

Policy Brief

Debunking the Backlash Uncovering European Voters' Climate Preferences¹

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#GreenTransition
#EuropeanElections
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The notion of a broad green backlash is set to dominate this year's European election campaign. Based on new survey data from more than 15.000 respondents in Germany, France, and Poland, we show that it is largely overblown. A majority of voters still wish for a more ambitious climate policy and would support a raft of concrete measures to bring down emissions. However, supporting pivotal voters in the middle will require a stronger focus on green investment and industrial policy and offsetting measures for effective but unpopular policies like carbon pricing. Parties should not waste the coming months outbidding each other over how to cater to imagined climate fatigue but compete over concrete recipes to green the economy.

The narrative of a widespread green backlash is set to dominate this year's European election campaign. The outgoing European Commission's overwhelming policy focus on climate – a familiar story goes (e.g. [here](#) and [here](#)) – has left voters increasingly disillusioned with the downsides of the economic transformation. So, when Europeans head to the ballot box this summer, they will turn towards politicians that promise to scale down EU climate ambitions, pause green regulation, or pivot to different topics altogether. This narrative seems plausible. It fits what we see in party manifestos, farmers' protests, and the final political rows within the outgoing European Parliament. **However, what we see in our data doesn't really bear this out.**

To get a comprehensive understanding of voters' climate preferences in the run-up to the elections, we surveyed 15,000 people in Germany, France, and Poland in December 2023. We used large representative samples, measuring preferences on more than 40 specific climate policies and different policy design options, and leveraging state-of-the-art survey experiments. Three findings stand out.

- **First, there is no widespread backlash against climate policy.** A majority of voters in these three countries are concerned about climate change, do not think climate regulation will cost them their jobs, and still wish for more ambitious climate policy.

¹ We thank Ana Sofia Gómez Sanchez for her excellent research assistance and the German Federal Ministry of Labour and Social Affairs as well as the Swiss National Science Foundation for their financial support.

- **Second, policy design matters, especially for the pivotal middle.** Left- and green-leaning voters support almost all climate policies. Supporters of far-right parties reject nearly all of them. Things are more complicated for voters of liberal and conservative parties. While this group supports ambitious climate policy in general, it is sceptical about a raft of concrete measures that would impose direct costs on them as individuals. Bringing these voters on board will require a stronger focus on green industrial policy and offsetting measures for effective but unpopular policies like carbon pricing.
- **Third, there is political scope for joint investment at EU level.** Most voters are hesitant to support green industrial policies in other member states with national subsidies. However, they are surprisingly open to establishing a new EU-wide investment instrument, especially if it combines climate goals with other priorities, above all, economic security.

Parties should, thus, not waste the coming months outbidding each other over how to best cater to perceived climate fatigue. For everyone but radical right voters, the relevant question remains how to find the right recipe to fight climate change. Our results show that developing effective packages with broad support is all but trivial. However, if parties decide to dodge this challenge altogether by simply watering down their green ambitions, they misread what voters want.

Methodological background (Box 1)

Our findings are based on three online surveys we conducted in Germany, France, and Poland. Each country sample consisted of approximately 5,000 respondents broadly representative of age, gender, education, and region. We fielded the surveys in November and December 2023. The relatively large sample size for each country allows us to study not only average opinions across the population as a whole but also investigating the preferences of subgroups of voters. In the following, we will discuss the main findings. However, for those interested in more specific questions and subgroups of some of our main items, we have prepared an online tool to delve further into the data.

1 No general backlash against climate policy

When President Ursula von der Leyen took office in 2019, the European Parliament had just been elected amidst a rising tide of climate strikes and broad calls for more ambitious policies to accelerate the transition to a greener economy. Five years and a European Green Deal later, protests regarding climate action are again shaping the election debate. However, this time, demonstrators are not pushing for more ambitious climate legislation but for less. Farmers across the Union are blocking city centres and public highways to give vent to their anger with environmental regulations. And more and more policymakers and parties believe voters are so frustrated with climate legislation that they have become [hesitant to endorse Green Deal initiatives](#), and instead call for a [moratorium](#) or even a roll-back of green regulation. So, has the tide of public opinion turned against the EU's climate ambitions?

Majorities in all three countries still support ambitious climate policies

Our survey results do not support this notion. Far from it: most respondents in Germany, France, and Poland still think that policymakers should do more to fight climate change. Asked whether existing climate policies have already gone too far or should become more ambitious, a majority - 57% in France, 53% in Germany, and 51% in Poland – favour further action (see Figure 1).²

² Between 16 and 20% of respondents in these countries neither express support for nor opposition to ambitious climate policies. This may suggest that a significant proportion of the population lacks a strong stance on this issue, possibly due to insufficient interest or knowledge (see also Dechelezelepretre et al. 2022).

Notably, this majority does not only hold for the supporters of green and left parties. In fact, proponents of increased climate ambition outnumber the opponents in almost all political affiliations in the three countries, including voters of liberal and conservative parties. While supporters of the latter tend to be more divided on the issue, 47% of those that plan to vote for the German Christian Democrats in the European elections, 57% of La République en Marche! supporters in France and, 62% of the Civic Coalition in Poland still think that politicians should do more to combat climate change.



Figure 1: General attitude towards climate policy in Germany, France, and Poland. Answers to the question: On a scale from 0 to 10, do you think that politics should do more to combat climate change (0) or has it already gone too far (10). Skeptics <5; Undecided = 5; Supporters > 5.

This broad support for more ambitious climate policy is mirrored by evidence that most people are concerned about the effects that climate change will have on their lives. In Germany and Poland around 60% of those surveyed state that they are already negatively affected by climate change or expect to be so in the next five to ten years. In France this proportion even reaches as high as 80%, likely exacerbated by the severe droughts and acute drinking water shortages [in recent years](#). In contrast, about 16% in Poland and Germany and only 9% in France think that climate change will not turn into a problem for their households (see Figure D1 in Annex).

The proportion of sceptics has not increased markedly and is mainly driven by ideological factors

Despite this general support, there is a sizeable minority against more ambitious climate policies in all three countries. It amounts to roughly 30% of the population in Germany and Poland and slightly less in France (23%). However, two things stand out here.

First, the group of opponents seems relatively stable over time. Despite the polarised debate on climate issues at EU level and, for example, in Germany, the narrative of a massive shift towards scepticism in recent years does not hold true. Instead, earlier studies in Germany using similar questions in 2021 and 2022 (GLES, 2021; Mercator, 2023) observed similar patterns. Eurobarometer surveys using related questions also show remarkably stable outcomes.

Second, there is little evidence that opposition to climate action is rooted in hard material concerns. We do not find a systematic link between the notion that climate policies have gone too far and factors indicating economic self-interest, for example income, job status, or industry of employment. Instead, preferences are mostly driven by ideology, with strong opposition among supporters of far-right parties. In Germany, for instance, 39% of dissenters align with the Alternative for Germany (AfD), in France, a significant portion backs parties like Rassemblement National and Reconquête (43%), and in Poland, Law and Justice (PiS) and Confederation voters are over-represented (51%).³ The fact these parties treat climate policy increasingly as an ideological battleground suggests that partisanship has become the central driver of scepticism towards climate policy.

2 How to bring down emissions matters, especially for conservative and liberal voters

Abstract support for climate policy, thus, remains high. The key political question is whether this also translates into support for concrete policies. Our survey results show two things. First, mainstream party voters still support a range of climate measures over policy inaction and prefer investment-oriented and green industrial policies as well as targeted regulatory measures over broader bans and price-based measures. Second, this distinction matters most for rallying support for climate initiatives from voters of liberal and conservative parties (see Box 2 for methodological details).

Methods Box 2: Pairwise Comparison Experiment

We conducted a forced-choice pairwise comparison experiment to estimate the preference order of citizens with regards to a wide range of climate policies. Respondents were presented with a series of randomly generated head-to-head pairs of policies and asked to select their preferred choice or indicate if they were indifferent. The experiment included 40 different climate policies encompassing a wide range of policy domains (e.g., transport, energy) and policy instruments (e.g., prices, bans, standards).

Each respondent was randomly presented with five different pairs of policies. Based on this data, we used a Bradley-Terry Model to scale the different policies based on their relative popularity. We estimate the popularity of the preferences relative to a baseline category which proposed to enact no additional climate policy measures.

The graphs presented below summarize the results of this experiment. The dashed lines indicate the baseline scenario. All policies with a positive estimate are favoured by respondents in comparison with this baseline (i.e., situated to the right of the vertical dashed line). Conversely, policies with negative estimates are disfavoured by respondents compared to the status quo (i.e., positioned to the left of the vertical dashed line). We report confidence intervals from quasi standard errors meaning that it is not only possible to compare the estimates of every policy relative to the baseline but also between different policies.

³ One exception here is that voters who think they are at risk of losing their job as a result of the green transition tend to be significantly more sceptical. However, this subjective assessment is also influenced by partisan position (i.e. AfD voters are more concerned about losing their jobs even when we hold factors such as income and sector of employment constant) and these fears are not very prevalent in our sample. Only 12% in Germany, and 20% in Poland and France indicate high levels of concern.

