CERV – Just Green Green transition in Hungary

2024

21 Research Center

About Just Green project

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

It addresses the challenges associated with the EU's green transformation, which is likely the most significant test for the Union in its recent history and is expected to bring profound changes to the economic and social lives of its citizens.

The project aims to engage citizens from the V4 countries in debates and other forms of public participation on the topic of decarbonization in three areas closely tied to their everyday lives: housing, mobility, and the labor market. Public participatory activities, along with accompanying research, aim to identify specific barriers faced by citizens and communities when implementing climate-friendly measures or adapting to the EU's decarbonization policies.

This project will support debates and other forms of citizen engagement in the V4 countries, conveying their feedback to local, national, and EU policymakers, thereby strengthening citizens' sense of co-responsibility for the EU's climate and environmental policies.

Methodology

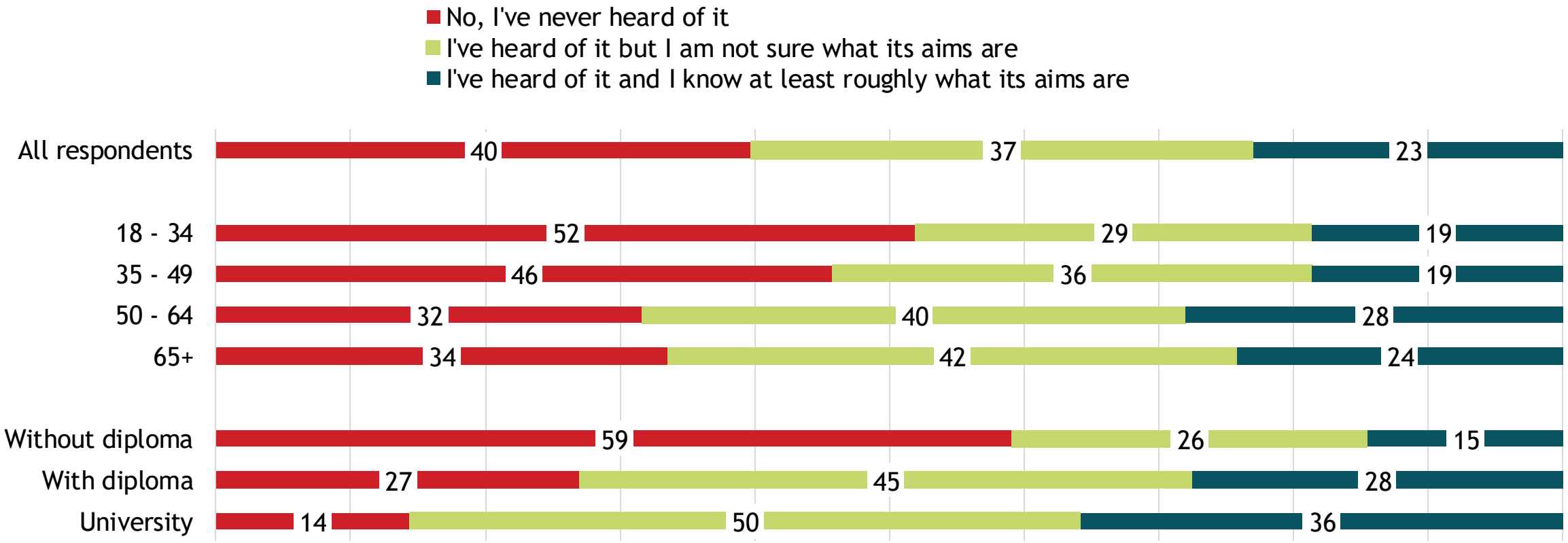
21 Research Center

Basic Research parameters	
Type of Research	Quantitative survey
Population	Hungarian population, citizens aged 18 and over
Data collection method	Online survey (CAWI); face-to-face interviewing (CAPI)
Sample size	N = 1005 (605 CAWI; 400 CAPI)
Method of Ensuring Representativeness	Quota sampling
Main quota	Age; Gender; Education; Region; Municipality size
Data collection	27. 09. – 15. 10. 2024

The Green Deal

4 out of 10 Hungarians have never heard of the Green Deal

21 Research Center

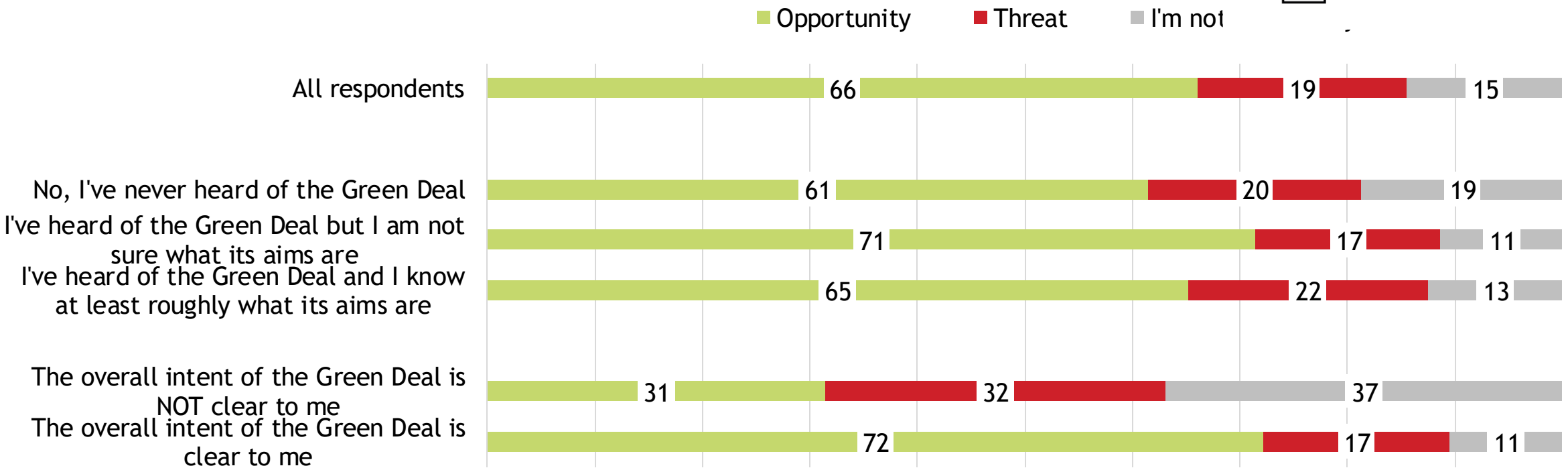


In general, the Green Deal is not a particularly well known measure in Hungary. 40% of the respondents have never heard of it, 37% have heard of it but do not really know what its aims are, and only 23% have heard of the Green Deal and know its objectives. The biggest differences are between different groups with different levels of education. 59% of the respondents without a high school diploma have never heard of the Green Deal. In contrast, it is only 14% of the respondents with a university degree who have never heard of it. Surprisingly, older people are more likely to have heard of the Green Deal than younger people.

G01 Have you heard about the Green Deal? (%) N= 1005

Two-thirds of Hungarians think the Green Deal is an opportunity

21 Research Center



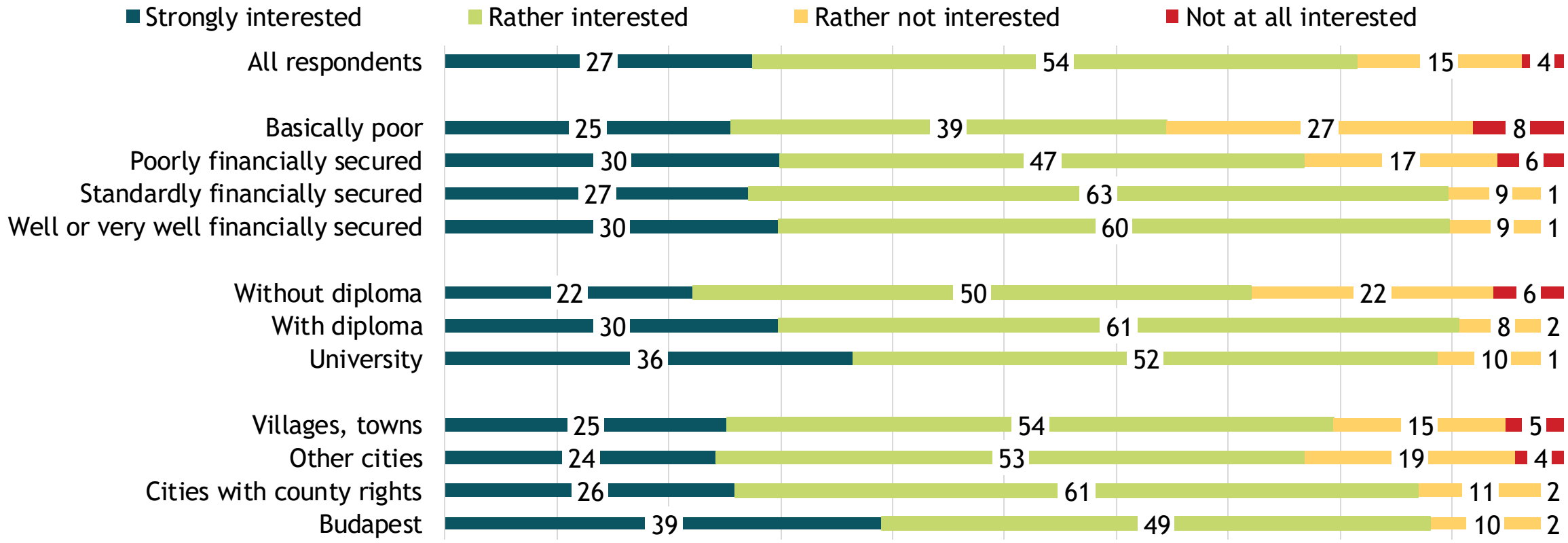
After the Green Deal's objectives were read out loud to the respondents, 66% see the Green Deal as an opportunity to the Hungarian economy. Interestingly, there is a difference of only 4 percentage points between those who have never heard of the Green Deal and those who have heard of it before and know roughly what its aims are. However, among those for whom these objectives were clear, a large majority, 72%, interpreted the Green Deal as an opportunity. On the other hand, among those for whom the Green Deal's objectives were not clear even after explanation, only 31% interpreted the Green Deal as an opportunity. Thus, a much higher proportion of those who understand the objectives of the Green Deal think positively about it. This highlights the potential and the importance of education about the Green Deal.

G03 Do you think that the Green Deal will be an opportunity or a threat to the Hungarian economy? (%) N= 1005

Attitudes towards climate change

8 out of 10 Hungarians care about the climate change

21 Research Center

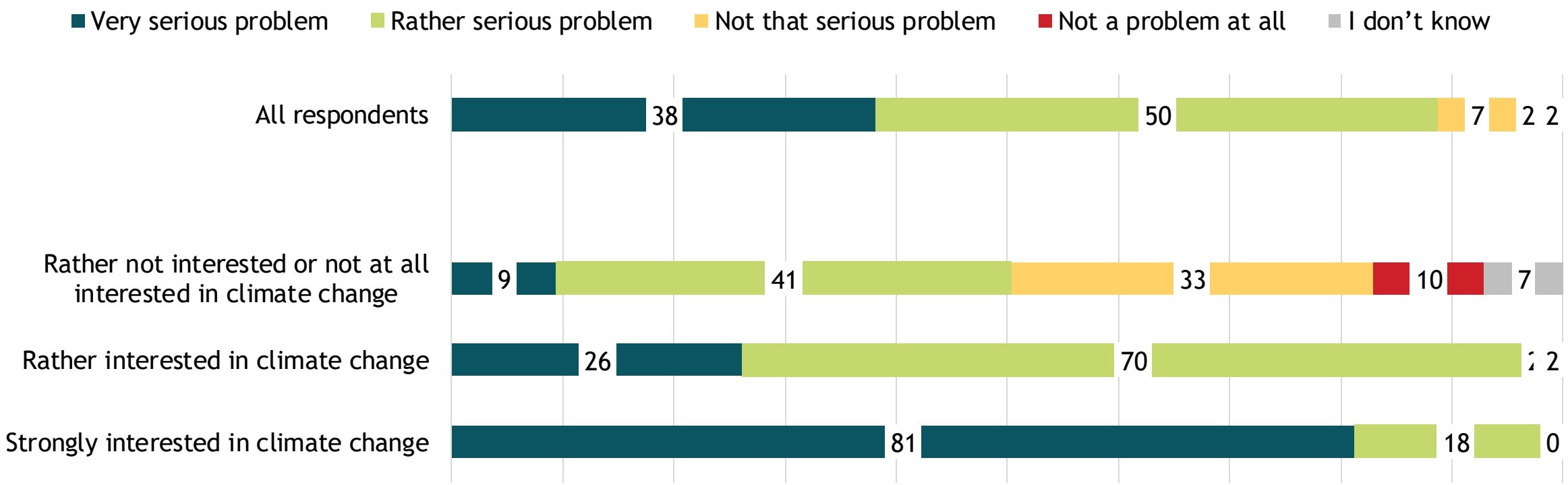


The questionnaire shows that the vast majority of people, 81% of Hungarian society are interested in the topic of climate change. The proportion of those who are strongly interested in the topic of climate change is higher among respondents with university degree and residents of Budapest. The proportion of those who are not at all interested in the topic of climate change is higher among those who consider themselves poor and those who have not completed secondary education. It is likely that for some groups of people with financial difficulties, making the ends meet is a burden that makes global issues such as climate change seem less pressing. However, it is important to note that the majority of those who identify themselves as poor are also rather interested or very interested in climate change.

