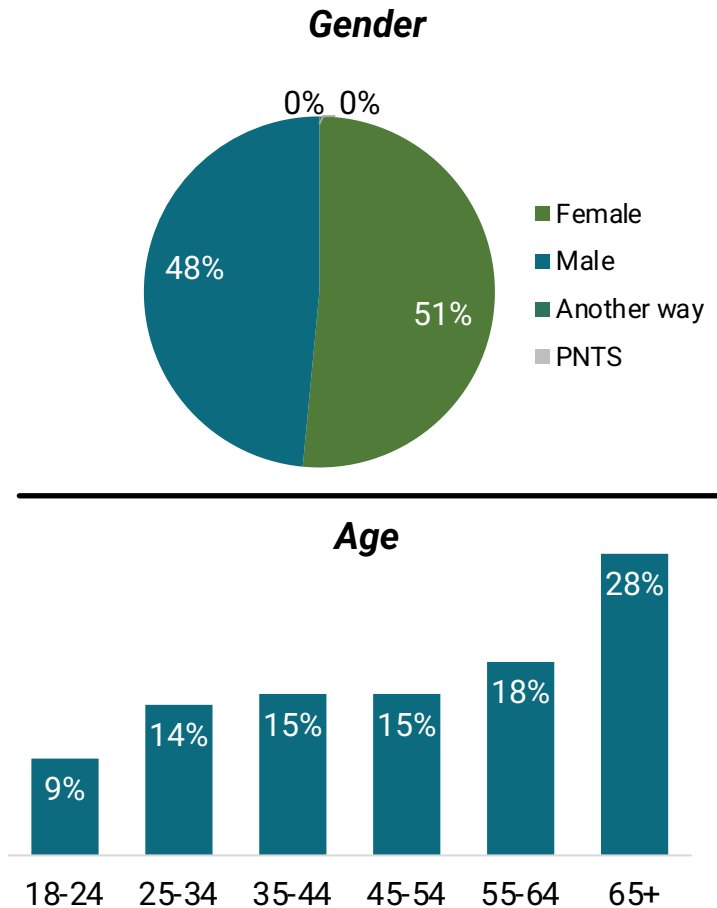


Urban vs Rural





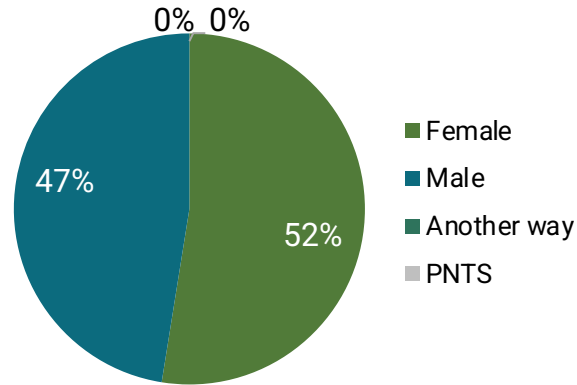
Demographics - Germany



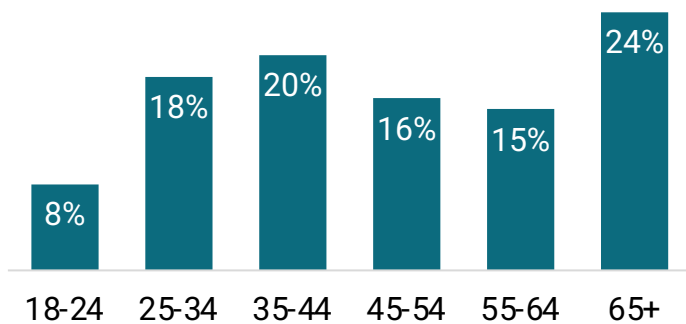


Demographics - Poland

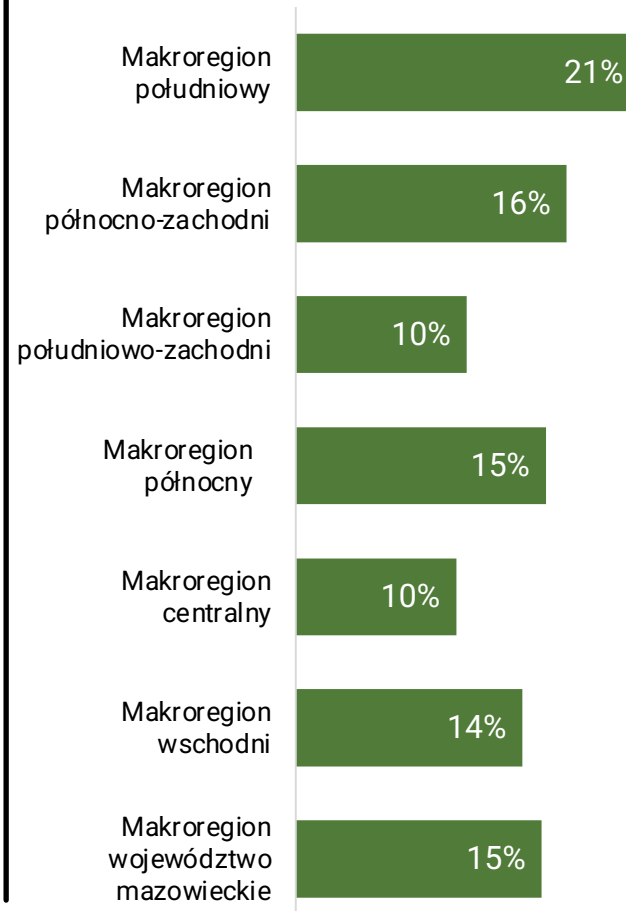
Gender



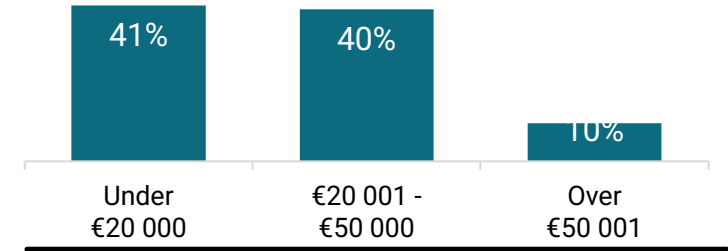
Age



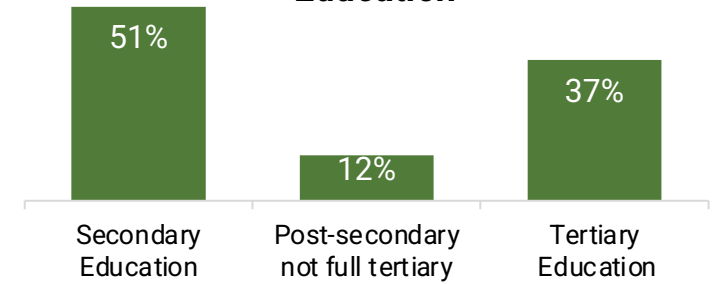
Region



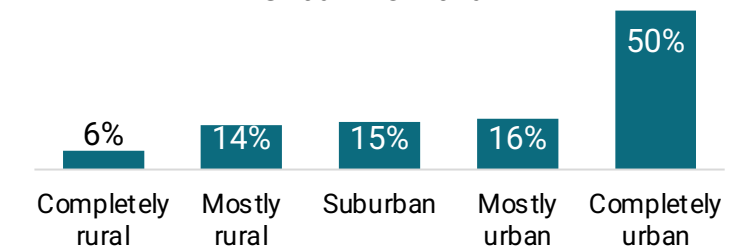
Income



Education



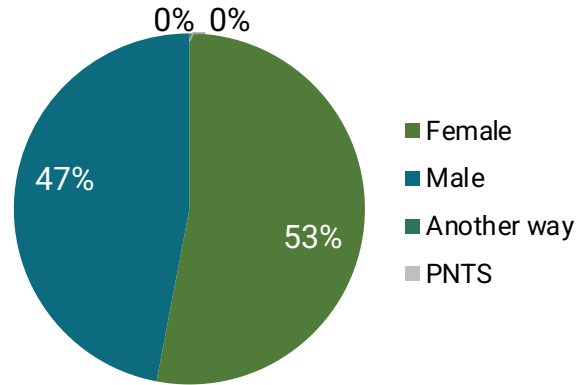
