

# \_JustGreen: A project to support dialogue and other forms of public engagement in the decarbonization of the economy

Presentation of Quantitative Outcomes from Citizen Consultations  
Results for Slovakia



29. 1. 2025

STEM 



**Research conducted by:**

STEM Ústav empirických výzkumů, z.ú.

**Project partners:**

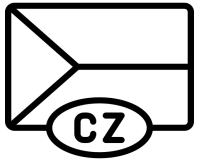
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- 21 KUTATOKOZPONT ALAPITVANY
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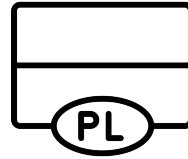


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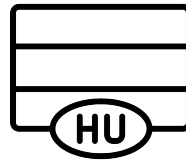
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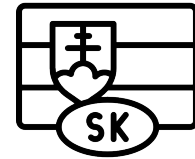
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21  
Kutatóközpont



Bratislavský inštitút pre politickú analýzu

# Table of Contents

|  |    |
|--|----|
| _Summary .....   | 4  |
| .....  | 6  |
| _Introduction and<br>Methodology .....   | 9  |
| .....  | 24 |
| _Attitudes Towards Climate Change and Combating<br>It .....                      | 30 |
| .....  | 40 |
| _Slovakia in the<br>EU .....   | 51 |
| .....  | 59 |
| _Willingness of Citizens to Engage Personally and Support Systemic Changes ..... |    |
| _Housing, Approach to Energy Savings, and Investments .....                      |    |
| _Labor Market and the Impact of Climate Change on<br>It .....                    |    |
| _Transport and Attitudes Towards<br>Electromobility .....                        |    |

# \_Summary - General Attitudes and Housing



- Slovaks have a generally **positive attitude toward the environment**, with a significant portion of the public perceiving climate change rather as a serious issue and acknowledging the need to address it. However, compared to (typically) economic threats, climate change is **not seen as equally important or urgent**.
- A third of the Slovak public still has **not heard about the European Green Deal** (which remains main driver of European decarbonization). Opinions on it are divided—some view it as an opportunity, others as a threat, and a portion of the population has yet to form an opinion.
- „**Europeanness**“ is a **value** for Slovaks, and society generally feels like part of Europe. However, for half of the population, the interests of the EU are perceived **as being in conflict with Slovak national interests**. Nonetheless, in the event of a referendum on leaving the EU, 66% **would vote to remain** in the Union.
- On an individual level, waste reduction is the most common action taken to reduce environmental impact. Looking ahead, challenges include **reducing household energy consumption and meat consumption**.
- In terms of insulation, panel apartment buildings are **the most advanced**, while gaps remain for apartment buildings made of materials other than paneling and for family homes.



# \_Summary – Labor market and transportation



- The public has **not yet felt the impact of climate change** on the labor market but expects its future impact to be mostly negative. There is significantly more concern about the **potential negative effects of the projected policies** designed to combat and address climate change.
- The most common mode of transportation for commuting to work and school in Slovakia is the **private car**, used by approximately 37% of people. The most important factors in choosing transportation modes are **price, followed by comfort and safety**. Beyond cars, Slovaks frequently use public transportation, whether for urban travel or longer distances, and, when possible, opt for walking.
- Electromobility enjoys a certain level of steady public support; however, most Slovaks **would still prefer a car with an internal combustion engine** if given the choice. Additionally, Slovaks are displeased with the planned ban on the sale of new internal combustion engine cars in 2035.

# Introduction and Methodology



# About the Just Green project

The JustGreen project emerges at a time when the EU faces numerous challenges – from war at its borders and shifting geopolitical power balances to issues of the rule of law and growing inequality – exerting pressure on the EU both externally and internally.

The project responds to the challenges associated with the EU's green transition, which represents one of the most significant tests in the EU's recent history and is likely to bring about far-reaching changes in the economic and social lives of the Union's citizens.

The project's goal is to **engage citizens of the V4 countries** in debates and other forms of public participation on the topic of decarbonization in three key areas that are closely linked to their daily lives: **housing, mobility, and the labor market**.

Public participation activities, together with accompanying research, aim to **identify specific obstacles** that citizens and communities face in implementing climate-friendly measures or adapting to EU decarbonization policies. This project will support debates and other forms of citizen engagement in the V4 region, conveying their feedback to local, national, and EU policymakers, thereby strengthening citizens' sense of shared responsibility for the EU's climate and environmental policies.

This report presents a quantitatively summarized outcome of citizen consultations conducted through standardized interviews using a questionnaire, serving, among other purposes, as a foundation for further project activities.



## Research team STEM

Jaromír Mazák  
Research lead  
jaromir.mazak@stem.cz

Martin Philipp  
Analyst  
martin.philipp@stem.cz

Aleš Vomáčka  
Analyst

Eliška Votavová  
Analyst

# Methodology

| Basic Research Parameters             |  |
|---------------------------------------|--|
| Type of Research                      | Quantitative survey                                    |
| Population                            | Slovak population, citizens aged 18 and over           |
| Data collection method                | Online survey (CAWI); face-to-face interviewing (CAPI) |
| Sample size                           | N = 1013 (701 CAWI; 312 CAPI)                          |
| Method of Ensuring Representativeness | Quota sampling   |
| Main quota                            | Age; Gender; Education; Region; Municipality size      |
| Data collection                       | 10.10. – 29. 10. 2024                                  |

The data collection was carried out by STEM/MARK, a. s. using the company's survey network for CAPI and the Czech National Panel (part of nationalpanel.eu) for CAWI.

STEM as the survey implementer, STEM/MARK as the data collection provider and the Czech National Panel as the supplier of respondents for CAWI are all members of SIMAR, an association of market and opinion research agencies that oversees compliance with industry standards.



# \_Attitudes Towards Climate Change and Combating It



**How does the public perceive the topic of climate protection?**

**Is climate change considered an important issue that should be addressed?**

**Have Slovaks already felt the impacts of climate change?**

**What is our perspective on the European Green Deal?**

# Attitudes Towards Climate Change and Combating It

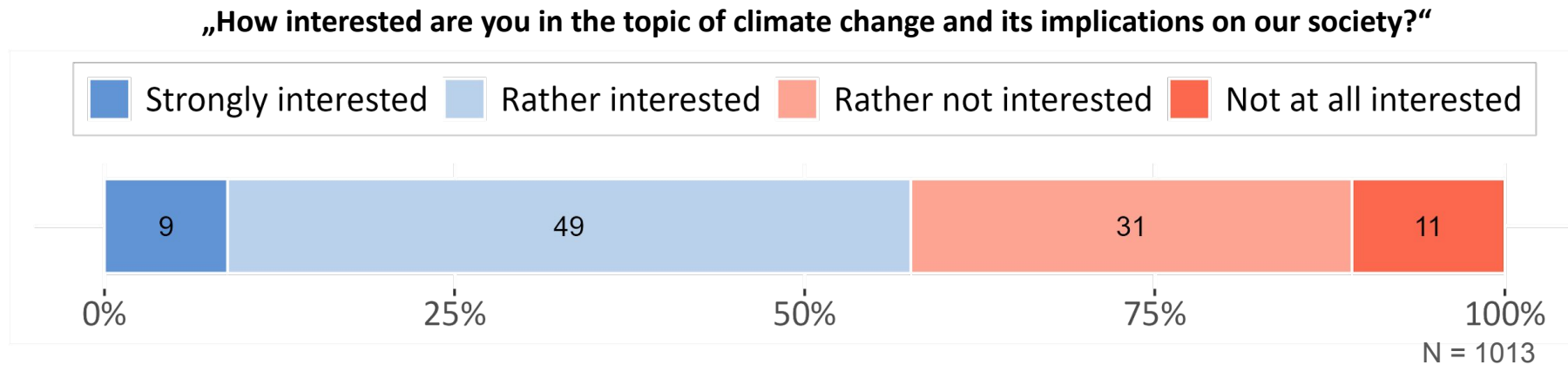
## Summary of findings

- Around 49% of Slovaks **are interested in climate change** issues as well as considering them a serious problem.
- According to 62%, we need to start **addressing climate change issues immediately or within the next five years at least.**
- Furthermore, 74% acknowledge that solving these problems requires **changes in human activity.**
- Half of the population reports that they have already **felt the impacts** of climate change on their daily lives.
- However, climate change is not perceived as a threat as severe as some other issues, primarily **economic ones.**
- A third of Slovaks have still not heard of the European Green Deal. While the purpose of the Green Deal is clear to 75% of the population after they are given explanation in the survey, it remains uncertain whether the public perceives the policy as an **opportunity or a threat.**



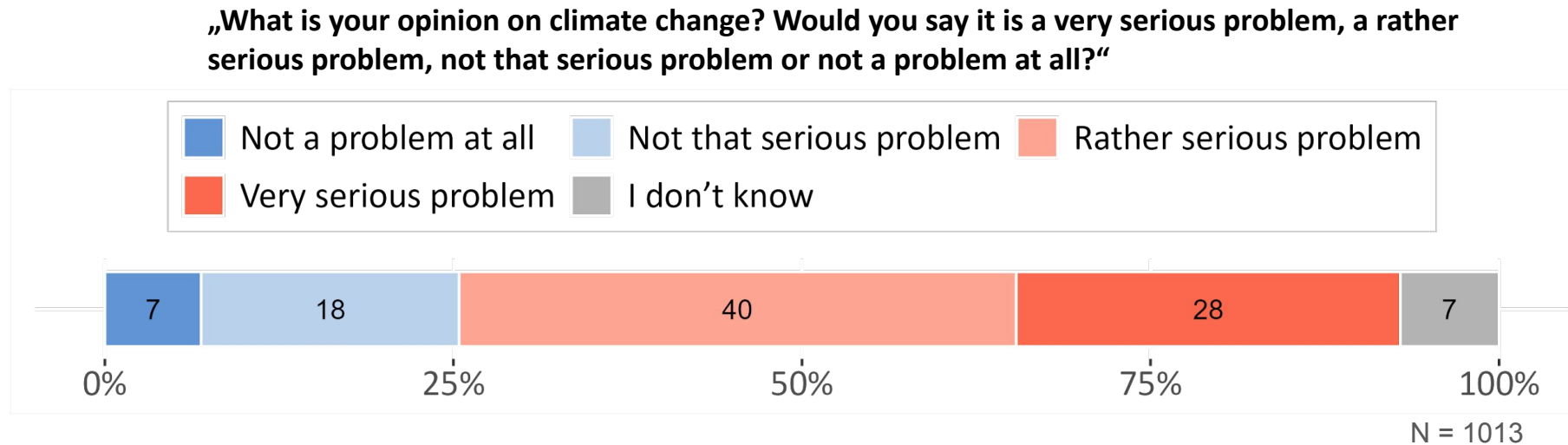
# Approximately six out of ten Slovaks state that they are interested in climate change

A tenth (9%) of people reports being „strongly“ interested, while the remaining 49% are somewhat interested. The rest (42 % combined „rather“ + „not at all“) remain uninterested. Interest in the topic is one of the most crucial foundations for existence of a public discussion.



# Climate change is a serious problem according to the majority of Slovaks

For around 7 in 10 (68%) Slovak citizens, climate change is a serious problem, while approximately a quarter of the population thinks the opposite. Only 7% state that they don't know.





# Index – Attitude towards climate change

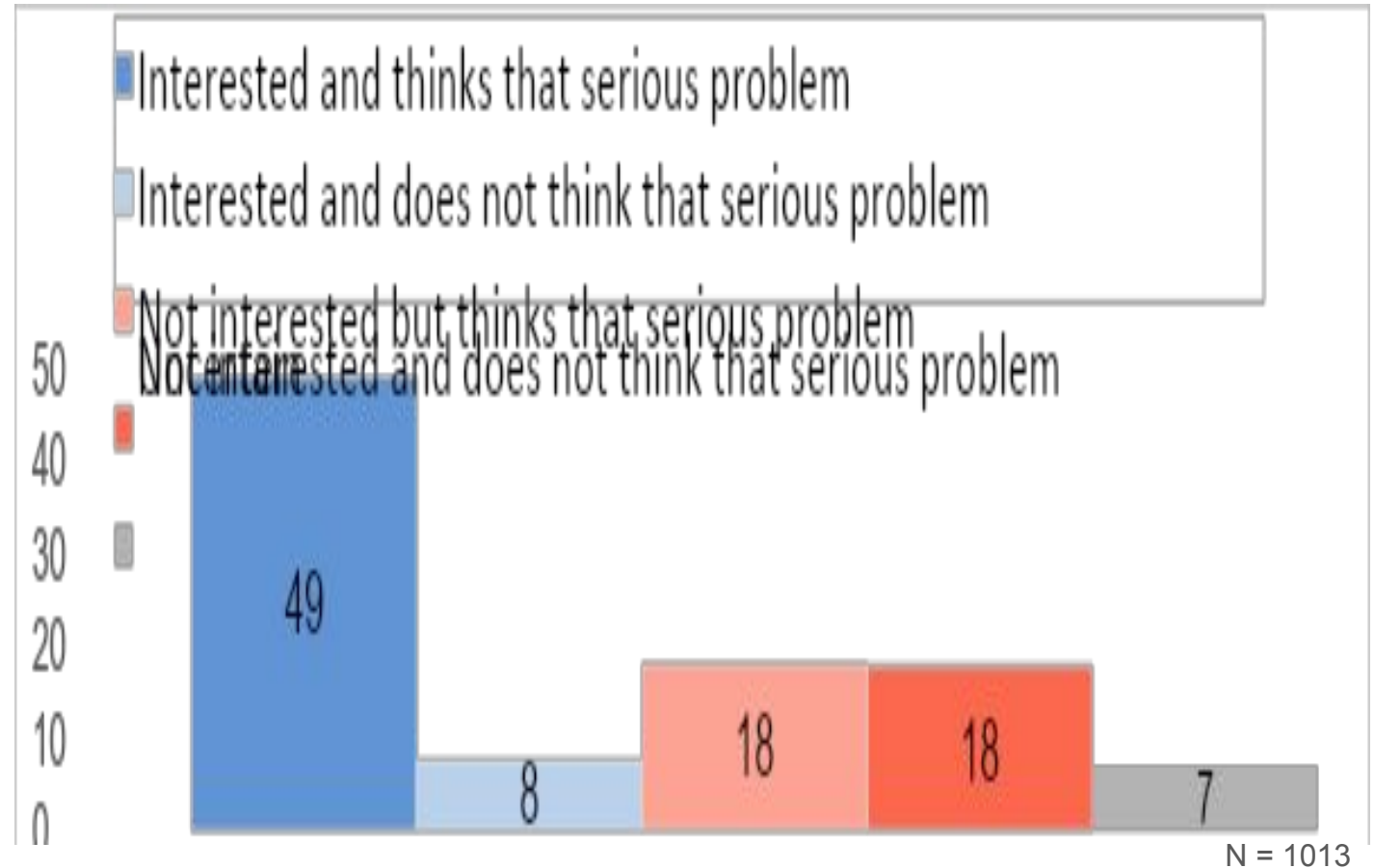
The graph shows a climate attitude index which is based on two variables – (a) interest in climate change issues and (b) perceived seriousness of the problem.

In Slovakia, half of the population (49%) are interested in climate change *and* also consider it to be a serious problem. Only a tenth (8%) are interested in climate change but do not see it as a serious issue.

About a fifth (18%) are not interested in the issue but still perceive it as a serious problem. Similarly, 18% neither express interest nor perceive climate change as urgent.

Finally, 7% of the population remains uncertain about their stance on this issue.

Climate attitude index

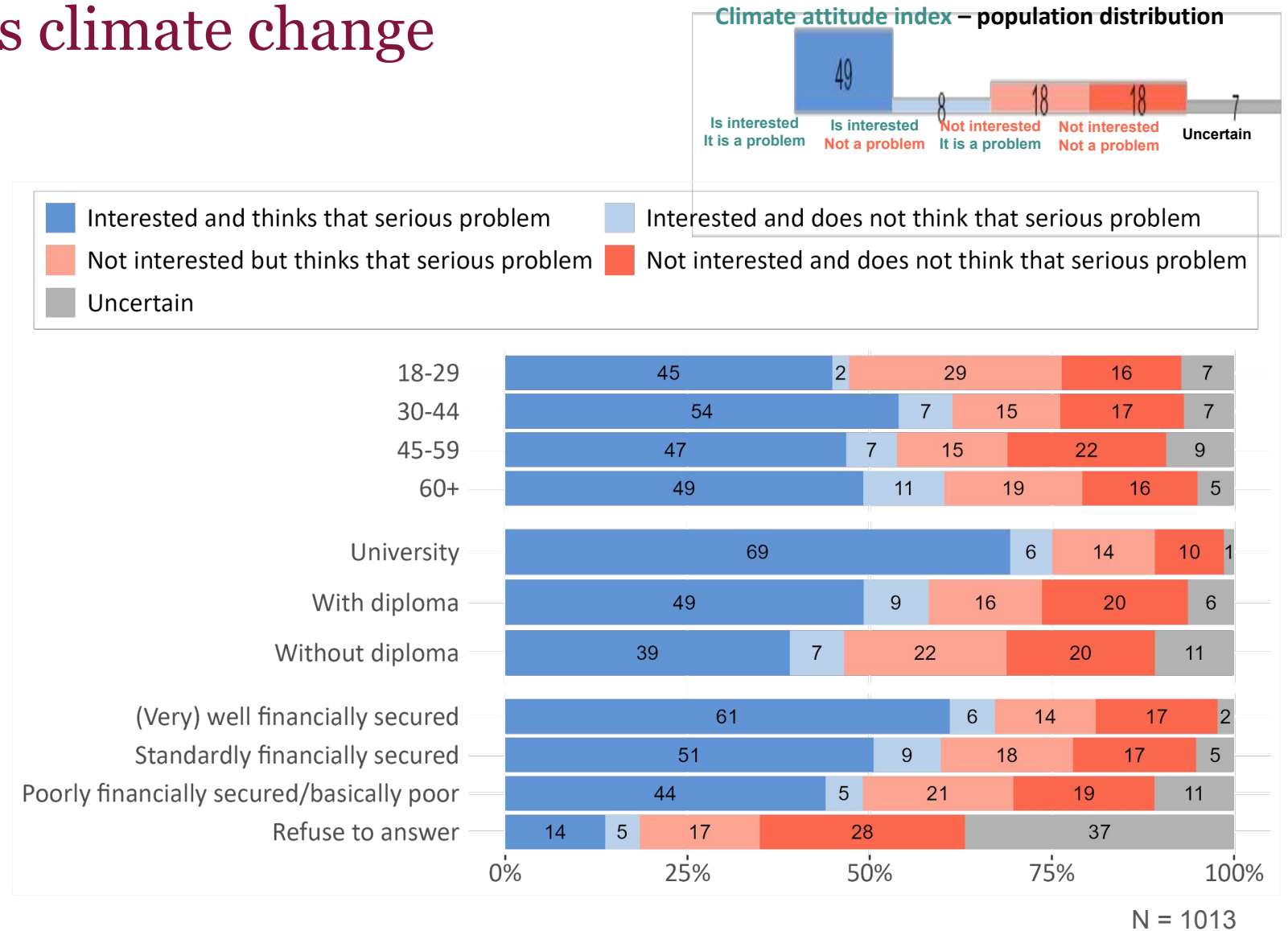


# Index – Attitude towards climate change

Looking at the climate attitude index through selected socio-demographic factors shows that, in terms of age structure, the groups are relatively evenly represented.

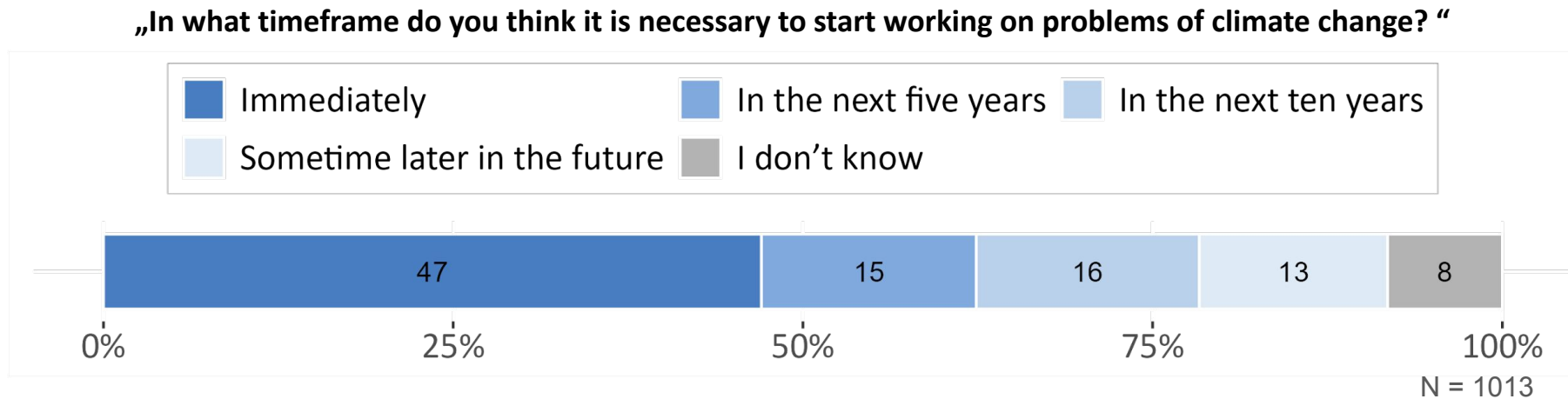
The situation differs when it comes to education, where university-educated individuals are most often in the group that is both interested in climate issues and considers them a serious problem.

Examining the groups from the perspective of financial security reveals that a higher level of perceived financial security correlates with greater interest in climate issues, alongside a stronger perception of climate change as a threat.