Broad support for climate investments and green industrial policies

Voters still favour a wide range of concrete policies over inaction (see Figure 2). Amongst the most popular options are government investments in green infrastructure like the electricity grid and public transport. Similarly, voters generally support green industrial strategies such as subsidies to help energy-intensive industries decarbonise or support the production of clean tech such as solar panels and wind turbines. Some targeted regulatory measures are also popular. For instance, there's notable support for implementing green energy standards in power generation and industry and we also find backing for bans on private jets and – except for Poland - short-haul flights.

On the other hand, average voters are critical of a lot of broader bans and price-based measures. Banning combustion engine-powered cars, for example, constitutes the most unpopular measure in all three countries. Similarly, regulatory curbs on gas and oil heaters are highly disliked, especially in Germany and Poland. Voters are also sceptical of carbon pricing, echoing findings from earlier studies. Raising the price tag on emissions is especially unpopular for housing and transport. However, at least in Germany and Poland, this opposition extends to carbon pricing in the industry and power sector.

The pattern that green investment and industrial policies are more popular than broader bans and price-based measures is strikingly similar across the trio of member states. However, there are some notable differences (see Figure 2): For example, French respondents prefer a wider set of climate policies over inaction than voters in Germany and Poland. This might be linked to the fact they are, on average, more worried about climate change and France's stronger reliance on nuclear energy that makes some measures targeting fossil fuels less relevant for the French electorate. Also, the heated debate on new gas and oil heating standards in Germany seems to have rubbed off on public opinion. At the very least, voters in Germany seem more critical of public support for heat pump manufacturers and green heating standards in new buildings. Overall, however, the similarities prevail.

Finding the right policy mix matters most for conservative and liberal parties

There are, however, substantial differences across ideological camps. Voters of green and left parties support almost all climate measures over policy inaction. Like the average respondent, these voters prefer public investments, green industrial policy and targeted regulation. However, they also support relatively unpopular measures such as higher carbon prices for industry and the energy sector. Most importantly, there is almost no policy these voters reject if the alternative is to avoid additional measures to fight climate change. Left and green parties thus have lots of room to develop ambitious climate policy without running into opposition from their voters.

The opposite holds for supporters of far-right parties. This part of the electorate prefers sticking with the status quo to almost any additional measure. This is especially true for supporters of the AfD in Germany. Similarly, it is hard to find a climate policy that is backed by Confederation voters in Poland. Interestingly, the pattern is less pronounced for Rassemblement National and PiS. Their broad electoral reach means these parties also find support among voters who would back a range of green investments, industrial policies, and regulatory measures.

Differentiation of policies is most relevant for conservative and liberal parties. A relative majority still wants to see greater ambition to fight climate change. But the scope for concrete measures that win backing is considerably narrower than for left-leaning voters. While they would welcome some climate policies such as renewable energy standards, public investments in green infrastructure, and green industrial policies, they would also strongly prefer sticking with the status quo if the alternative is measures like bans in the transport sector and higher emission prices. Gathering support from this demographic is, thus, tricky. This makes designing the policies correctly all the more important.

Estimated 'Popularity' of Climate Policies in Germany, France, and Poland

Relative to Baseline: No additional measures

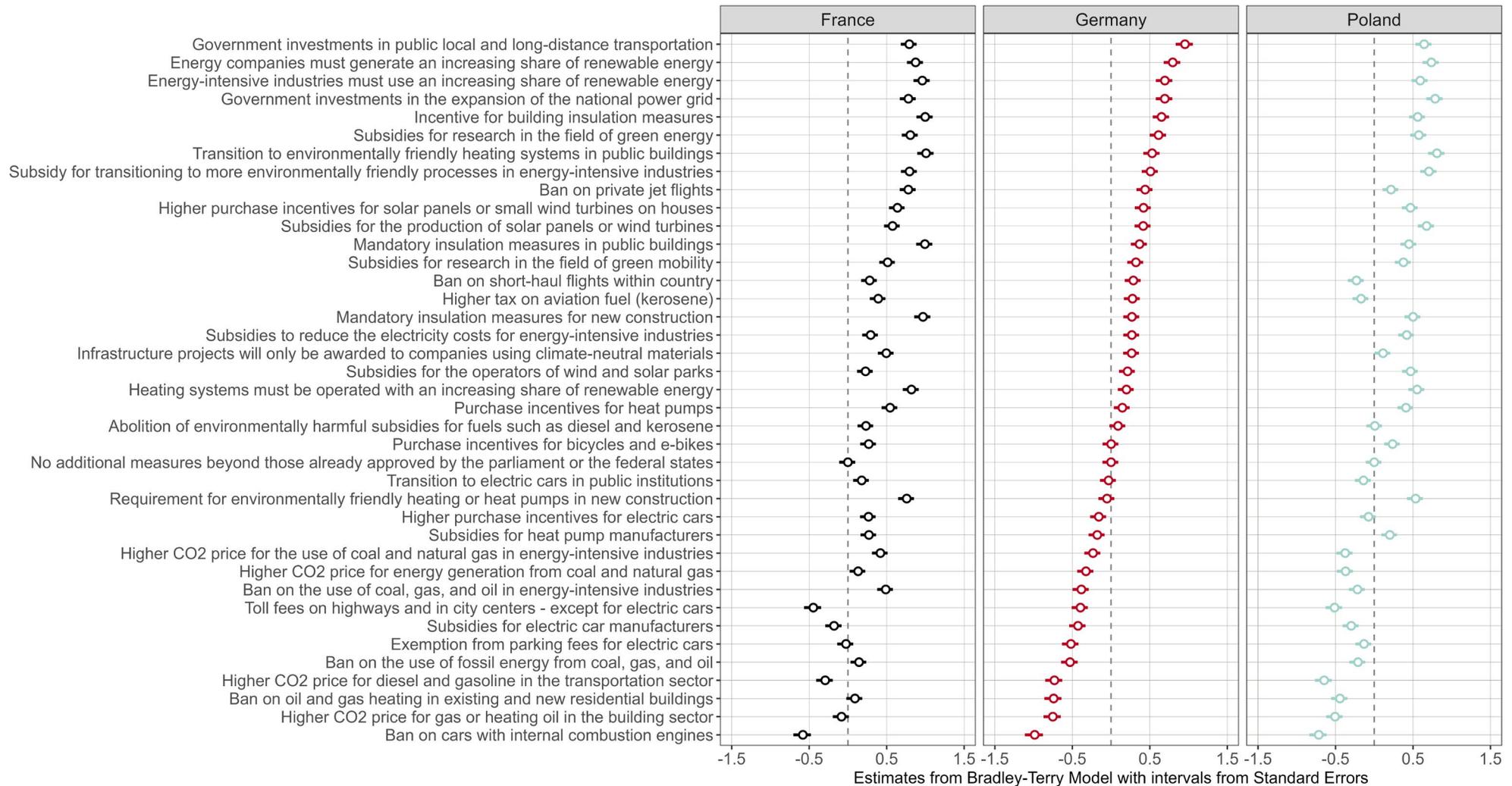


Figure 2: Estimated popularity of different climate policies in Germany, France, and Poland relative to baseline “no additional measures beyond those already approved”.
For methodological details see Box 2.