C02 How interested are you in the topic of climate change and its implications on our society? (%) N= 1005

88% of the Hungarian population think that climate change is a problem

21 Research Center

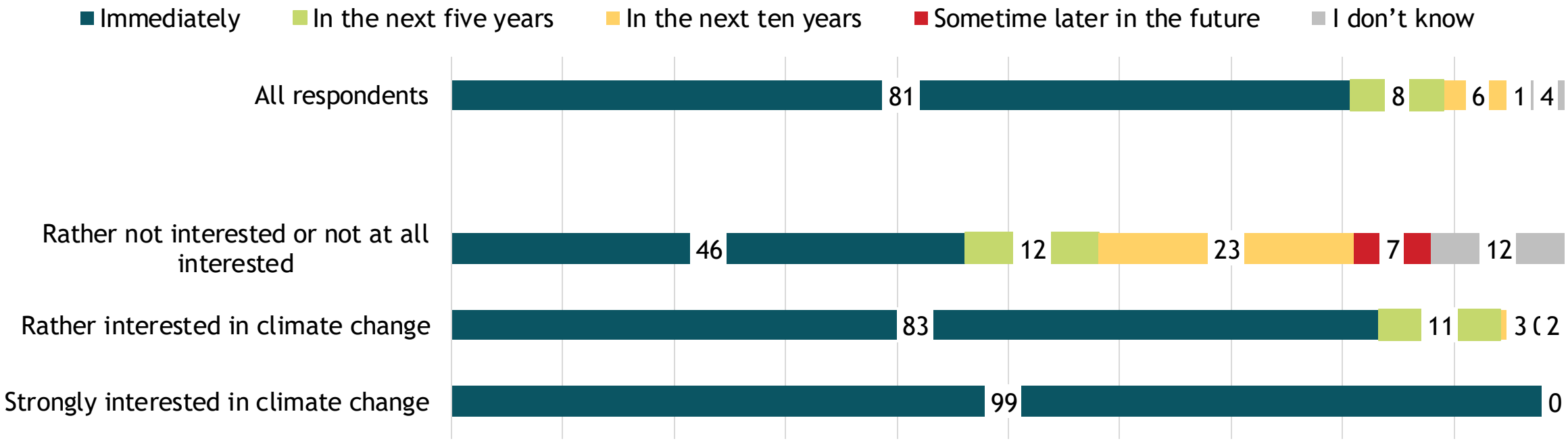


Almost everyone, 88% of the Hungarian population think that climate change is a problem, and 38% of the population think that it is a very serious problem. Interestingly, even among those who are rather not interested or not at all interested in the topic of climate change, half of them, 50%, think that it is a problem. However, only 9% of those who are not interested in climate change think that it is a very serious problem, while this number is 81% among those who are strongly interested in climate change.

C03 What is your opinion on climate change? Would you say it is a very serious problem, a rather serious problem, not that serious problem or not a problem at all? (%) N= 1005

81% of the Hungarian population think that we should start working on problems of climate change immediately

21 Research Center

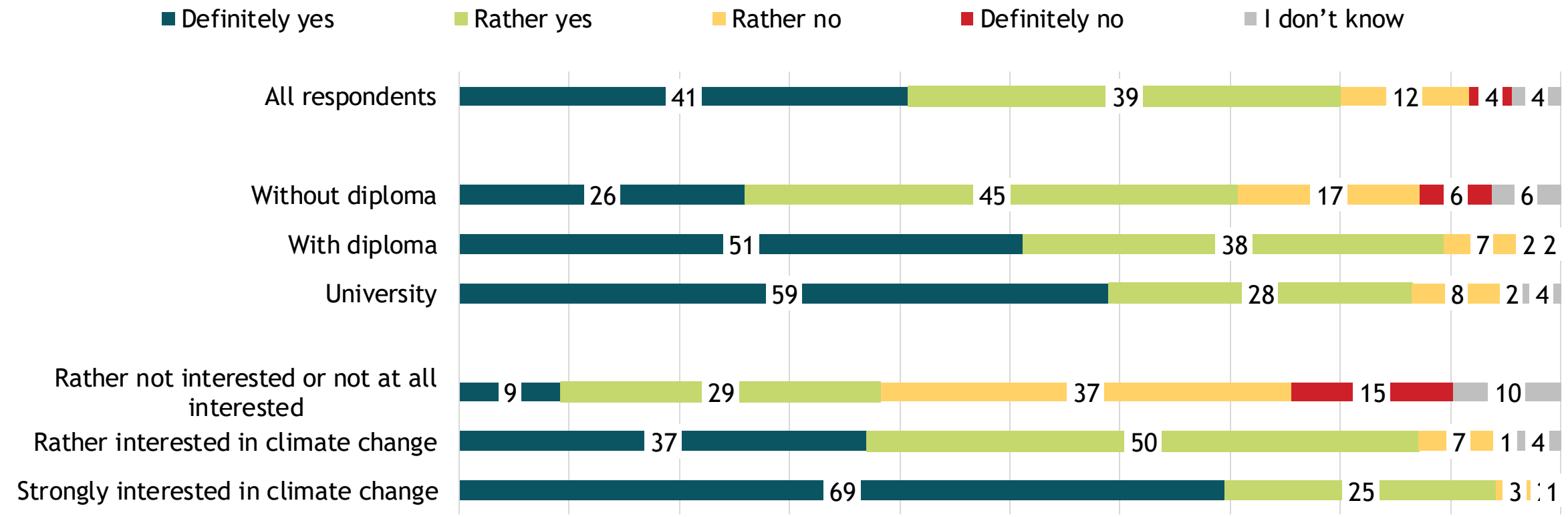


Most people, 81% of the Hungarian population think that we should start working on problems of climate change immediately. Similarly to the seriousness of the problem of climate change, even among those who are rather not interested or not at all interested in the topic of climate change, 46% think that we should act immediately. This number is 99% among those who are strongly interested in climate change.

C04 In what timeframe do you think it is necessary to start working on problems of climate change? (%) N= 1005

80% of the Hungarian population feel that climate change has an impact on their daily lives

21 Research Center



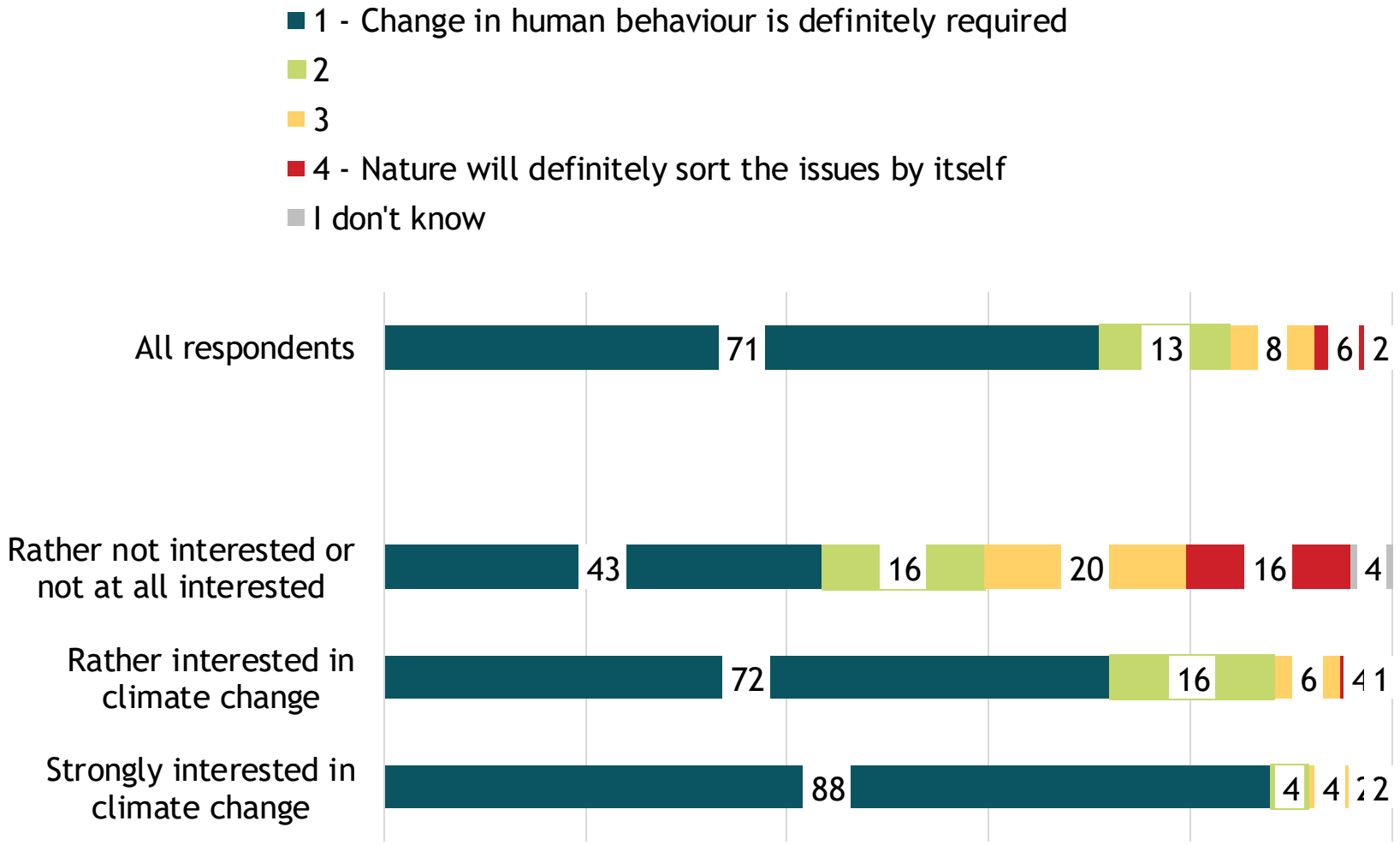
80% of the Hungarian population feel that climate change has an impact on their daily lives. 41% definitely think that it is a discernible impact. The proportion of the respondents who think that climate change definitely has a discernible impact on their daily lives is higher among people with higher levels of education. However, the detection of climate change on the level of daily life is highly dependent on whether someone is interested in the topic or not in the first place. The less someone is interested in the topic of climate change, the less they think it has a discernible impact on their daily lives.

C05 Has climate change had a discernible impact on your daily life? (%) N= 1005

Very few people think that nature will solve climate-related issues by itself

21 Research Center

Very few people think that nature will solve climate-related issues by itself. 71% of the respondents think that change in human behaviour is definitely required. This proportion is lower among those who are not interested in the topic of climate change (43%), and higher among those who are rather interested (72%) or strongly interested in the topic (88%).



C06 Do you think that solving climate change-related issues requires changes in human behaviour, or will nature sort the issues by itself? (%) N= 1005

Attitudes towards climate change
Main take-aways

21 Research Center

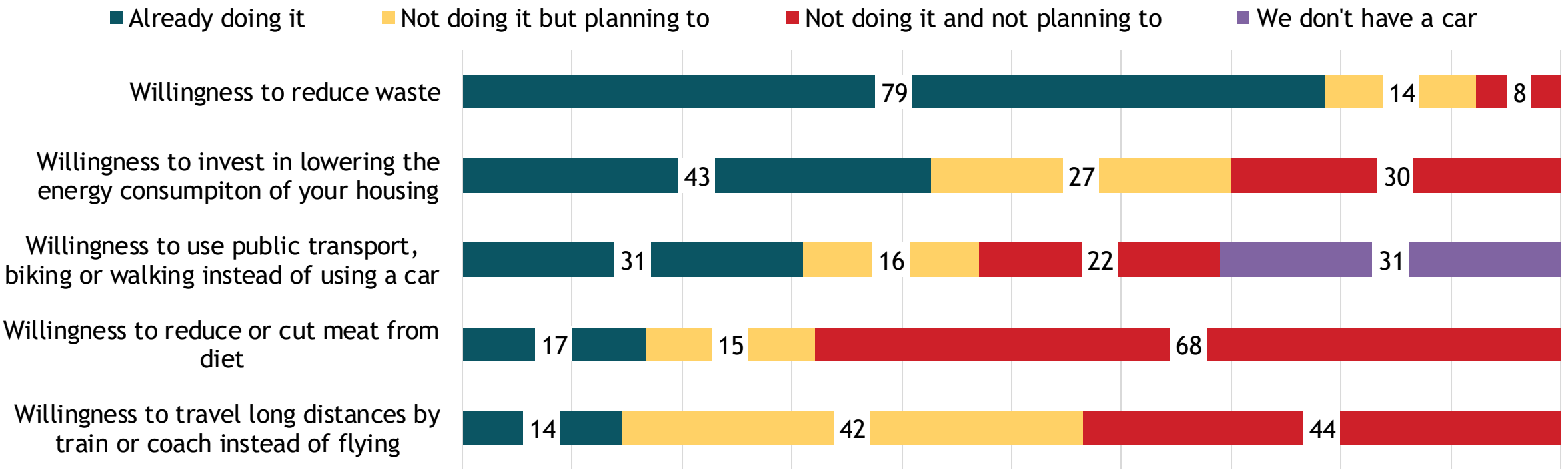
The majority, 88% of the Hungarian population agree that climate change is a serious problem, we should act immediately (81%) and change in human behaviour is definitely required to achieve that (71%). The proportion of people who think like this is higher among those who have a basic interest in this topic. However, the proportion of people who agree with the seriousness of the problem and the urgency to start acting is high even among those who are not interested in the topic at all.

The proportion of those who are strongly interested in the topic of climate change is higher among people with higher levels of education and the residents of Budapest. On the other hand, the proportion of those who are not at all interested in the topic of climate change is higher among those who consider themselves poor and those who do not have high school diploma, although the majority of these people are also rather interested or very interested in climate change. It is likely that for some groups of people with financial difficulties global issues such as climate change seem less pressing.

80% of the Hungarian population feel that climate change has an impact on their daily lives. However, the detection of climate change on the level of daily life is also highly dependent on whether someone is interested in the topic or not in the first place. The less someone is interested in the topic of climate change, the less they think it has a discernible impact on their daily lives.