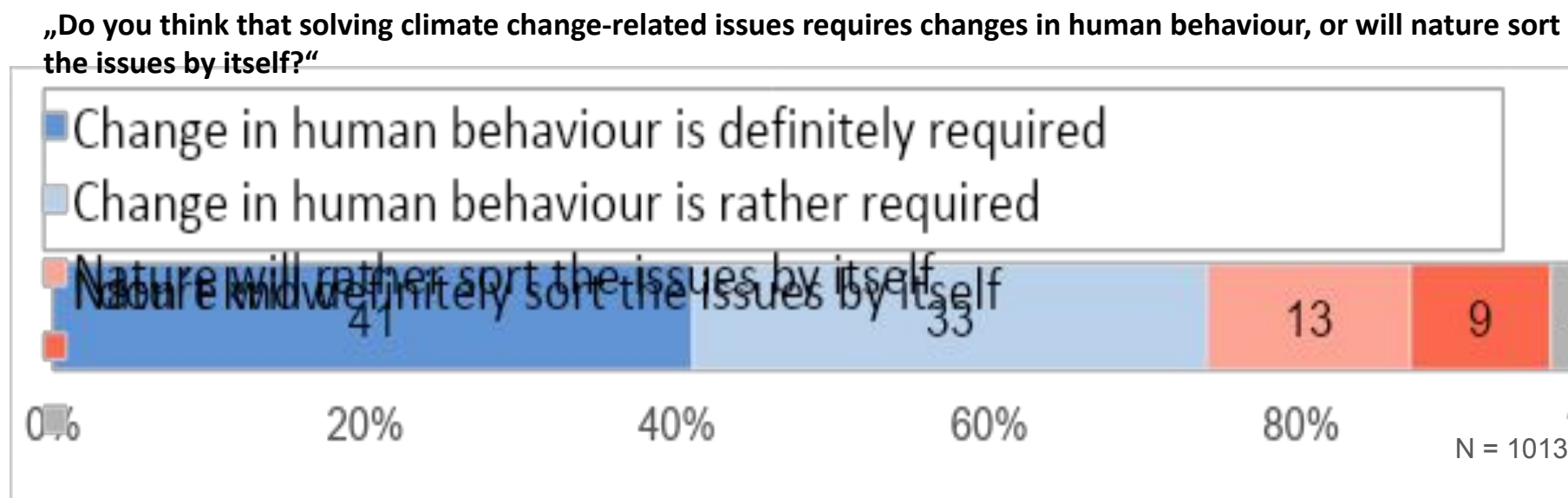
# Climate action should begin as soon as possible according to Slovaks

According to half (47%) of the Slovak population, it is necessary to start working on the problems relating to climate change „immediately“. Further 15% say that action should be taken in the next five years. A third of the people (29% combined) would prefer it to start later – in the next 10 years or some time later in the future. Some 8% of Slovaks say they don't know what their opinion on this is.



# Three in four think that humans should change their behaviour in order to fight the climate change

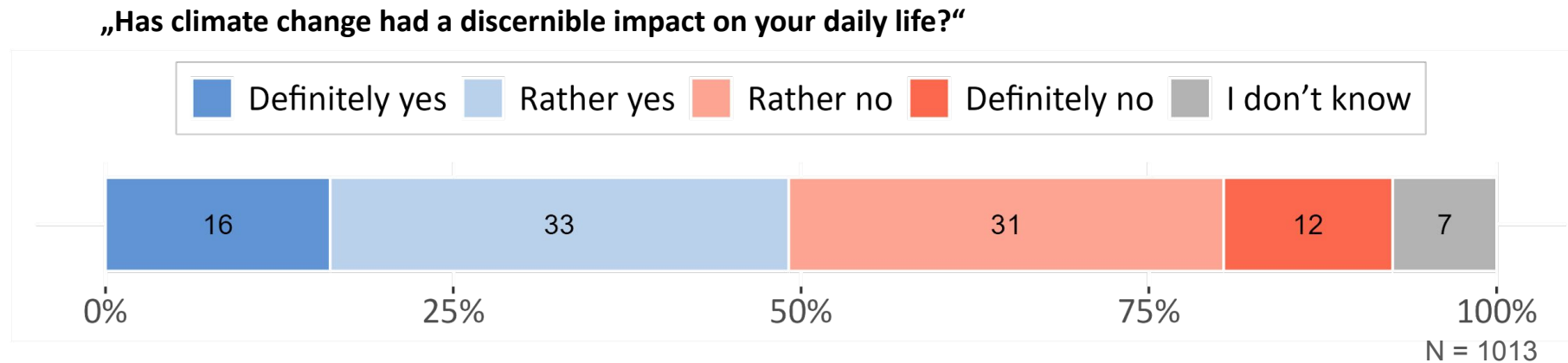
When it comes to the question whether the climate change crisis should be solved by human activity (in contrast to the view that nature will „sort the issues by itself“), 41% declare that change in human behaviour is „definitely“ required. The alternative view is held by 22% of Slovaks and only 4% report being unsure.





# Climate change has had discernible impact on lives of half of the Slovak population

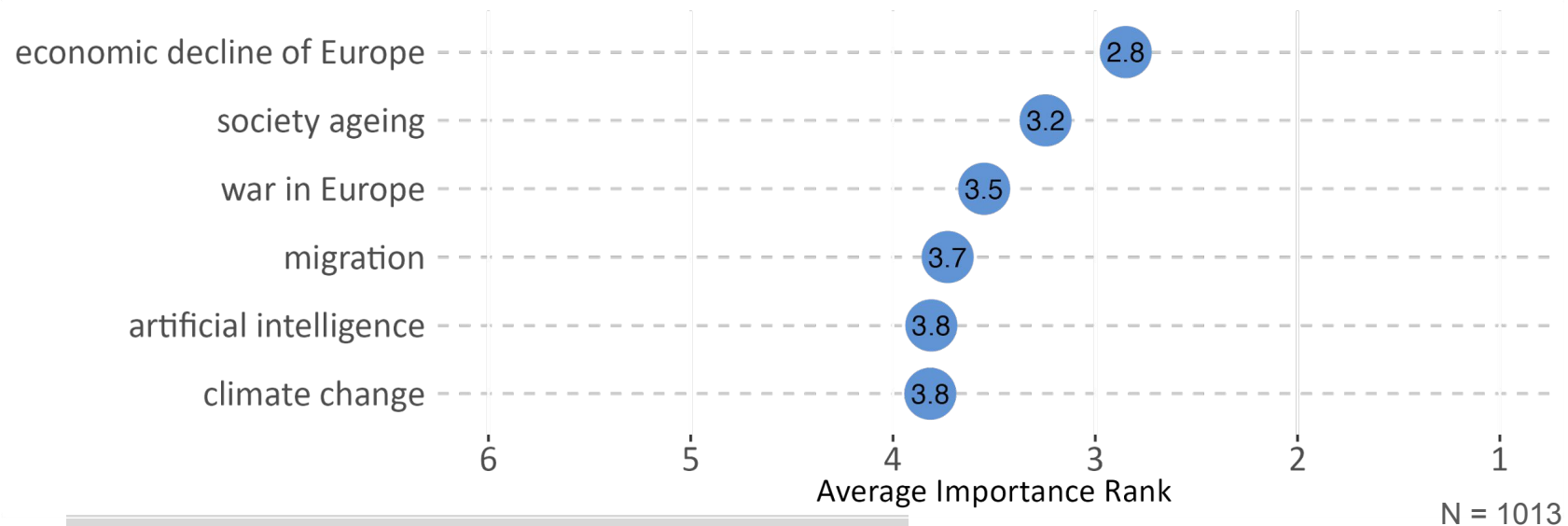
Half (49%) of Slovaks report that climate change has already had a significant impact on their lives. 43% of the people claim the opposite, while 7% do not know or cannot tell.



# The economic decline of Europe worries Slovaks more than the threat of climate change

We asked the research participants to rank several phenomena threatening our society. Based on perceived priority, "economic decline of Europe" ranked the highest overall, with an average placement of 2.8. The second-most strongly perceived threat was another primarily economic issue, population aging (3.2). Lower rankings were given to more tangible threats, such as war in Europe and migration. More abstract threats, like artificial intelligence and climate change, were ranked the lowest.

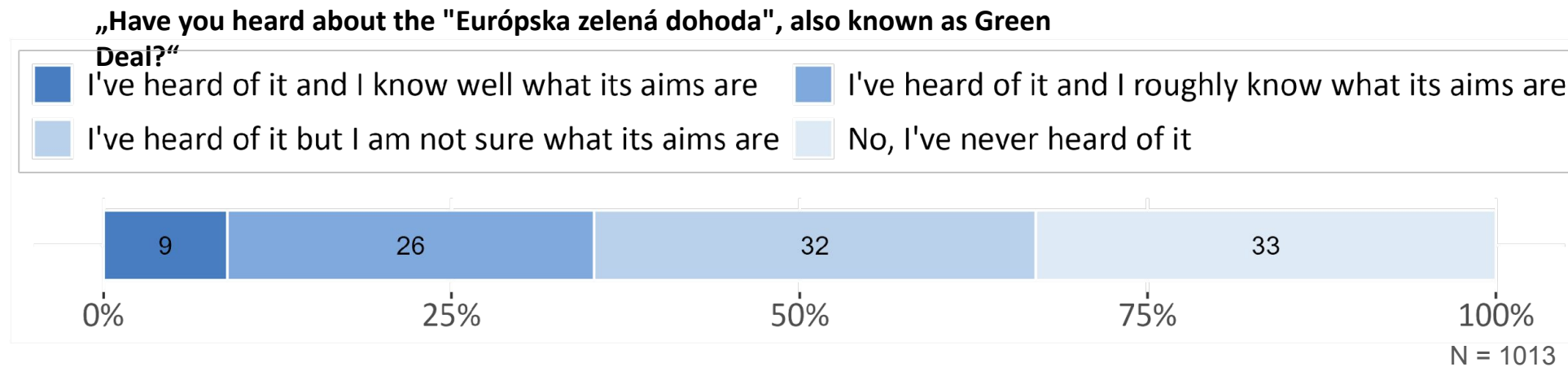
**„Please rank the following phenomena according to how much you think they are likely to seriously threaten the future of our society. Put the most likely threatening phenomenon to first place, and the least likely threatening to the last place.“**



*\*The displayed values represents the average ranking, where a lower value indicates a higher level of perceived probability.*

# Two thirds of the nation have already heard about the European Green Deal

The European Green Deal is already widely known in Slovakia, with two thirds (67%) stating they have at least heard of it. However, a third (33%) of the public has not yet heard about the policy. Declared awareness does not necessarily reflect actual understanding, but we know that strong self-assurance about understanding the Green Deal's content often leads to more firmly held opinions.

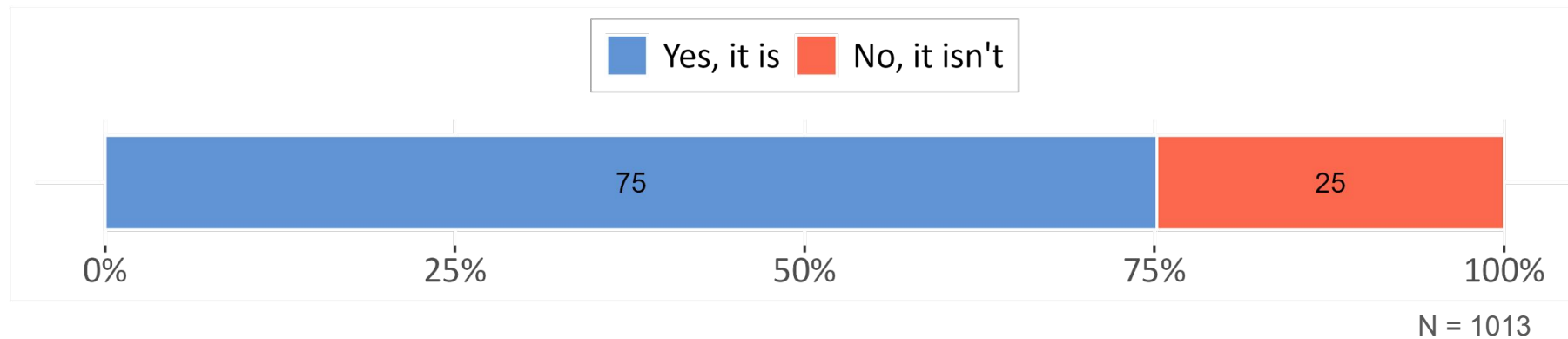


# The aim of the Green Deal is understandable to three-quarters of the population.

When provided with an explanation of the Green Deal, three-quarters of respondents stated that they understand the content of the document. Overall, the Green Deal's core seems accessible to a broader group of people and not overly difficult to comprehend.

**„The European Green Deal is a set of specific policies that intent to achieve climate neutrality in the EU by 2050. Simply said, that means producing only as much greenhouse gases that we are able to neutralise. This will amount to many changes in industry, transportation, and energy, but also financial support from the common European budget.**

**Is the overall aim of the Green Deal clear to you?“**

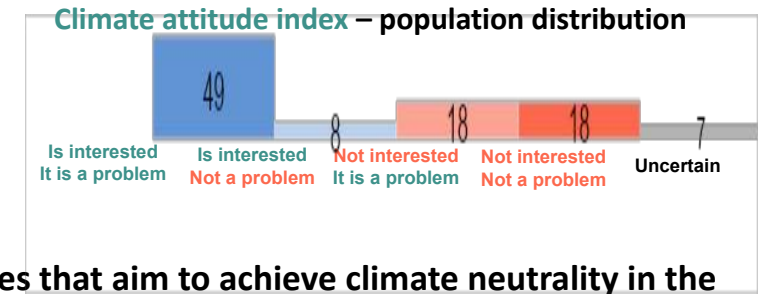




# The Green Deal is clearer to those who consider climate change a problem

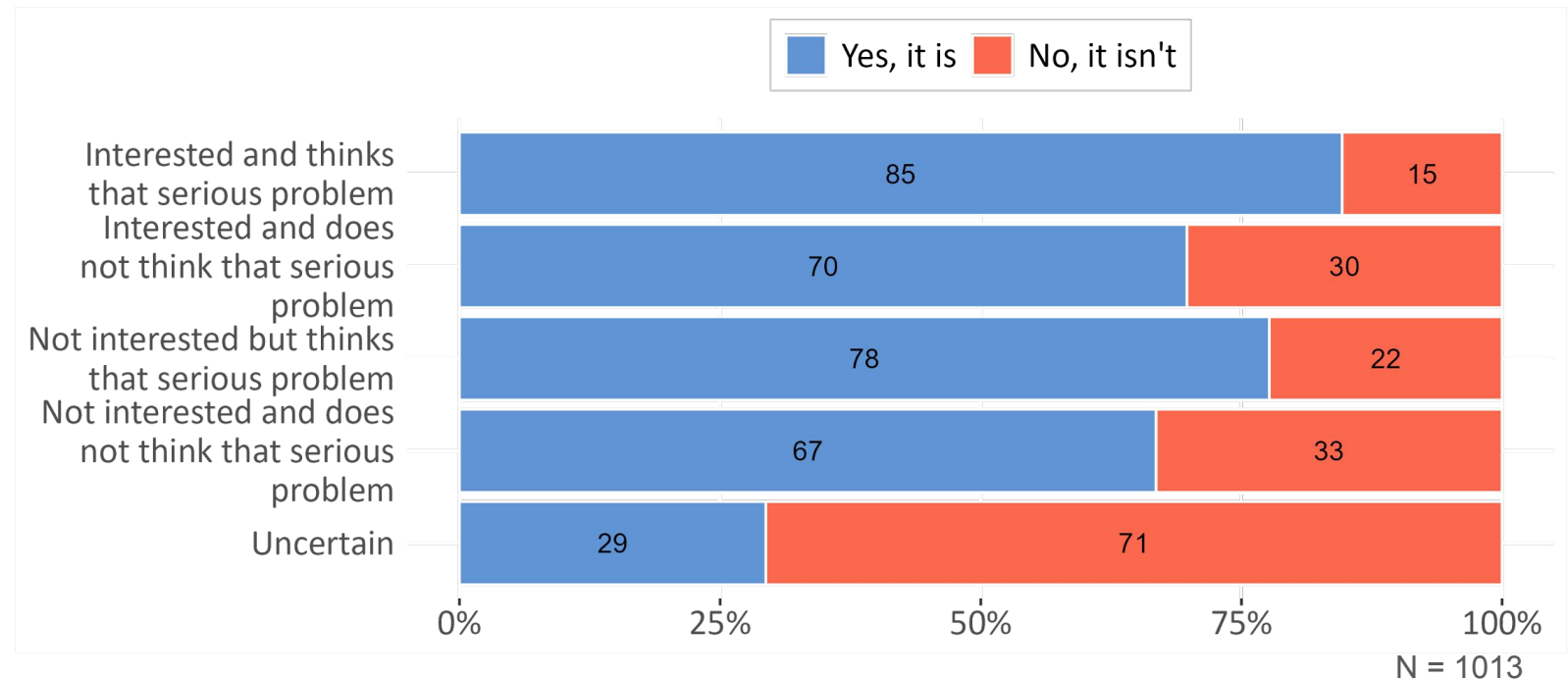
In the breakdown of responses by the climate attitude index (interest in climate change and perceived seriousness), we observe that (even following the survey explanation) the purpose of the European Green Deal is more understandable to those groups who, regardless of their interest in environmental issues, consider climate change a serious problem.

An exception to this is the group of „the uncertain“, where 7 out of 10 state that they do not understand the purpose of the Green Deal.



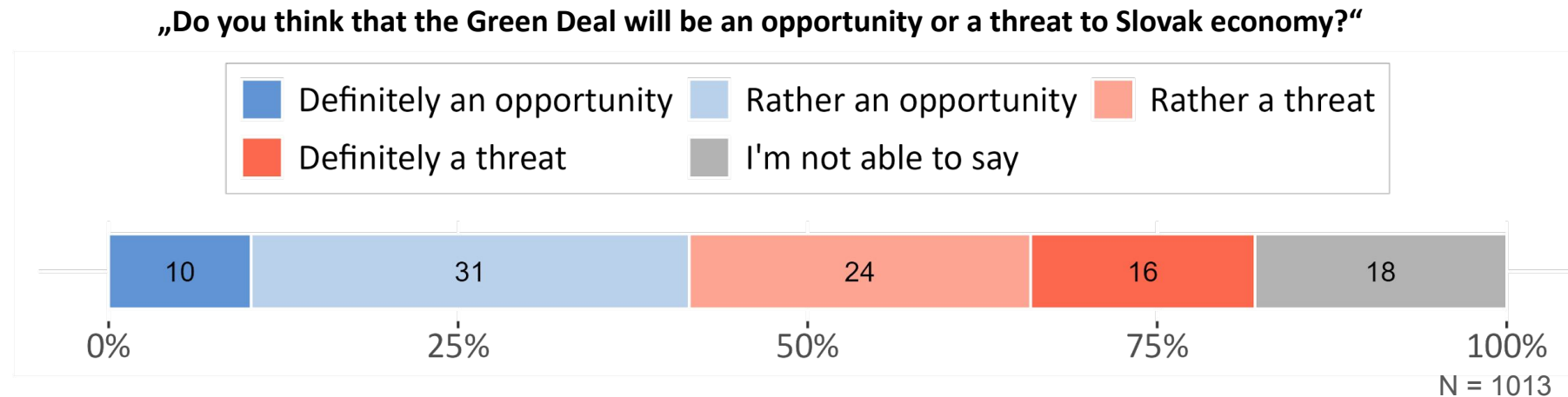
**„The European Green Deal is a set of specific policies that aim to achieve climate neutrality in the EU by 2050. Simply said, that means producing only as much greenhouse gases that we are able to neutralise. This will amount to many changes in industry, transportation, and energy, but also financial support from the common European budget.**

**Is the overall intent of the Green Deal clear to you?“**



# To Slovaks, Green Deal seems to be as much an opportunity as a threat

Five years after its official introduction, the Green Deal is seen as an opportunity by about two-fifths (41%) of the population. A similarly large proportion (40%) would say it is more of a threat. The remaining fifth is unable to assess it. This indicates that society is currently divided on this issue.

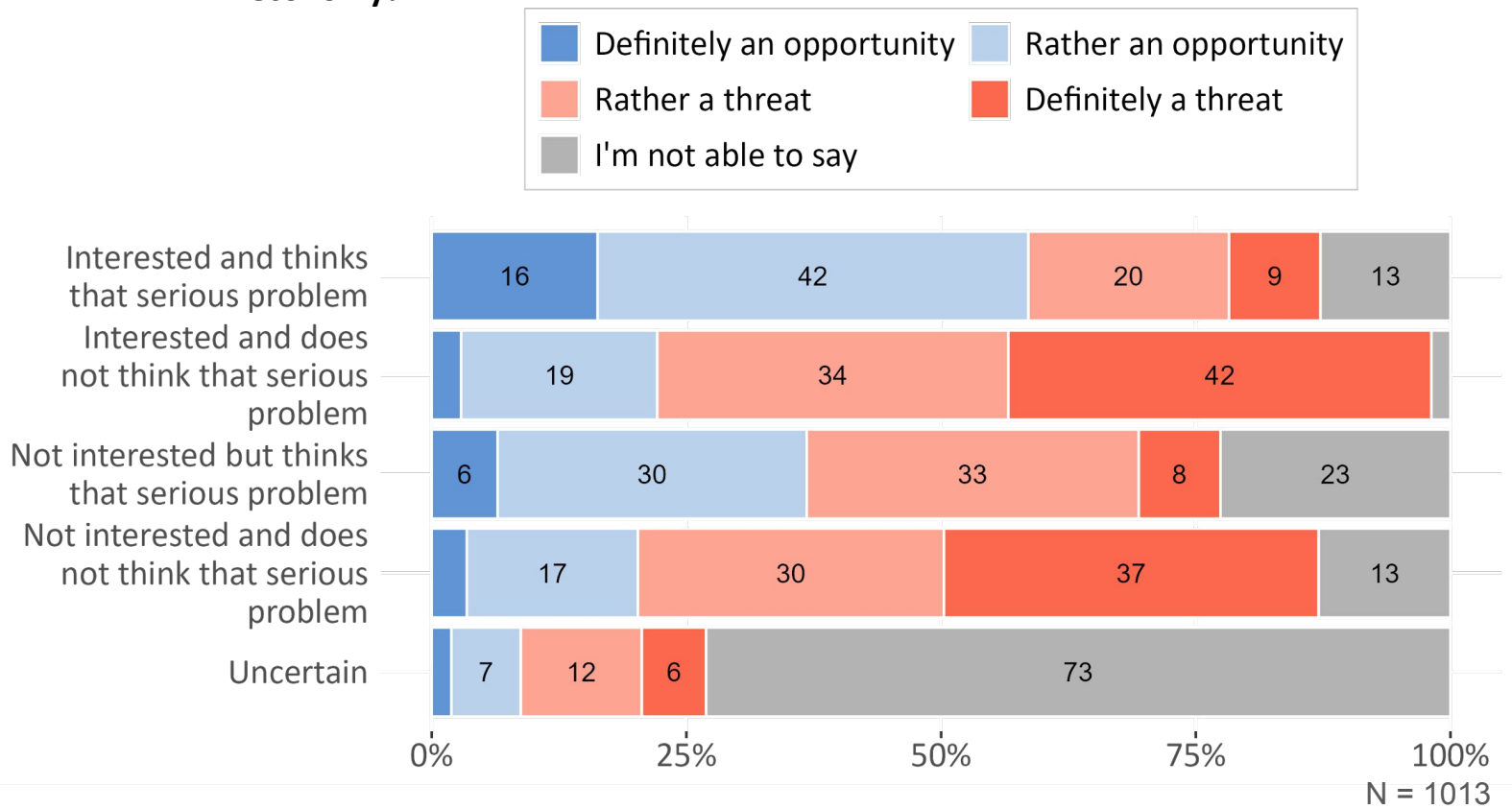


# People who do not perceive climate change as a problem tend to view the Green Deal as a threat

When opinions on the Green Deal are analyzed based on the climate change attitude index, the strongest factor contributing to the perception of the Green Deal as a threat is the belief that climate change is not a problem that needs to be addressed, regardless of interest in the topic.