Estimated 'Popularity' of Climate Policies in Germany

Relative to Baseline: No additional measures

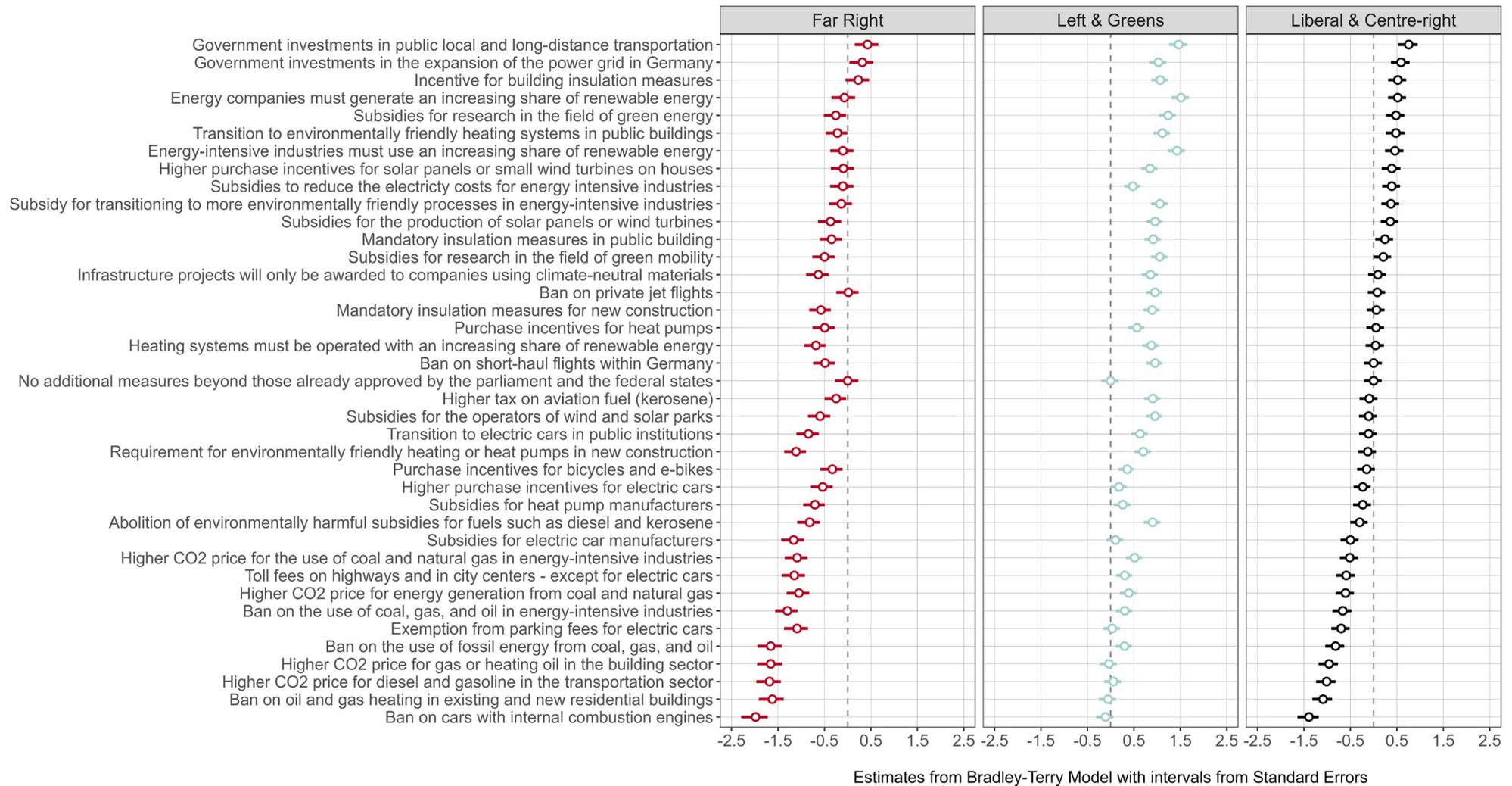


Figure 3: Estimated popularity of different climate policies relative to baseline “no additional measures beyond those already approved” across party groups in Germany. For methodological details see Box 2. For results for France and Poland see Figures A2 and A3 in the appendix.

3 How to finance popular policies and reduce opposition towards unpopular ones

Our findings so far show two things. First, a lot of popular climate policies are fiscally costly. A key question is, therefore, how voters think that green industrial policies should be designed and, especially, financed in practice. Second, some policies necessary to fight climate change are unpopular. This begs the question how carbon pricing systems in particular can be devised to garner more support from voters? Our survey allows us to study these questions in more detail (see Methods Box 3).

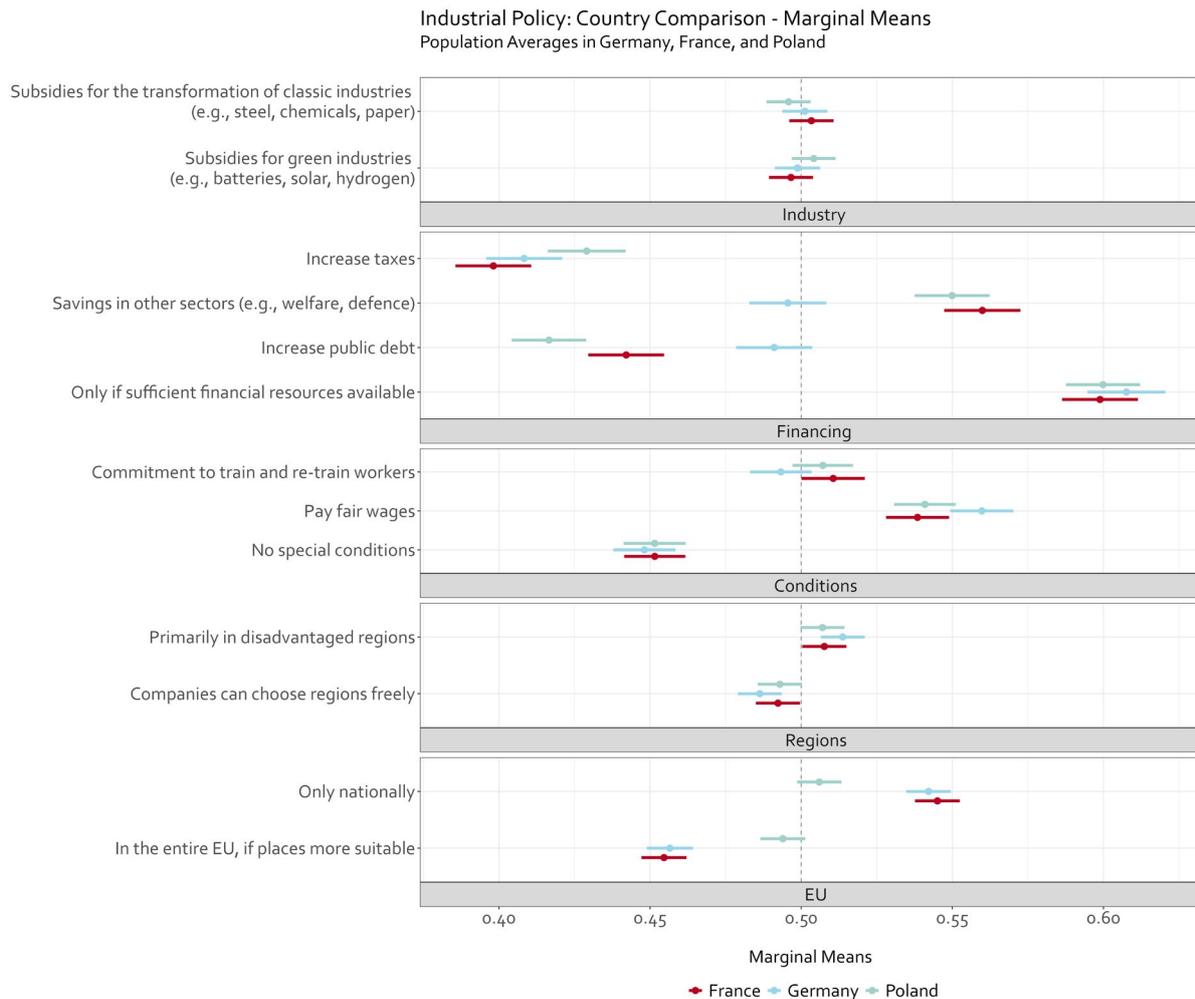


Figure 4: Public preferences for the design of green industrial policies in Germany, France, and Poland. Estimates on the right-hand side of the dashed line indicate that attribute leads to higher support for the policy; estimates on the left-hand indicate that attribute leads to lower support. Attributes for which estimates cross the dashed line increase neither support nor opposition towards policy. For methodological details see Box 3.

Popular industrial policies come with strings attached and should not be financed through taxes

When it comes to designing industrial policies, voters, first of all, do not seem to care about their sectoral focus. Whether support goes to new cleantech industries or helps traditional sectors decarbonise has no discernible impact on public support. Moreover, voters think that public money should come with strings attached. Industrial policies are more popular when they impose conditions on companies forcing them to pay fair wages or invest in poor regions (see Figure 4). Furthermore, voters gravitate towards options that confine national subsidies to domestic projects, at least in Germany and France. In contrast, left and conservative voters in Poland are more open to supporting investments throughout

the EU if conditions elsewhere in the single market are more suitable (see Figures C1 – C3 in the appendix).

A key question about many of the green subsidies voters like is, however, how to finance them. Unsurprisingly, our results show that voters would prefer packages that are financed through existing surplus revenues. In reality, there are, of course, rarely surpluses in public budgets. So, where could additional resources come from? Raising taxes to finance green subsidies is the most unpopular option across countries and party lines. But, especially in France and Poland, freeing public money for green investments through cuts in other areas of the public budget would be an option in the eyes of voters. In Germany, public opinion on the issue is more divided. While conservative and liberal voters support financing through budget prioritization, voters of left parties would prefer raising money for green industrial policies through more government debt.

Methods Box 3 - Conjoint Experiments

When citizens evaluate investment packages, they need to trade off attributes of such packages on different levels. They might have preferences on which industries receive support (i.e., traditional industries or clean tech), on how these investments are financed (e.g., by an increase in taxes or savings in other policy areas), on whether these investments should be linked to certain conditions (e.g., paying fair wages or creating jobs in a structurally weak region) and on whether these investments should be implemented at national or EU-level.

To capture this multidimensionality, we conducted a survey-based conjoint experiment. This allows us to understand how citizens make these trade-offs when evaluating such complex investment packages. Participants were presented with two packages containing the aforementioned attributes and asked to choose their preferred option. By analyzing these choices, we can determine the relative importance of different attributes and how they influence respondents' decision-making.