Willingness to change behaviour

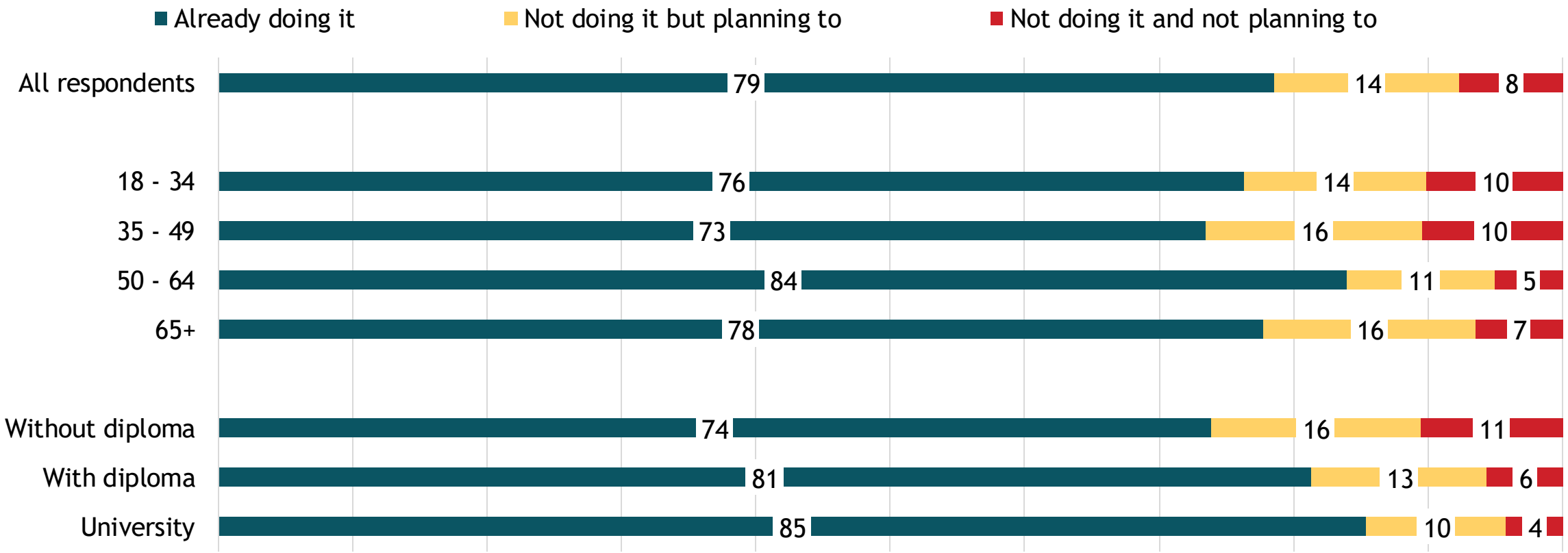
Willingness to change



The step Hungarians are least willing to take is stopping eating meat. 68% of the respondents are not willing to do so. Reducing waste is the thing respondents said they are already doing in the highest proportion, but it is worth bearing in mind that this is the least tangible category. The next issue for which the lowest proportion of respondents has taken a step so far is choosing to take the train or long-distance bus instead of flying. However, this is also the step that the highest proportion of people would be willing to make.

B02A B02B B02C B02D B02E B02F W01A W01B W01C W01D W01E T01A Which of the following steps have you taken in recent years to reduce your environmental impact?; How likely it is, that you will take the following steps in the near future to reduce your environmental impact?; What type of engine is the car that your household uses? If you have more than one car, please check all that apply.: We don't have a car (%) N= 1005

Willingness to reduce waste

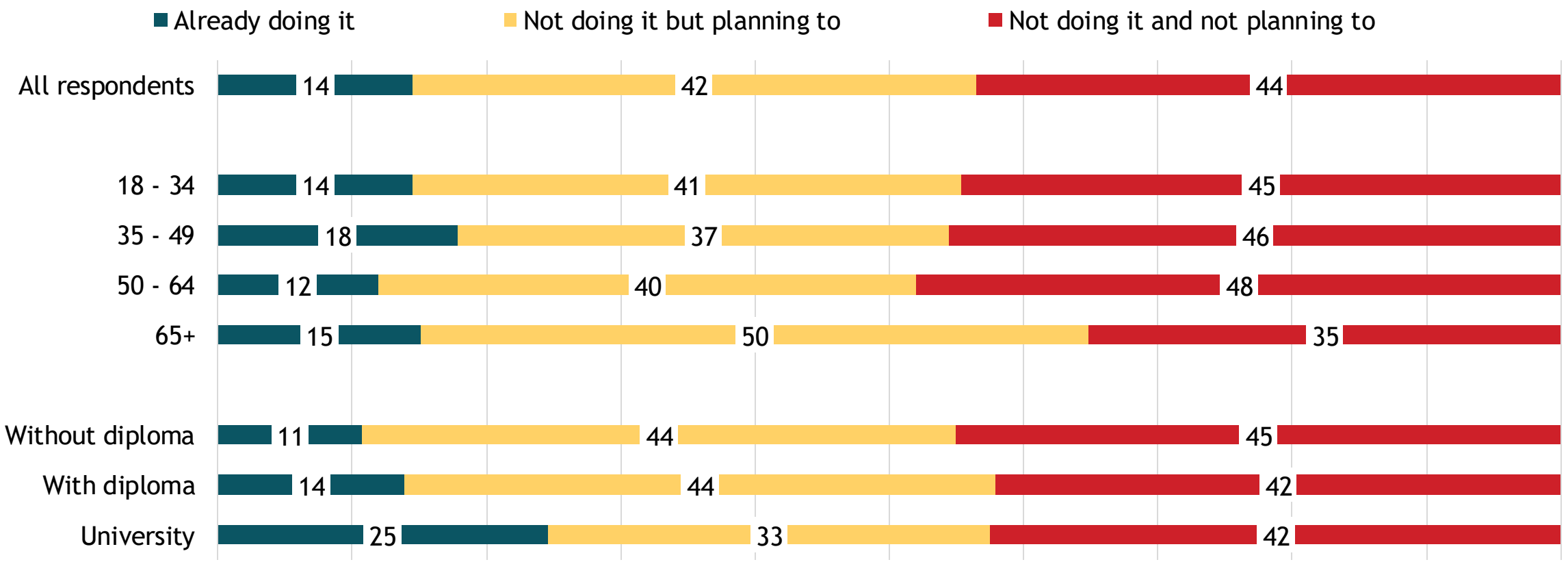


Waste reduction is what people do in highest proportion. All age groups indicated they have made this step. Higher educated people are doing it slightly more than lower educated people, but there are no marked differences.

B02A B02B B02C B02D B02E B02F W01A W01B W01C W01D W01E Which of the following steps have you taken in recent years to reduce your environmental impact?; How likely it is, that you will take the following steps in the near future to reduce your environmental impact? (%) N= 1005

Willingness to travel long distances by train or coach instead of flying

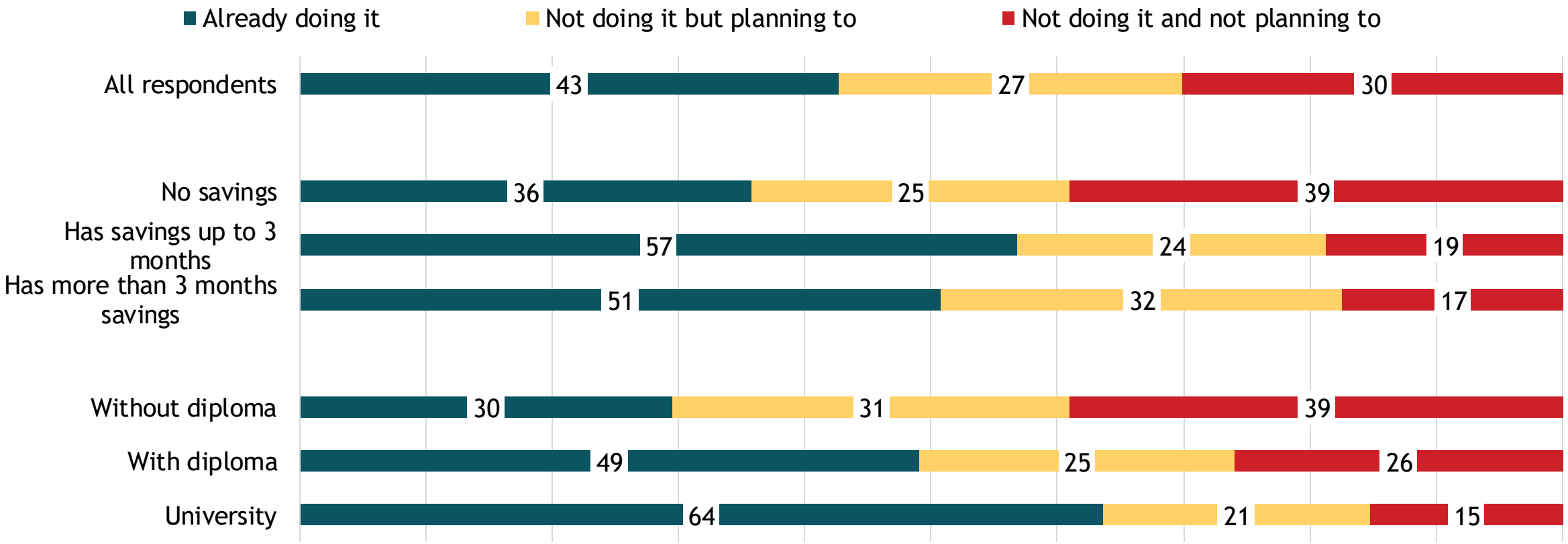
21 Research Center



People with university degree are willing to give up flying in favour of long-distance bus and train travel in higher proportion than lower educated people. However, it is also worth to consider that they are in better financial situation and are probably more likely to travel by air than those with lower levels of education - although this was not asked in the questionnaire -, so they are more able to forego flying than those who fly less.

B02A B02B B02C B02D B02E B02F W01A W01B W01C W01D W01E Which of the following steps have you taken in recent years to reduce your environmental impact?; How likely it is, that you will take the following steps in the near future to reduce your environmental impact? (%) N= 1005

Willingness to invest in lowering the energy consumpiton of your housing

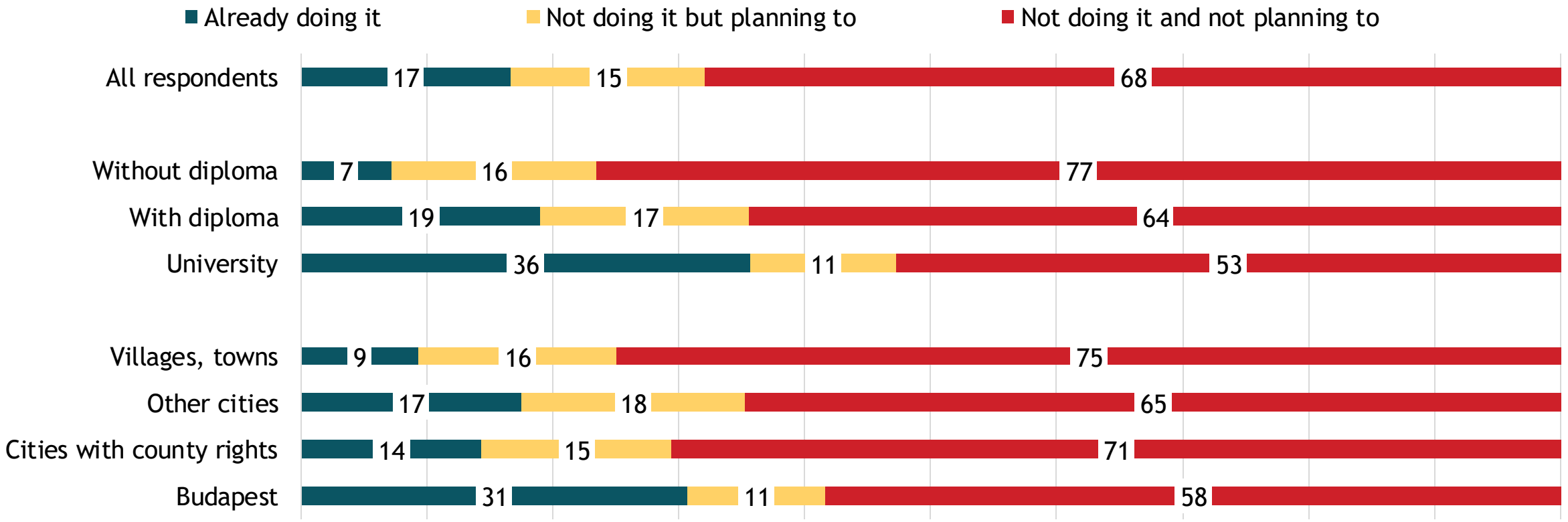


The willingness to invest in lowering the energy consumption of someone's housing has a statistically significant relationship with the respondent's educational level and whether the respondent has savings or not.

B02A B02B B02C B02D B02E B02F W01A W01B W01C W01D W01E Which of the following steps have you taken in recent years to reduce your environmental impact?; How likely it is, that you will take the following steps in the near future to reduce your environmental impact? (%) N= 1005

Willingness to reduce or cut meat from diet

21 Research Center

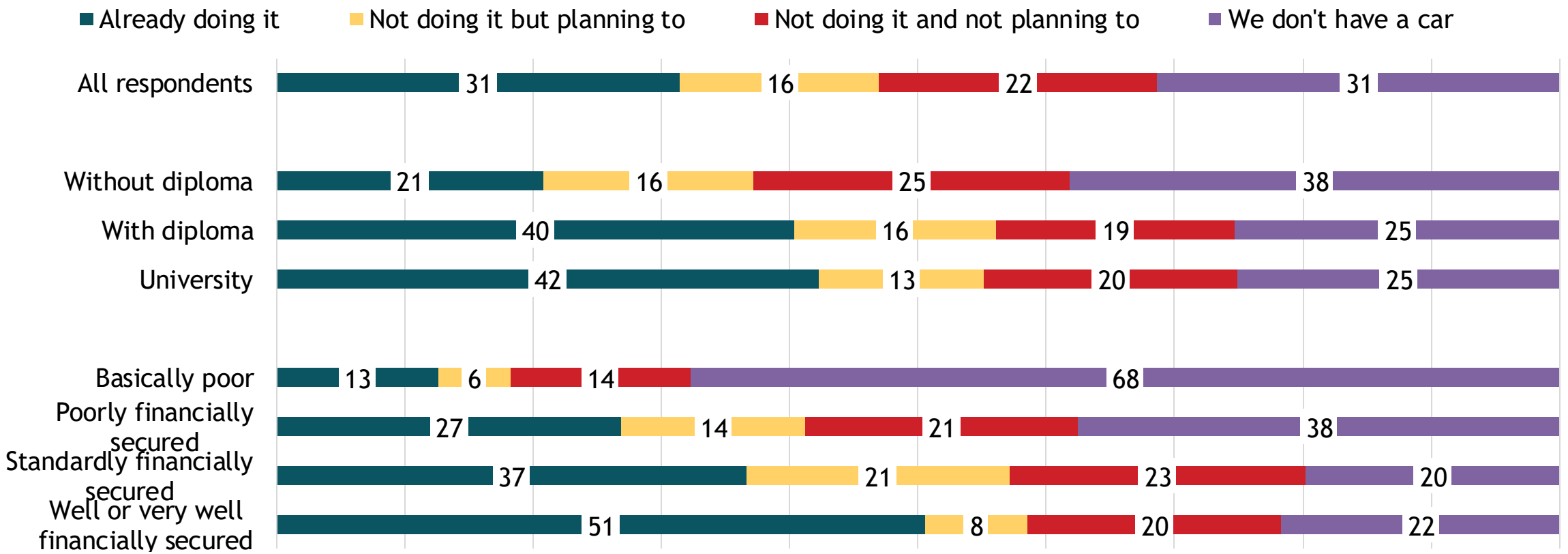


People with higher level of education and people who live in Budapest are reducing or cutting meat from their diet in higher proportion.