Groups that consider climate change a serious issue have a significantly higher proportion of people who view the Green Deal as an opportunity for Slovakia and its economy.

„Do you think that the Green Deal will be an opportunity or a threat to Slovak economy?“



# \_Slovakia in the EU

**Do Slovaks feel European?**

**Does the EU represent a partner or a conflict force to Slovak interests?**

**Referendum on leaving the EU – stay or leave?**

# Slovakia in the EU

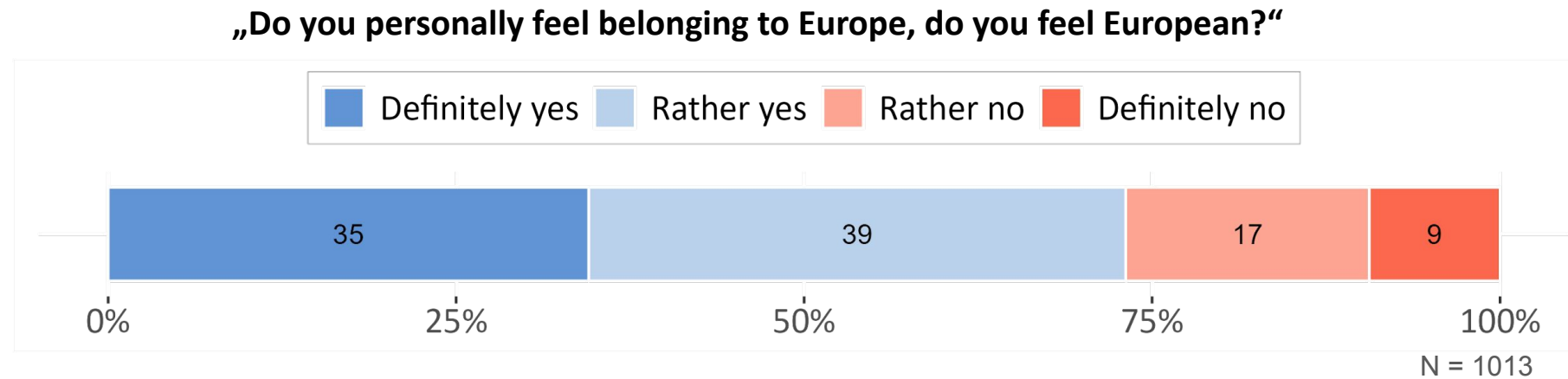
## Summary of findings

- Slovaks identify as Europeans, with 74% stating they **feel a sense of belonging to Europe**.
- On the question of whether EU interests' conflict with national interests, Slovak society **is evenly divided**.
- Nevertheless, 59% of the population **would support deeper integration with the EU**.
- In the event of a referendum on leaving the Union, two-thirds would **vote to remain**.



# Slovaks feel a sense of belonging to Europe

Around three-quarters (74%) of the public state that they feel to be Europeans, with 35% stating so “definitely.” The sense of European identity is significantly more common among those with a higher education.

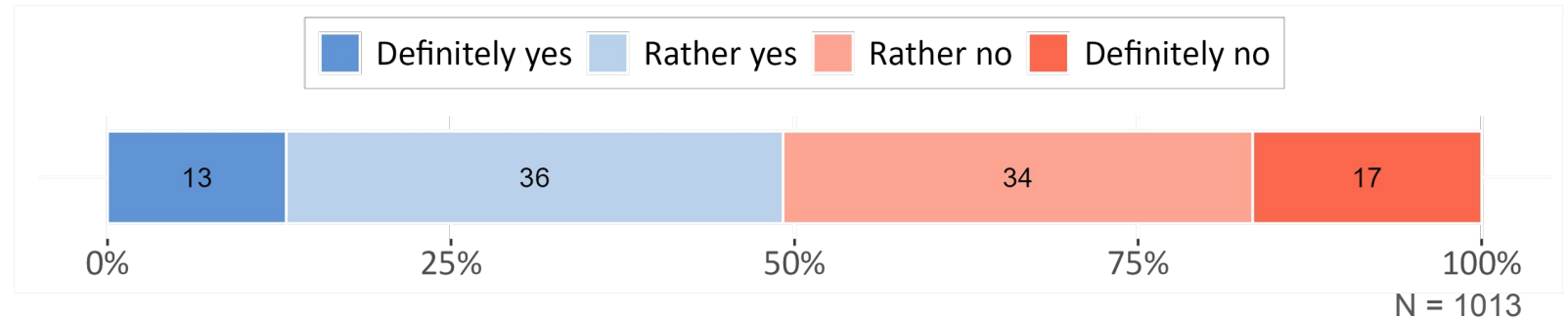


# The public is divided on the issue of national interests, with half believing they conflict with the interests of the European Union

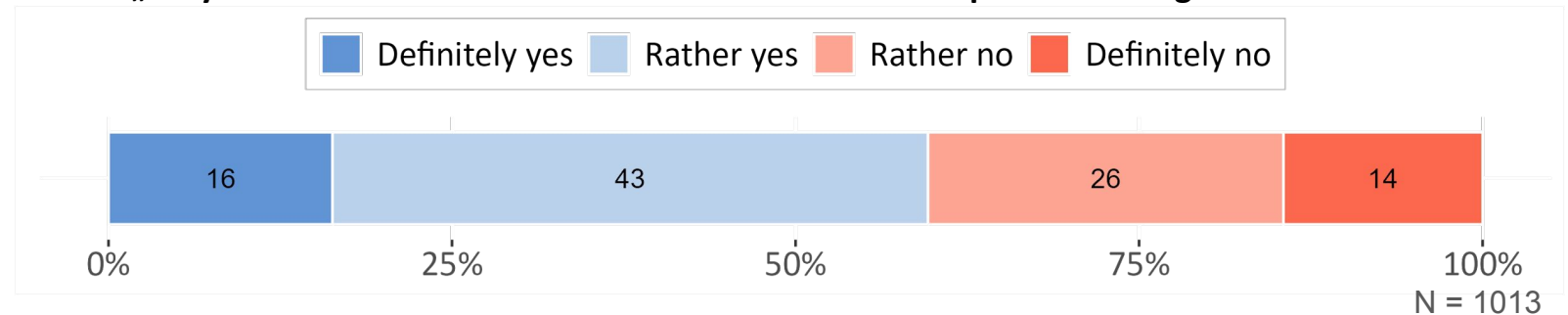
The Slovak public is split roughly in half on the potential conflict between national (Slovak) interests and the interests of the European Union as an institution. The firmness of opinions is also quite similar, with comparable proportions choosing "definitely" and "rather".

Around three-fifths (59%) would like to see further integration of EU member states.

**„Do you think that our national interests align with those of the European Union?“**

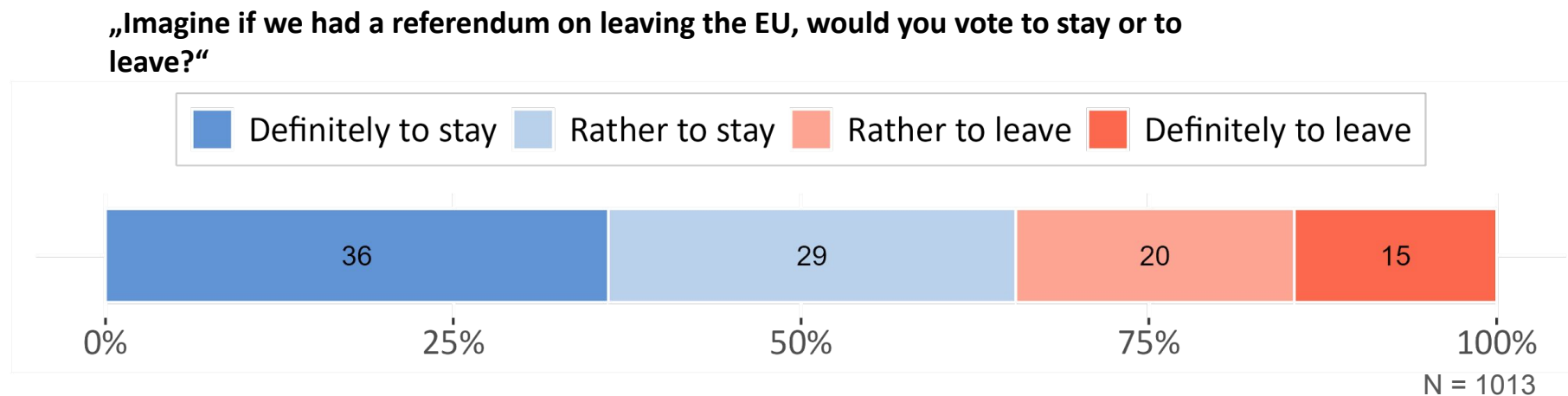


**„Do you think that member states of the EU should deepen their integration?“**



# The majority of the public would vote to remain in the EU if a referendum were held

A potential referendum on leaving the EU in Slovakia would result in a vote to remain, with around two-thirds (65%) of the population supporting continued membership. Only 15% of the public would vote „definitively“ in favor of leaving.

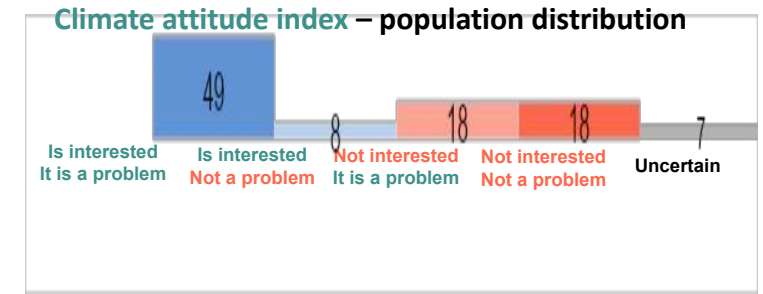




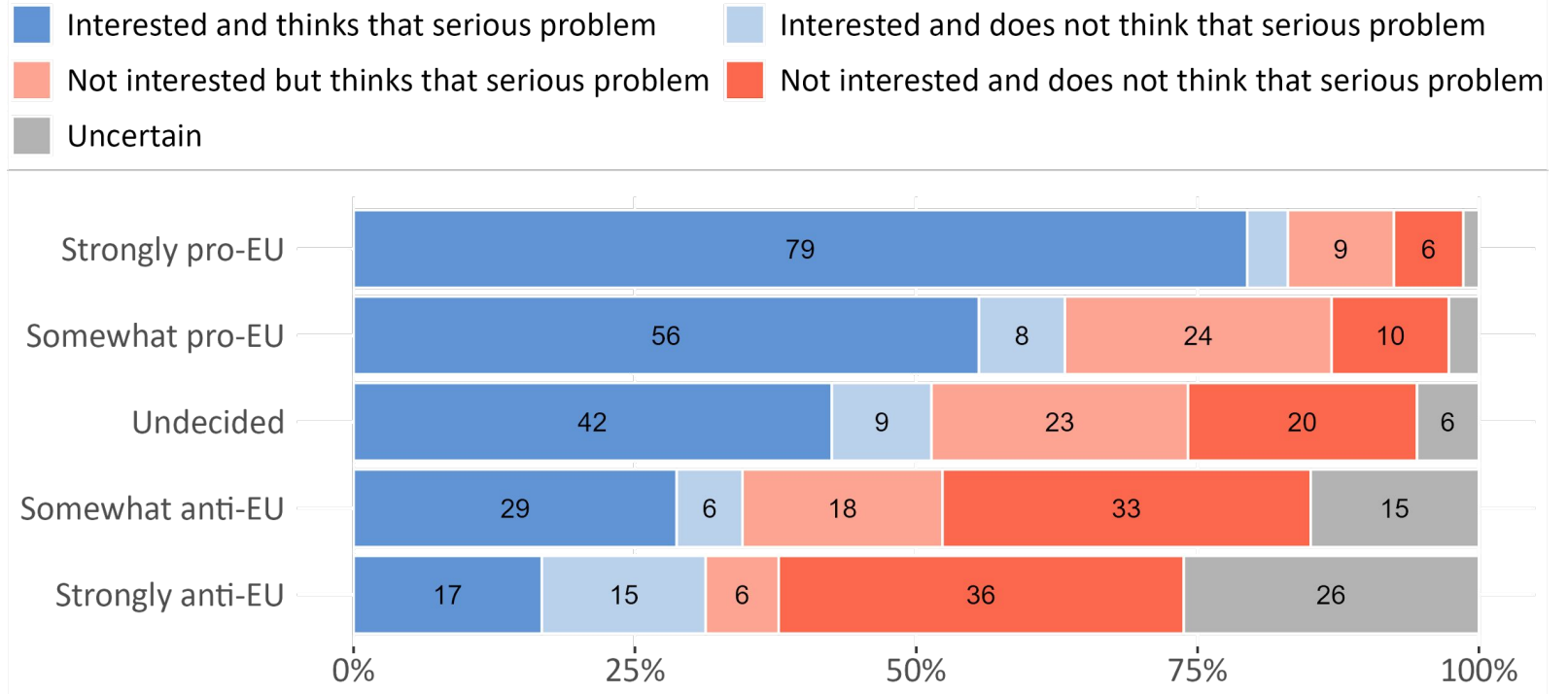
# Affinity to the EU is related to a stronger perception of climate change as a problem

Over time, surveys have consistently shown that attitudes toward the European Union (as an institution) and attitudes toward climate change are interconnected. This relationship is also visible in the graph, which illustrates how the groups defined by the EU Attitude Index are distributed across the Climate Attitude Index.

We can observe that the Strongly Pro-European group predominantly expresses concern about climate change and considers it a serious issue. As the strength of the inclination toward the EU decreases, the proportion of this group steadily declines, giving way to those who are less engaged with the issue of climate change. Among the group that strongly opposes the EU, the proportion of individuals categorized as Uncertain in the Climate Attitude Index is significantly overrepresented, making up a quarter (26%) compared to just 7% in the general population.



**EU attitude index x Climate attitude index**



*The EU attitude index reflects the inclination of population toward the European Union.*

N = 1013

A hand holding a condensation-covered plastic bottle over a recycling bin. The background is a blurred recycling bin with a red, white, and blue recycling symbol. The text is overlaid on the left side of the image.

# \_Willingness of Citizens to Engage Personally and Support Systemic Changes

**What does the public do to reduce its environmental impact?**

**What is the outlook for willingness to change habits in the future?**

**What systemic climate policies enjoy public support?**

# Attitudes Towards Climate Change and Combating It

## Summary of findings

- 71% of Slovaks reported that they try to **reduce waste** as part of their efforts to protect the climate.
- In contrast, only 12% have **reduced their meat consumption**.
- People rather believe that **collective efforts** to reduce environmental impact would be effective.
- Among systemic policies, **bottle deposit schemes are the most popular**, followed by discounts on public transportation.



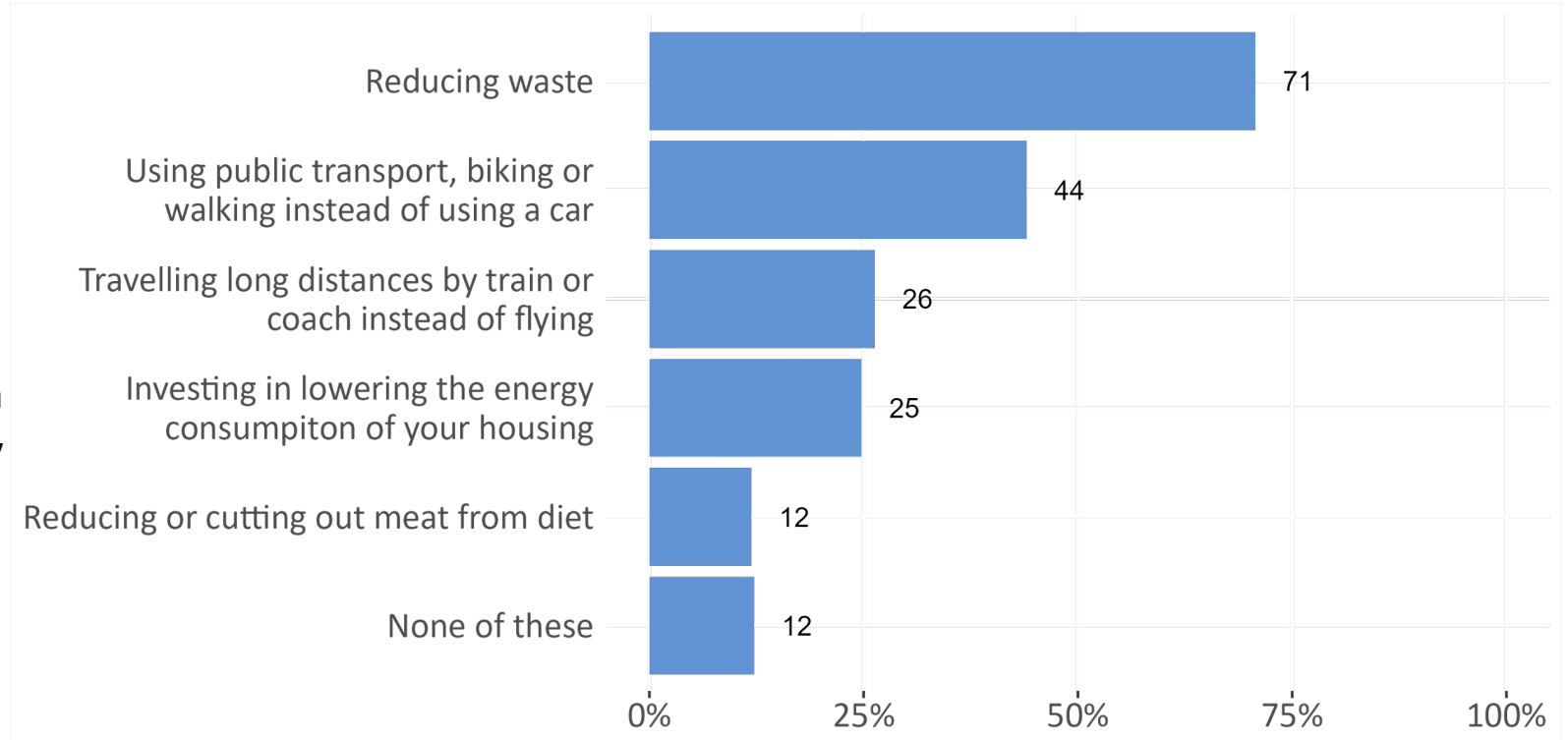
# Slovaks most commonly reduce waste and try to avoid driving cars

Seven out of ten Slovaks (71%) report trying to reduce waste in their daily lives, making it by far the most common action taken with the aim to reduce their environmental impact.

The second most frequent measure taken by Slovaks is using public transport (44%). Less popular actions include avoiding long-distance travel by air (26%) and investing in reducing the energy consumption of their homes, which a quarter of Slovaks have done or are currently doing.

Only 12% have reduced or eliminated meat from their diets. Further 12% state they have not undertaken any of the listed measures.

**„Which of the following steps have you taken in recent years to reduce your environmental impact?“**

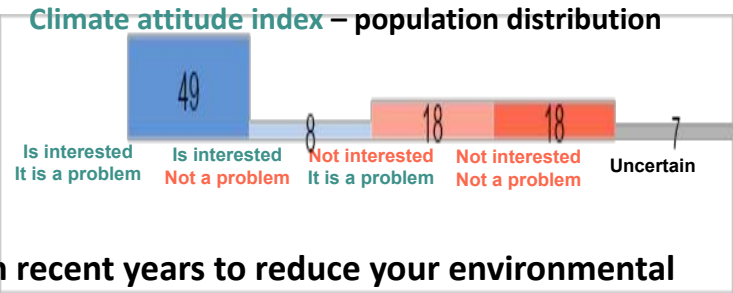


N = 1013

# Practically everyone reduces waste. Interest in climate topics increases overall activity

Within the group interested in climate change and viewing it as a problem, four-fifths (80%) report trying to reduce waste. For other relatively popular measures, their activity aligns more closely with the population average, except for using alternative transportation instead of cars.

Overall, most groups have not implemented most measures in significant numbers, with participation only exceeding half or a third in a few cases. However, only a minorityof people stated they had done absolutely nothing to reduce their environmental impact, even among those with no interest in climate change and low perception of the urgency of the problem.