Urban vs Rural



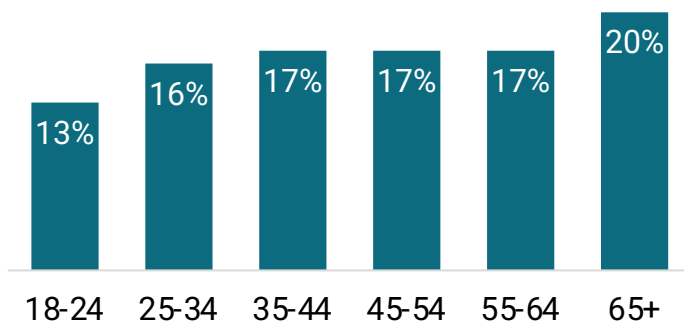


Demographics - Portugal

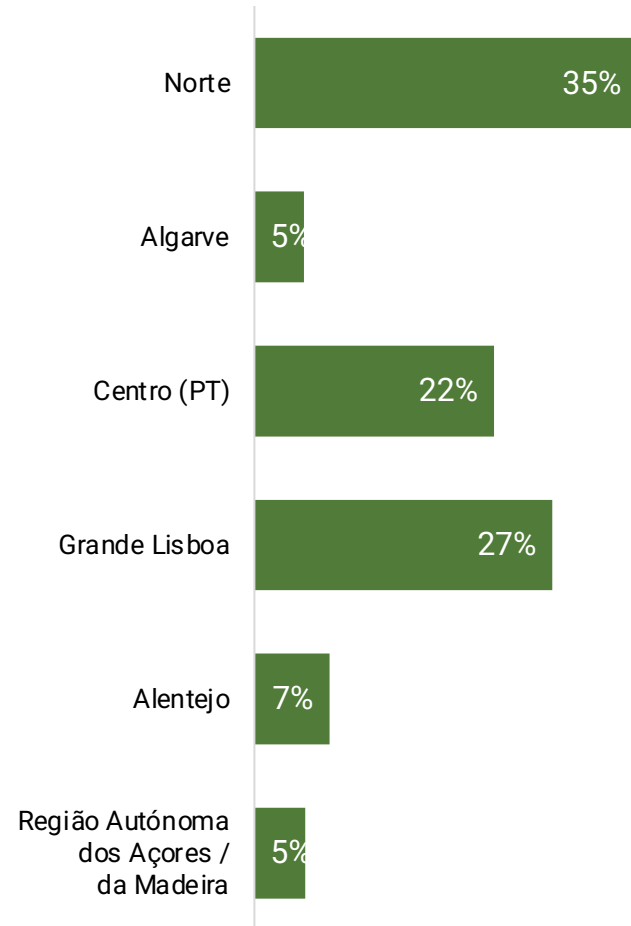
Gender



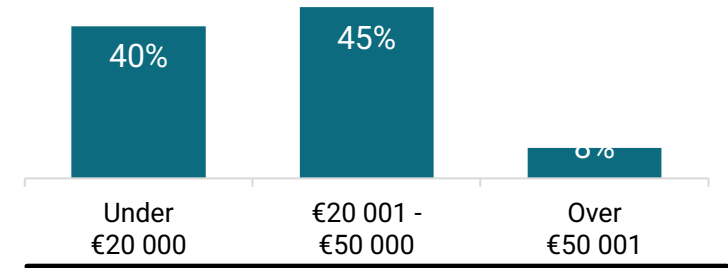
Age



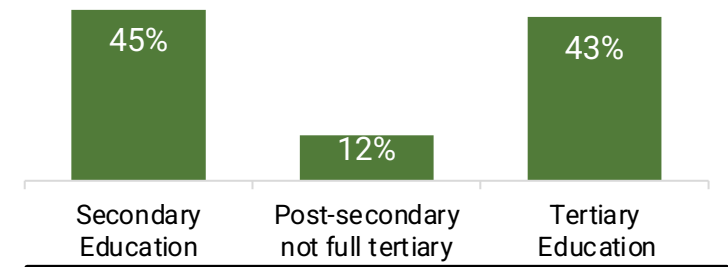
Region



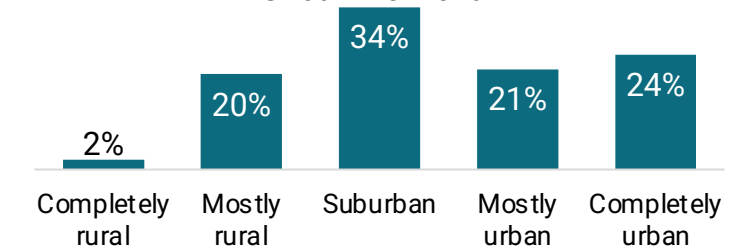
Income



Education

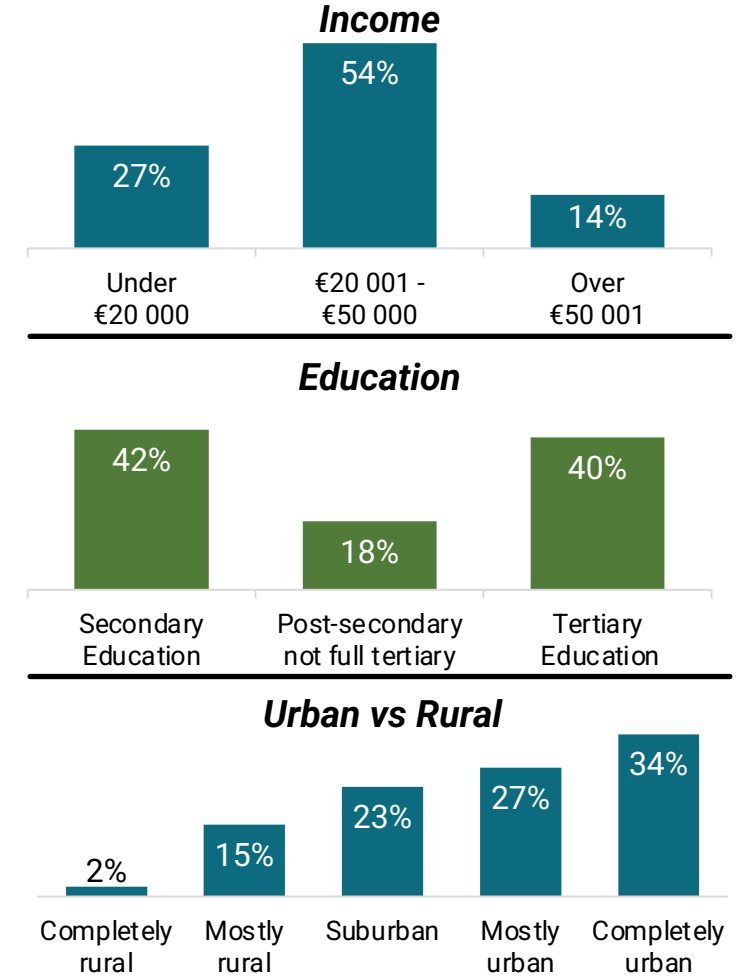
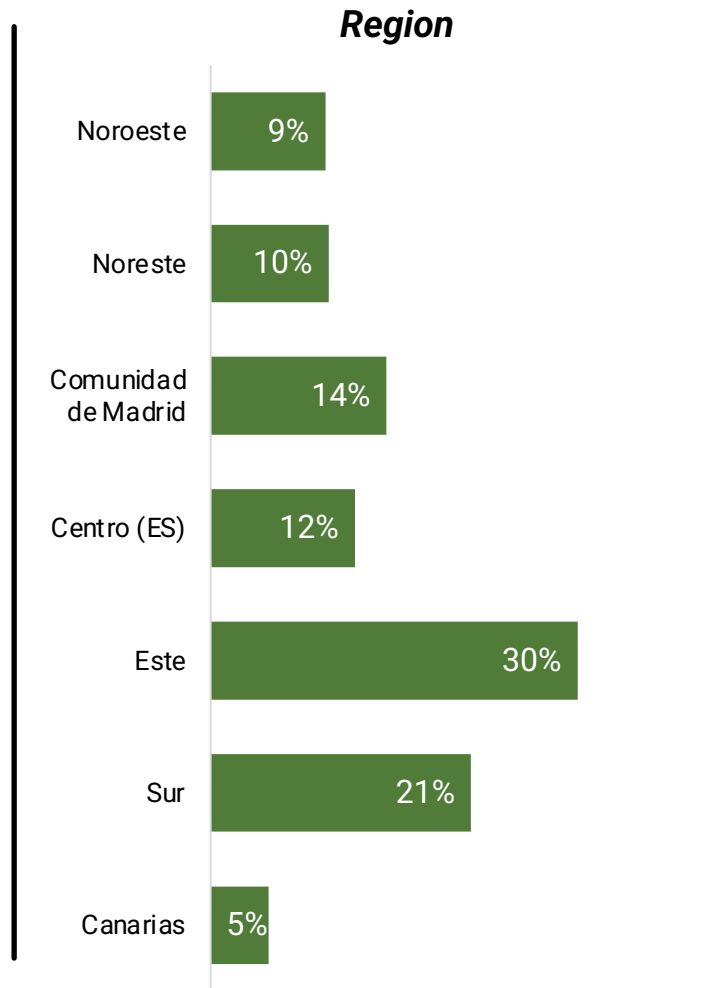
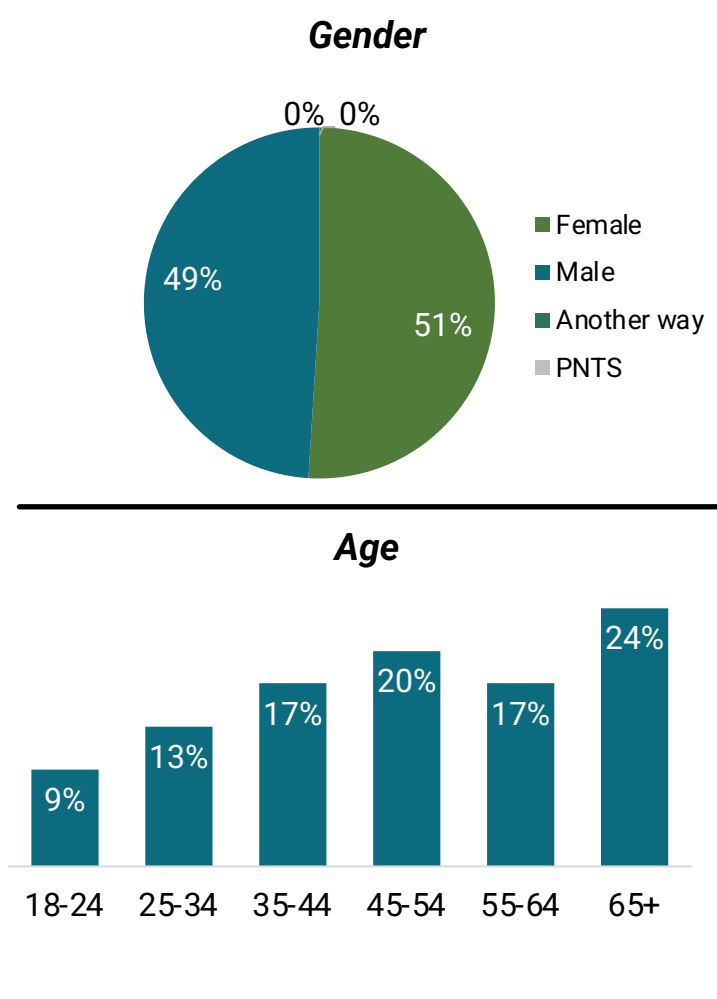