B02A B02B B02C B02D B02E B02F W01A W01B W01C W01D W01E Which of the following steps have you taken in recent years to reduce your environmental impact?; How likely it is, that you will take the following steps in the near future to reduce your environmental impact? (%) N= 1005

Willingness to use public transport, biking or walking instead of using a car

21 Research Center



The best financially secured and higher educated people indicated in higher proportion that they consciously use public transport or walk instead of using a car. It is also important to note that the poor people mostly cannot afford to have a car, therefore, they are the ones who do not use a car at the highest rate.

B02A B02B B02C B02D B02E B02F W01A W01B W01C W01D W01E T01A Which of the following steps have you taken in recent years to reduce your environmental impact?; How likely it is, that you will take the following steps in the near future to reduce your environmental impact?; What type of engine is the car that your household uses? If you have more than one car, please check all that apply. (%) N= 1005

Willingness to change behaviour
Main take-aways

21 Research Center

The step Hungarians have taken in the highest proportion to reduce their environmental impact is choosing to take the train or long-distance bus instead of flying. Also, this is the issue for which the lowest proportion of respondents has taken a step so far, but it is important to note that we do not have information from the questionnaire about their flying habits. The step Hungarians are the least willing to take is to stop eating meat. 68% of the respondents are not willing to do so. Reducing waste is the thing respondents said they are already doing in the highest proportion, but it is worth bearing in mind that this is the least tangible category.

In general, the willingness to take steps to lower environmental impact highly depends on one's highest level of education. People with a university degree show the highest proportion across all categories, indicating they are either willing to take action or are already doing so.

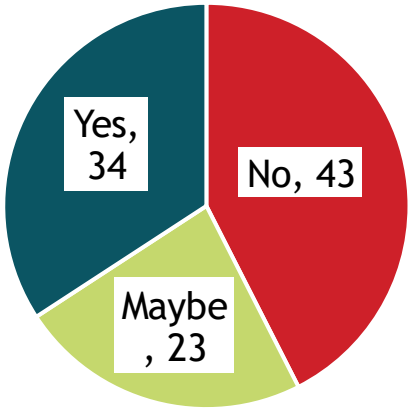
It is also important to note that the least financially secured group has less opportunity to change certain things, like investing in lowering the energy consumption of their housing. Also, the best financially secured and higher educated people indicated in higher proportion that they consciously use public transport or walk instead of using a car. However, the poor people mostly cannot afford to have a car, therefore, they are the ones who do not use a car at the highest rate.

Investment

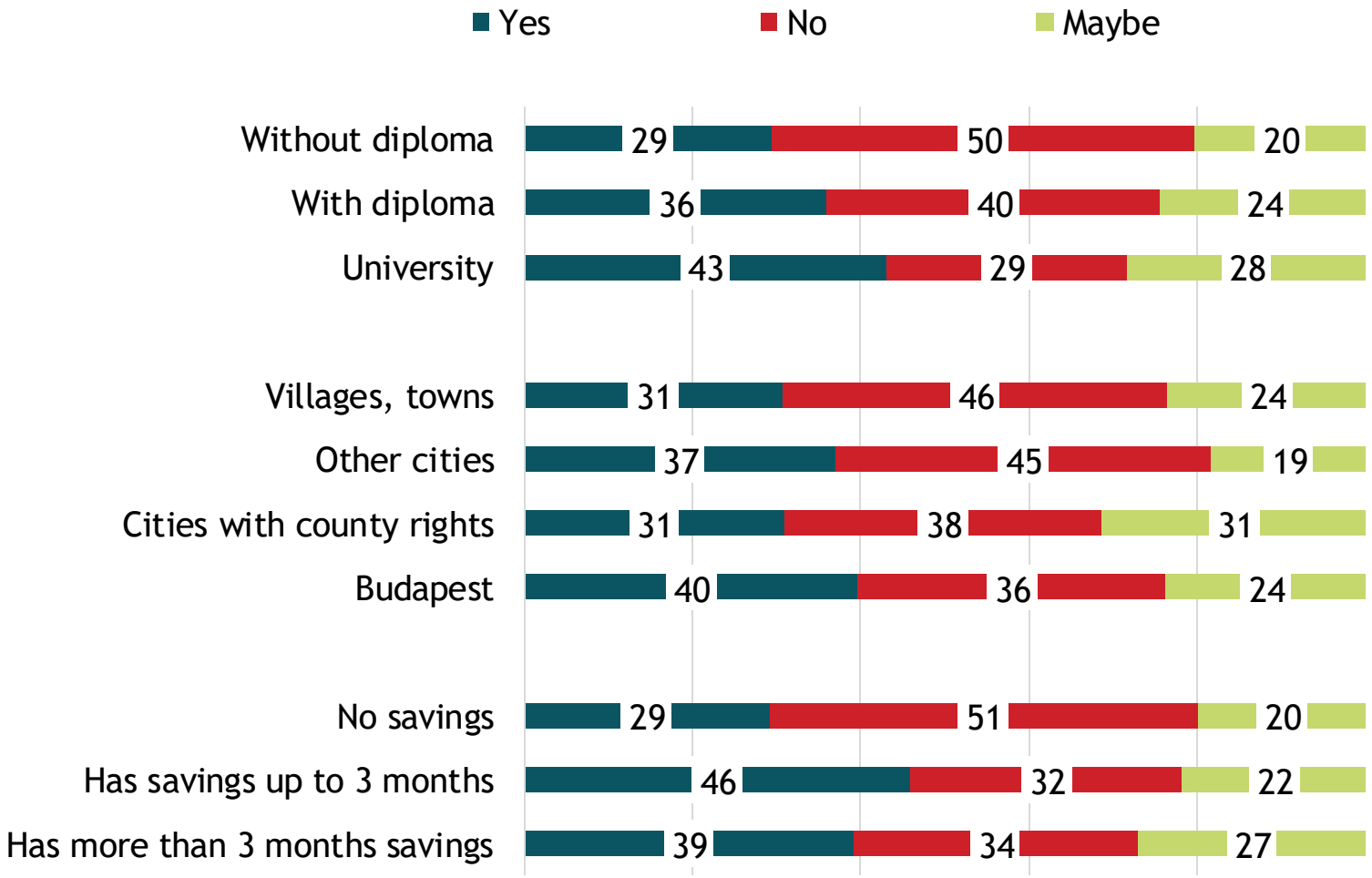
Third of house owners plan to invest in reducing the energy consumption of their home

21 Research Center

34% of the house owners plan to invest in lowering the energy consumpltion of their housing in the next five years.



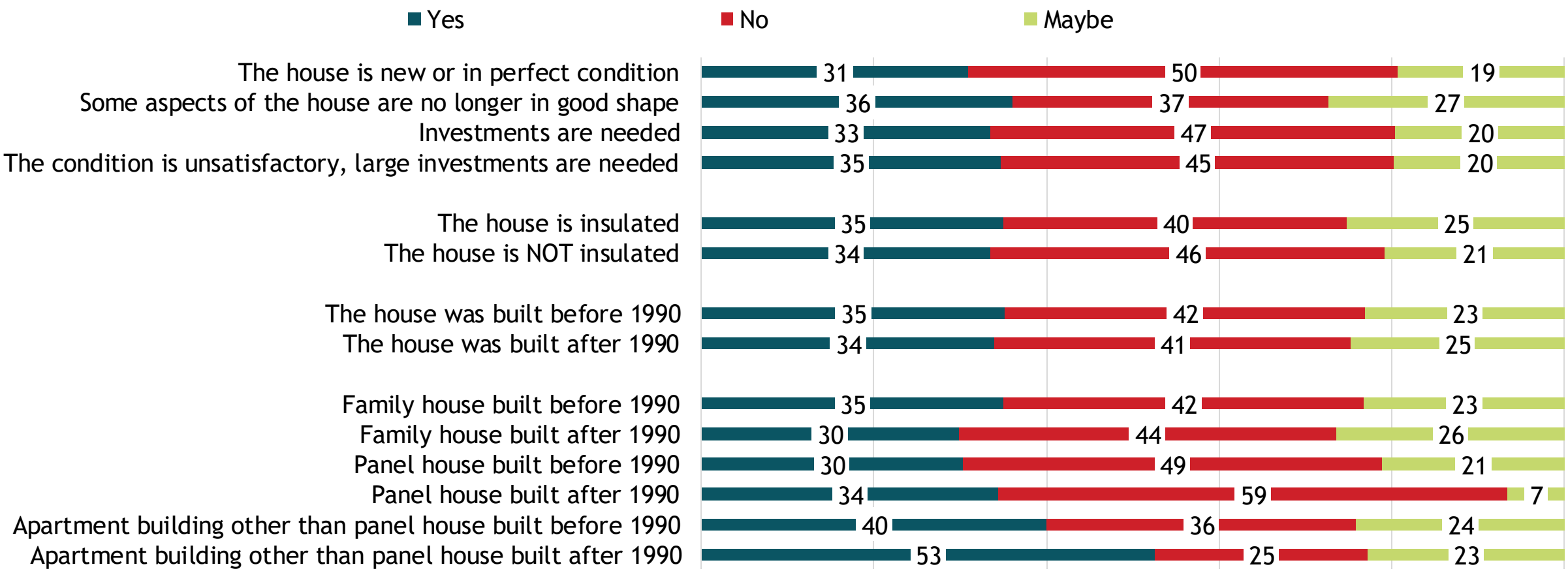
The relationship between the willingness to invest in energy efficiency of the housing and settlement size is not statistically significant. It rather depends on someone's education level and financial situation. Those who have savings or are in a more secure financial position are more likely to plan to invest in improving the energy efficiency of their property over the next five years.



W03 Are you planning to invest in lowering the energy consumption of your housing in the next five years? – within house owners (%) N= 858

The willingness to invest in the house doesn’t depend on the condition, type and age of the house

21 Research Center



The willingness to invest in reducing the energy consumption of the housing in the next 5 years does not statistically depend on the condition of the house, the age of the house, the type of the house or whether the house is insulated or not.

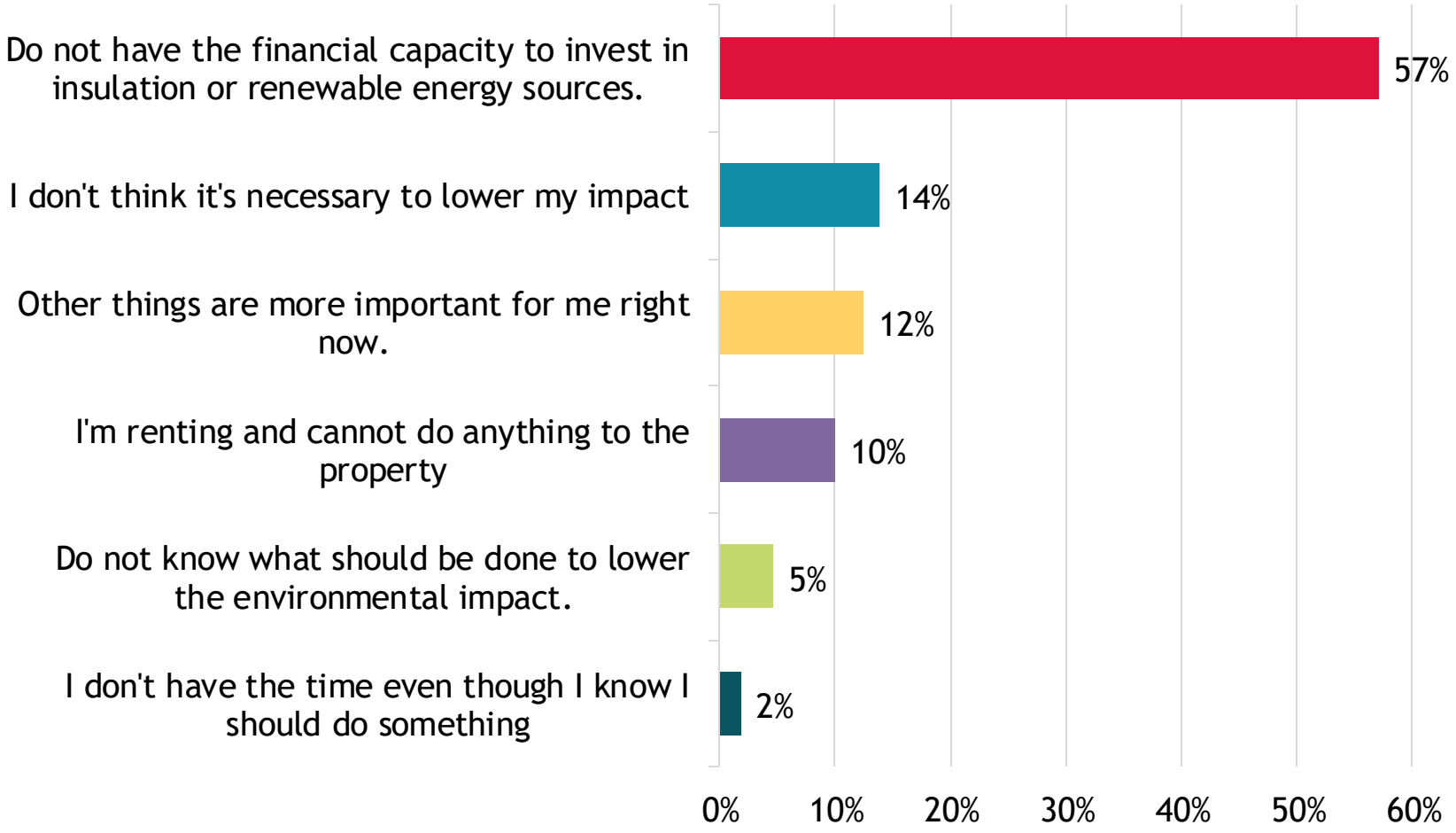
W03 Are you planning to invest in lowering the energy consumption of your housing in the next five years? – within house owners (%) N= 858

The main barrier of making households energy efficient is the lack of money

21 Research Center

57% of the respondents who are not planning to invest in insulation or renewable energy sources indicated that that the reason of this is that they do not have the financial capacity to do so. This highlights the main barrier of making households energy efficient. The primary issue is that even if households are aware of the problem, they do not have the means to make any changes.