„Which of the following steps have you taken in recent years to reduce your environmental impact?“

|  | Interested and thinks that serious problem | Interested and does not think that serious problem | Not interested but thinks that serious problem | Not interested and does not think that serious problem | Uncertain |
|--|--|--|--|--|-----------|
| Reducing waste   | 80   | 70   | 71   | 61   | 32        |
| Using public transport, biking or walking instead of using a car | 56   | 39   | 35   | 34   | 17        |
| Travelling long distances by train or coach instead of flying    | 32   | 22   | 22   | 22   | 12        |
| Investing in lowering the energy consumption of your housing     | 32   | 27   | 22   | 13   | 8         |
| Reducing or cutting out meat from diet                           | 18   | 11   | 7  | 3  | 2         |
| None of these  | 4  | 7  | 12   | 22   | 51        |

\_Proportion of Agreeing Responses

N = 1013



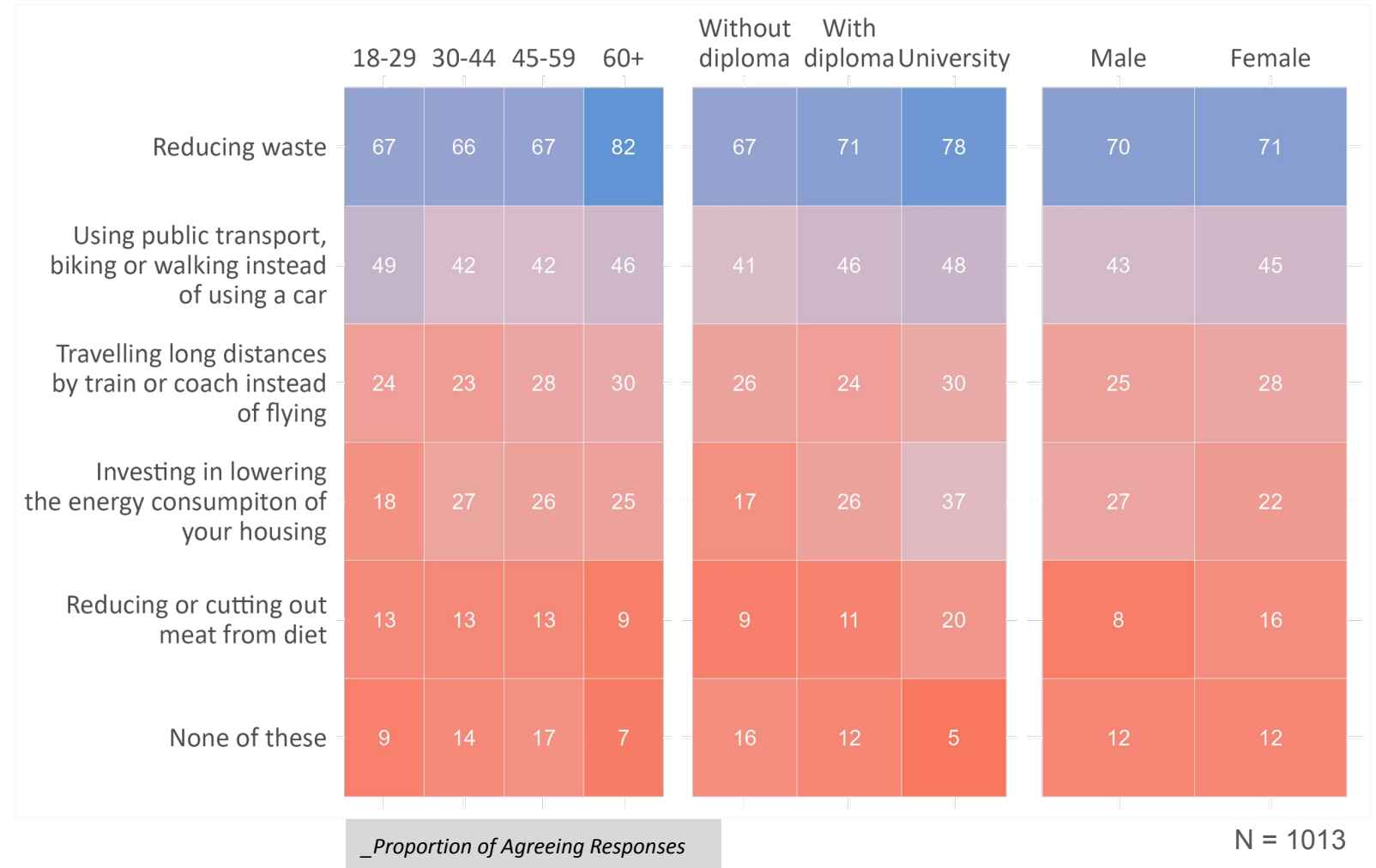
# Almost everyone is reducing waste, but elders by far the most

When comparing individual actions across socio-demographic groups, the most popular measure, waste sorting, is significantly more common among people aged 60 and older.

University-educated individuals are more likely to sort waste compared to those without secondary education. Additionally, those with higher education are significantly more likely to invest in reducing their homes' energy consumption and to limit or eliminate meat from their diets.

Gender does not play a significant role in most actions, except for limiting or eliminating meat from diets, which is more commonly done by women.

„Which of the following steps have you taken in recent years to reduce your environmental impact?“

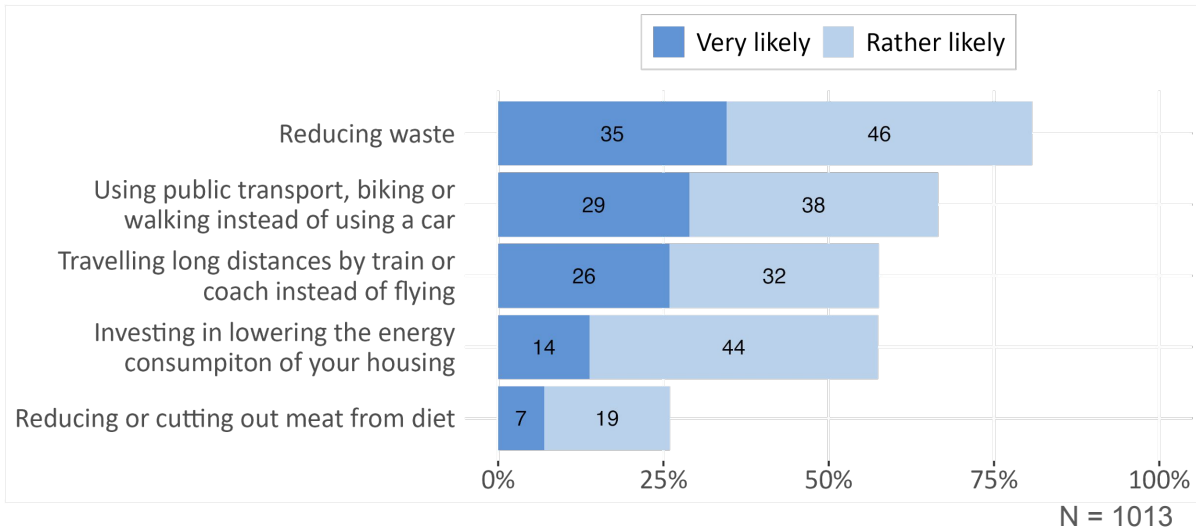


# The population is uncertain about the effectiveness of individual measures, with the exception of reducing meat consumption

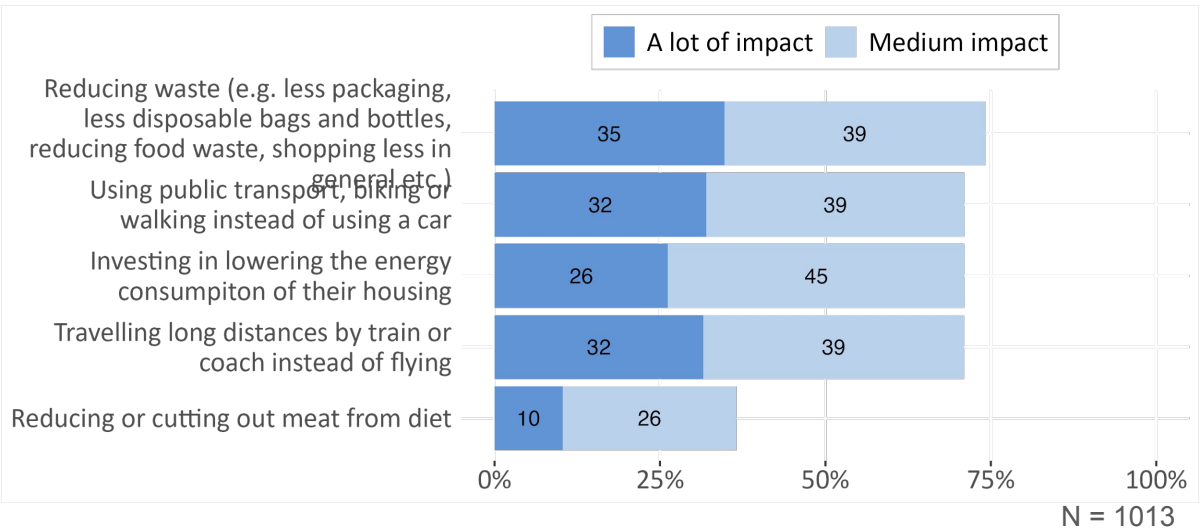
The left graph shows that Slovaks are primarily willing to reduce waste production in the future, followed by using alternatives to cars or planes for long-distance travel. Reducing meat consumption is not particularly popular, with only about a quarter (26%) willing to adopt this measure.

Regarding the perceived ultimate impact of these actions if undertaken by everyone, the public believes all measures are roughly equally effective, except for reducing meat consumption, which is seen as less impactful.\*

„How likely it is, that you will take the following steps in the near future to reduce your environmental impact?“



„In your opinion, how much impact would it have, if a lot of people would take the following steps?“



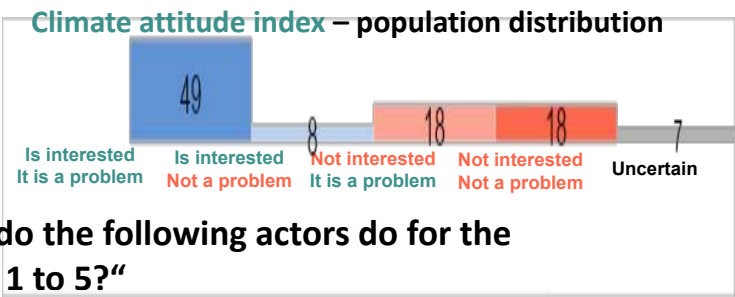
\* This is contrast with existing literature which indicates that reducing meat in the diet belongs among the most impactful steps that individuals can take towards reducing their carbon footprint. See e.g. Ivanova, D. et al. (2020). Quantifying the potential for climate change mitigation of consumption options. In Environmental Research Letters (Vol. 15, Issue 9, p. 093001), or Steinitz, F. et al. (2024). From hamburgers to holiday In Current Research in Environmental Sustainability (Vol. 7, p. 100249).

# Interest in the issue is most reflected in self-assessment of climate behaviour

People who are interested in climate change most often perceive themselves and their immediate surroundings as those doing the most for the environment. However, this perspective is also shared by people in other groups within the index.

The overview graph further indicates that across different groups, there is somewhat higher trust in an individual's immediate surroundings, as well as in the government. Among groups that view climate change as a serious problem, there is also trust in non-governmental organisations and the European Union.

In general, businesses lack public trust.



„In your opinion, how much do the following actors do for the environment on a scale from 1 to 5?“

|                                | Interested and thinks that serious problem | Interested and does not think that serious problem | Not interested but thinks that serious problem | Not interested and does not think that serious problem | Uncertain |
|--------------------------------|--|--|--|--|-----------|
| yourself                       | 3.4  | 3.2  | 2.8  | 2.7  | 2.9       |
| your friends and family        | 3.1  | 2.9  | 2.7  | 2.6  | 2.9       |
| non-governmental organisations | 3  | 2.1  | 3  | 2.5  | 2.8       |
| local government               | 3  | 2.8  | 2.8  | 2.7  | 2.8       |
| European Union                 | 3.2  | 2.6  | 3  | 2.8  | 2.7       |
| businesses                     | 2.5  | 2.2  | 2.4  | 2.3  | 2.4       |
| (national) people              | 2.8  | 2.8  | 2.6  | 2.7  | 2.8       |
| (National) government          | 2.4  | 2.7  | 2.5  | 2.5  | 2.6       |

Average rating (1 = Almost nothing, 5 = As much as possible)

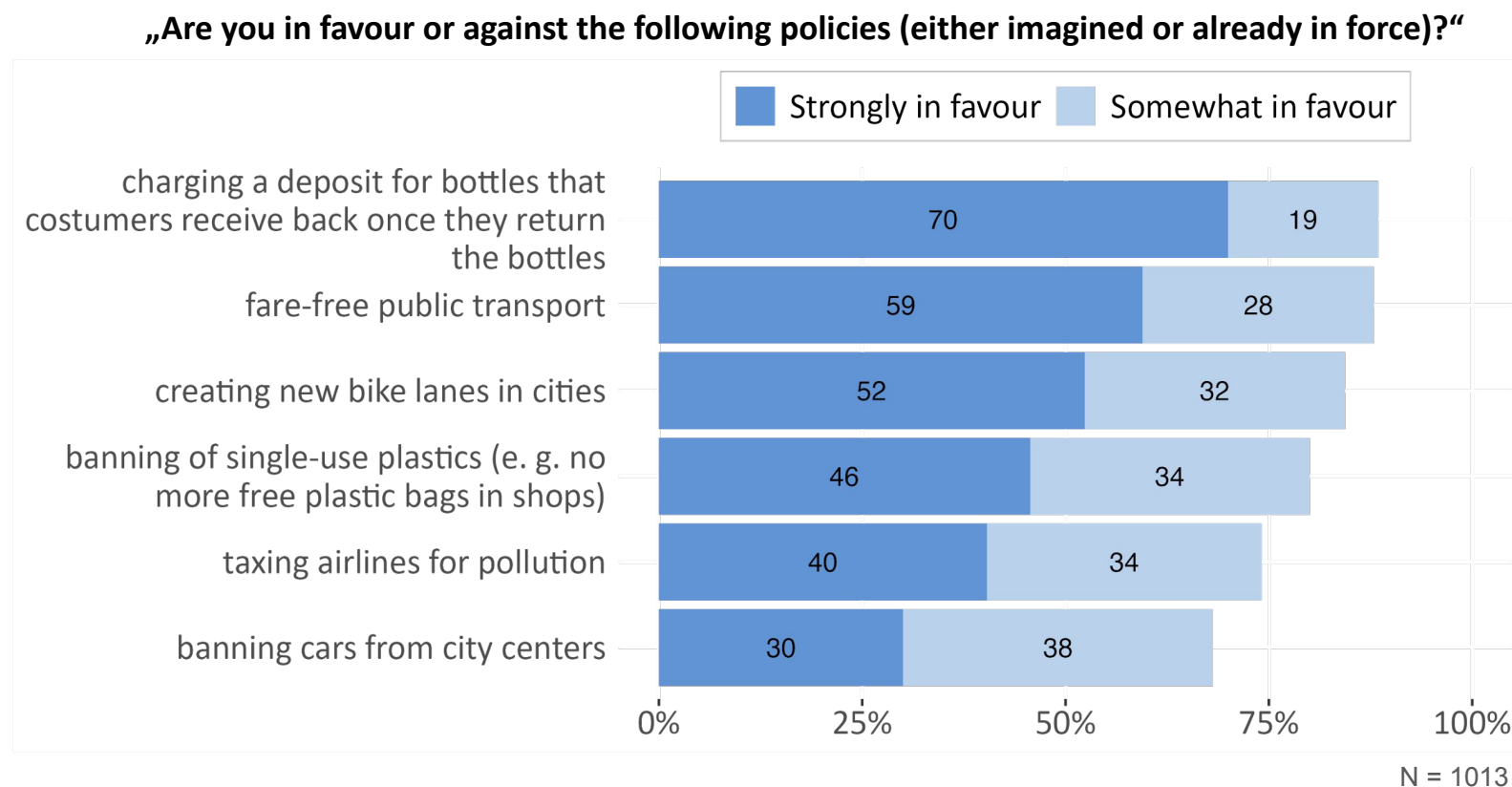
N = 1013



# The greatest public support is for bottle deposit schemes, with 7 out of 10 Slovaks in favor

Bottle deposit schemes have surpassed even policies like free public transport, which is strongly supported by 59% of the public. Additionally, around a half of the people (52%) supports the creation of new cycling lanes in cities, while slightly less than half (46%) are in favor of banning single-use plastics.

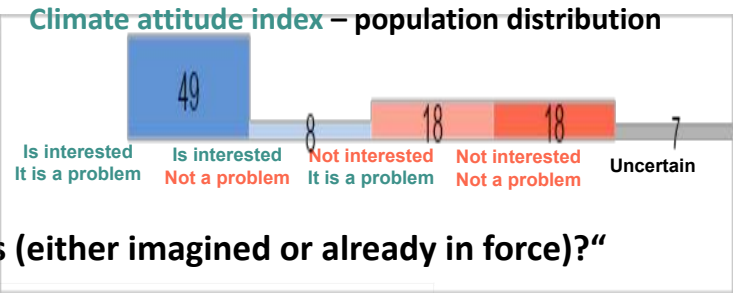
Bans and taxes are less popular overall; however, 40% support taxing airlines for pollution. The least popular measure is banning cars in city centers, supported by only 30% of the population.



# In general, Slovaks oppose the ban on cars entering city centers

When analyzed by the climate attitude index, the two most popular policies—bottle deposit schemes and fare-free public transport—enjoy strong support across all groups. Opinions on other policies, however, are more divided.

It is interesting to note that creating new bike lanes in cities is more frequently accepted by groups that perceive climate change as a serious issue.



„Are you in favour or against the following policies (either imagined or already in force)?“

|                                   | Interested and thinks that serious problem | Interested and does not think that serious problem | Not interested but thinks that serious problem | Not interested and does not think that serious problem | Uncertain |
|-----------------------------------|--|--|--|--|-----------|
| fare-free public transport        | 61   | 52   | 61   | 63   | 41        |
| charging a deposit for lbottles   | 82   | 58   | 70   | 58   | 34        |
| creating new bike lanes in cities | 63   | 34   | 49   | 42   | 29        |
| taxing airlines for pollution     | 42   | 50   | 38   | 39   | 29        |
| banning of single-use plastics    | 58   | 36   | 40   | 31   | 22        |
| banning cars from city centers    | 35   | 24   | 31   | 22   | 20        |

\_Share of answers „Strongly in favor“

N = 1013

# People with a positive inclination toward the EU are more likely to support systemic measures

When systemic measures are analyzed through the EU attitude index, it becomes evident that the more positively a group views the EU, the more likely they are to support individual measures.

However, even the group which stands strongly against the EU still shows majoritarian support for public transport initiatives.

„Are you in favour or against the following policies (either imagined or already in force)?“

|   | Strongly pro-EU | Somewhat pro-EU | Undecided | Somewhat anti-EU | Strongly anti-EU |
|---|-----------------|-----------------|-----------|------------------|------------------|
| charging a deposit for bottles that costumers receive back once they return the bottles | 81              | 76              | 70        | 59               | 43               |
| fare-free public transport  | 59              | 61              | 59        | 62               | 54               |
| creating new bike lanes in cities   | 70              | 59              | 45        | 45               | 30               |
| banning of single-use plastics (e. g. no more free plastic bags in shops)               | 58              | 52              | 44        | 33               | 25               |
| taxing airlines for pollution   | 39              | 37              | 43        | 43               | 39               |
| banning cars from city centers  | 39              | 34              | 26        | 21               | 23               |

\_Share of answers „Strongly in favor“ + „Somewhat in favor“

N = 1013

# \_Housing, Approach to Energy Savings, and Investments



**How many houses are insulated in Slovakia?**

**What technologies do Slovak households use in heating?**

**What are the most commonly considered investments for home renovations?**

# Housing, Approach to Energy Savings, and Investments

## Summary of findings

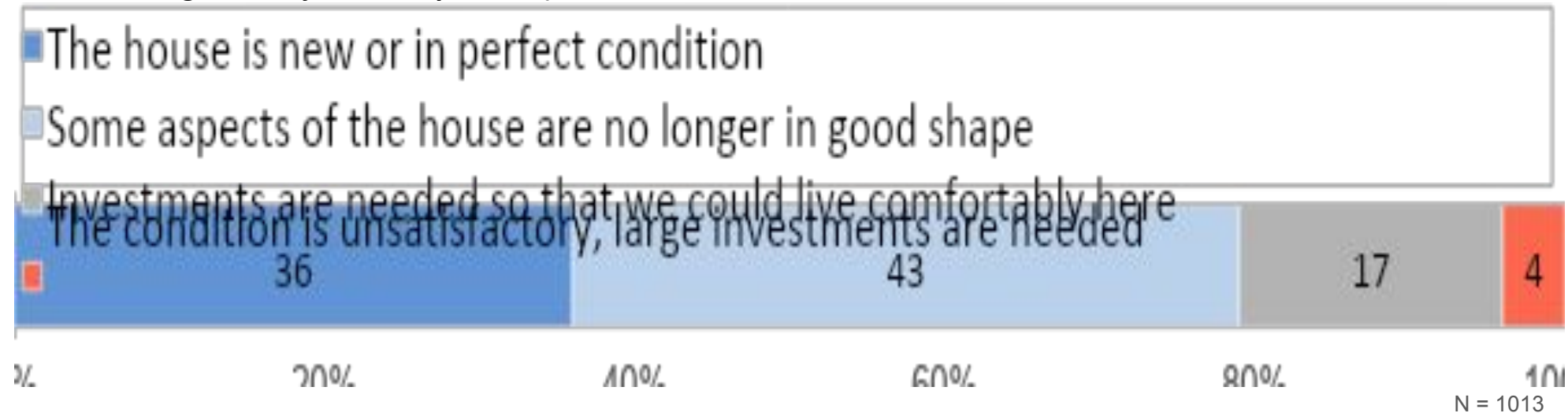
- **Most of the population thinks their houses are in a good shape.** Just 17 % says major investments for comfortable living are needed and 4 % that the building is rather not suitable for living.
- Panel apartment buildings are the most commonly insulated house type in Slovakia, with seven out of ten being insulated.
- When it comes to renovations and energy savings, Slovaks **most often replace windows.** However, a significant barrier to further renovations is the lack of financial resources.
- In general, we see limited experience with utilizing subsidy programs so far. **However, a significant share of the population is considering this option in the future.**



# Four out of five Slovaks rate the condition of the building they live in as good

Let's first look at how Slovaks subjectively assess the condition of their housing. Subjective evaluation of a property's condition can be a significant factor in deciding whether a renovation will take place (and, in turn, whether energy-saving measures will be implemented). According to one-third (36%) of respondents, their property is in perfect condition, while another two-fifths (43%) believe only minor repairs are needed. One-fifth (17%) state that significant investments would be necessary, and 4% rate the condition of their house or apartment as very poor.