Below we present the marginal means for all conjoint feature levels included in our design. By definition, marginal means in forced choice conjoints average at 0.5 with values above 0.5 (i.e., on the right side of the dashed line) showing that a feature level, on average, increases the favourability of a policy package and values below 0.5 (i.e., on the left side of the dashed line) showing a decrease in favourability.

Carbon pricing becomes more popular when revenues are redistributed

Even if industrial policies are well designed and amply funded, Europe will not reach its climate goals without carbon pricing. So, how can this unpopular tool be designed to garner more support? For one thing, voters in all surveyed member states are more supportive of carbon prices if they do not affect them directly. Accordingly, raising the costs of emissions in industry or aviation is more popular than raising emission prices for the transport sector, gas and heating oil, or environmentally harmful groceries like meat (see Figure 5).

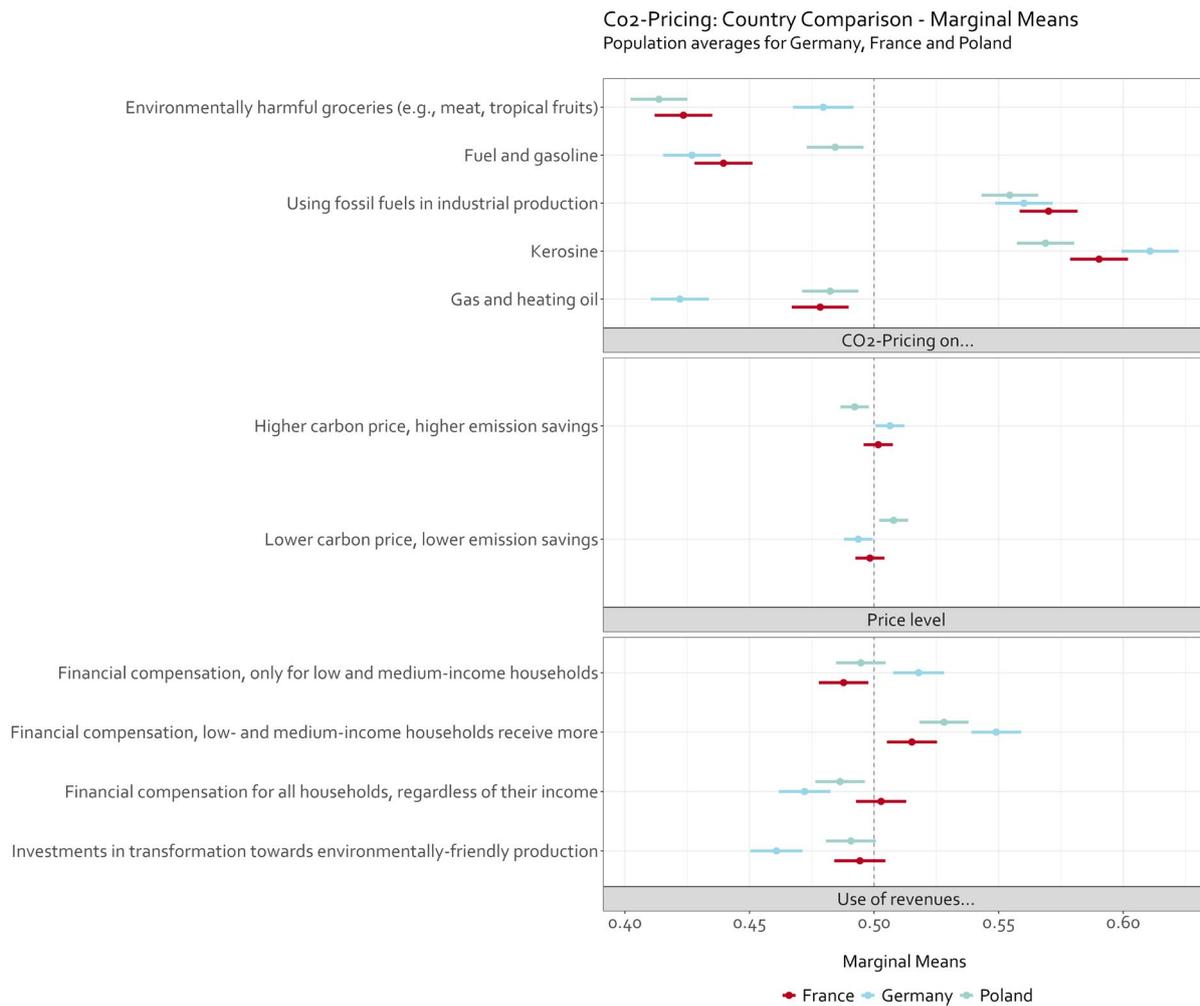


Figure 5: Public preferences for the design of CO₂-Pricing in Germany, France, and Poland. Estimates on the right-hand side of the dashed line indicate that attribute leads to higher support for the policy; estimates on the left-hand indicate that attribute leads to lower support. Attributes for which estimates cross the dashed line increase neither support nor opposition towards policy. For methodological details see Box 3.

The obvious issue is that from a climate perspective heavily polluting sectors like housing and transport cannot simply be spared from carbon pricing. **Our results show that using emission revenues for compensation could be a possible way to enhance citizens' approval.** Crucially, this should not come in the form of lump sum payments. Instead, a progressive system could reduce opposition across countries and party lines. A mechanism that provides everyone with some form of compensation, but privileges poor and medium-income households constitutes the most popular option in our survey.⁴ So, while measures that directly affect voters like higher carbon prices are generally unpopular, policymakers can find ways to garner more support if they design them in ways that takes away some of their economic sting.

⁴ Supporters of mainstream parties in France and Poland rate packages that use emission price revenues to support the decarbonization of the economy relatively positively. Given the stronger rejection of financing green investment through government debt in this country, this could provide an important source of revenue. However, even in these countries, progressive redistribution remains the most popular option (see Figures B2-3 in the appendix).

4 European investment packages may gain support if they pursue the right priorities

The fact that voters prefer tackling climate change through the public purse also poses questions for the EU. Its climate policy traditionally focuses mostly on the regulatory side and Europe currently lacks permanent resources to finance this strategy at EU level. Not all member states have the fiscal space to do it on their own, and national solo efforts—especially in industrial policy—run the risk of fuelling economic divergence and unfair competition in the single market. Some experts and political parties have, therefore, argued that Europe needs more financial resources for joint investments. A crucial question for the coming months is whether voters would support this.



Figure 6: Preferred public priorities of potential EU investment instrument in Germany, France, and Poland. Respondents were asked to distribute 100 points to the listed potential policy objective for an EU climate investment fund.

Our results provide grounds for cautious optimism. The previous section showed that most respondents would rather confine national subsidies to their own countries. So, in a context in which voters think mainly about national programmes, they do not want their money going to support companies in other member states. However, when we ask respondents whether they would support a joint EU climate investment package that follows their own priorities, we do not find much opposition. Only 28% in Germany, 32% in France, and 27% in Poland would reject such an instrument. This holds true even though we remind voters that this would mean that national taxes could go to projects outside their countries. **Critically, support reaches beyond the electorate of parties that traditionally push for EU fiscal integration.** In Germany, for example, 72% of voters of the Greens, 61% of SPD supporters but also 51% of CDU backers would support such a package

However, our findings also show that voters think that a common EU investment instrument should pursue goals beyond fighting climate change. After the pandemic and the Russian war on Ukraine voters in Germany and France, for example, prioritise resilience and the idea of curbing the EU's economic dependence vis-à-vis countries like China over finding the most efficient ways to reduce emissions. Similarly, voters in Poland still think that common investments should first and foremost aim at reducing economic disparities across member states. **To build broad support for strengthening the EU's green spending power, policymakers will, thus, have to make the case that climate policy can serve other goals such as economic resilience and convergence.**

Conclusion and lessons for the European elections

In summary, there are three lessons that European policymakers should take from our analysis. **First, taking common armchair diagnoses about a green backlash at face value would be a mistake.** Even after five years of a heavy European policy focus on climate regulation, and despite high inflation, a tough economic context and pressing security issues, most voters would still support a more ambitious climate policy. A European election campaign in which parties try to outbid each other over who scales down their climate ambitions the most would simply misdiagnose where voters stand on the issue.

The central question of the coming months should, instead, be how to develop the European climate policy mix going forward. This is especially relevant to rallying support from pivotal voters in the middle. Two results stand out here. First, **a stronger focus on green investments and industrial policy would be popular.** Of course, this poses tricky questions on financing and the proper division of labour between the national and EU levels. These issues are knotty but not impossible to overcome. **Second, policymakers will also have to implement unpopular policies such as carbon pricing to reach European climate goals. For that, compensation is key.** Voters across countries and party lines are less opposed if governments help those hit hardest by these measures.