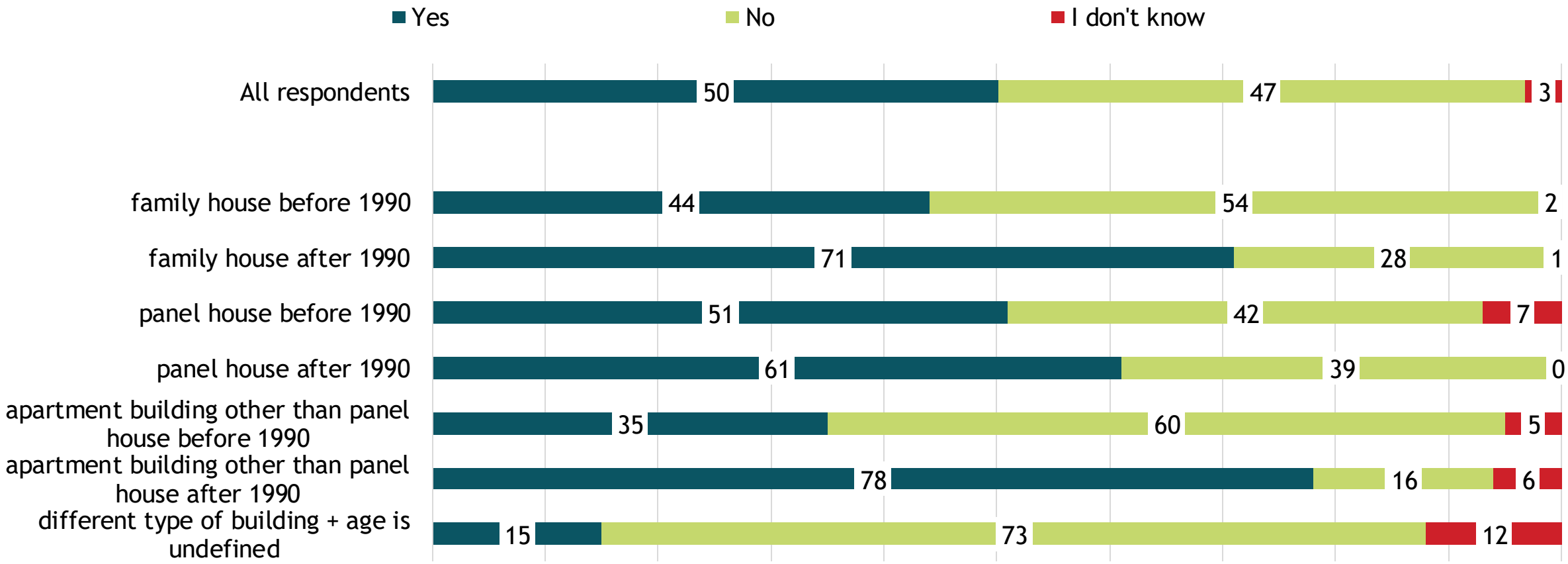
Those who are not planning to invest in lowering the energy consumption of their housing



W04 What is the main reason which prevents you from investing in lowering the energy consumption of your housing? – within house owners (%) N= 858

Half of the houses are insulated

21 Research Center

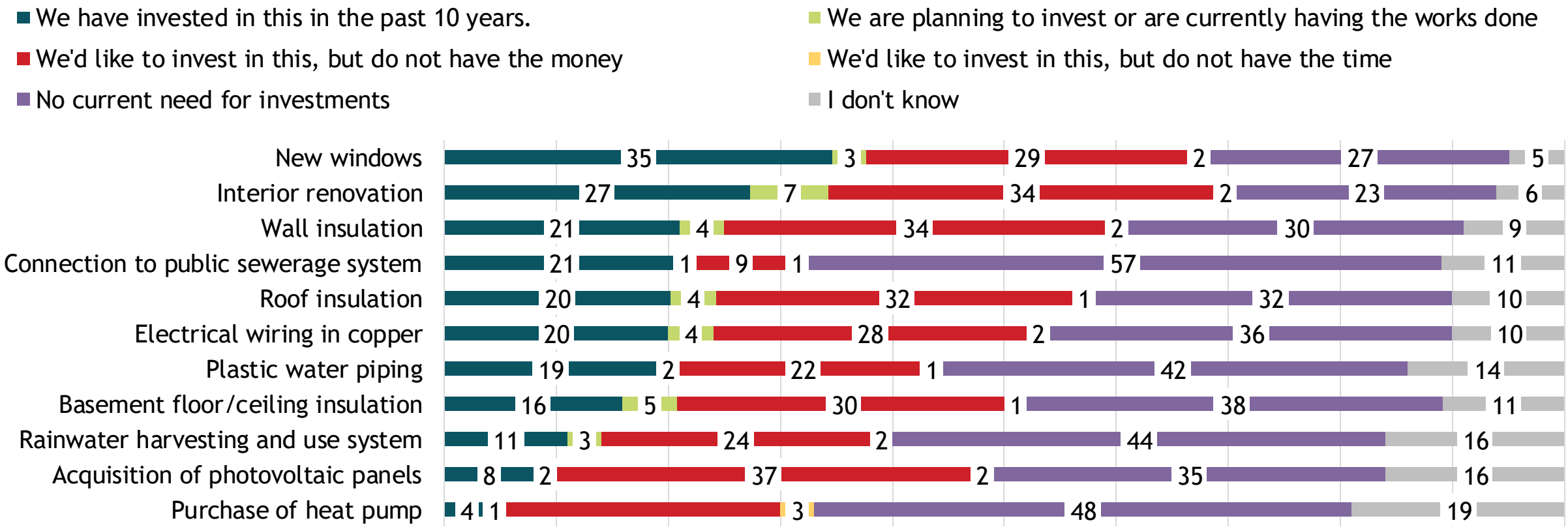


In Hungary, 50% of the houses are insulated. Apartment buildings other than panel houses built after 1990 (78%) and family houses built after 1990 (71%) are insulated in the highest proportion. The contrast is the smallest between panel houses built before (51%) 1990 and after 1990 (61%).

H03 Is the house you live in insulated? (%) N= 1005

The biggest barrier to modernise houses is money

21 Research Center

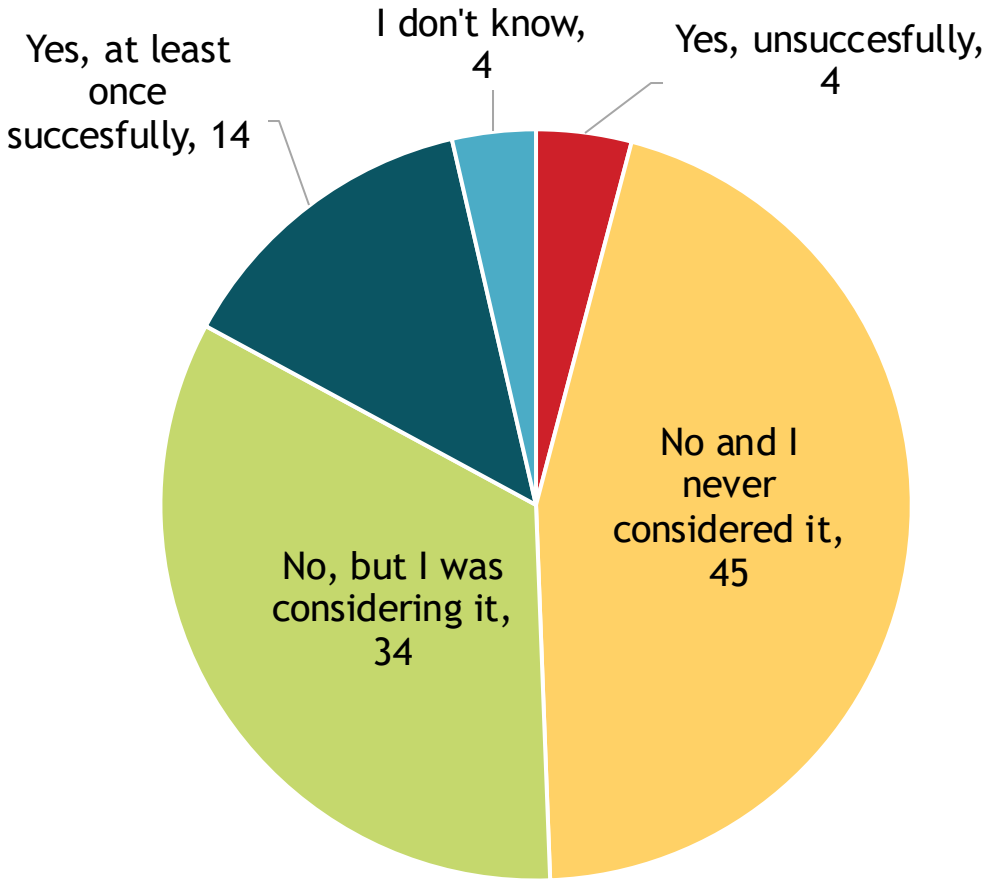


The three investments that respondents would most like to invest in, but do not have the financial resources for, are the acquisition of photovolatic panels (37%), wall insulation (34%) and interior renovation (34%). The data shows that the population has very few resources to make any investment realistic. The proportion of investments that they actively plan to make is negligible compared to those that they feel they need for but do not have the resources to carry out. The biggest barrier to modernise houses is money. Although there is a significant need for renovation, financial constraints make these investments unlikely in the foreseeable future.

H14A H14B H14C H14D H14E H14F H14G H14H H14I H14J H14K Please indicate whether you plan to renovate or invest in the following things... (%) N= 1005

Half of Hungarian households have already applied or have been considered to apply for a scheem to decrease energy consumption of their housing

In total, almost half of the respondents (48%) stated that they have already applied for support from a scheme meant to decrease the energy consumption of their housing or they have been considering it. 45% have never applied and never even considered it. 4% applied successfully.

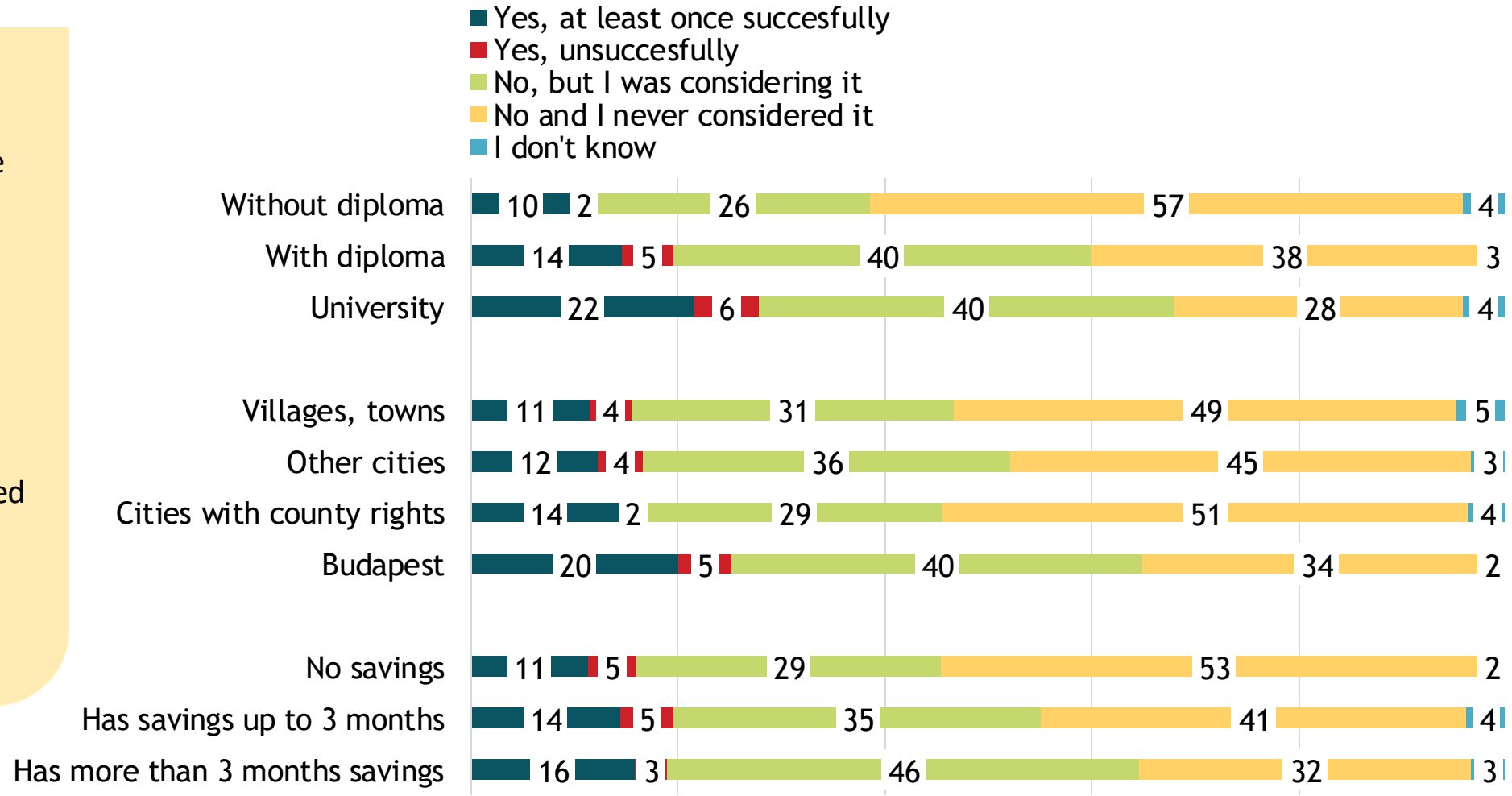


H06 Have you or people from your household ever applied for support from a scheme meant to decrease the energy consumption of your housing? – within house owners (%) N= 858

The higher the level of education or the more savings someone has, the more likely they have already applied for or considered applying for a scheme

21 Research Center

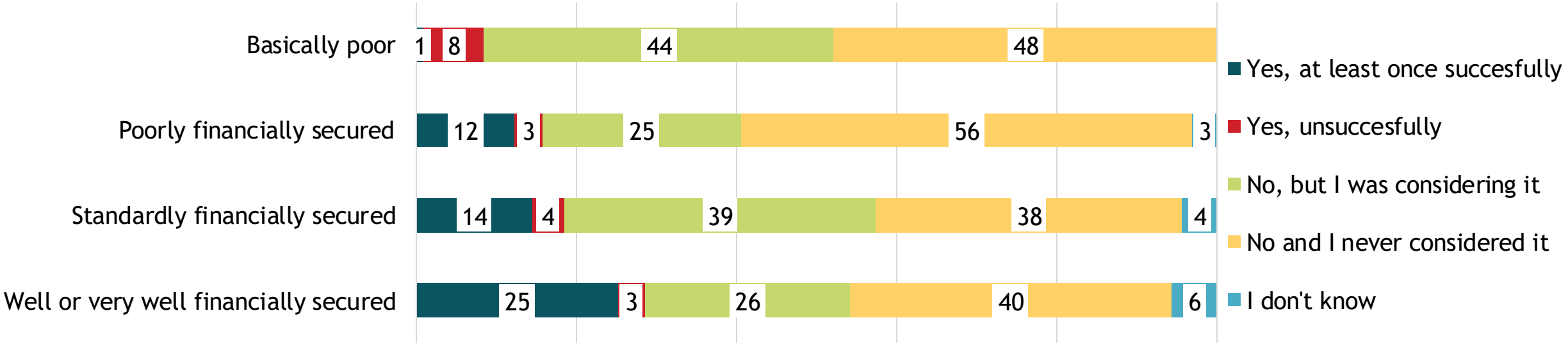
The higher the level of education or the more savings someone has, the more likely they have already applied for or considered applying for support from a scheme meant to decrease the energy consumption of their housing. Budapest residents have also applied for these schemes in higher proportion than residents of other settlement types.