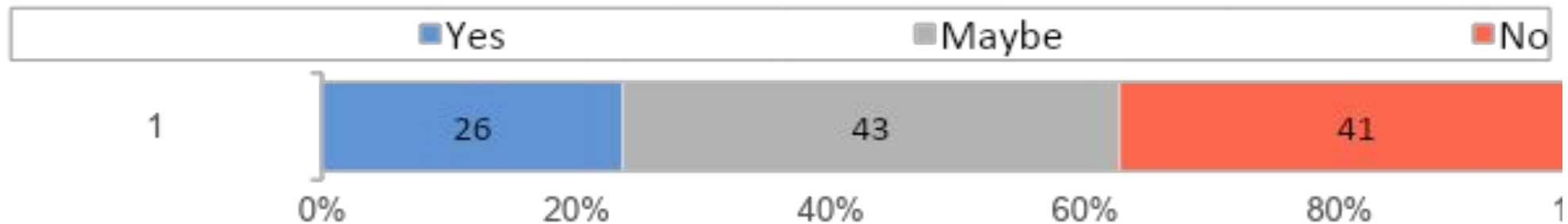
„How would you describe the general condition of the building you live in? (If you are living in a flat, please think about the whole building and not just about your flat.)“



# A quarter is planning to invest in lowering the energy consumption of their household

In the next five years, only 26% of people plan to invest in reducing their home's energy consumption. About two-fifths (43%) are still undecided, and a similar proportion say they do not plan such investments.

„Are you planning to invest in lowering the energy consumption of your housing in the next five years?“

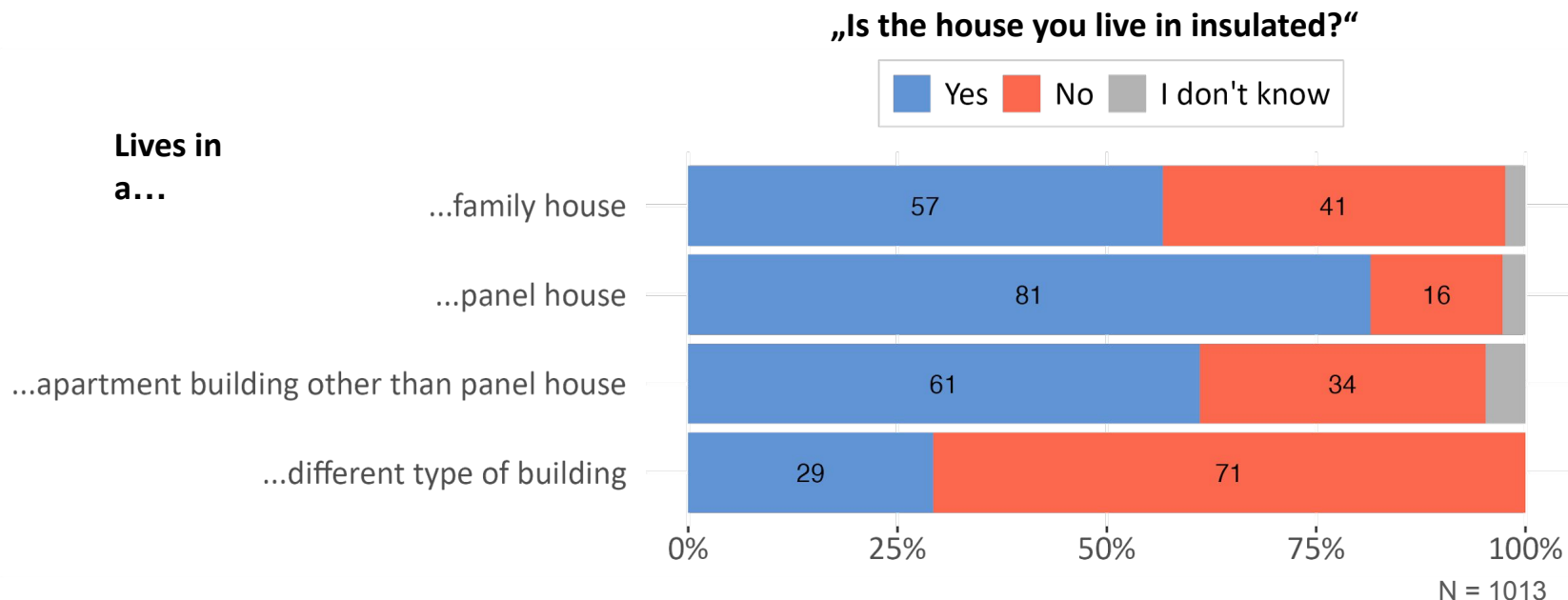


N = 1013

# A large portion of panel buildings has already been insulated, while there is still potential among detached houses and apartment buildings

In Slovakia, panel apartment buildings are the most insulated house type, with the vast majority of participants (81%) living in panel apartment buildings reporting this. The situation differs for apartment buildings made from other materials (typically bricks), where approximately three-fifths (61%) of houses are insulated, indicating significant potential for improvement in this category.

As for detached houses, 57% are already insulated; however, it is likely that not all in this segment can be insulated.



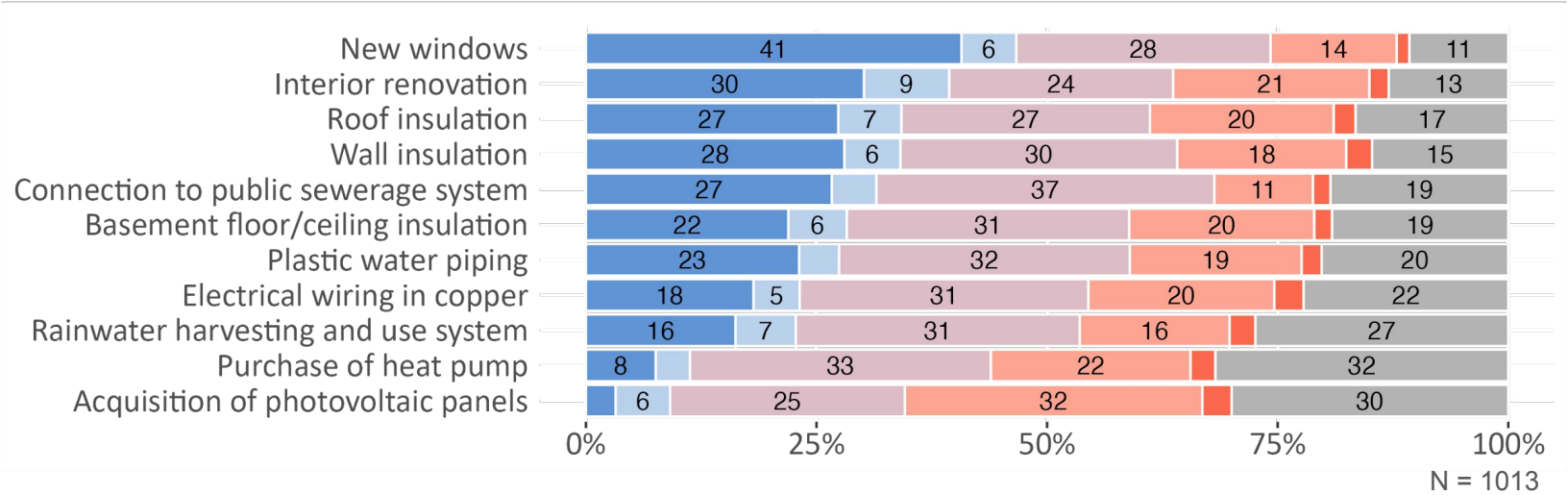


# For most renovation, a fifth of respondents would like to implement them but lack the financial resources for reconstruction

From the list of potential renovations, it is clear that window replacement is the most common, undertaken by 41% of households. This is an energy-efficient measure, though it is advisable to complement it with additional insulation if not already done. For participants, the time required to carry out such investments is far less of an issue compared to the lack of financial resources.

„Please indicate whether you plan to renovate or invest in the following things ...“

We have invested in this in the past 10 years.      We are planning to invest or are currently having the works d  
No current need for investments      We'd like to invest in this, but do not have the money  
We'd like to invest in this, but do not have the time      I don't know

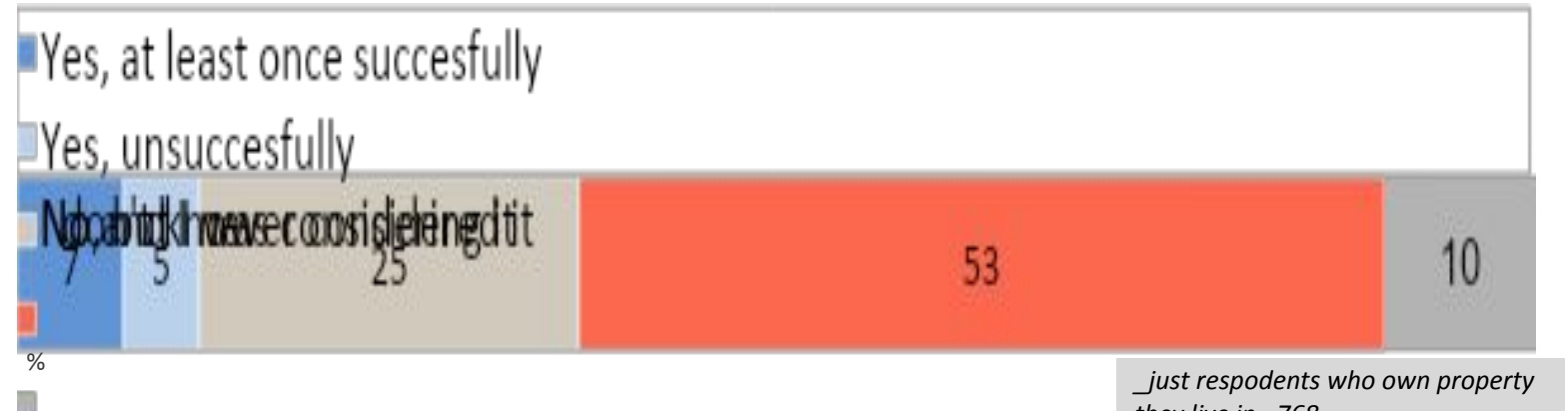


# Only one-tenth have experience with subsidy programs

This question was asked only to people who own the property they live in. The reason for this is that, although improving energy efficiency is also important for households living in rented accommodations, in most cases, they are not eligible to apply for support from grant programs.

Nevertheless, only 12% have experience with such applications. Moreover, of this group, only 7% had a successful application, while the remaining 5% were unsuccessful. Despite this, a quarter (25%) are considering applying in the future. More than half (53%) have not even considered applying for a grant.

**„Have you or people from your household ever applied for support from a scheme meant to decrease the energy consumption of your housing? “**



*\_just respondents who own property they live in= 768*

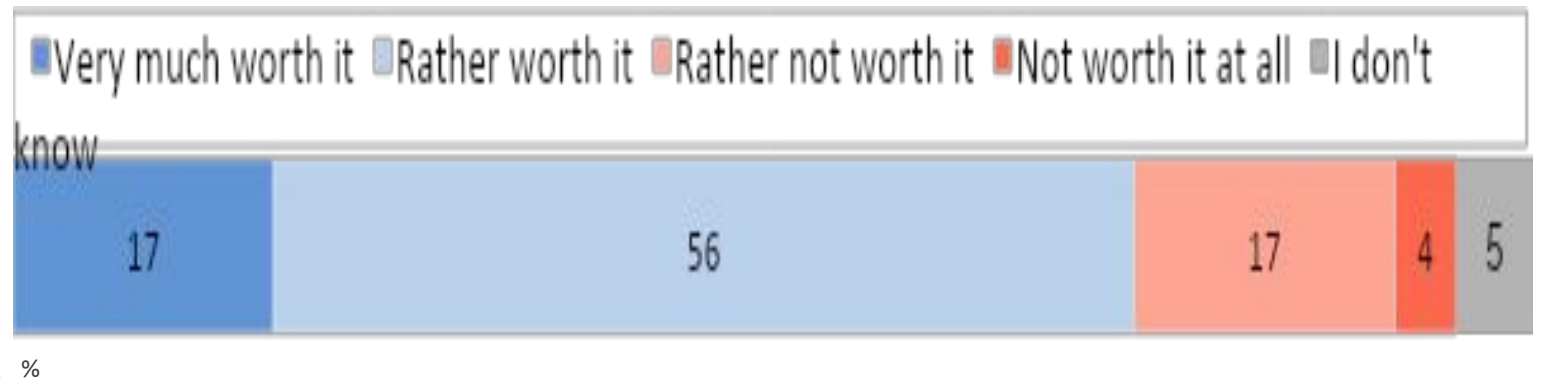
# The overall process of obtaining support leaves a positive sentiment.

People, who reported experience with applying for a grant were then asked how they assess the process and the overall costs of the grant, including the administrative procedures involved. From the responses, we can see that applicants are more often satisfied in the end. A total of 73% considered the grant beneficial, while one-fifth (21%) stated that the whole process was not worth it.

„Have you or people from your household ever applied for support from a scheme meant to decrease the energy consumption of your housing? “



„If you think about the overall cost of the subsidy (like paperwork, labor cost, material cost etc.) Was it worth to do it?“



N = 94

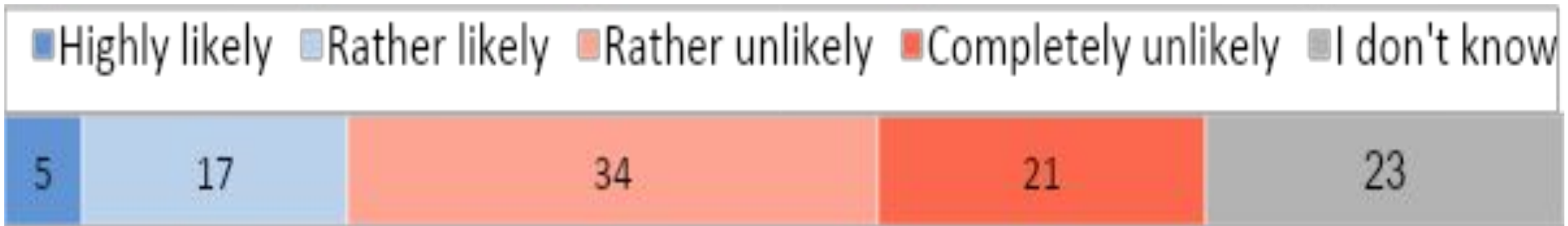
\_\*just respondents who own property they live in= 768

# More than a half of all owners, potential applicants, believe that they would not receive a grant if they applied

A potentially significant barrier is the fact that up to half (55%) of all potential applicants for grants aimed at reducing the energy demand of buildings believe that receiving a grant in their case is rather unlikely. On the other hand, about one-fifth (22%) are optimistic, while a similar proportion (23%) are unable to say.

This finding can be compared with the previous two sections, which showed that the majority of applications are successful and that most recipients are satisfied with the process.

„In your opinion, how likely it is that you would receive such support if you applied?“



%

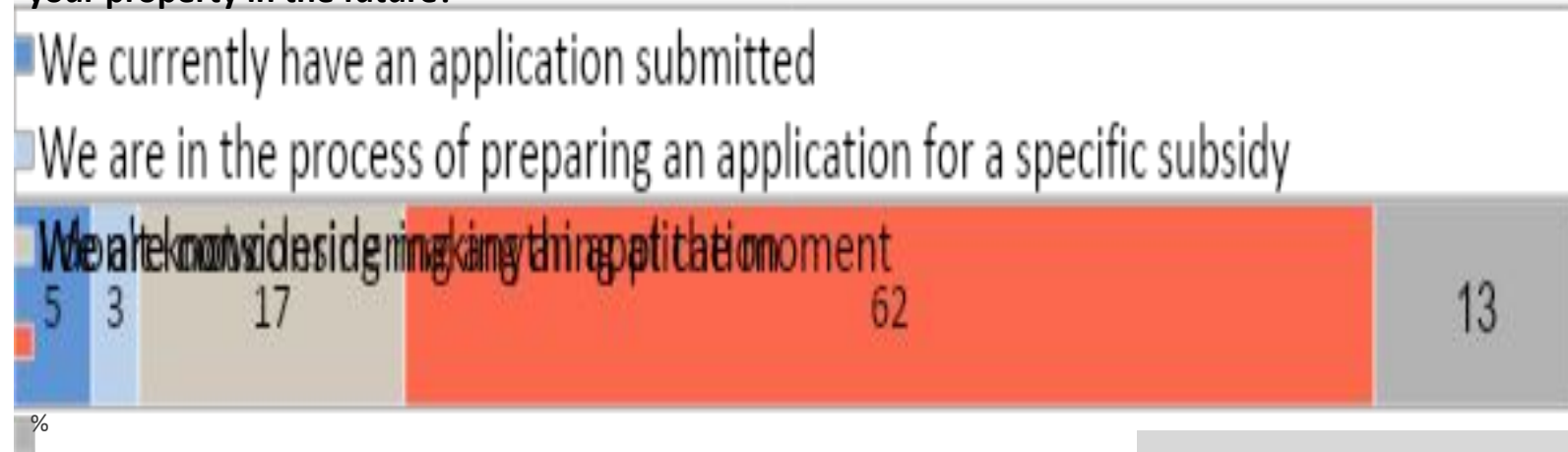
\_\_just respondents who own  
property they live in= 768

# Currently, up to a quarter of property owners are either considering applying for a subsidy program or have already applied

At the same time, looking ahead, three-fifths (62%) of people currently do not consider applying for a grant. However, 5% have already applied, and another 3% are in the preparation phase. Additionally, 17% are considering applying in the future.

This suggests, that the number of properties undergoing comprehensive renovations aimed at reducing energy consumption could potentially increase significantly in the future.

„How does your household feel about applying for subsidies to reduce the energy consumption of your property in the future?“



\_\_just respondents who own property they live in= 768

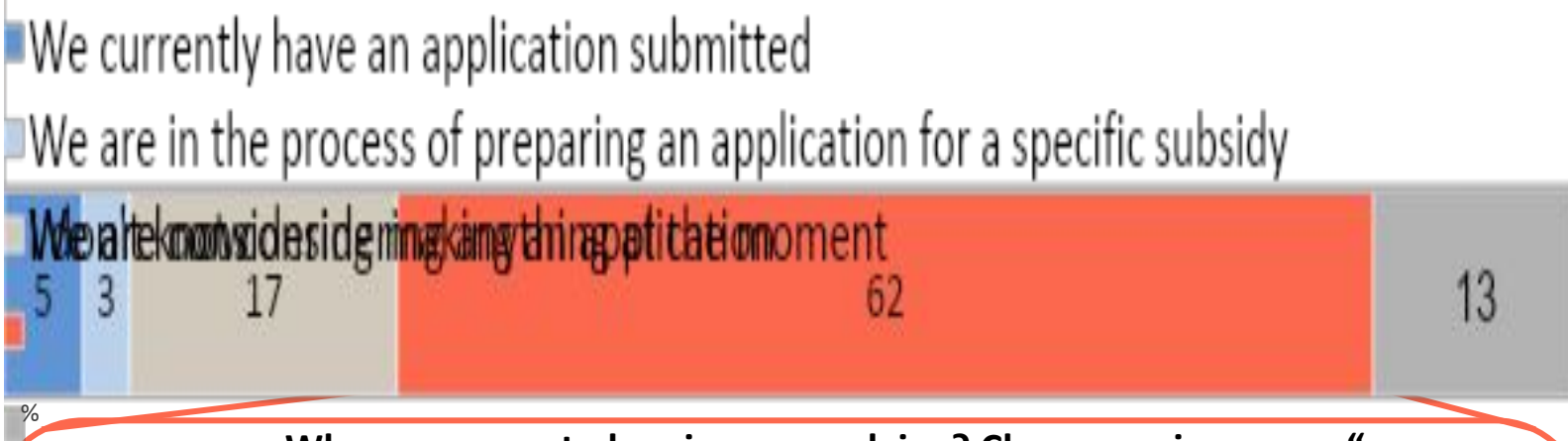
# The most common reason for not applying for a grant is that a renovation is not needed

Among those who do not consider applying for support, one-third (34%) believe that a renovation is unnecessary. This reason is certainly legitimate, especially for newer properties that are indeed in good condition.

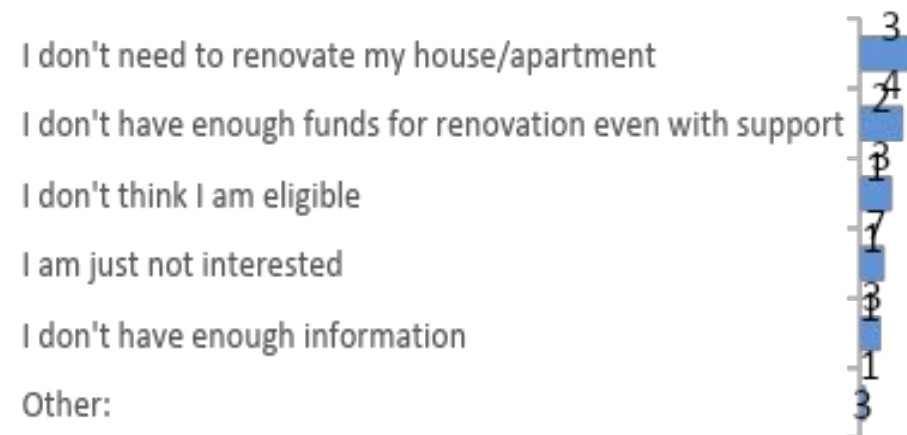
A fifth (23%) state that even with financial support, they lack sufficient funds of their own. A similar proportion (17%) believe they do not meet the grant requirements. Comparing this with general beliefs about eligibility for grants, we see that this reason is relatively minor compared to others.

Additionally, 13% are simply not interested in applying for a grant, and 11% say they do not have enough information about the process.

„How does your household feel about applying for subsidies to reduce the energy consumption of your property in the future?“



„Why are you not planning on applying? Choose main reason:“



N = 470

\_ \*just respondents who own property they live in= 768





# \_Labor Market and the Impacts of Climate Change

How many Slovaks have already felt the impacts of climate change on the labor market?