Urban vs Rural





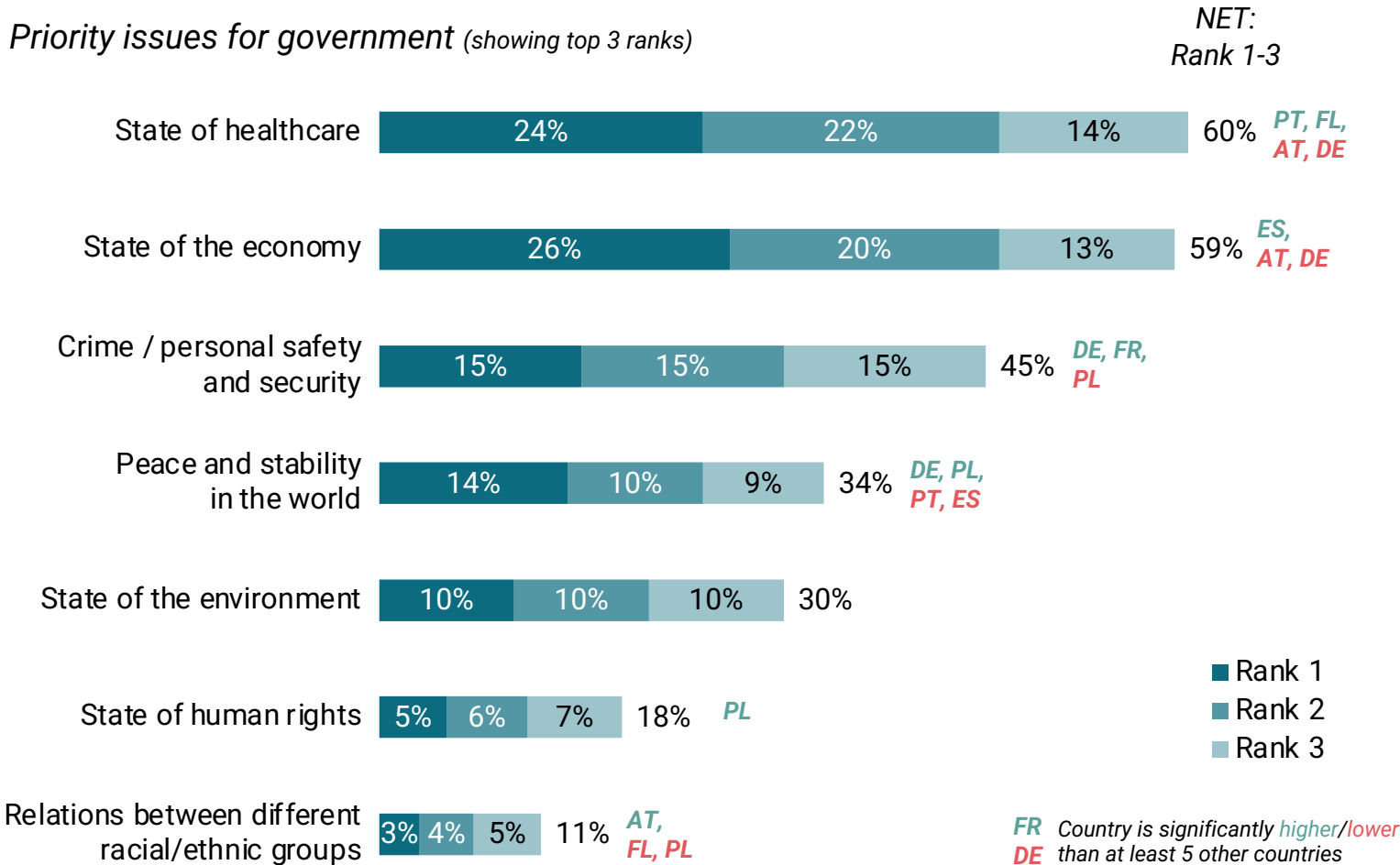
Demographics - Spain



Results



Healthcare and the economy are the two issues that are top of mind for respondents in the EU. The environment is a top 3 issue for almost a third of respondents.



Austrians and Germans are the likeliest to list the environment as one of their top 3 issues (35% and 34%). Meanwhile Finland, Spain and Portugal are those least likely to do so (25%, 26% and 27% respectively).

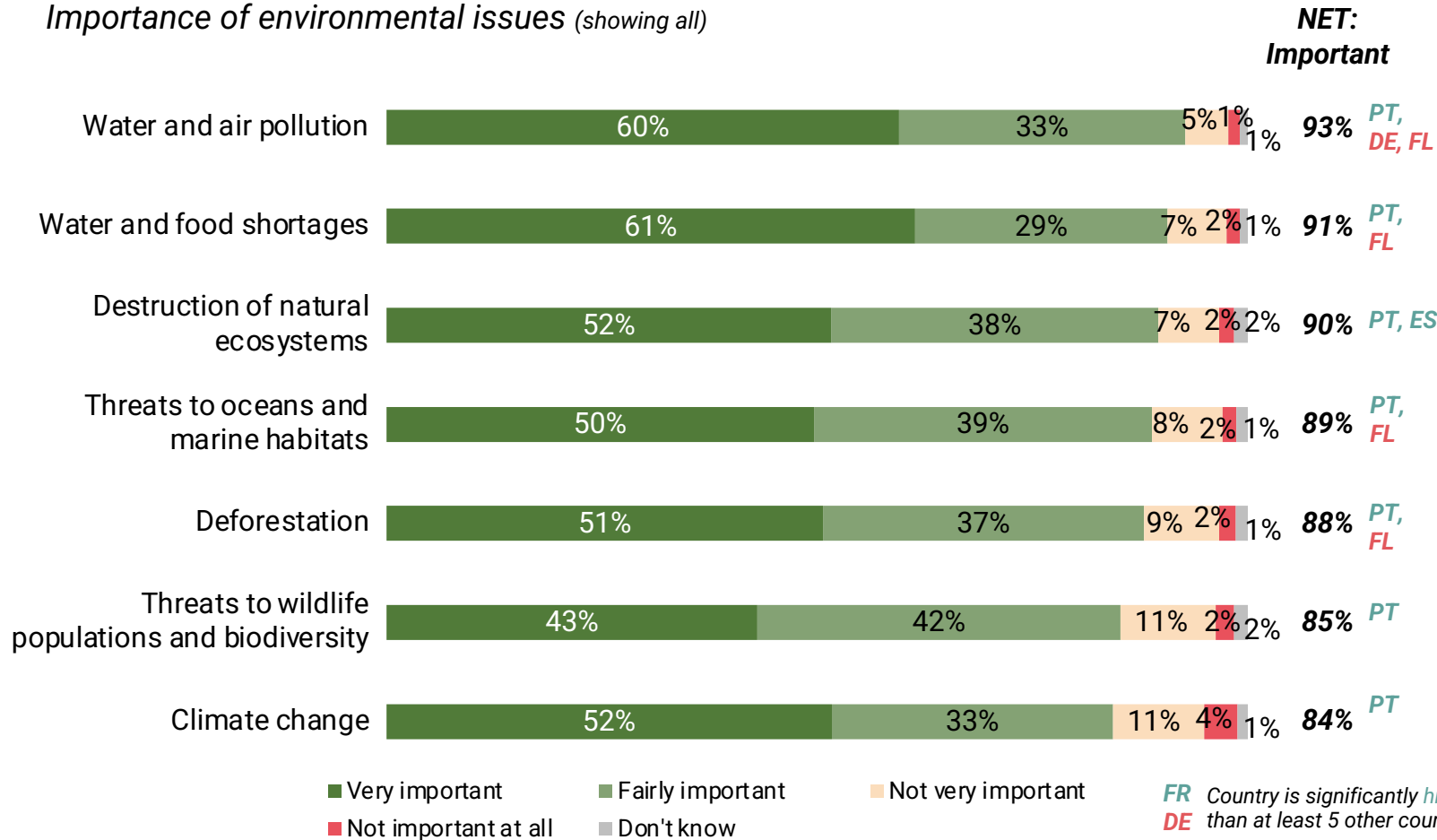
Respondents aged 55+ are significantly likelier than younger groups to have the environment in their top 3 issues (33% vs 28% for both 18-34 and 35-54). Those 18-34 are likeliest of all age groups to list human rights in their top 3 issues (25% vs 18% for 35-54 and 14% for 55+)

Similarly, those with high incomes (€50k+/year) are significantly likelier than medium and low-income respondents to have the environment in their top 3 (33% vs 30% for medium income and 29% for low).