H06 Have you or people from your household ever applied for support from a scheme meant to decrease the energy consumption of your housing? – within house owners (%) N= 858

Those in the best financial position are the most likely to apply successfully, and the poorest are basically excluded from these grants

21 Research Center

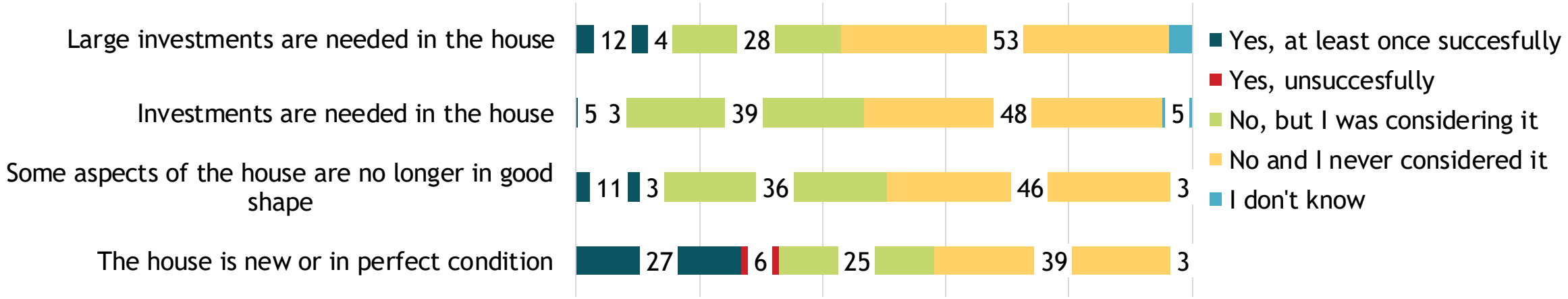


The greater someone's subjective financial security, the more likely that they have ever successfully applied for such a grant. Furthermore, the poorest are the most likely to have been unsuccessful in their application. This highlights who the current applications are actually targeting. Those in the best financial position are the most likely to apply successfully, and the poorest are basically excluded from these grants.

H06 Have you or people from your household ever applied for support from a scheme meant to decrease the energy consumption of your housing? – within house owners (%) N= 858

The worse the condition of someone's property, the less likely is that they have applied or ever considered applying for a scheme

21 Research Center



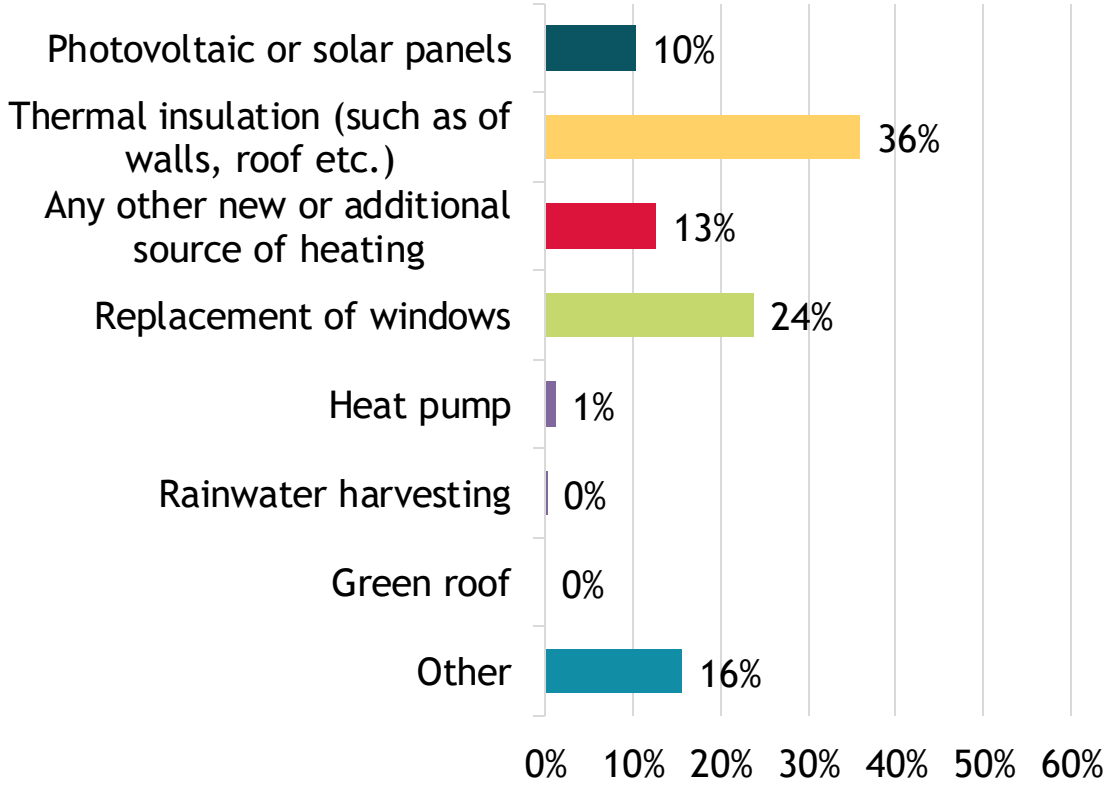
The worse the condition of someone's property, the less likely is that they have applied or ever considered applying for support from a scheme meant to decrease the energy consumption of their housing. However, respondents whose house is in the best condition were the most likely to apply successfully. There are a few possible explanations for this. Their property might be in good condition because they have applied for some kind of scheme in the past, or the most successful applicants are the ones whose houses are in good condition anyway. However, it is important to note that 12% of the respondents whose house is in the worst condition have also successfully applied for a scheme in the past, but they are also have never considered applying in the largest proportion. This highlights that, on the one hand, there may be barriers difficult to overcome that deter those with properties in the worst condition from applying –(such as lack of money). On the other hand, as we will see in later slides, lack of information may also be an issue for those with properties in the worst condition.

H06 Have you or people from your household ever applied for support from a scheme meant to decrease the energy consumption ofyour housing? – within house owners (%) N= 858

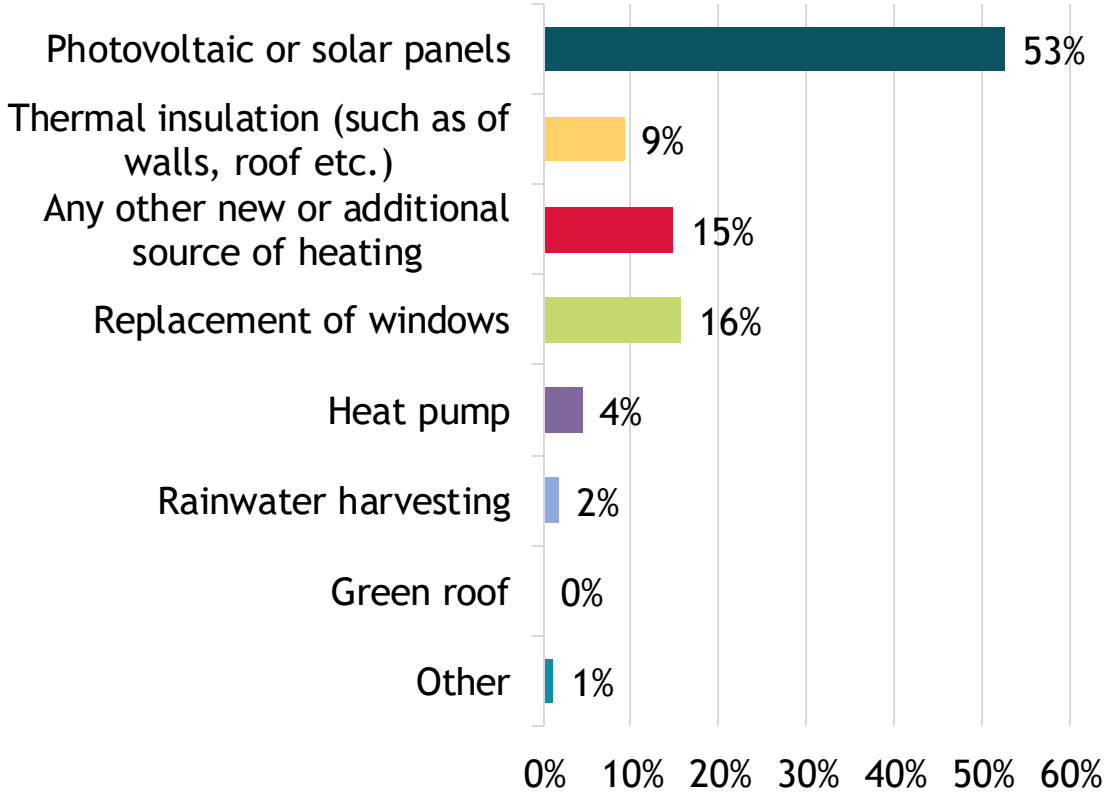
For owners of houses built before 1990, energy modernisation is the priority when considering investments

21 Research Center

Houses built BEFORE 1990



Houses built AFTER 1990



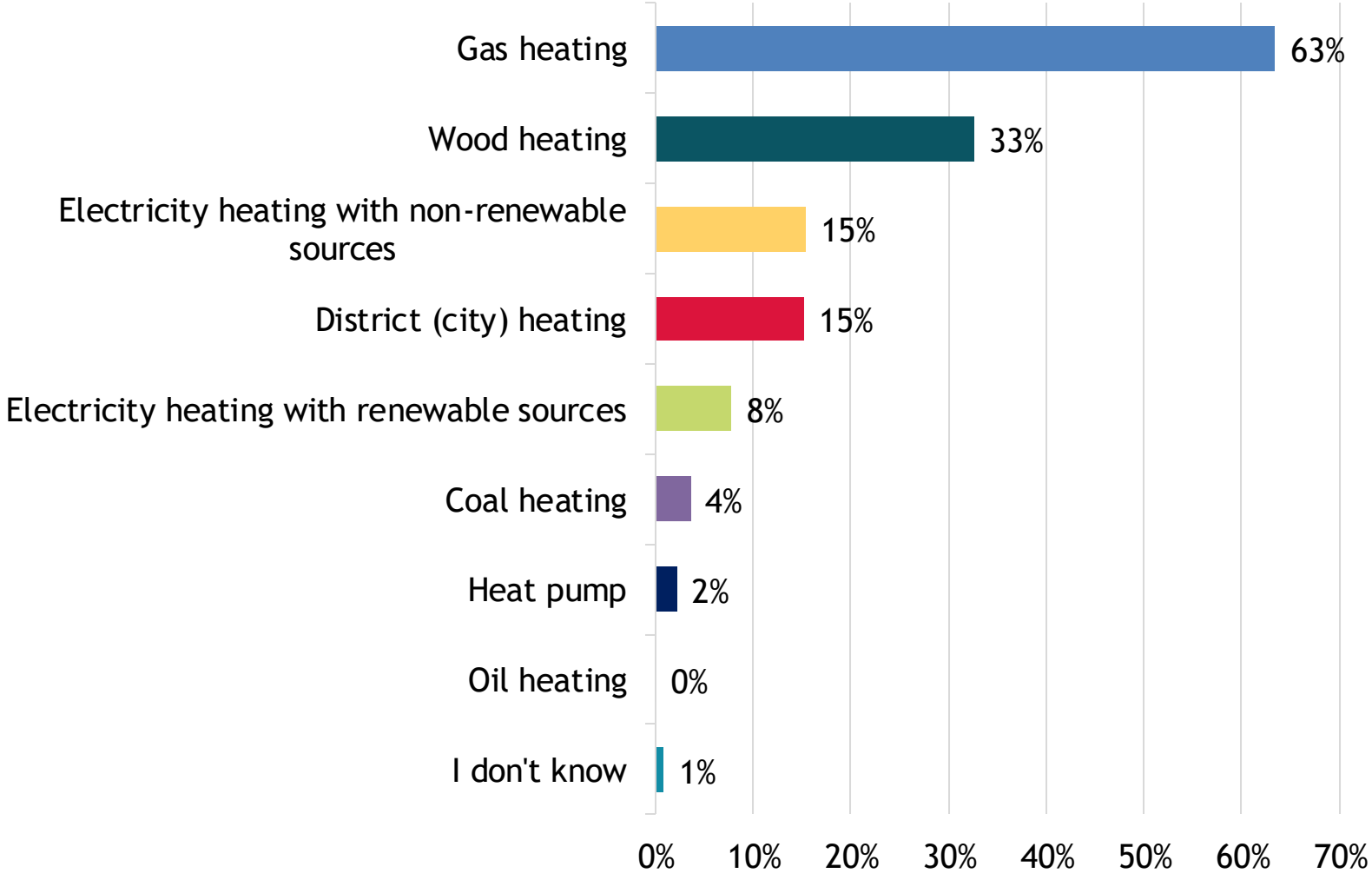
In the case of houses built before 1990, the largest proportion of the respondents applied for support for external wall insulation and window replacement. For houses built after 1990, applications for solar panels were predominant. Thus, for houses built before 1990, energy modernisation is the priority. In case of new houses, which are built with a more modern energy performance by default and require less investment, owners can allocate resources for a green energy switch.