What are the expected impacts on the labor market in Slovakia overall?

How will the labor market be affected by economic transformation in the fight against climate change?

# \_Labor Market and the Impact of Climate Change on It

## \_\_\_Summary of findings

- Three out of ten Slovaks fear that climate change **will negatively impact the labor market in the future.**
- However, the public claims **not to have yet experienced** the effects of climate change, either positive or negative.
- Concerns that **efforts to combat climate change will harm the Slovak economy are strong**, with 41% of the population believing this will be the case.
- Slovaks are most worried about **job losses and wage reductions.**





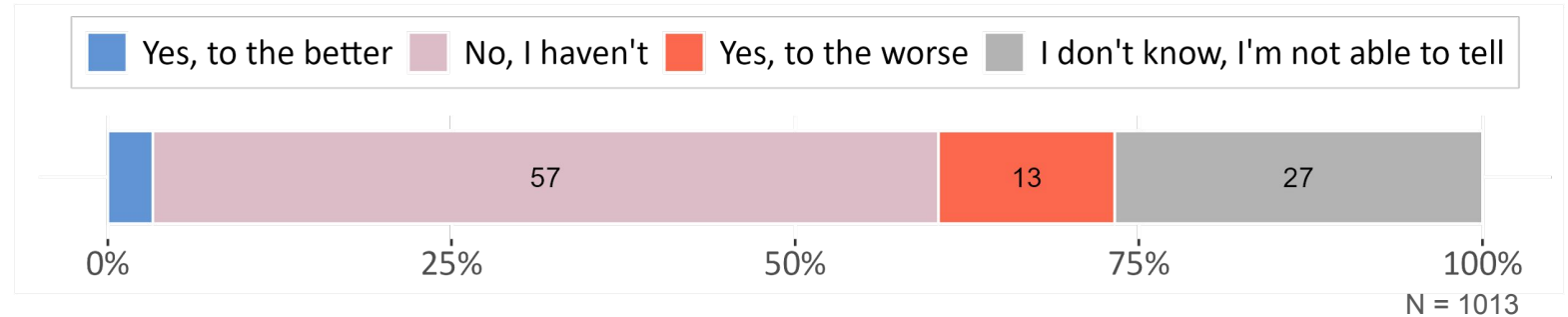
# The impacts of climate change on the labor market have not personally affected Slovaks yet. However, they look to the future with concern

Currently, three-fifths (57%) of the public state that they have not yet experienced any impacts of climate change on the labor market. Among those who did, 13% report negative effects, while only a small fraction note positive impacts.

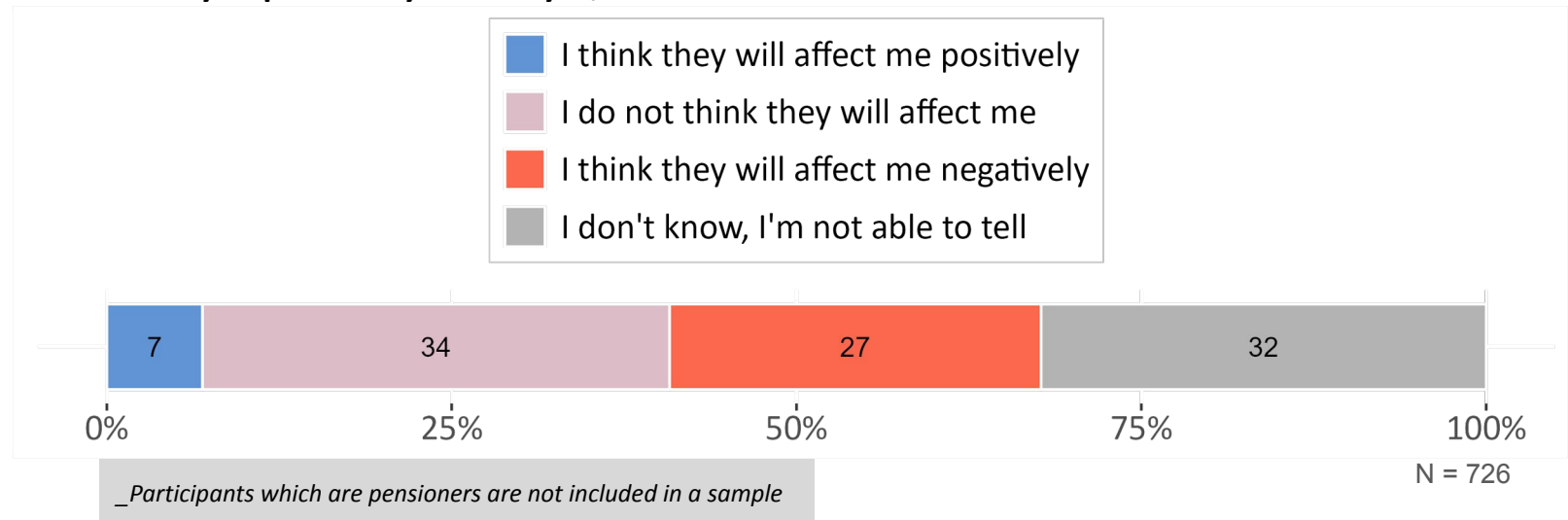
When asked whether they believe these impacts will personally affect them in the future, the public is more pessimistic. About a quarter (27%) are certain the effects will be negative, while a third (33%) of Slovaks are unable to assess the situation.

While the current impact of climate change on the labor market is difficult for the public to evaluate, the outlook for the future is generally more negative.

**„Have you personally already experienced impacts of climate change on the labour market?“**



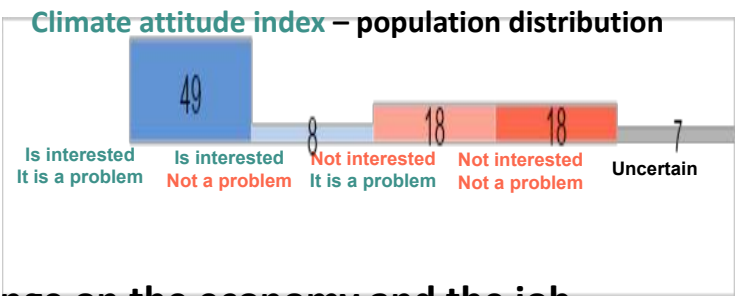
**„Do you think that the effect of climate change on the economy and the job market will affect you personally? And if yes, how?“**



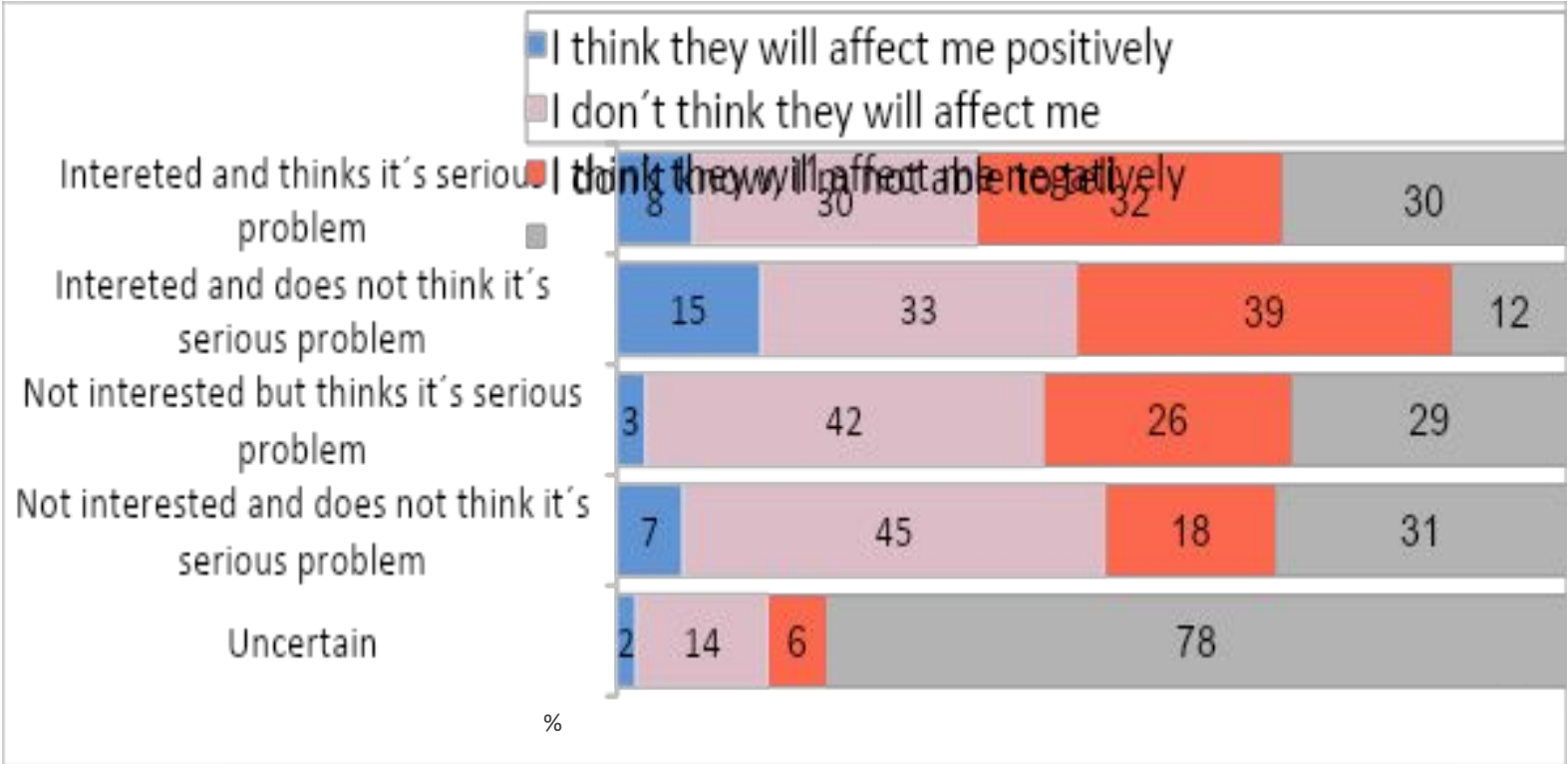
# Interest in climate change contributes to higher negative expectations regarding the job market

Groups interested in environmental issues are more likely to believe that the impacts of climate change will affect them negatively on the labour market. In contrast, within the group that does not perceive climate change as a serious problem, 15% still expect a positive impact.

Overall, significant differences across groups are not apparent, except for the group of people that are interested in climate change but do not perceive it as a problem. However, this group is considerably smaller than the others, representing only 8% of the population.



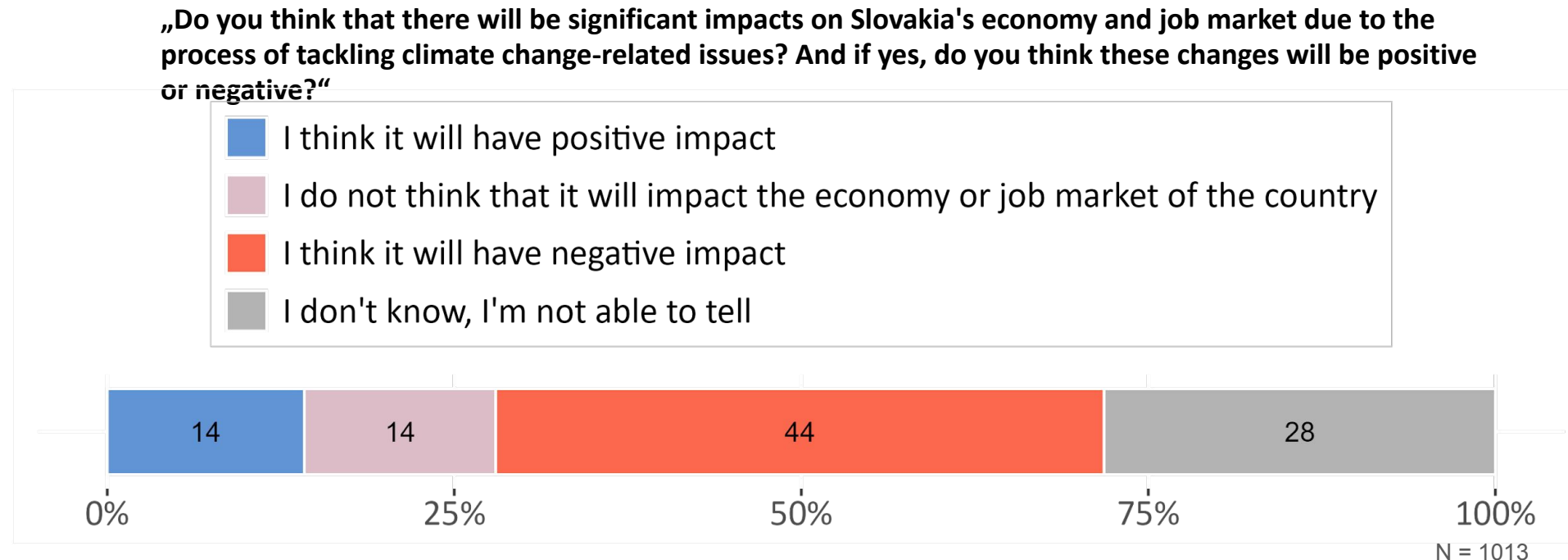
„Do you think that the effect of climate change on the economy and the job market will affect you personally? And if yes, how?“



# Almost half of the people believe that tackling climate change will negatively affect Slovakia's economy, while a third are uncertain

When asked not about the impact of climate change itself, but about the effects of the current systemic solutions aimed at climate mitigation or adaptation, nearly half (44%) of the population state that these steps will have a negative impact on the job market.

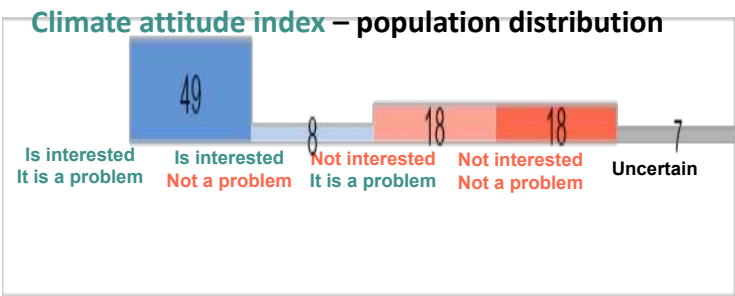
Around three-tenths (28%) are unable to assess the future impact. Efforts to combat climate change remain unsettled in Slovak discourse and evoke concerns among a large part of society.



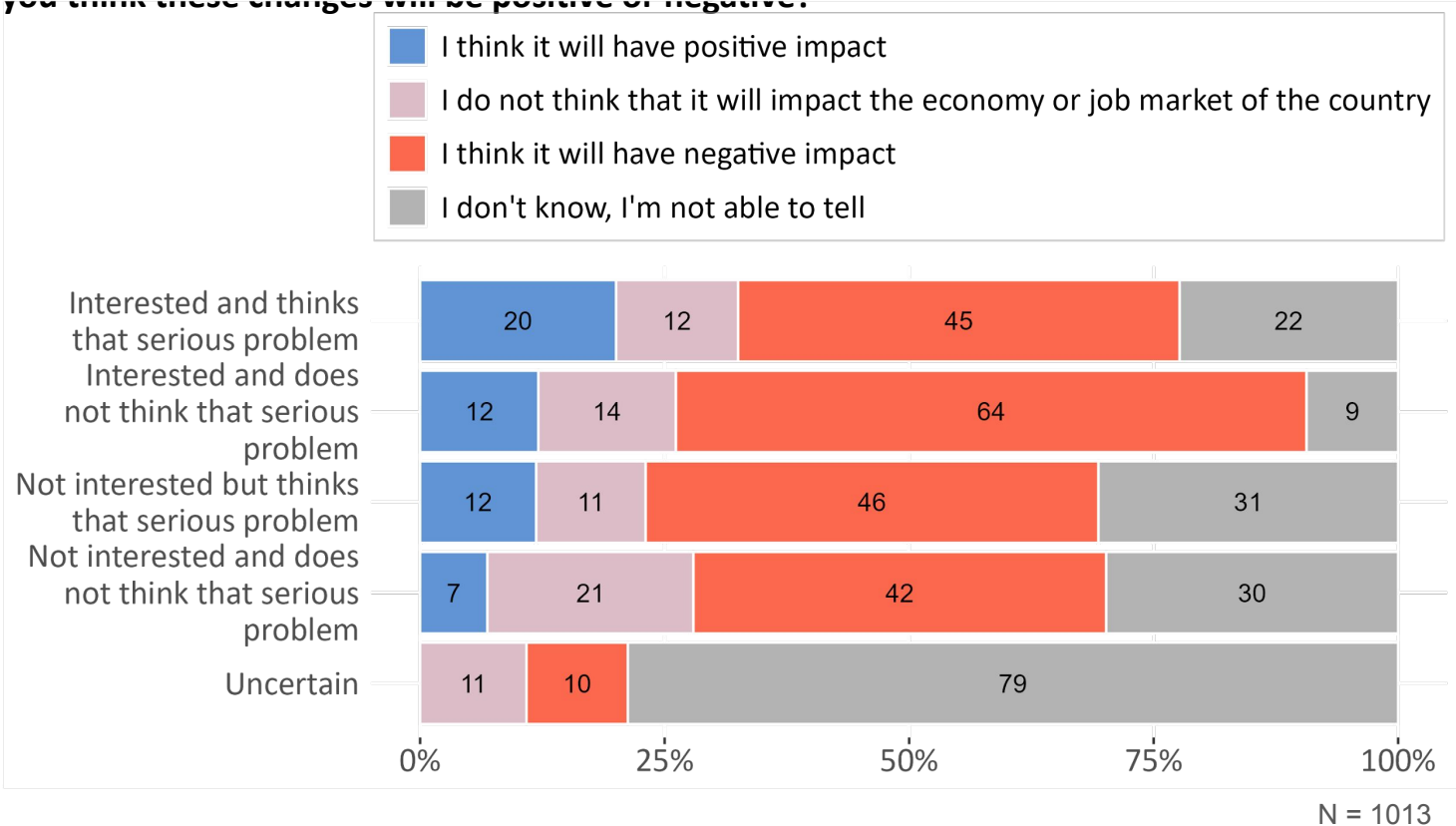
# People across attitude groups are convinced about the negative impacts

Although the group interested in the topic alongside perceiving climate change as a problem is slightly more likely to expect a positive impact of climate change on the job market, the belief that the effects will be negative is present in around 50% of all groups.

Across the population, regardless of their inclination towards climate change topics, the outlook remains largely pessimistic. Communication efforts should therefore also target groups that are open to the broader transformation.



„Do you think that there will be significant impacts on Slovaks's economy and job market due to the process of tackling climate change-related issues? And if yes, do you think these changes will be positive or negative?“



# Negative impacts are perceived as more likely. People expects lower wages of salaries and decline of jobs

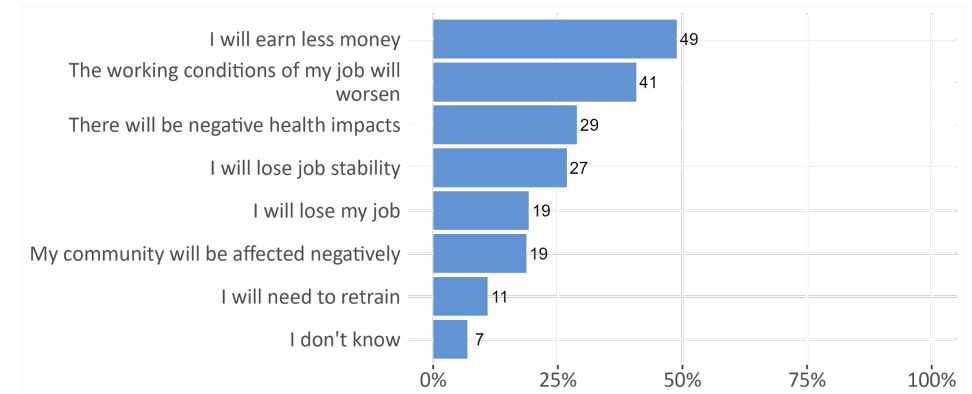
The most common concern among Slovaks is that climate change impacts will lead to lower earnings, with 49% believing they will earn less. Another one-fifth (41%) expect worsening working conditions. Additionally, 3 in 10 Slovaks (29%) anticipate a decline in their health, while 27% worry about job security. A more direct fear—the outright loss of employment—is expressed by 19% of respondents.

From a nationwide perspective, half of Slovaks (52%) believe that people will start losing jobs due to the negative effects of climate change, and 46% think the labor market will generally become less stable.

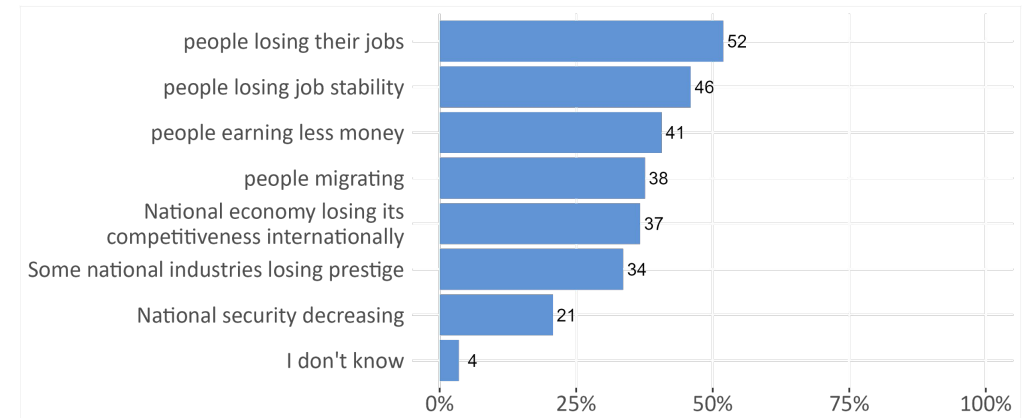
Furthermore, one-fifth (41%) expect that these impacts will lead to lower earnings, while 38% foresee migration (into Slovakia). Another 37% believe that the national economy will lose global competitiveness, and similarly, one-third (34%) expect industries to lose their prestige.