All listed issues are seen as important by an overwhelming majority of respondents.
 Deforestation is seen as very important to just over half of them.

Importance of environmental issues (showing all)



Portugal is significantly likelier than all other countries to say each of the issues listed are important to them.

Finland is the country least likely to say that deforestation is important to them (77% vs 88% avg.).

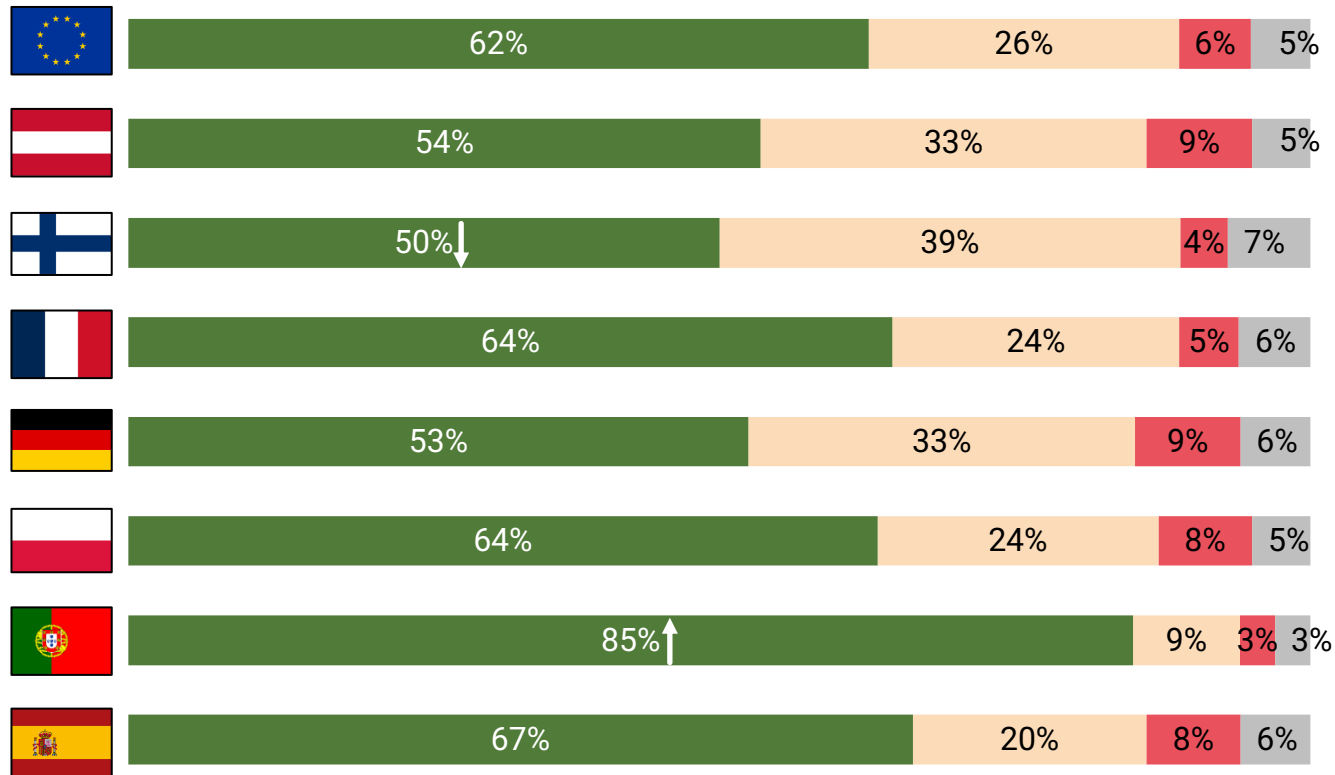
Women are significantly likelier than men to say deforestation is an important issue for them (90% vs 85%).

Younger respondents aged 18-34 are among those least likely to say deforestation is an important issue (82% vs 88% for 35-54 and 91% for 55+).



Most respondents want environmental regulations to be stronger, hardly any respondents want weaker regulations.

Preference for environmental regulations (showing all)



■ Wants stronger regulations
 ■ Wants regulations to remain the same
 ■ Wants weaker regulations
 ■ Don't know

↑ Country is significantly higher than at least 5 other countries
↓ Country is significantly lower than at least 5 other countries

Preference for environmental regulations is highest in Portugal, with an overwhelming majority (85%) in favour of stronger regulations.

Conversely, it is lowest in Finland where only 50% are in favour of stronger regulations (though they are not more likely to want weaker regulations).

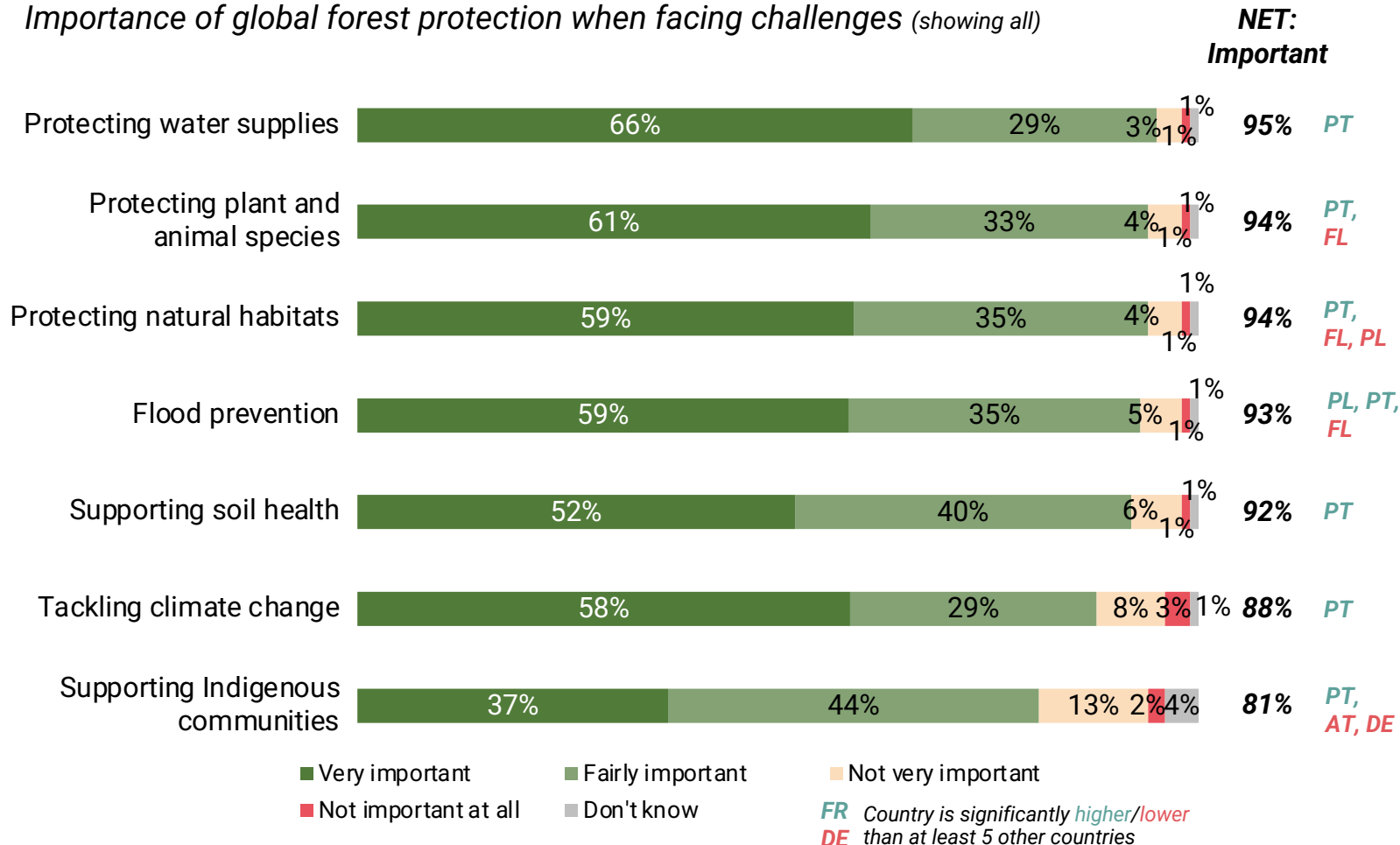
Preference for environmental regulations also varies by gender. The vast majority (67%) of female respondents want stronger regulations, with just over half (58%) of males doing the same.

Respondents with lower incomes (<€20k/year) are likelier than medium and high-income respondents to want stronger regulations (66% vs 63% for medium incomes and 58% for high ones).



Respondents are consistently and overwhelmingly finding that global forest protection is an important way of tackling environmental challenges.

Importance of global forest protection when facing challenges (showing all)



Global forest protection is almost unanimously seen as important to deal with environmental challenges, albeit to a lesser extent in supporting Indigenous communities.