H07 What was the subject of your application for a subsidy to reduce the energy consumption of your housing (the most recentone, if there was more than one)? – within those who applied (%) N= 151

The vast majority of the Hungarian households heat with gas

21 Research Center

The vast majority of the Hungarian households heat with gas. Wood heating is in second place, followed by electric heating with non-renewable energy sources and by district (city) heating.

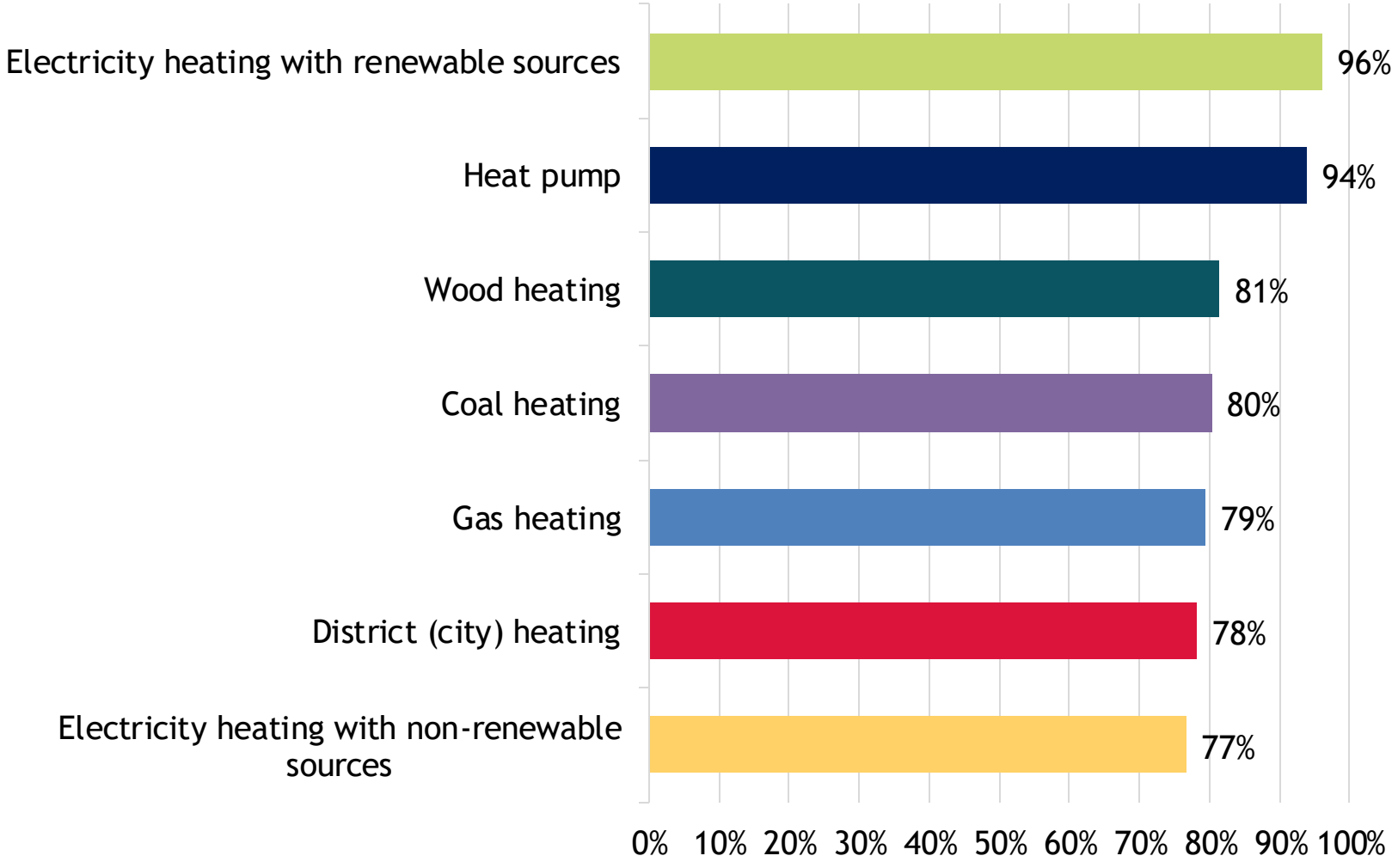


H09A H09B H09C H09D H09E H09F H09G H09H H09I What kind of power source (or sources) does your housing unit (house of flat) use for heating? Think about both heating the rooms and heating water. (%) N= 1005

Nearly 100% of users are satisfied with electric heating from renewable sources

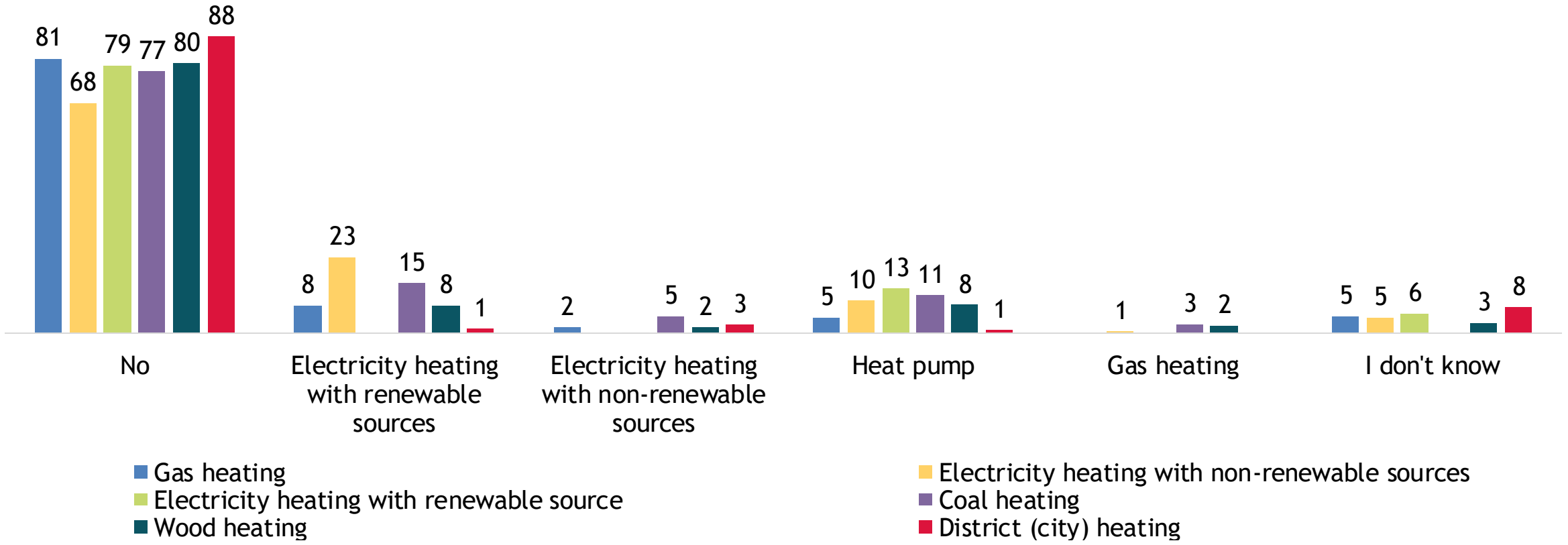
21 Research Center

Whilst gas heating, district heating and electric heating from non-renewable sources are the most common types of heating, they are the least satisfied. Nearly 100% of users are satisfied with electric heating from renewable sources, while only 8% of the respondents have this type of heating.



H10 Are you satisfied with the kind of power source you're using for heating? (Yes) (%) N= 1005

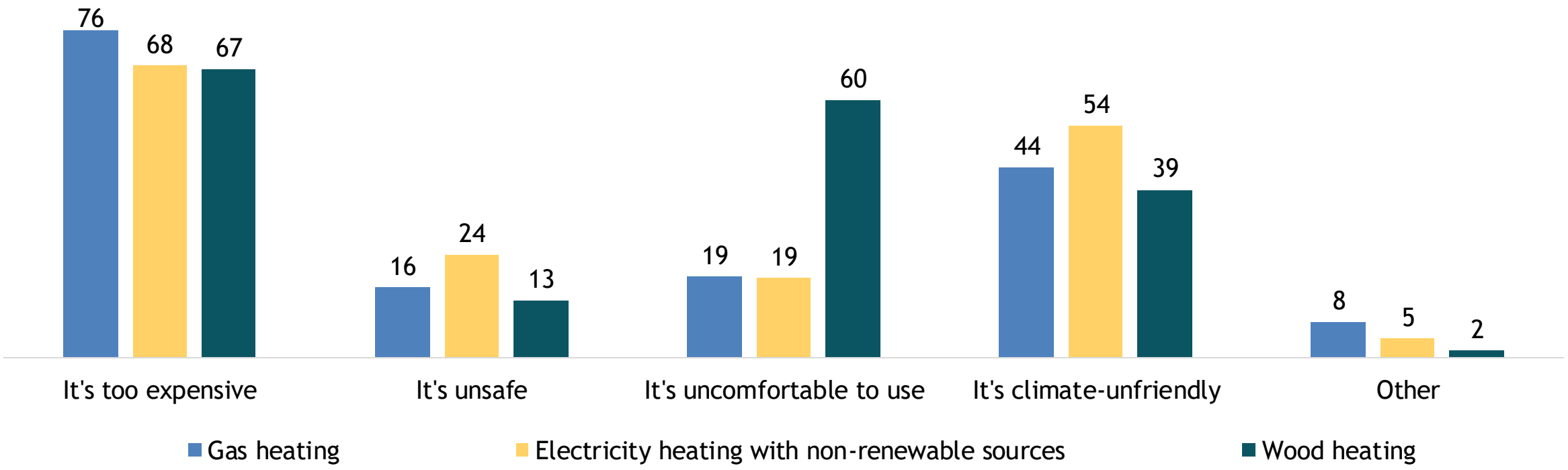
20% of the respondents plan to switch to another power source



The highest proportion of people who plan to switch to other energy sources are those who have an electricity heating system with non-renewable energy sources. In the highest proportion, they want to switch to a renewable energy source (23%). Those who live in a district-heated dwelling are the most likely not to want to change their heating method (88%), probably because it is the least ‚flexible' heating method and they do not have the option switch.

H12A H12B H12C H12D H12E H12F H12G H12H H12I H12J H12K Are you planning to switch to another power source? If you are, to which one? Think about both heating the rooms and heating water. (%) N= 1005

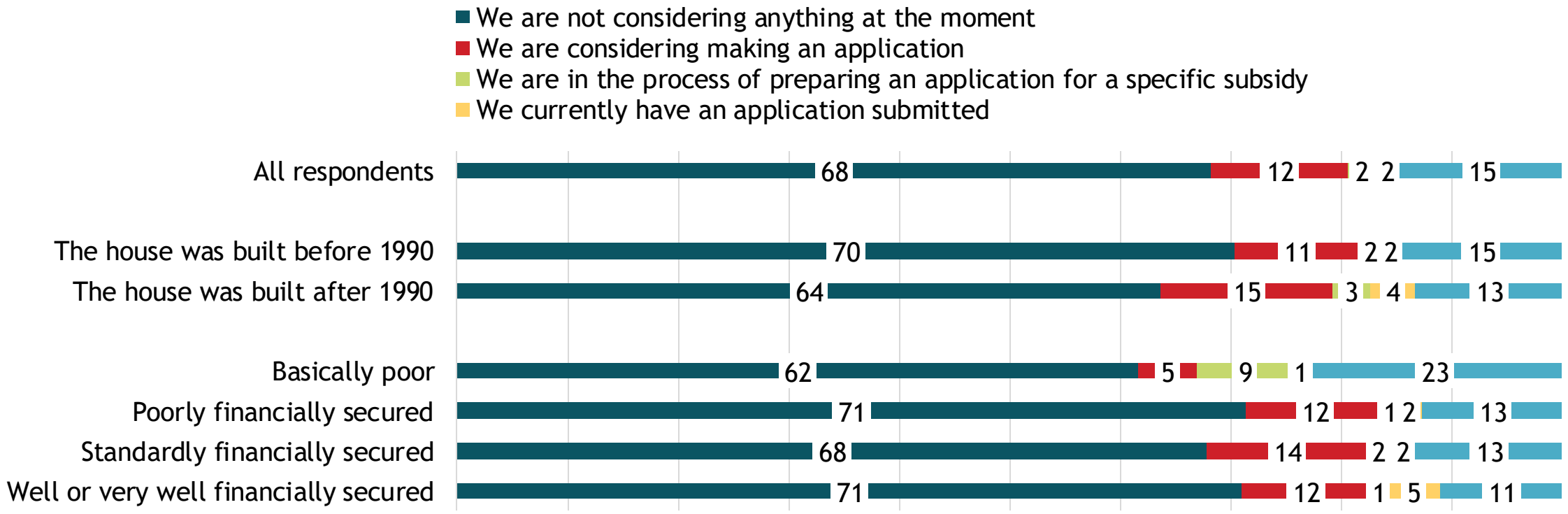
Every type of heating is found too expensive by users



If we analyse why respondents are not satisfied with the type of heating they use in case of the three most common types of heating, we see that for each type, the most frequently mentioned reason that they find it too expensive. However, dissatisfaction with the inconvenience is also very significant for wood heating. They also find these types of heating to be climate-unfriendly in high proportion. Hungarian consumers are therefore most concerned about the financial burden and perceive heating-related costs as significant, regardless of the type of heating. Whether a given heating method is environmentally friendly is also not important to them, but this is less important than the financial burden.