Finally, how parties position themselves towards climate policies matters. Ideology and partisanship greatly impact climate policy opinions. That also means voters' positions on the issue may well be malleable. This makes the coming election months decisive. Mainstream voters still care about climate policy. If parties compete over the best recipes on how to fight climate change, explain trade-offs, and try to convince them of necessary but unpopular steps they will take notice. **If parties, on the other hand, play the tune of a minority of procrastinators and obstructionists, they could end up creating the very climate fatigue they are trying to cater to.**

Appendix with additional figures

Annex A: Estimated 'Popularity' of Climate Policies

Estimated 'Popularity' of Climate Policies in France

Relative to Baseline: No additional measures

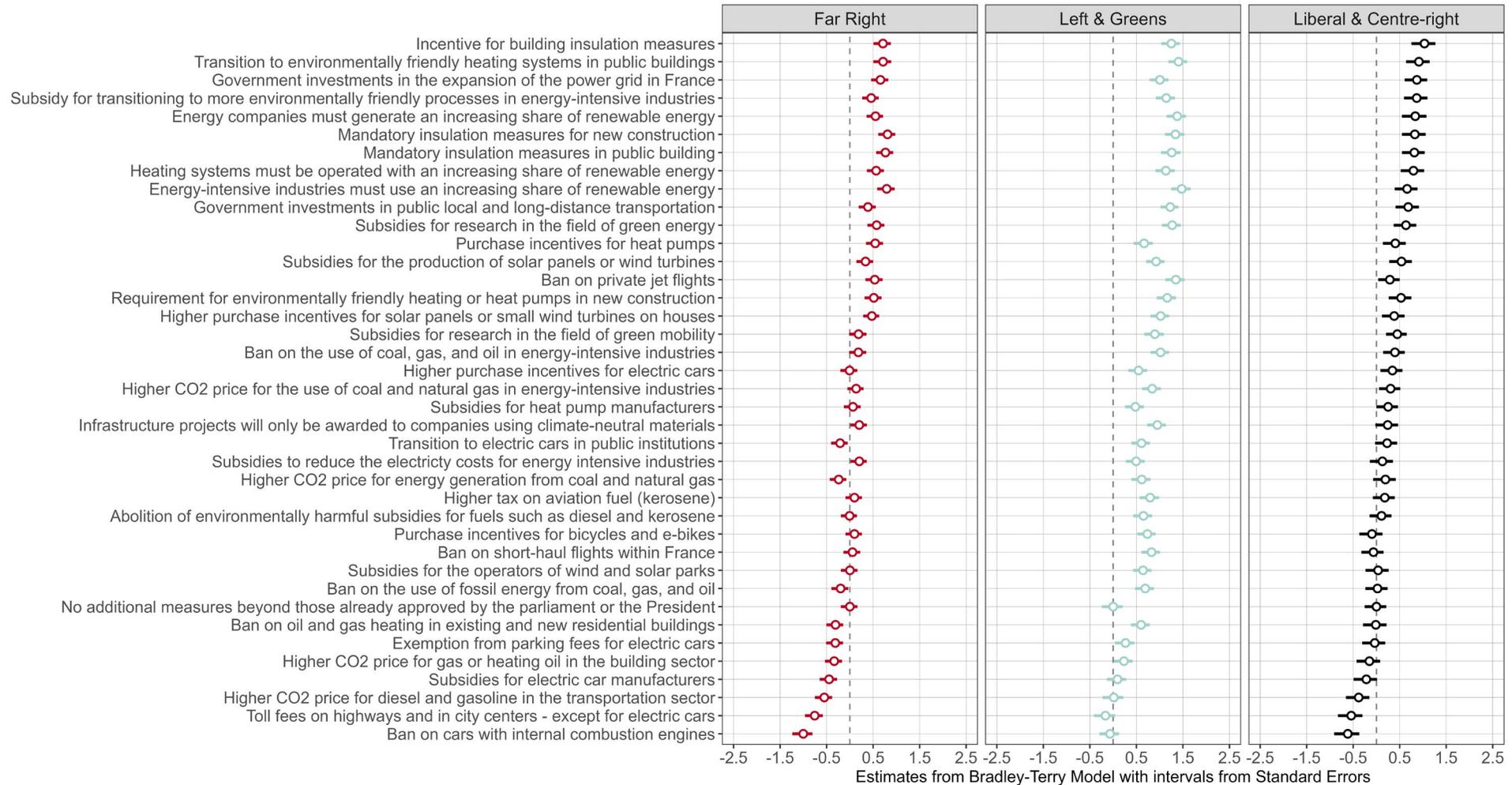


Figure A2: Estimated 'Popularity' of Climate Policies in France

Estimated 'Popularity' of Climate Policies in Poland

Relative to Baseline: No additional measures

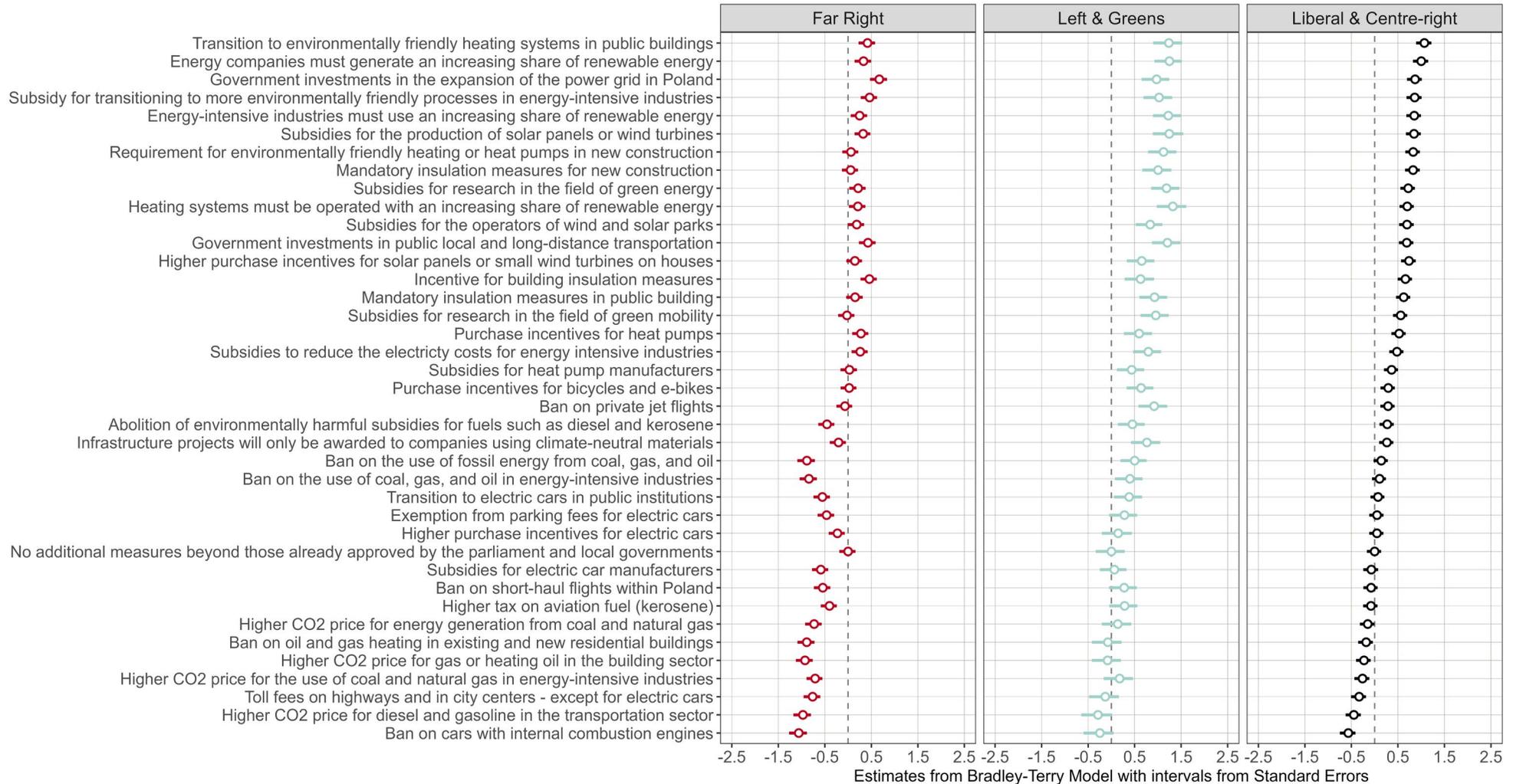


Figure A3: Estimated 'Popularity' of Climate Policies in Poland

Annex B: CO2-Pricing

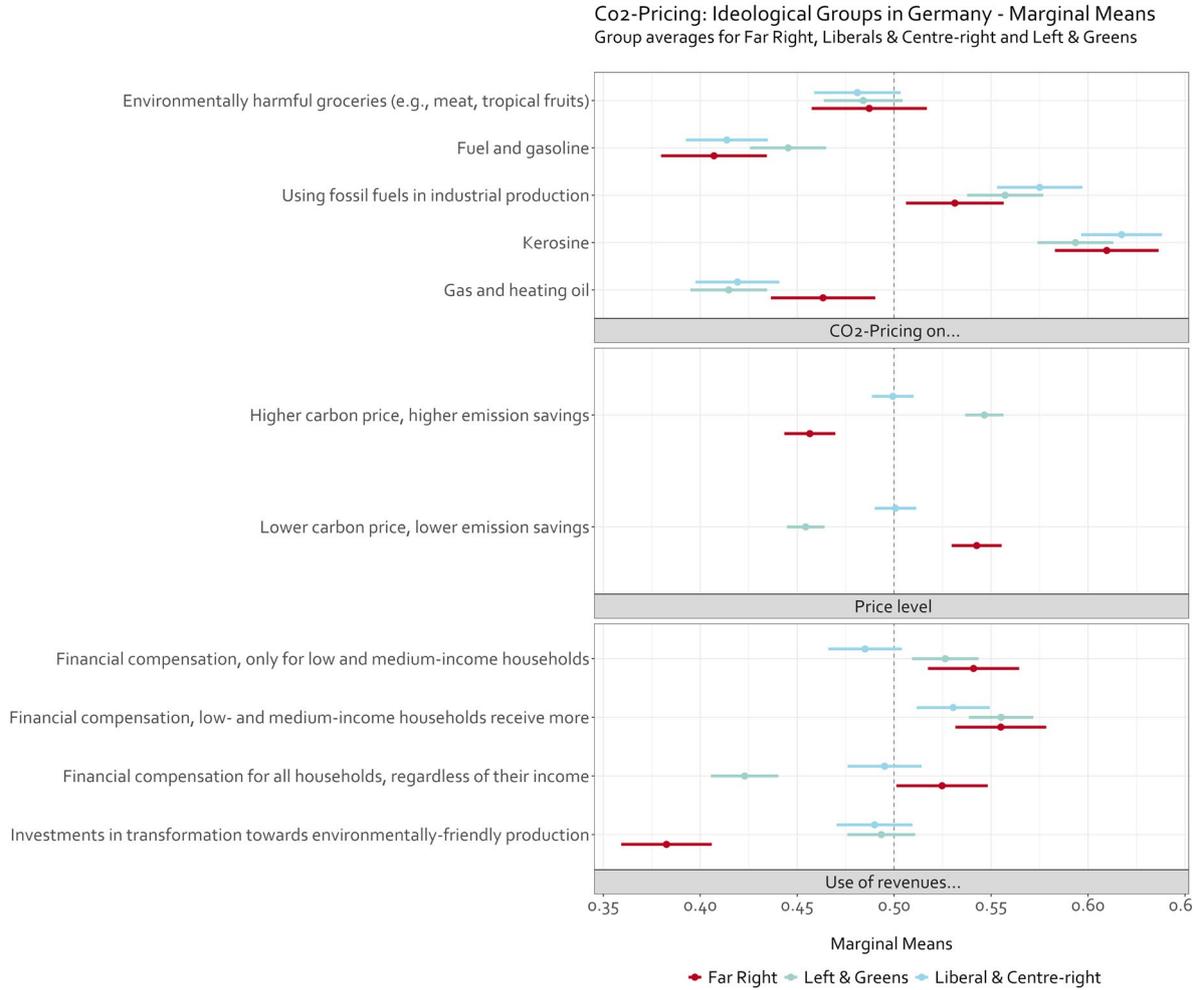


Figure B1: Public preferences for the design of CO2-Pricing across party lines in Germany

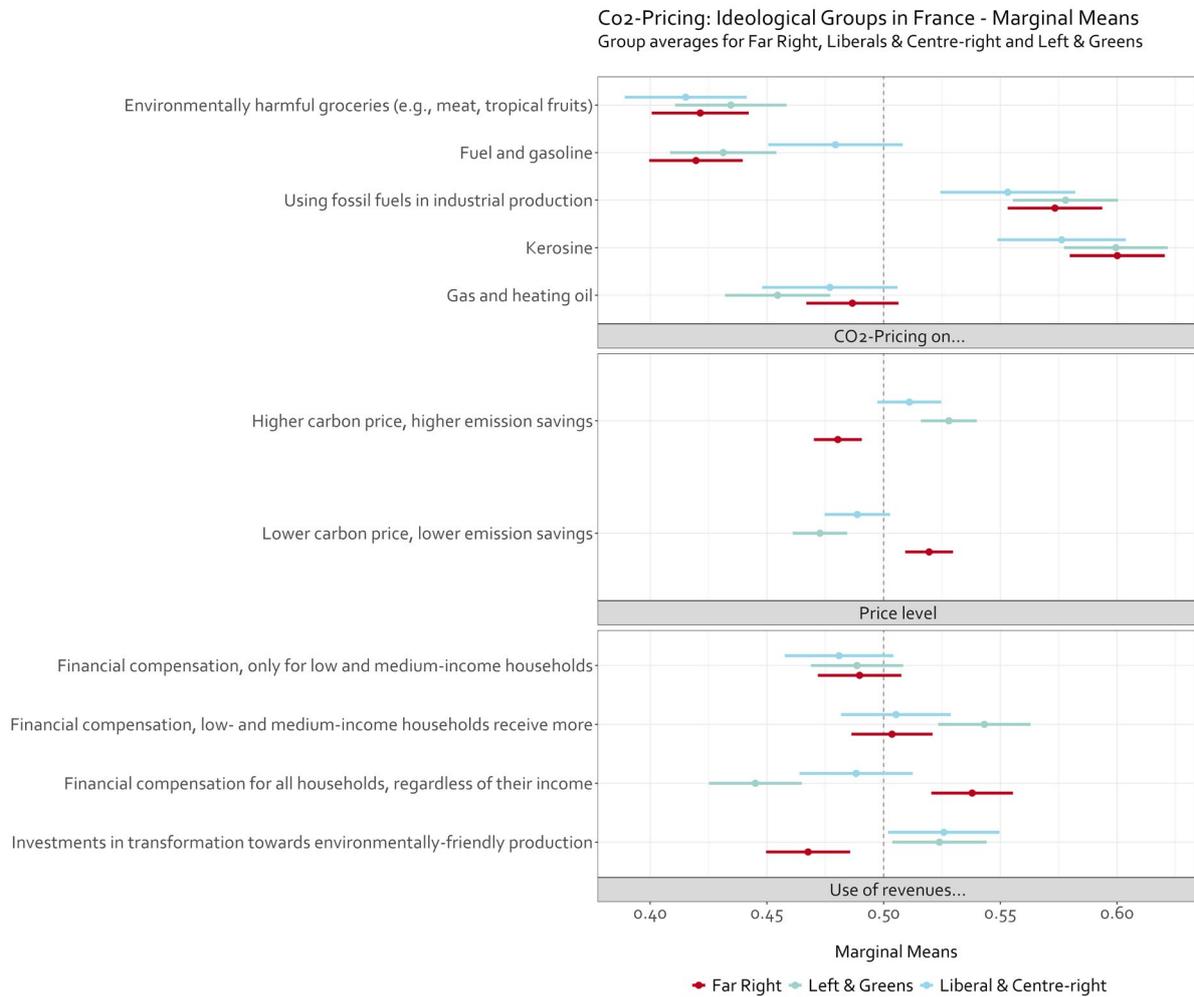


Figure B2: Public preferences for the design of CO₂-Pricing across party lines in France