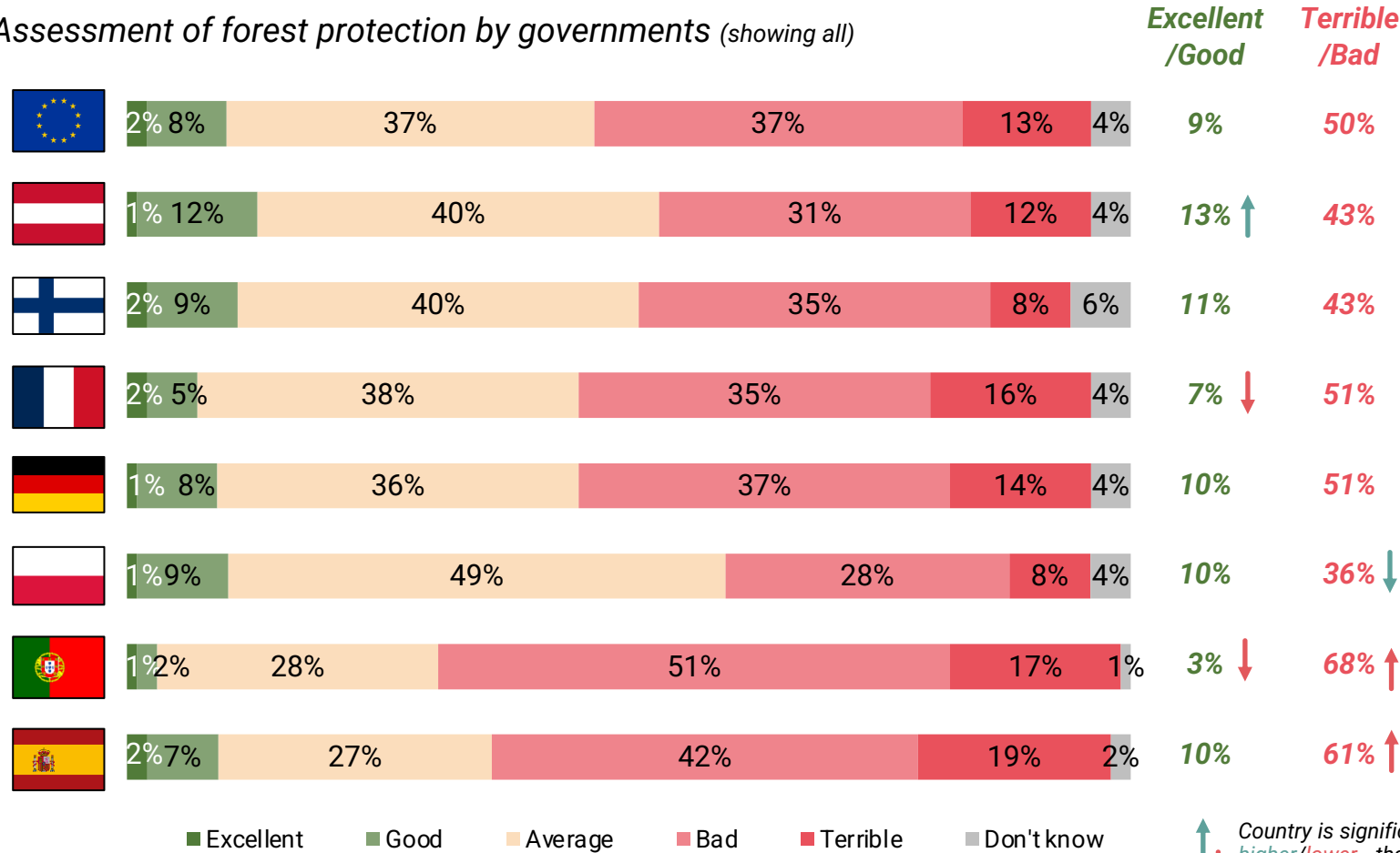
Portugal is consistently more likely than other countries to say forest protection is important to deal with environmental challenges.

Similarly, for all listed challenges, female respondents are significantly likelier than males to say that global forest protection is important. Those aged 55+ show an identical trend as they are also consistently more likely to say this than those aged 35-54 or 18-34.



Half of respondents think governments are doing a bad/terrible job at forest protection and less than one in ten think they are doing a good/excellent job.

Assessment of forest protection by governments (showing all)



Whereas half (50%) of respondents felt governments are doing a bad/terrible job at forest protection, in Portugal this share reaches 68%, higher than all other markets. Conversely, Poland is the least likely to say governments are doing a bad job (36%).

There are also age disparities in the assessment of forest protection. While 38% of those aged 18–34 rate forest protection as bad/terrible, almost three in five (59%) of 55+ year olds do the same.

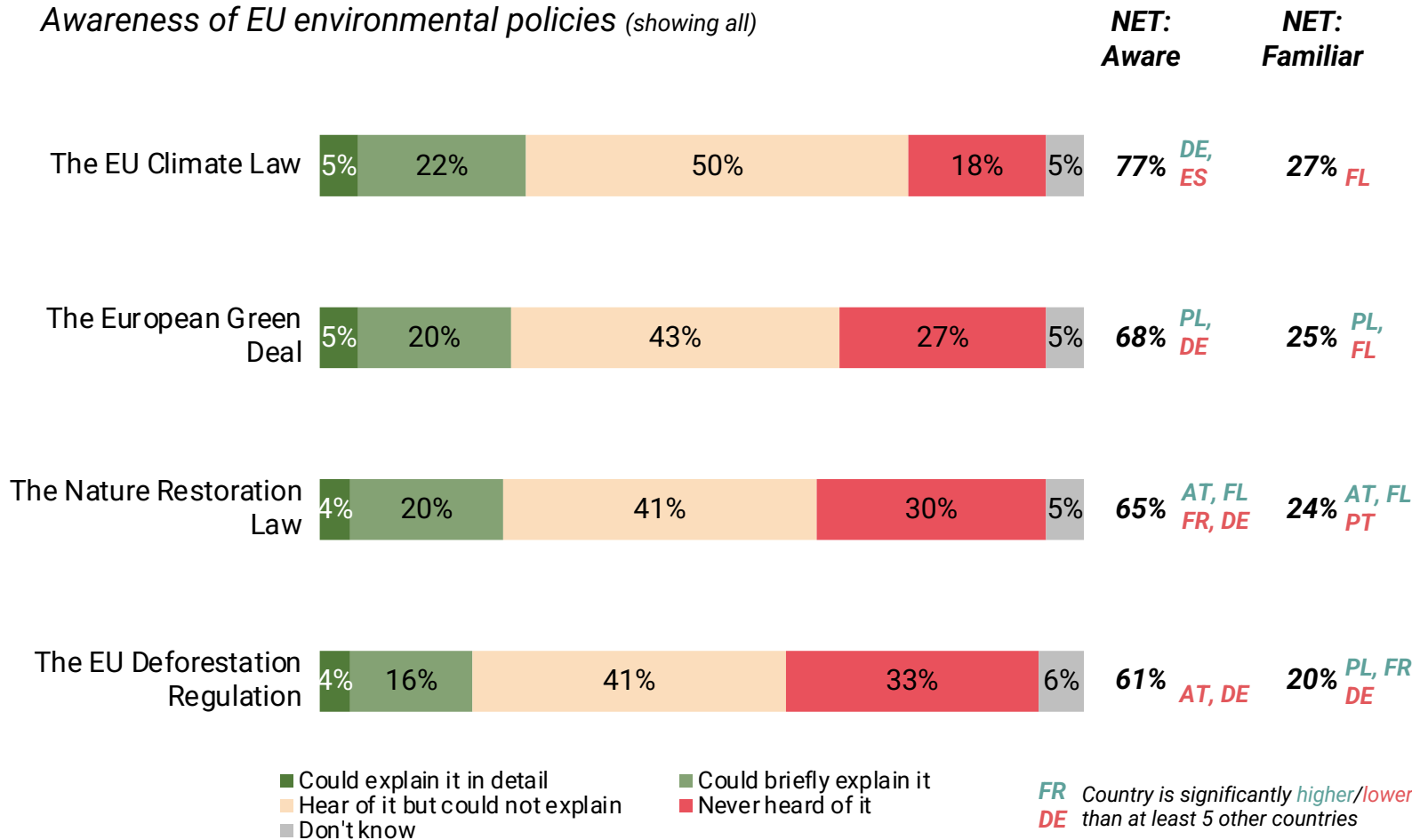
Those who list the environment among their top 3 issues are more likely than those who don't to say governments are doing a bad/terrible job at forest protection (58% vs 47%).

↑ Country is significantly higher than at least 5 other countries
↓ Country is significantly lower than at least 5 other countries



Three in five respondents have heard of the EUDR, but only one in five is familiar with it

Awareness of EU environmental policies (showing all)



The EU Climate Law is the EU environmental policy with the highest awareness among those surveyed (77%), followed by the EU Green Deal (68%), the Nature Restoration Law (65%) and the EUDR (61%).