Overall, we can observe that while personal impacts are not perceived as overwhelmingly severe, the effects on the country as a whole are considered serious by a significant share of Slovaks.

## Believe the impacts will affect them **NEGATIVELY** (27%)



## Believe the impacts will affect the Slovakia **NEGATIVELY** (43%)



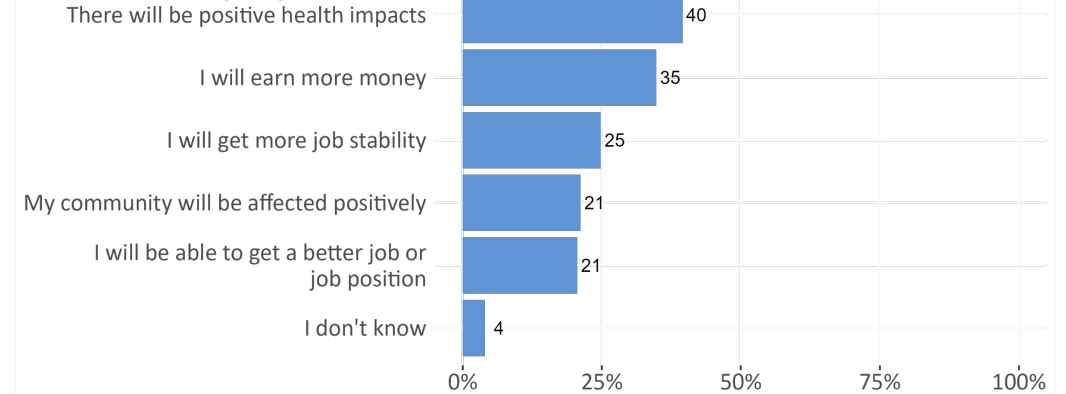
# If people expect positive impacts, these are expected to mean salary raises and positive health impacts

In the case of positively perceived impacts, which are expected by only 5% of the total sample, we see that the most frequently mentioned benefit are positive impacts on health, as believed by 40% of participants. Similarly, a comparable proportion (35%) thinks they could earn more money in the future due to climate change. A quarter (25%) expects that they might gain greater job stability.

Slightly more participants (7%) believe that there could be positive impacts on the entire job market in Slovakia. Within this group, the prevailing opinion is that salaries could increase (30%), although an equal proportion (30%) stated that they are unsure what specific impacts might occur. Around one-fifth (20%) believes that the changes will positively influence job stability or lead to the creation of new job opportunities.

## Believe the impacts on the job market will affect them

### POSITIVELY (5%)



## Believe the impacts on the job market will affect Slovakia

### POSITIVELY (7%)



*\_The overall share of people expecting positive impacts constitutes a smaller portion of the total sample. Therefore, the individual response shares should be interpreted as indicative rather than definitive.*



# Transport and Attitudes Towards Electromobility

**What are the most important factors which affect choosing a mode of transportation?**

**How do Slovaks prefer to travel?**

**What are the biggest barriers to transitioning to electromobility?**



# \_Transport and Attitudes Towards Electromobility

## \_\_\_Summary of Findings

- For Slovaks, the most important transportation factors are **price, comfort**, and the **safety of the vehicle**.
- Around 37% of citizens travel to work or school by **car**.
- The most-considered alternative modes of transport are **public transportation and walking**.
- Slovaks do not outright reject the idea of **supporting electromobility** through incentives and policies.
- However, they are **less certain** about the advantages of electric vehicles compared to internal combustion engine cars.



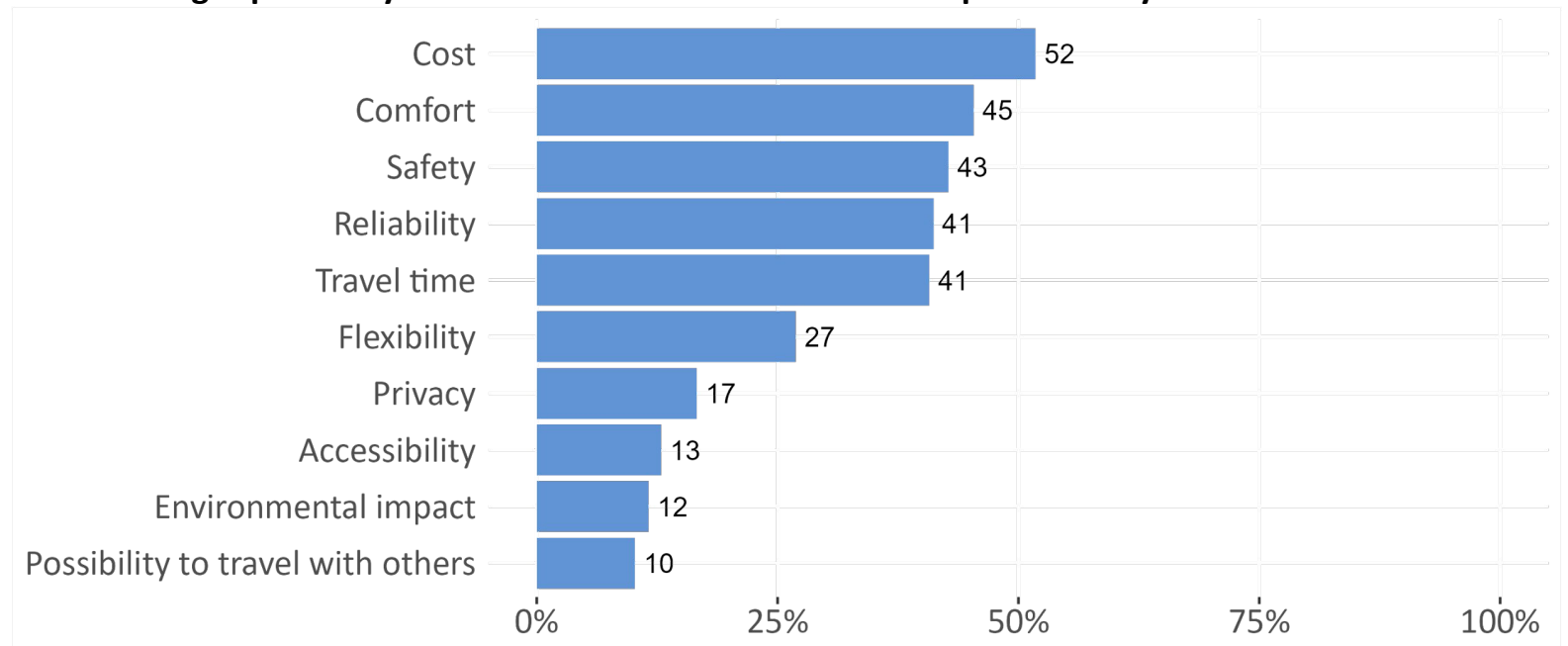
# Price and comfort are the most important factors for Slovaks when choosing a mode of transportation

When choosing a mode of transportation, we inevitably consider multiple factors, which, if we have options, can be prioritized differently. Among participants, the top three factors most frequently mentioned were cost (52%), comfort (45%), and safety (43%).

Reliability (41%) and travel time (41%) were considered moderately important.

Factors deemed less important included connection flexibility (27%), privacy (17%), and, for only about a tenth of participants, accessibility (13%), environmental impacts of transportation (12%), and the ability to travel with someone else (10%).

**„When deciding on which mode of transport to use, how important are the following aspects to you? Please choose the three most important for you.“**

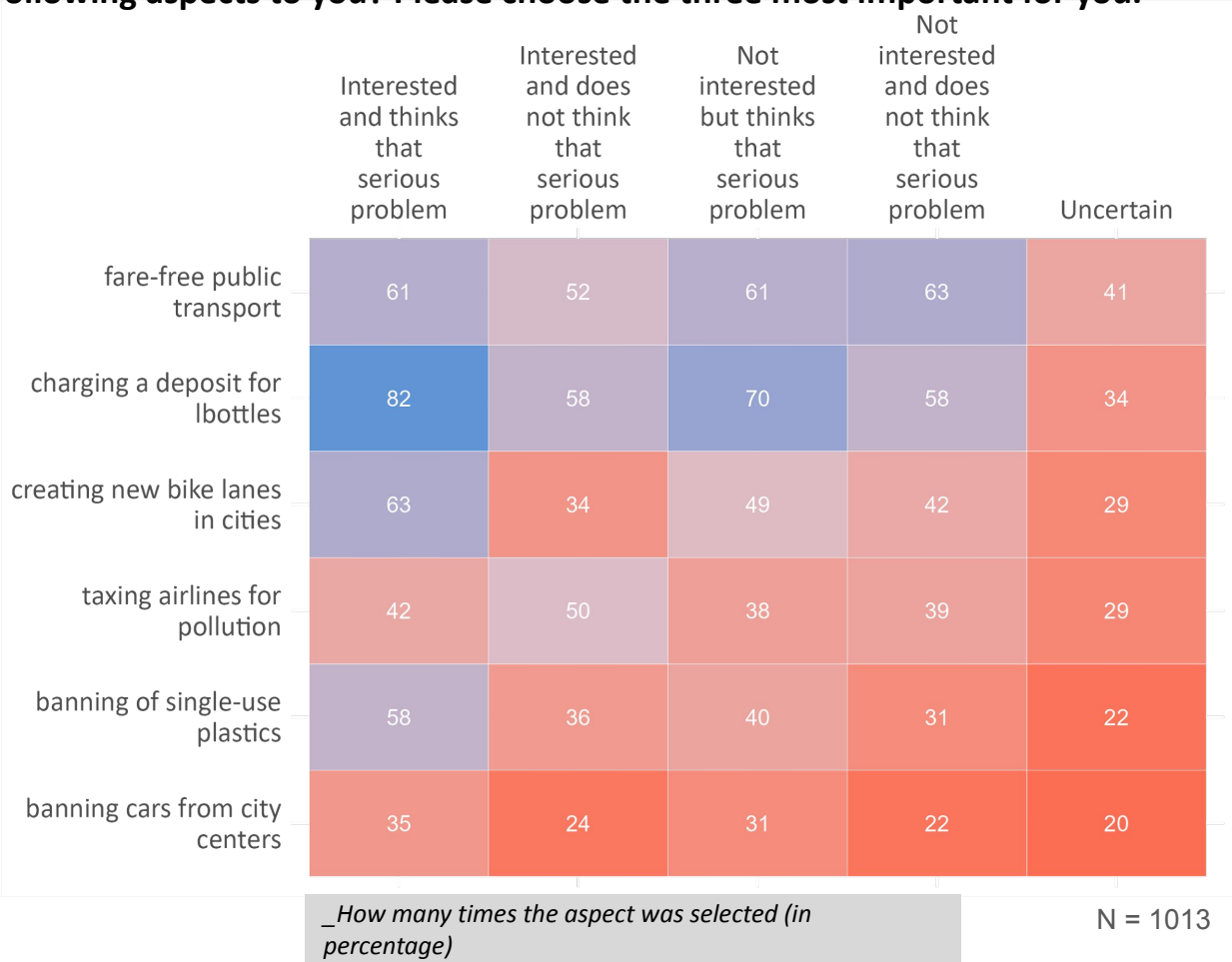


# Attitudes toward climate don't significantly influence the preferred aspects of transportation

The trio of "price, comfort, and safety" plays the most important role across all groups when viewed through the climate attitude index. For all groups, these three aspects were cited as the most essential, except for the group that is interested in climate issues but does not perceive them as urgent.

Where minor differences can be observed, they tend to occur among groups that do not consider climate change a serious problem. The "Uncertain" group does not significantly differ from the average.

„When deciding on which mode of transport to use, how important are the following aspects to you? Please choose the three most important for you.“



# Travel priorities differ most in older/younger age and for people in a poor financial situation

First, let's look at the responses based on age structure. In this breakdown, we see that the most cited important aspect (price) is more significant for citizens aged 60+ and for young people aged 18–29. Young people also value comfort and travel time highly. In contrast, for those of working age, reliability and flexibility become more important.

When viewed through income groups, price is significantly more important for less financially secure groups. Conversely, travel time becomes less of a priority for them, while flexibility and comfort gain importance.

**„When deciding on which mode of transport to use, how important are the following aspects to you? Please choose the three most important for you.“**

|                                   | 18-29 | 30-44 | 45-59 | 60+ | (Very) well financially secured | Standardly financially secured | Poorly financially secured/basicly poor |
|-----------------------------------|-------|-------|-------|-----|---------------------------------|--------------------------------|---|
| Cost                              | 55    | 48    | 49    | 57  | 49                              | 47                             | 63                                      |
| Comfort                           | 53    | 46    | 45    | 41  | 46                              | 47                             | 41                                      |
| Safety                            | 31    | 42    | 49    | 43  | 38                              | 42                             | 46                                      |
| Travel time                       | 48    | 39    | 41    | 41  | 42                              | 45                             | 32                                      |
| Reliability                       | 33    | 40    | 35    | 51  | 36                              | 42                             | 42                                      |
| Flexibility                       | 32    | 37    | 26    | 14  | 35                              | 28                             | 21                                      |
| Privacy                           | 18    | 16    | 19    | 12  | 19                              | 15                             | 17                                      |
| Accessibility                     | 13    | 10    | 11    | 18  | 12                              | 12                             | 15                                      |
| Environmental impact              | 8     | 11    | 16    | 11  | 15                              | 10                             | 14                                      |
| Possibility to travel with others | 9     | 11    | 9     | 11  | 7                               | 11                             | 10                                      |

N = 1013

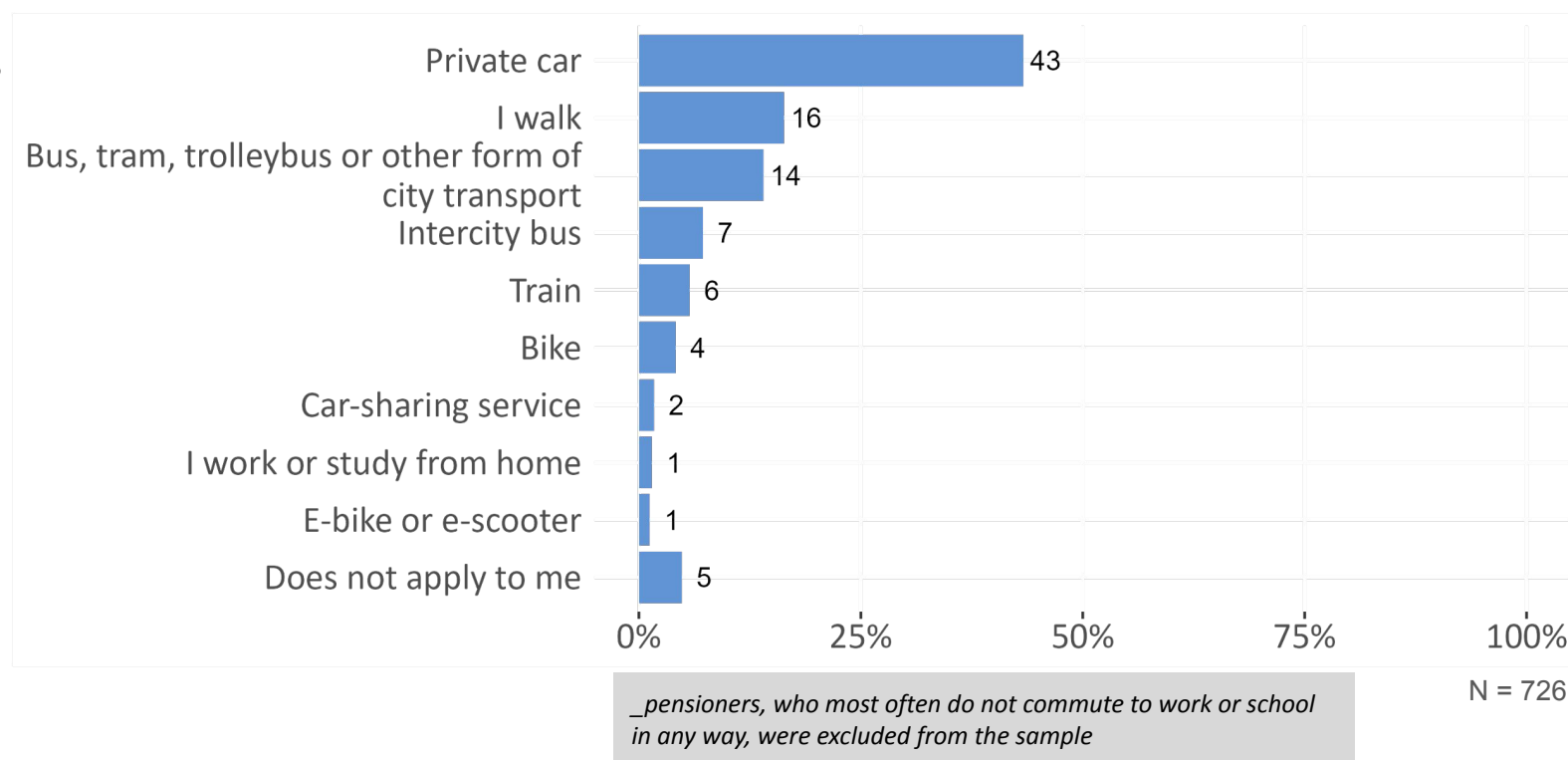
# Two-fifths of Slovaks most often travel by personal car, followed by walking or using public transportation.

The majority, a total of 43%, travel to work or school by car, followed by 16% who travel on foot. About 14% opt for public transportation.

Vehicles designed for longer distances, such as trains or intercity buses, are regularly used by 14% of the population.

From this data, it can be inferred that approximately two-thirds of the population rely on motorised transportation, likely powered by fossil fuels engines. Alternatives like car-sharing or shared bicycles remain very rare.

**„Which mode of transport do you personally use the most often for travelling to work or school? (If there are multiple, choose the one you travel the longest with)“**



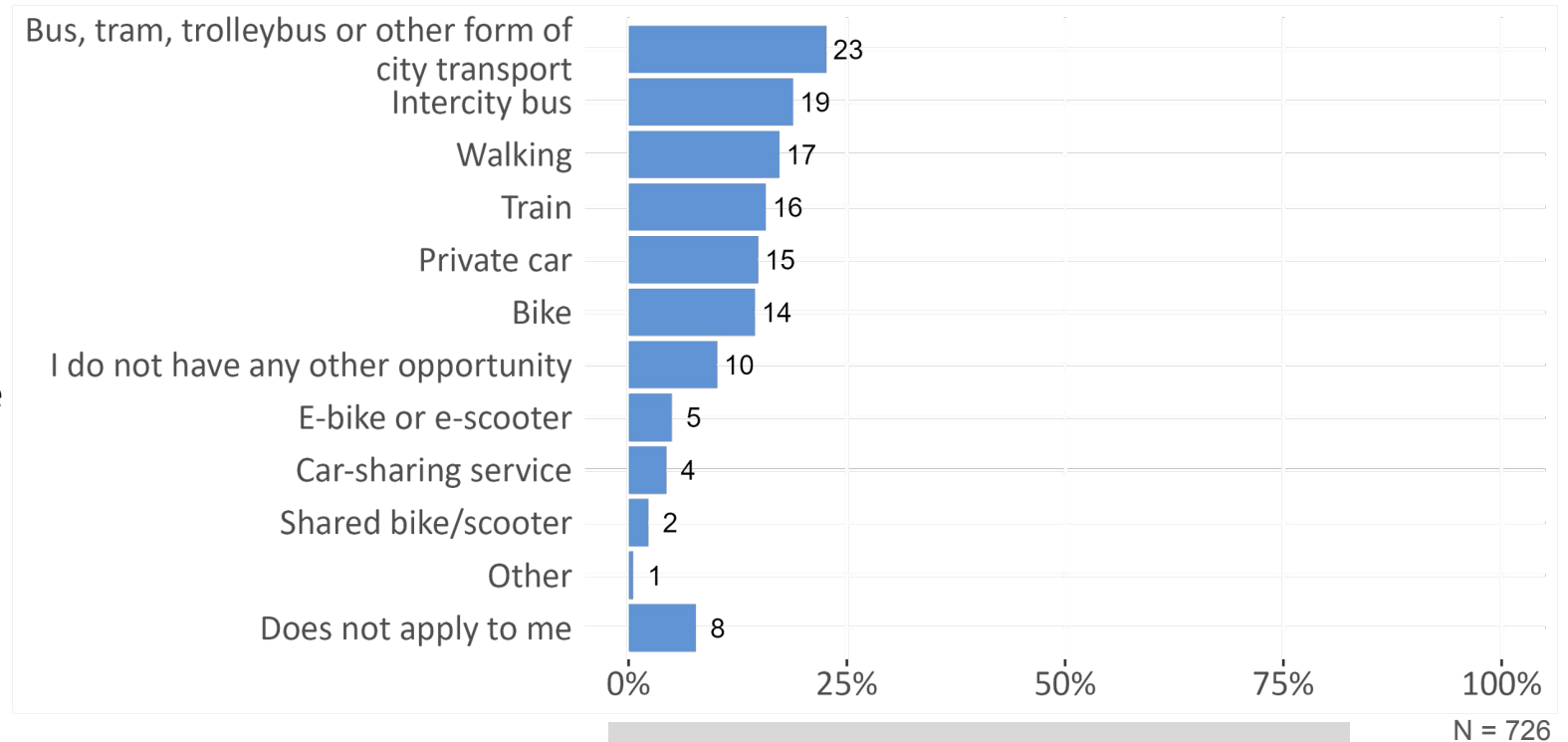
# The most preferred alternatives for the public are public transportation and walking.

If the primary mode of transportation were unavailable, public transportation or walking would be the most commonly considered alternatives. These forms of transport can be regarded as preferred alternatives, though their support primarily makes sense in urban areas. Intercity buses ranked similarly high.

Personal cars would be chosen by 15%, though it is important to note that cars are already the most common primary mode of transport. Next in line are trains, followed by cycling (14%).

E-bikes and various forms of shared transportation (car sharing or bike sharing) are considered only minimally, even as alternatives.