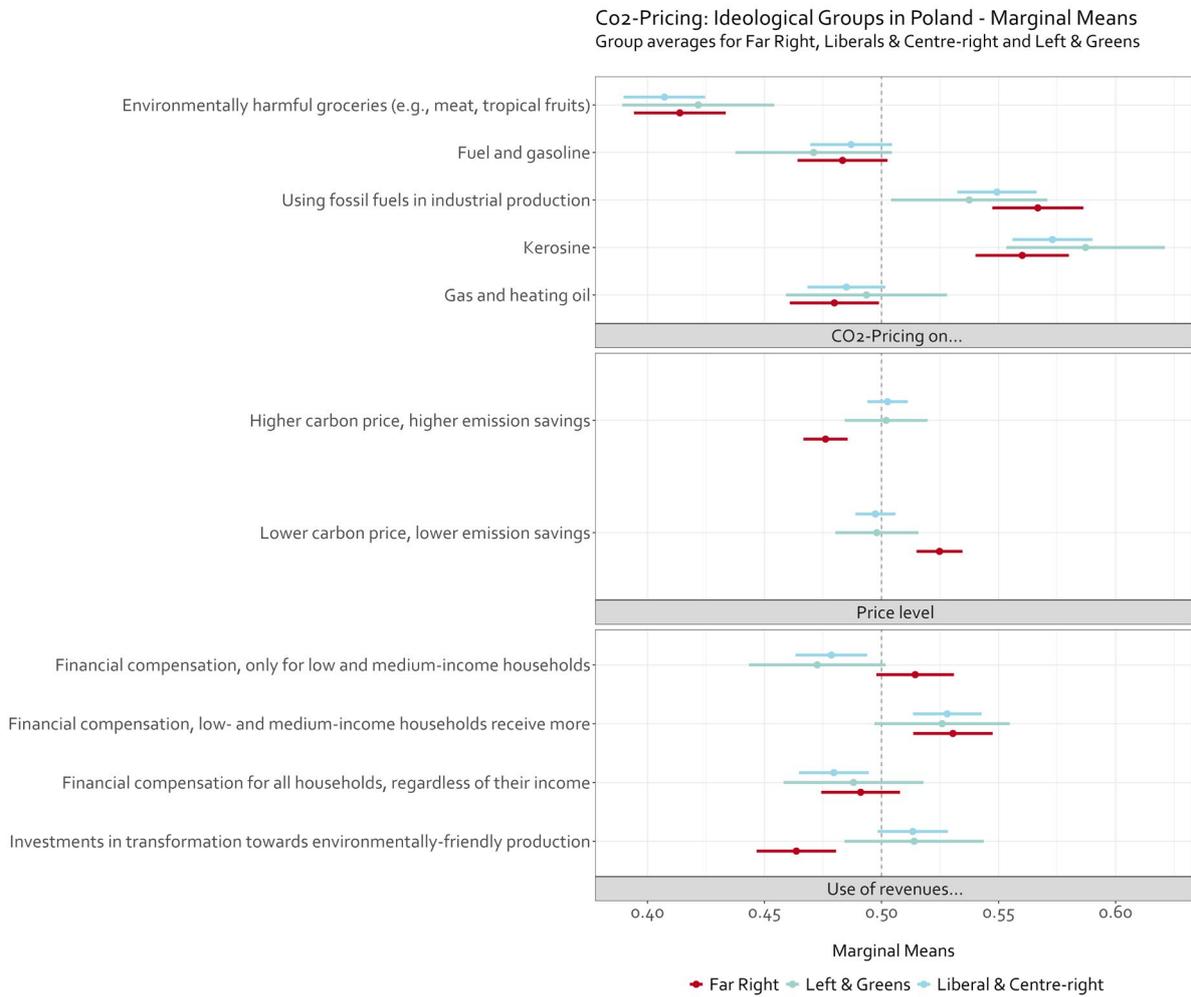


Figure B3: Public preferences for the design of CO₂-Pricing across party lines in Poland

Annex C: Industrial Policy

Industrial Policy: Ideological Groups in Germany - Marginal Means
Group averages for Far Right, Liberals & Centre-right and Left & Greens

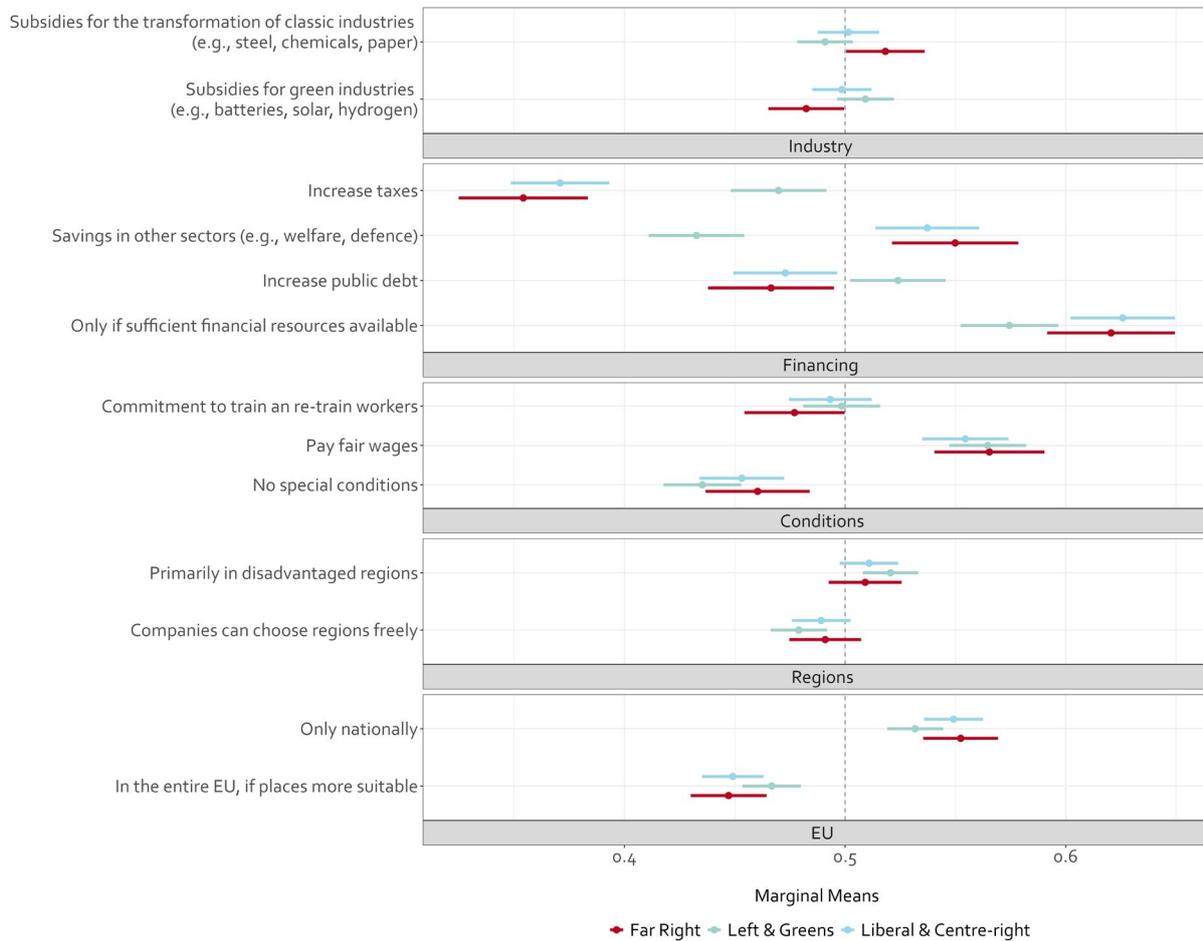


Figure C1: Public preferences for the design of green industrial policies across party lines in Germany

Industrial Policy: Ideological Groups in France - Marginal Means
Group averages for Far Right, Liberals & Centre-right and Left & Greens

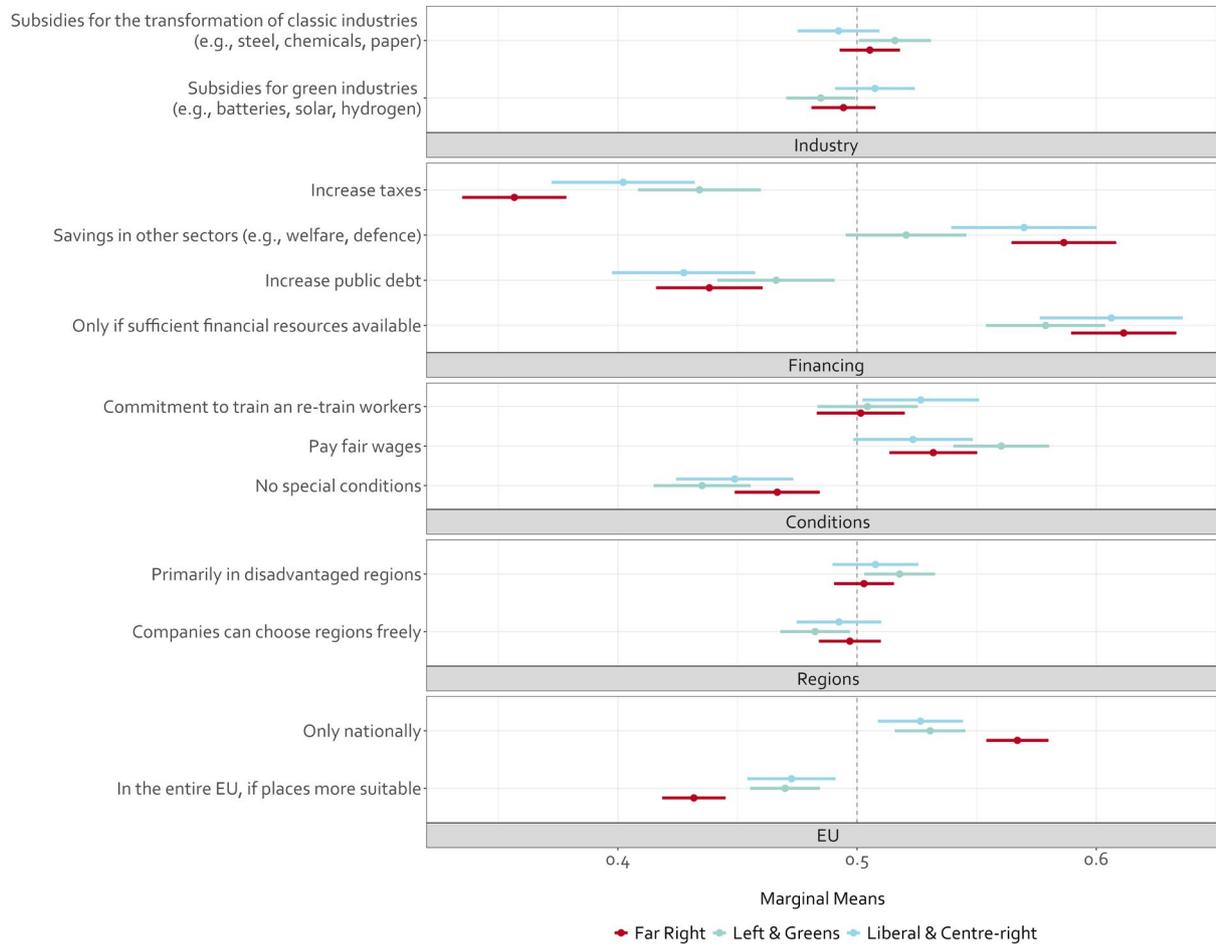


Figure C2: Public preferences for the design of green industrial policies across party lines in France