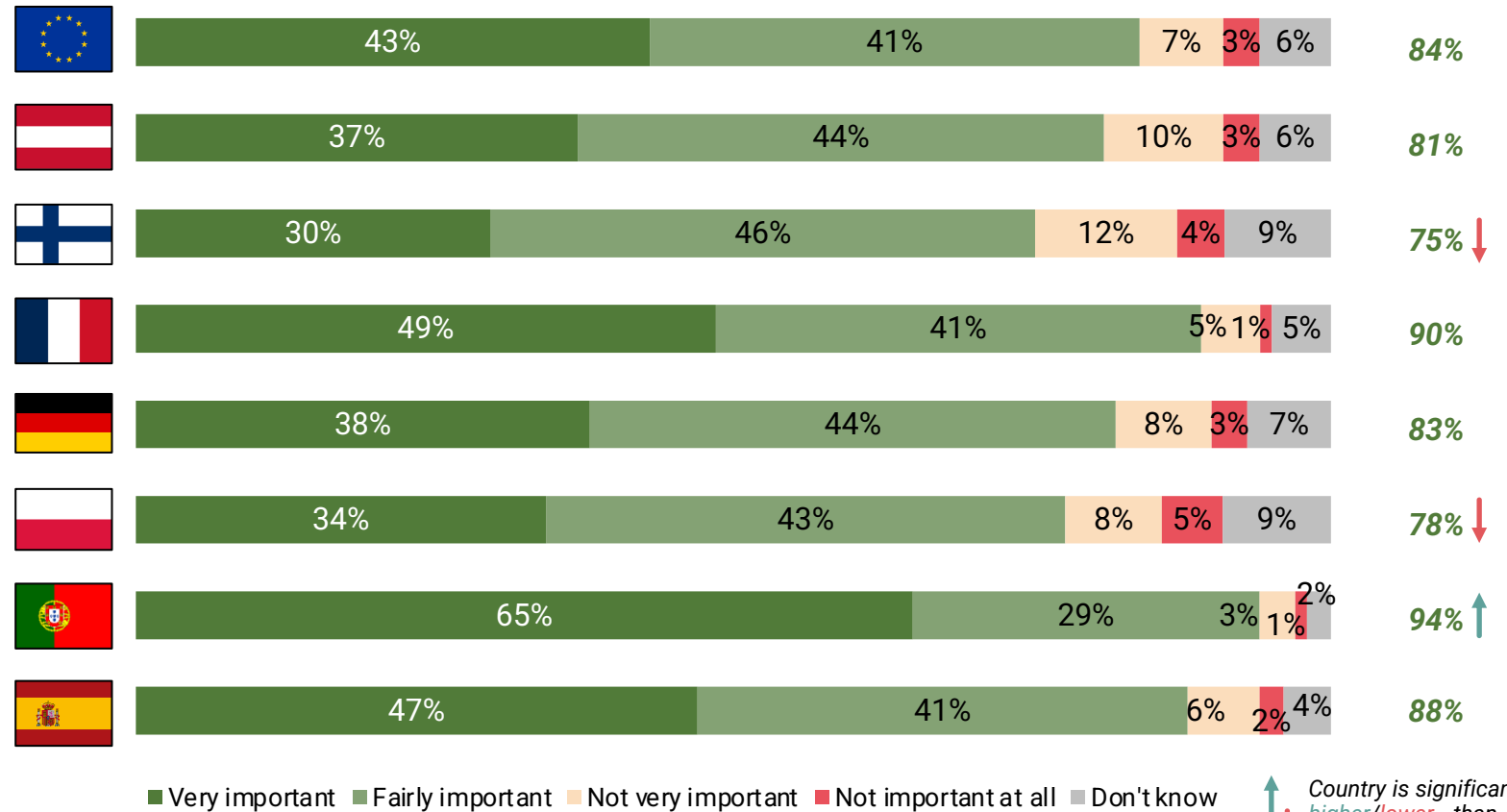
Men are significantly likelier than women to say they are familiar with the EUDR (22% vs 18%).

Over a quarter (26%) of those aged 18-34 say they are familiar with the EUDR, significantly more than those aged 35-54 (20%) or 55+ (16%).



An overwhelming majority of respondents consider implementing the EUDR to be important with over two in five saying it is very important.

Importance of implementing EUDR (showing all)



Finland and Poland are significantly less likely than all other markets to say implementing the EUDR is important. This may be due to feelings that the EUDR threatens the forestry industry of those countries more than others.

Women are significantly likelier than men to find implementing the EUDR important (86% vs 82%).

90% of those who agree that misinformation threatens environmental regulation think implementing the EUDR is important compared to only 65% for those so disagree with this.

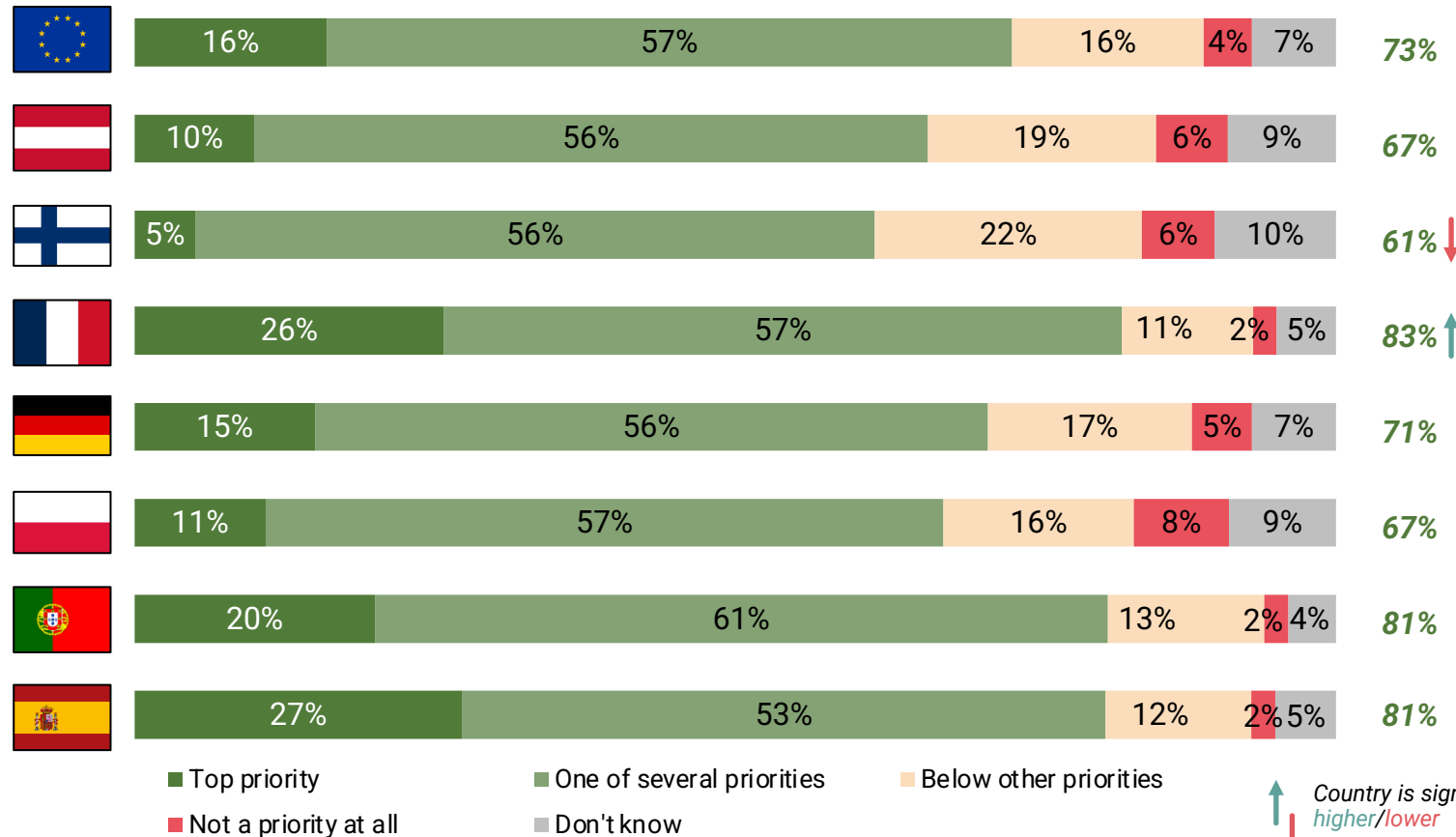
■ Very important
 ■ Fairly important
 ■ Not very important
 ■ Not important at all
 ■ Don't know
 ↑ Country is significantly higher than at least 5 other countries
 ↓ Country is significantly lower than at least 5 other countries



Almost three in four respondents believe the EUDR should be one of the EU’s priority pieces of legislation to implement, though only about one in six believe it should be the top priority.

Prioritisation of EUDR implementation (showing all)

NET:
Priority



In France and Spain, over a quarter of respondents say the implementation of the EUDR should be a top priority (26% and 27% respectively).

Those aged 18-34 are significantly less likely than those older groups to want the EUDR implementation to be a priority (68% vs 72% for 35-54 and 77% for 55+).