**„If your primary mode of transport would not be available, would you be able to use another type of transport? And if yes, which of the following? (Please check all that apply)“**

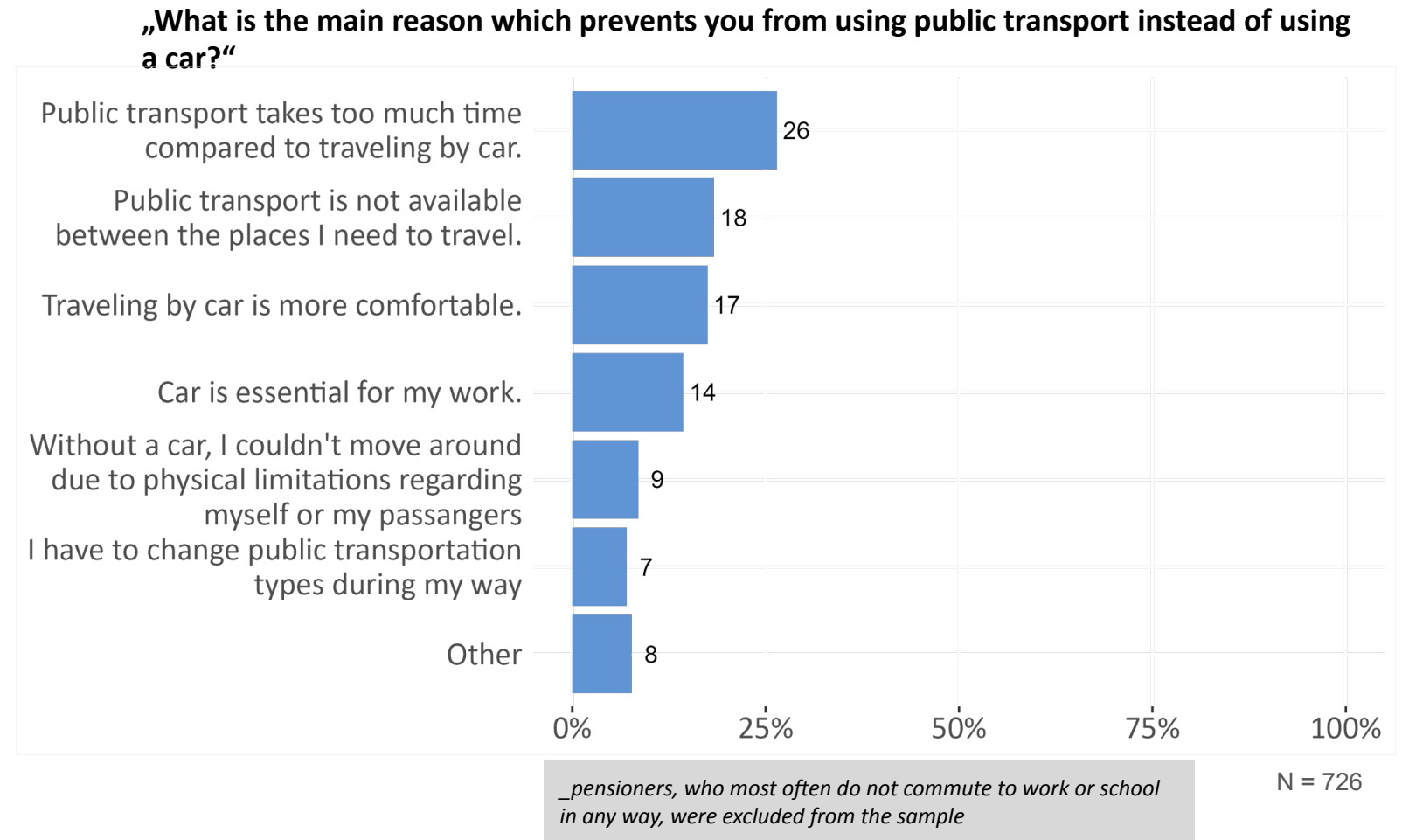


*\_pensioners, who most often do not commute to work or school in any way, were excluded from the sample*

# Time consumption and spatial accessibility are perceived as main barriers to wider use of public transport

Slovaks state they prefer cars over public transport due to public transportation travels taking more time compared to car travel (26%) and public transport being less accessible in terms of coverage (18%). Additionally, 17% cite insufficient comfort compared to traveling by car, and 14% say a car is essential for their job.

Nearly one-tenth of people (9%) states that they are unable to use public transportation due to physical limitations, either their own or those of their passengers. A similar proportion (7%) mention the necessity of changing connections during their journey as a barrier.





# Electromobility

The following section focuses on the topic of electromobility, exploring the public's general opinion on electric vehicles and comparing motivations for owning a car with an internal combustion engine.

Based on previous findings, it is clear that the personal mobility segment holds a significant potential for decarbonization, as Slovaks most frequently travel by car.

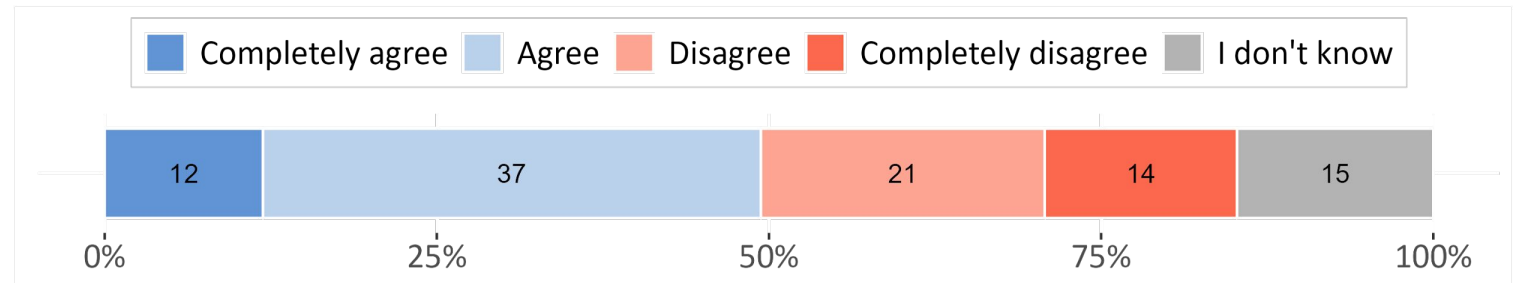


# Slovaks agree with the principle of supporting electromobility, but they oppose the ban on the sale of new internal combustion engine cars

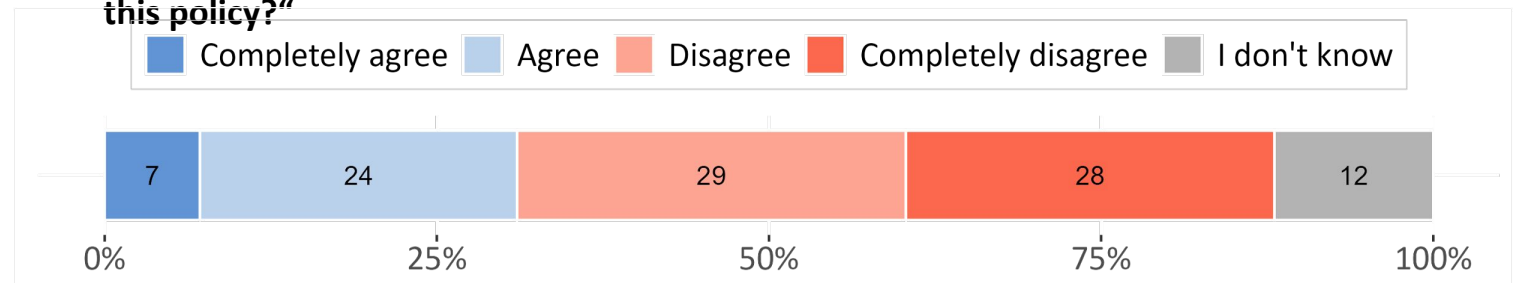
Although half of Slovaks (49%) agree with supporting electromobility and building more infrastructure for electric vehicles, nearly three-fifths (57%) of the population oppose the planned ban on the sale of new internal combustion engine cars in 2035.

Only 31% agree with the ban. The ban itself is a widely debated and controversial topic across the EU and holds a distinct place in the broader discussion about electromobility.

**„These days, some countries and cities are promoting the use of electric cars to support lowering the emissions of greenhouse gases. This support can be financial or infrastructural. Would you say you agree or disagree with such incentives?“**



**„The European Union has introduced a policy that will ban the sale of new petrol and diesel cars from 2035. Cars sold before that date will be able to operate freely. Second-hand market will still offer petrol and diesel cars. The goal of the policy is to reduce greenhouse gases emissions in Europe. Would you say you agree or disagree with this policy?“**

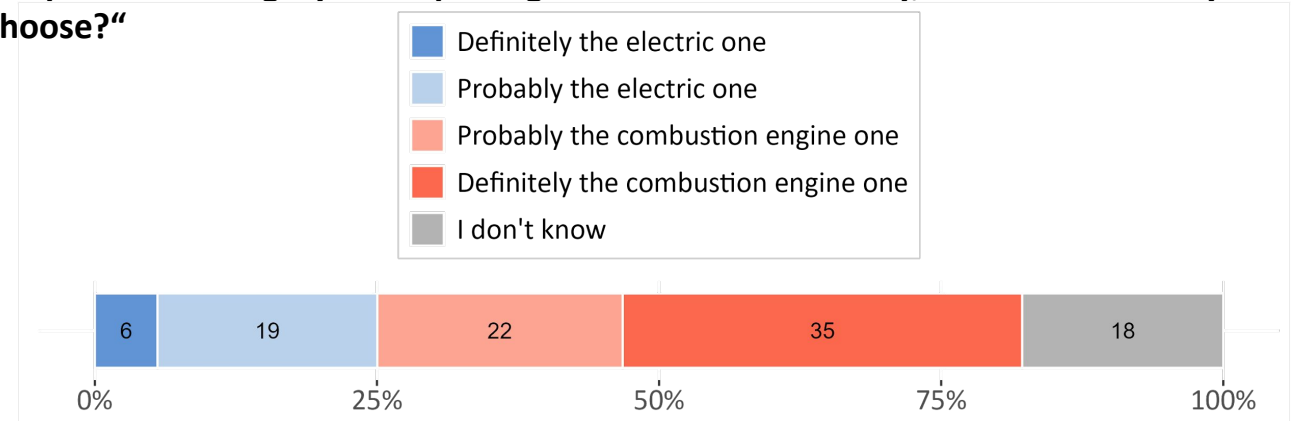


# Even under the same price, only a quarter of the public would prefer an EV. Half the population does not see EVs as climate-friendly

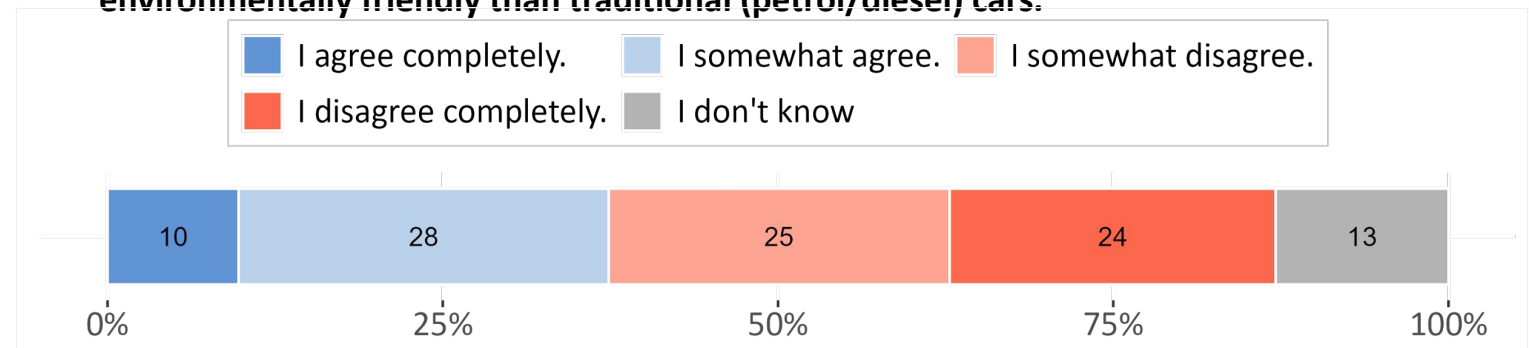
Given the option to choose between an internal combustion engine car and an electric vehicle in the same category and at the same price, nearly three-fifths (57%) of Slovaks would prefer the internal combustion engine car. One-fifth (20%) are unsure, leaving a quarter (25%) who would prefer an electric vehicle.

Additionally, half the people (49%) disagree that electric vehicles are more environmentally friendly than internal combustion engine cars, while two-fifths (38%) believe they are.

**„If you had the possibility to choose between a combustion engine car and an electric car of the same price and category when picking a new car model to buy, which one would you likely choose?“**



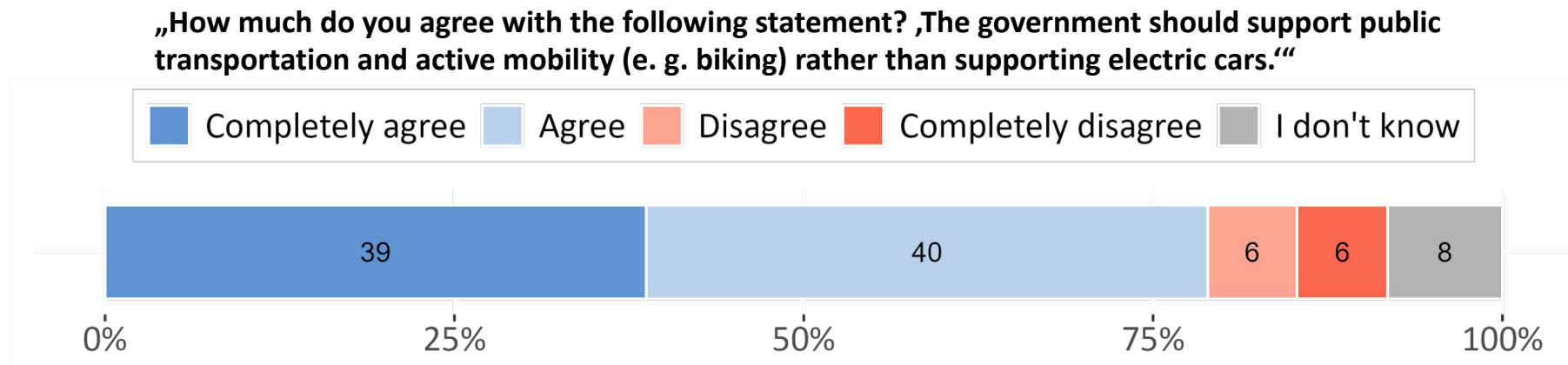
**„How much do you agree with the following statement? „Electric cars are more environmentally friendly than traditional (petrol/diesel) cars.““**



# According to the public, public transportation and other forms of mobility are suitable alternatives to electromobility

Four-fifths (79%) of the public agree that the government should support alternative forms of transportation rather than focusing solely on electric vehicles. About 8% are unsure, leaving 12% leaning toward supporting electric cars.

While alternative forms of transportation are seen as a popular option according to these findings, it remains important to consider that electric vehicles are intended to replace internal combustion engine cars specifically within the personal transportation segment.



# For two-fifths of the public, a lower price would be a key motivation for purchasing an electric vehicle

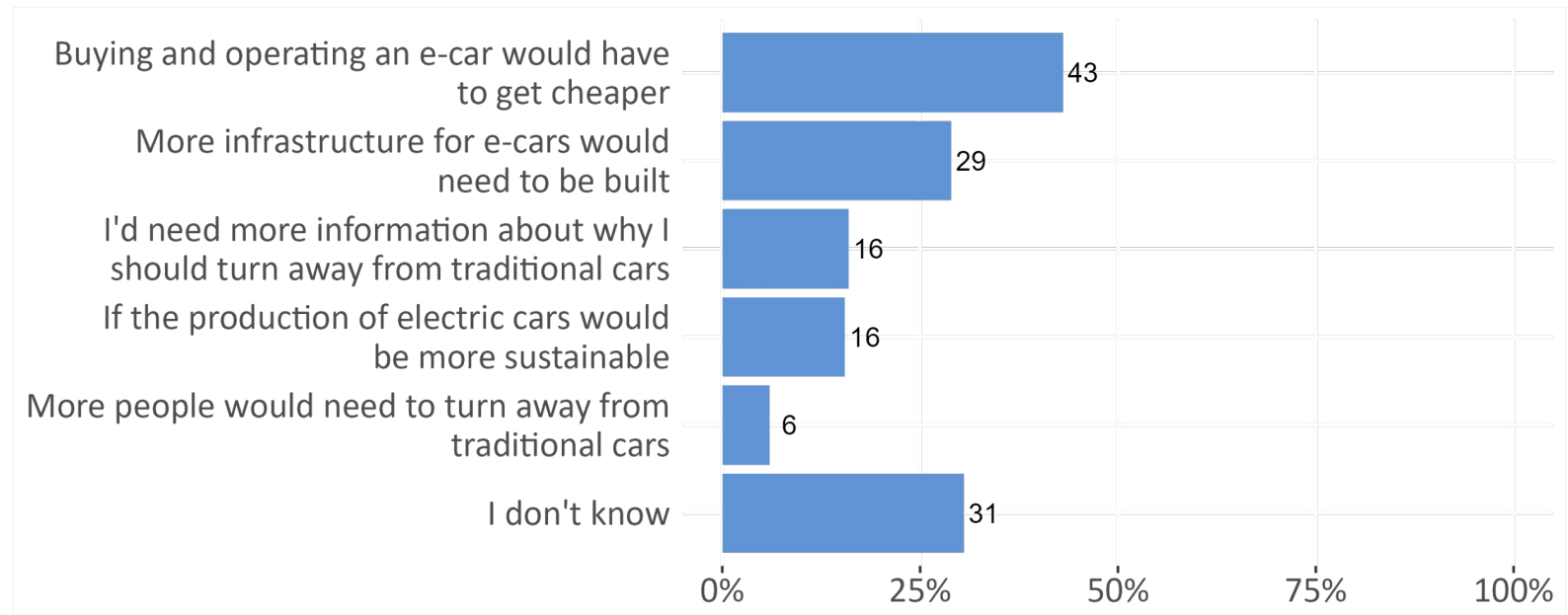
Slovaks would generally consider purchasing an electric vehicle if it were cheaper compared to a combustion-engine one. Additionally, 3 out of 10 respondents stated that building more infrastructure would be a key factor that would encourage them to buy an EV.

Furthermore, 16% would appreciate more information about why they should avoid internal combustion engine cars, and the same proportion would be motivated if the production of electric vehicles became more sustainable.

Only 6% would wait for more people to move away from internal combustion engine cars before making the switch themselves.

At the same time, a third (31%) are uncertain and unable to provide a definitive answer on this topic.

**„What conditions would motivate you to consider buying an electric car?“**



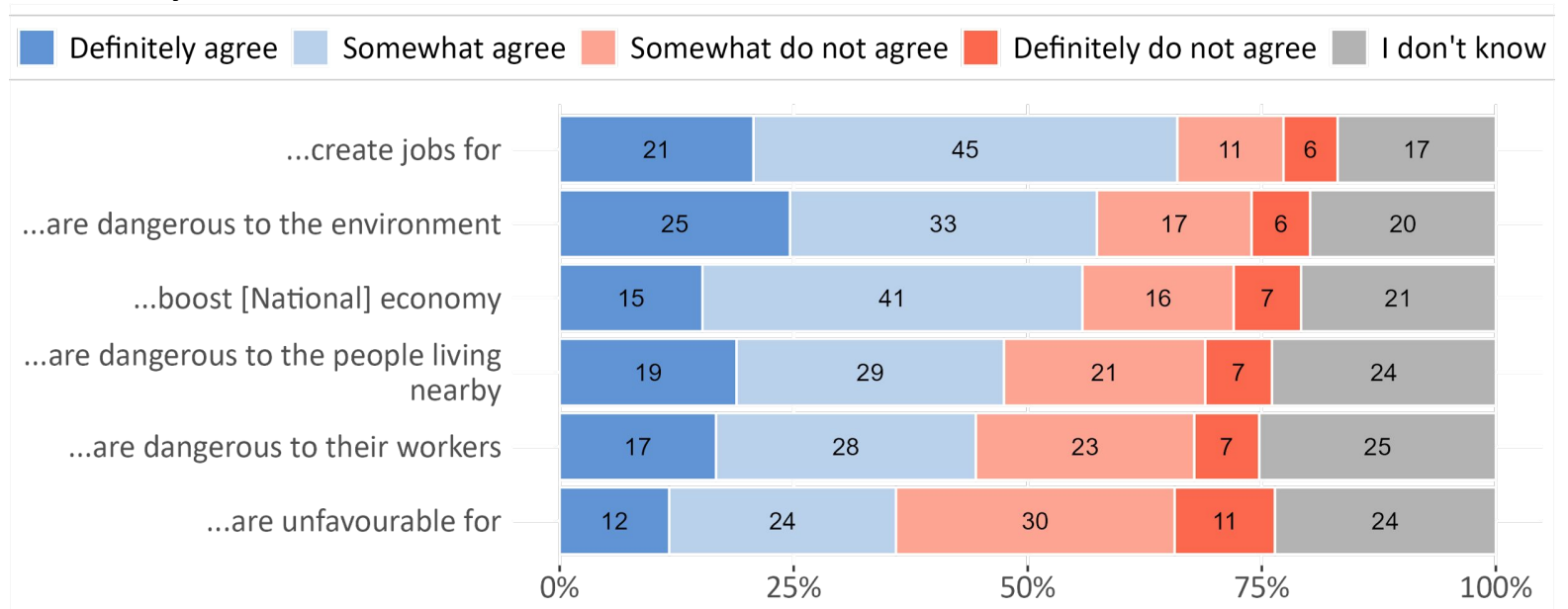
# Gigafactories can create jobs and support the economy, but they are also considered dangerous for the environment

Battery factories, known as „gigafactories“, represent a crucial part of electric vehicle production and are currently a relevant topic in Slovakian public debate.

According to public opinion, the factories offer significant economic potential for the national economy, with 66% believing they will create new jobs and 56% agreeing that they will benefit the national economy. However, 58% consider them dangerous for the environment, and 48% believe they may pose risks to people living nearby.

Approximately one-fifth of participants were unsure or unable to answer the statements.

**How much do you agree with the following statements?  
Battery factories...**





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