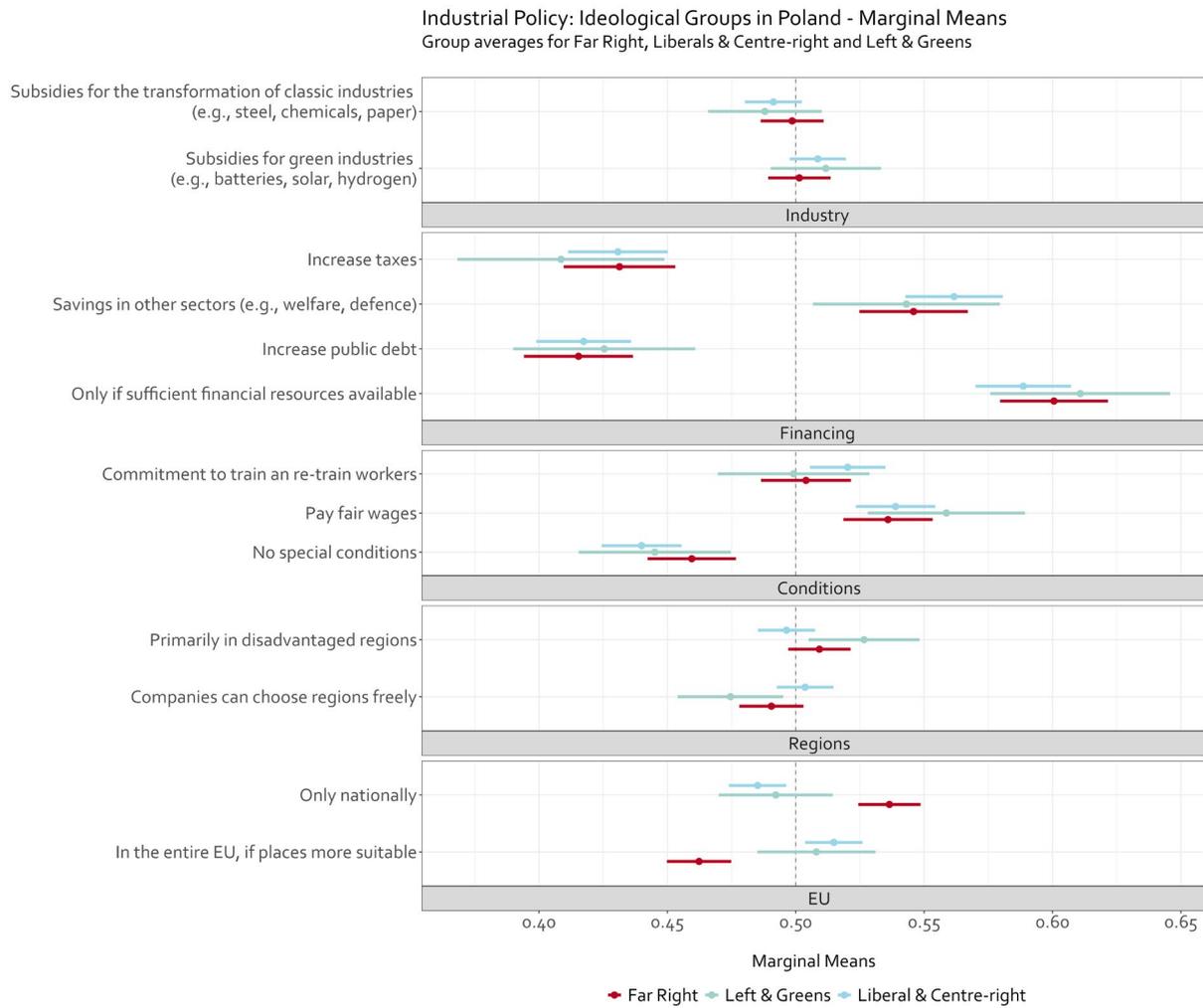


Figure C3: Public preferences for the design of green industrial policies across party lines in Poland

Annex D: Public concerns about climate change

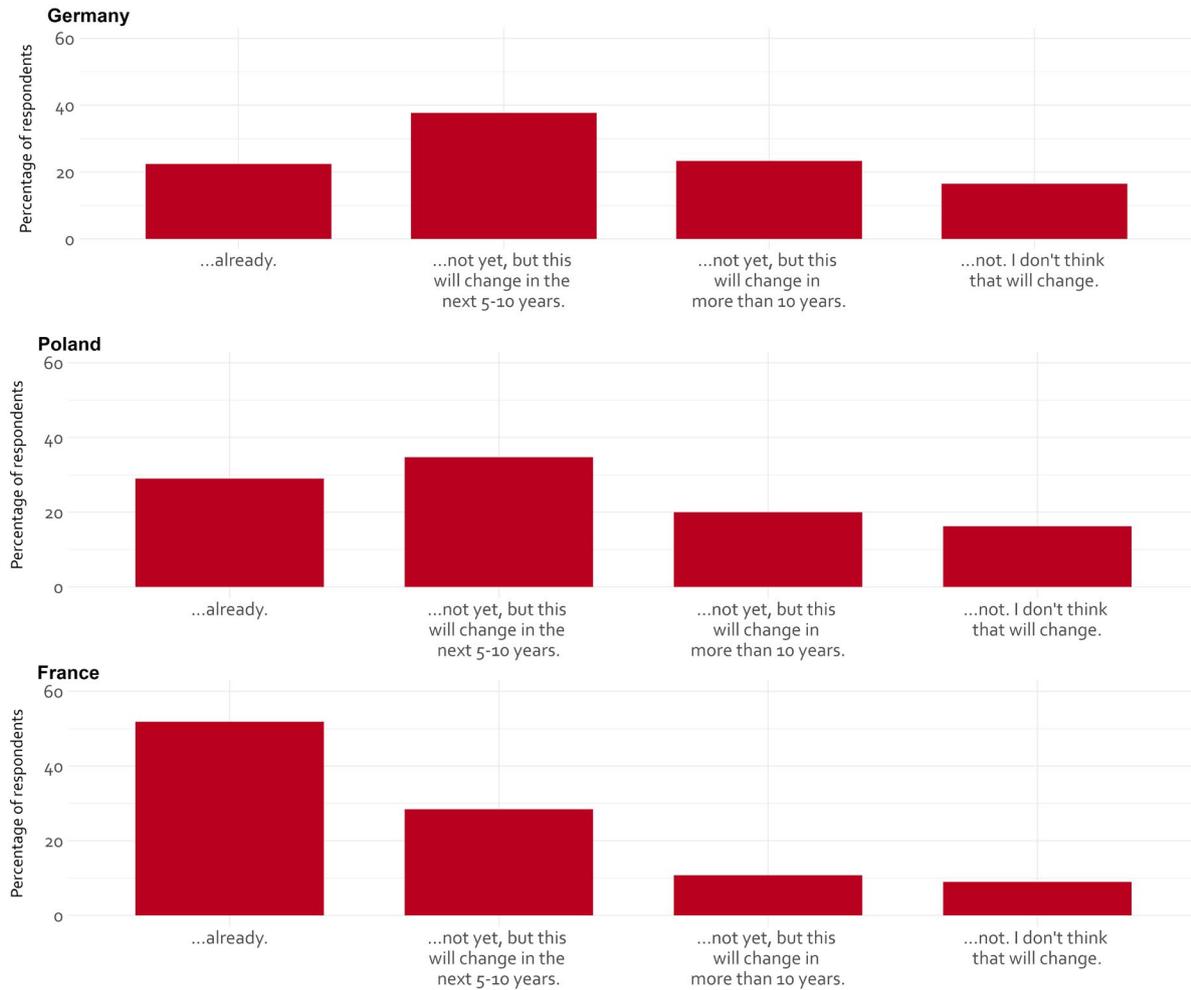


Figure D1: The negative effects of climate change affect me and my family...

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