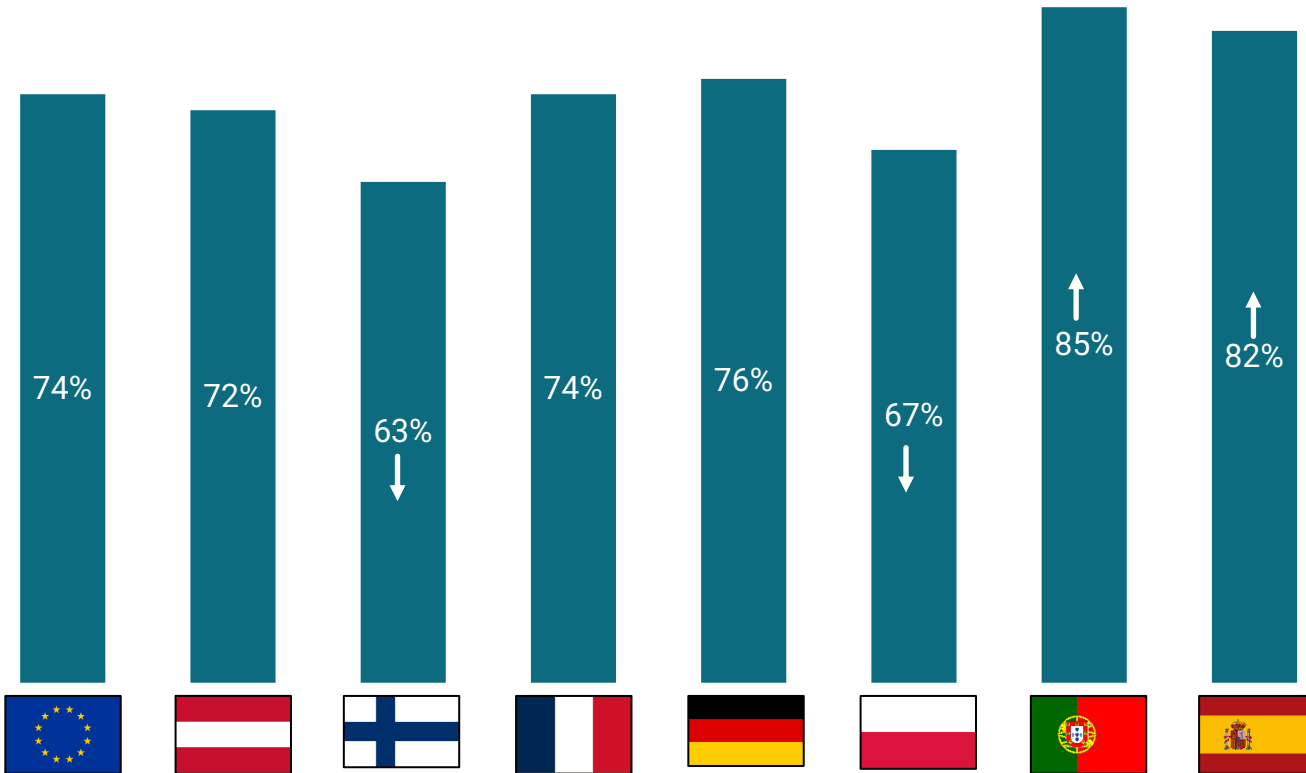
Only 48% of those who disagree that misinformation threatens environmental regulation think implementing the EUDR should be a priority compared to 82% among those who agree with the statement.



Almost three in four respondents support the EUDR protecting all types of forests such as mangroves and wooded savannahs.

Should the EUDR protect all types of forests

(showing % saying EUDR **should** include protection of all types of forests)



Both Portugal and Spain are significantly likelier than all other markets to say the EUDR should protect all types of forests. This is perhaps due to a sense of greater vulnerability regarding the impacts of climate change (e.g. forest fires) being further south than other countries surveyed. Conversely, Finland and Poland are both significantly less likely than all other markets to say this.

Women are significantly more likely than men to want the EUDR to protect all types of forests (77% vs 71%).

Those aged 18-34 are less likely than older age groups to say the EUDR should protect all types of forests (71% vs 75% for 35-54 and 76% for 55+).

Rural respondents show a similar trend compared to suburban and urban respondents (71% vs 76% and 75%).

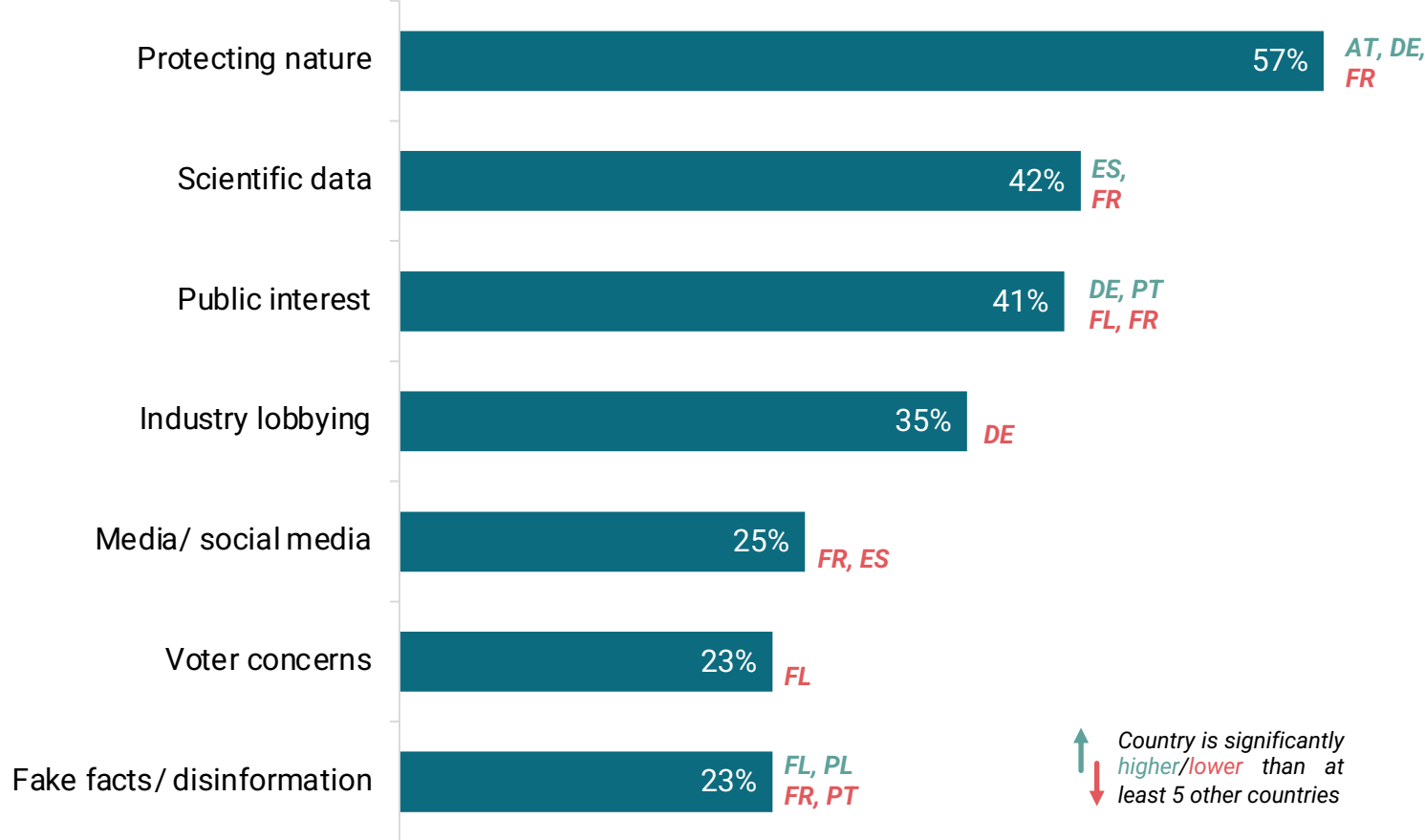
↑ Country is significantly higher than at least 5 other countries
 ↓ Country is significantly lower than at least 5 other countries



Most respondents say environmental policy is guided by protecting nature, but a third also think it is guided by industry lobbying and a quarter say it is by fake facts.

Factors guiding environmental policy

(showing all excl. "other", "none of the above" and "don't know")



34% of those in Poland and 28% in Finland say environmental policy is guided by fake facts compared to 15% in Portugal and 16% in France.

Men are significantly likelier than women to say environmental policy is guided by fake facts (25% vs 21%) or industry lobbying (37% vs 32%).

39% of respondents aged 55+ say industry lobbying is guiding environmental policy compared to 26% for those 18-34 years old.

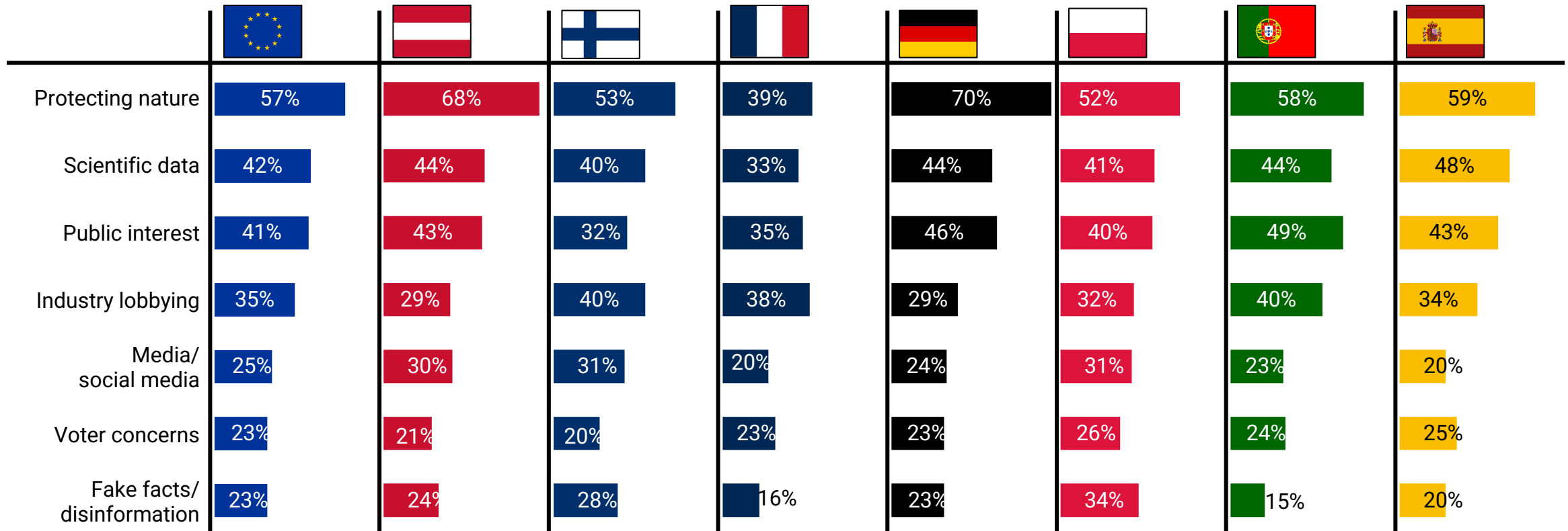
Those who think deforestation is not an important issue are significantly likelier to say fake facts are guiding policy than those who do think its important (27% vs 22%). However, they are significantly less likely than them to say industry lobbying is guiding such policy (27% vs 36%).



French respondents are as likely to say industry lobbying is guiding environmental policy as protecting nature.

Factors guiding environmental policy

(showing all excl. "other", "none of the above" and "don't know")

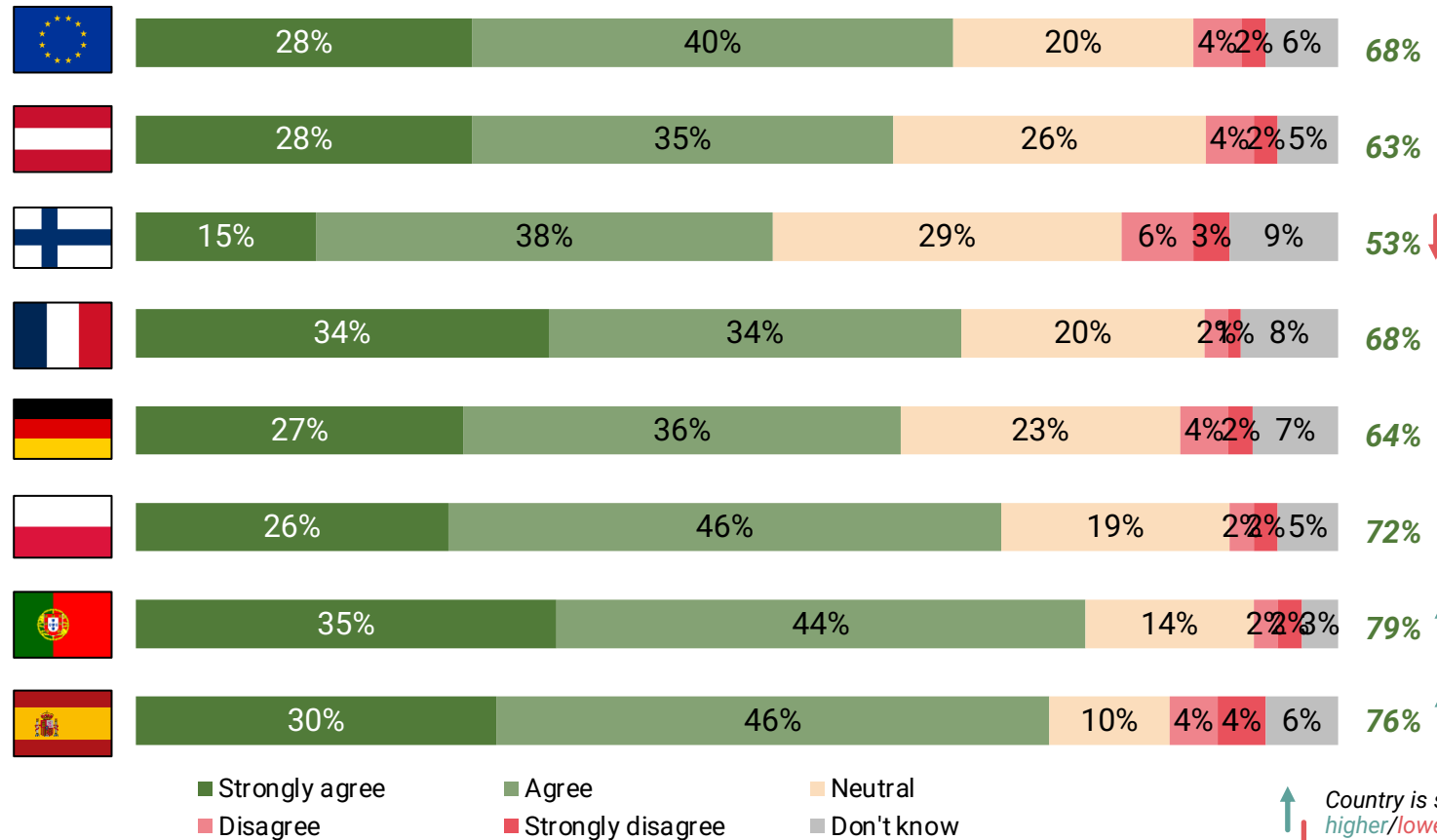




Just over two in three respondents agree that misinformation by industry lobbyists is a big threat to effective environmental regulation and its implementation.

Importance of implementing EUDR (showing all)

NET:
Agree



Only half (53%) of those in Finland agree with the statement compared to three in four in Portugal and Spain (79% and 76%). The share of those agreeing in France is average (68%) but those who strongly agree with the statement is much higher than average (34% vs 28% avg.).

Only 60% of young respondents (18-34) agree with the statements compared to 67% for those 35-54 and 73% for 55+ years old.

73% of those with a tertiary education agree that misinformation by lobbyists threatens environmental regulation compared to 64% of those who have only received secondary education.

Summary

Summary

Even if the environment is not a top issue, it is still important to respondents.

Different perspectives on the environments and the EUDR between EU markets can be attributed to a complex interplay of ecological, economic, cultural, and political factors. Those more concerned with the economy or healthcare (such as Portugal, Finland or Spain) are less likely than other countries to place the environment in their top 3 issues.

However, this does not mean these countries are not concerned by the environment. Portugal gives consistently higher importance to environmental issues than other markets and is likeliest to want stronger environmental regulations (85%). Conversely, Finland which least likely to want this (50%).

Looking at age groups, those aged 55+ are more likely to have the environment in their top 3 issues than those 18-34 (33% vs 28%). Those 18-34 are instead more likely than older groups to list human rights in their top issues (25% vs 18% avg.). However, this doesn't mean younger respondents do not care about the environment either. Those 18-34 are as likely as older age groups to say they want stronger regulations on the issue (62% for 18-34 as well as 35-54 and 55+).

Governments are not seen as protecting forests well; legislation can change minds.

When it comes to global forest protection, almost all respondents recognise its importance in tackling various environmental issues. However, they do not feel that governments are pulling their weight on this issue, less than a tenth (9%) of respondents say they are doing a good job at protecting forests. Half (50%) say they are doing a bad/terrible job.

This is not inevitable, respondents who are familiar with the EUDR are significantly less likely than those unaware of the policy to say governments are doing a bad/terrible job at protecting forests (44% vs 54%).

Poland is the country least likely to feel governments are doing a bad/terrible job at protecting forests (36% vs 50% avg.). This may be due to the familiarity it has with the European Green Deal which is twice as high as the next highest country (50% vs 25%).

Younger respondents who are consistently more aware of EU green policies are also less likely than older groups to think governments are doing a bad/terrible job at protecting forests.

The EUDR has strong awareness and is seen as important legislation that should be prioritised.

Awareness of the EUDR is strong at 61% though that is below other EU green policies. Awareness is lower in Germany (48%) and Austria (51%) than all other markets. Familiarity with the policy is at 20% and reaches up to 25% in France and 24% in Poland.

84% of respondents feel it is important for the EUDR to be implemented and 73% believe it should be at least one of several priorities for the EU. In France and Spain, over a quarter of respondents believe it should be the EU's top priority (26% and 27%).

Younger respondents are also more likely to be familiar with EU policy. About two thirds (67%) are aware of the EUDR and 26% are familiar with it.

While most respondents (57%) think environmental policy is guided by protecting nature (reaching 70% in Germany), there are also 35% who say it is guided by industry lobbying and 23% by disinformation (34% in Poland). Two thirds of respondents (68%) agree that misinformation by industry lobbyists threatens effective environmental regulation.

A large, semi-transparent grey letter 'Q' is positioned on the left side of the slide, partially overlapping the word 'Questions?'.

Questions?

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