H13 You've mentioned that you are not satisfied with the kind of power source you're using for heating at home. What are the reasons for that? (%) N= 84

Higher proportion of those who plan to apply for a scheme have a house built after 1990

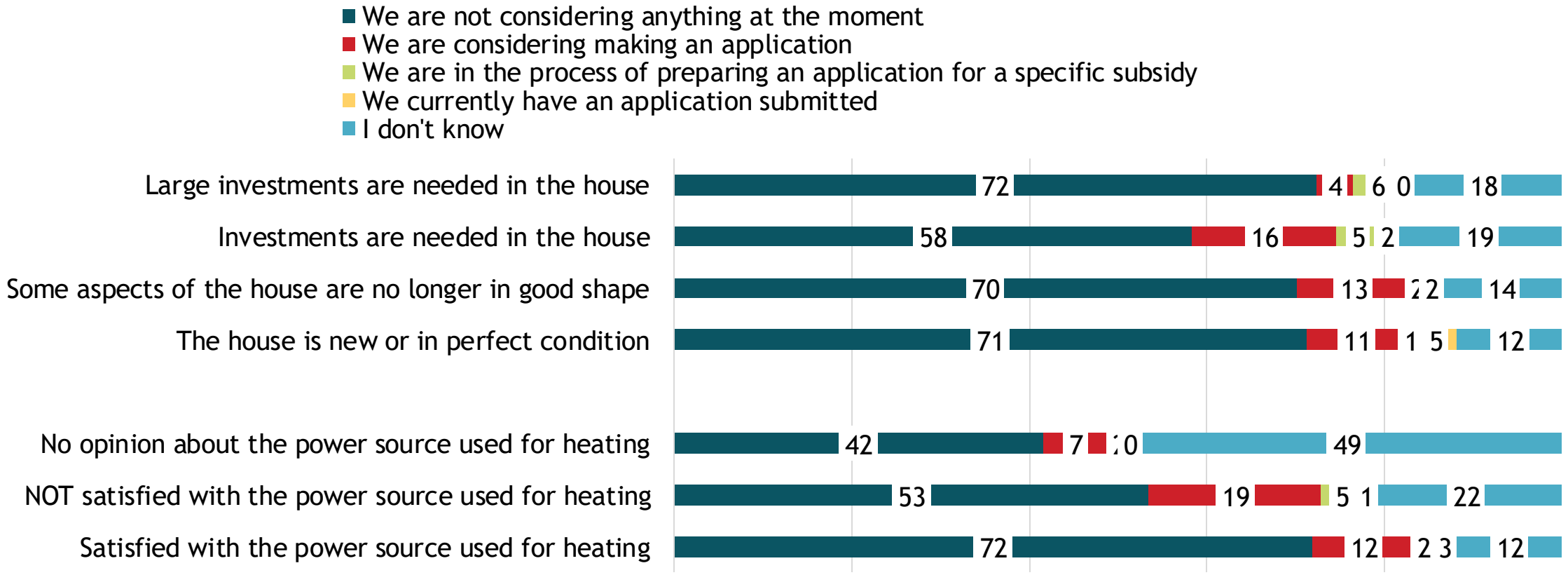


When we ask respondents about their future intentions to apply for subsidies to reduce the energy consumption of their property, we find that a higher proportion of those who plan to apply for such subsidy have a house built after 1990.

H15 How does your household feel about applying for subsidies to reduce the energy consumption of your property in the future? (%) N= 1005

Those whose house is in the worst condition are the least likely to apply for a subsidy to reduce the energy consumption of their housing

21 Research Center

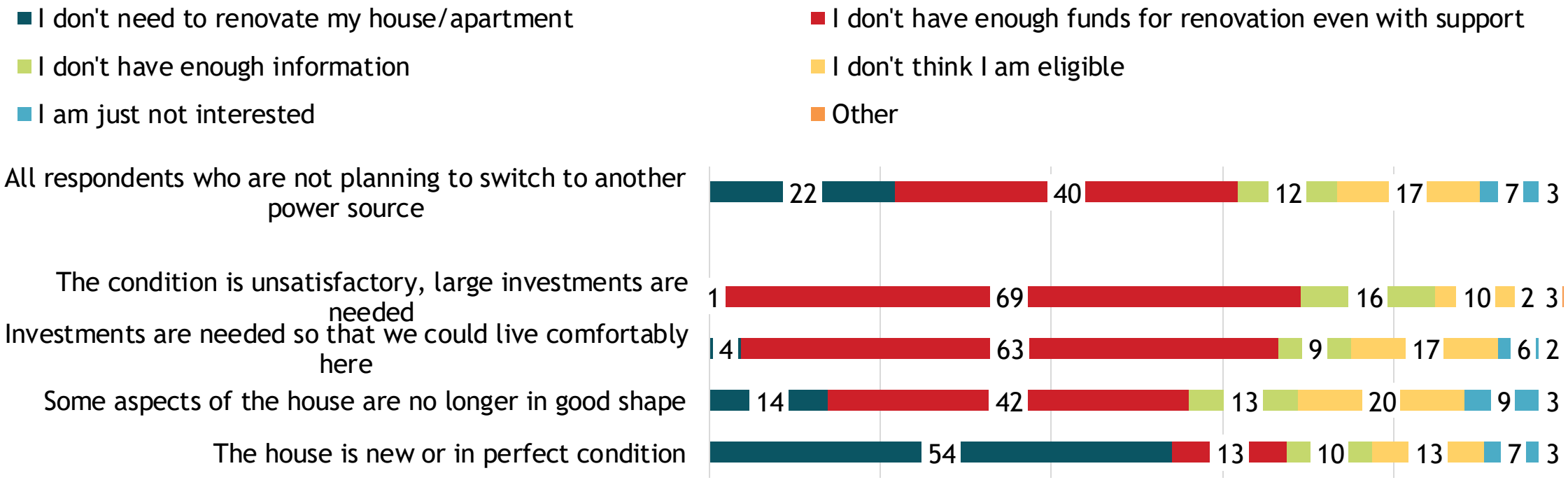


This figure also shows that those whose house is in the worst condition are the least likely to apply for a subsidy to reduce the energy consumption of their property. This underpins that those whose homes are in the greatest need of renovation are often the ones most likely to miss out on these grants.

H15 How does your household feel about applying for subsidies to reduce the energy consumption of your property in the future? (%) N= 1005

People who are most in need lack the financial means to apply for a subsidy

21 Research Center

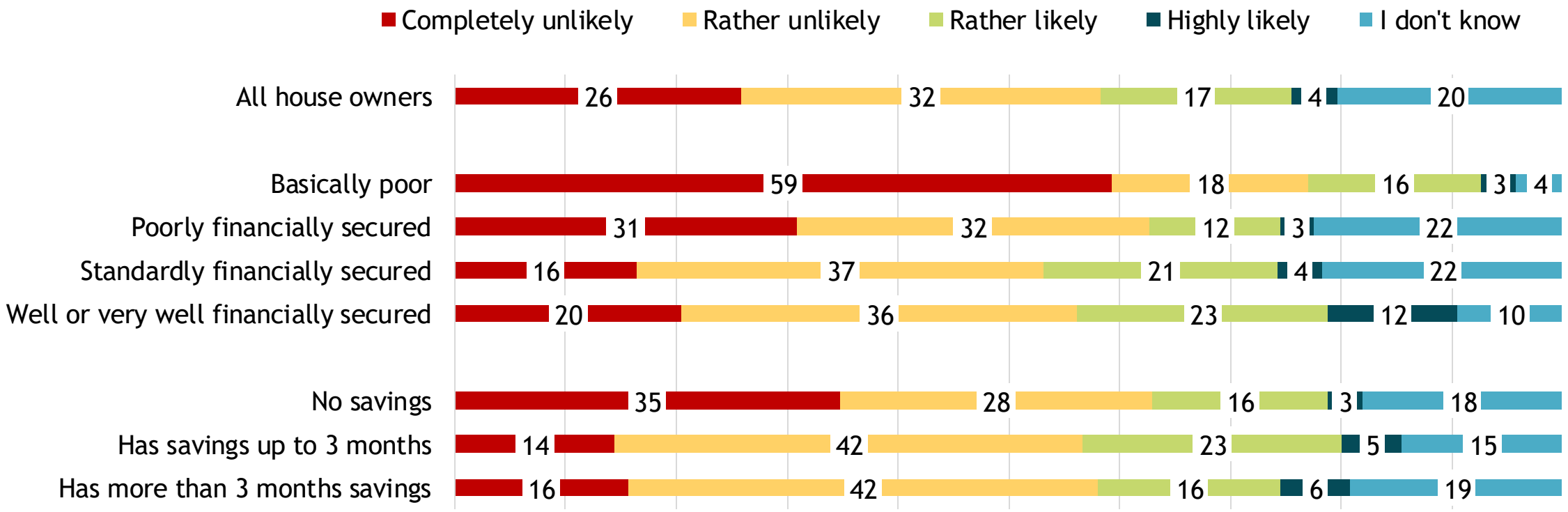


Those who are not satisfied with their heating but do not want to apply for any subsidy are most likely to say that they do not have the financial means to apply (40%). The second biggest problem is the lack of eligibility by 17% of the respondents. 69% of those whose housing is in the worst condition cited this as the main reason, and 16% picked the lack of information. Those whose property is in need of major renovation but not in the worst category also picked lack of funds (63%) and lack of eligibility (16%) as the main barriers. This supports the above finding that the biggest barrier to energy upgrading is that the people who are most in need lack the financial means to apply, and that it is important to better inform society about the options available.

H16 Why are you not planning on applying? – within home owners (%) N= 585

Only 4% of the Hungarians think it is highly likely that they would receive a support to reduce the energy consumption of their property

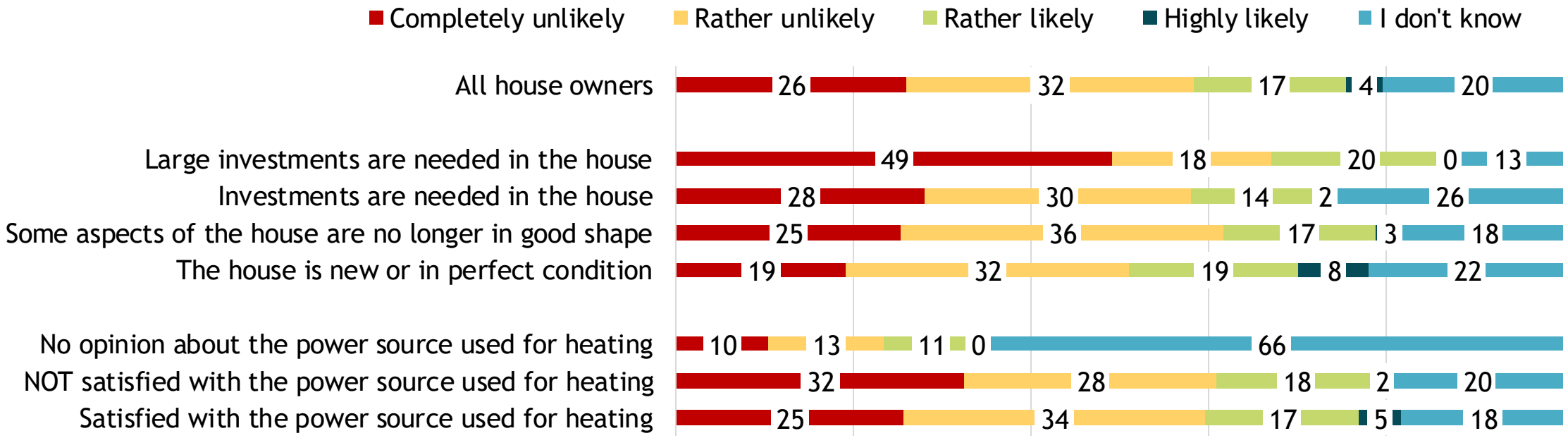
21 Research Center



Only 21% of the respondents think they could receive a grant to reduce the energy consumption of their property if they applied. Only 4% of them think it is highly likely that they would apply successfully. This proportion is higher among those who are well or very well financially secured. 12% of them think they have a good chance of winning such a grant. A high proportion of the poorest people (59%) and those without savings (35%) believe it is completely unlikely that they would receive such support.

H17 In your opinion, how likely it is that you would receive such support if you applied? – within home owners (%) N= 585

Those whose house is in the best condition are the most likely to get a grant

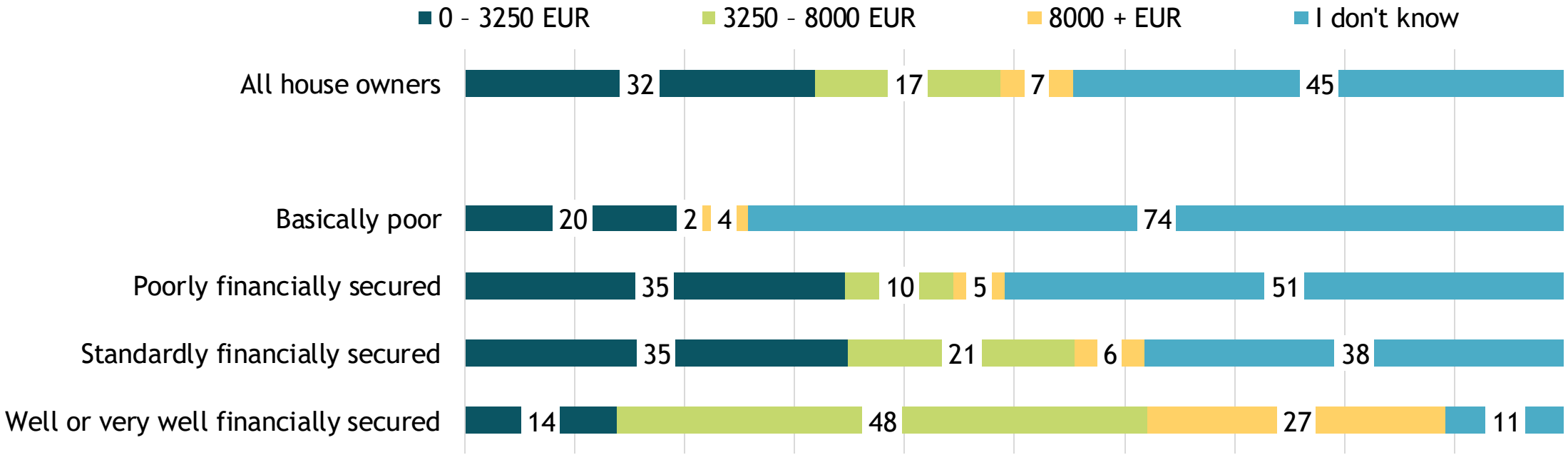


The perception of success in applying for a grant also shows that those whose house is most in need of renovation are the most likely to feel that it is completely unlikely that they would receive a grant to reduce the energy consumption of their housing (49%). The better condition someone's property is in, the lower the proportion who thinks they would definitely not receive a grant. Those whose house is in the best condition are the most likely to believe they would definitely get a grant (8%). Dissatisfaction with heating shows a similar picture. Those who are dissatisfied with their heating system think in higher proportion that they would definitely not get a support to reduce energy consumption (32%) than those who are satisfied (25%).

H17 In your opinion, how likely it is that you would receive such support if you applied? – within home owners (%) N= 585

The amount of money that can be invested in the energy modernisation of a house depends less on the condition of the house, and more on the financial stability of the homeowner

21 Research Center

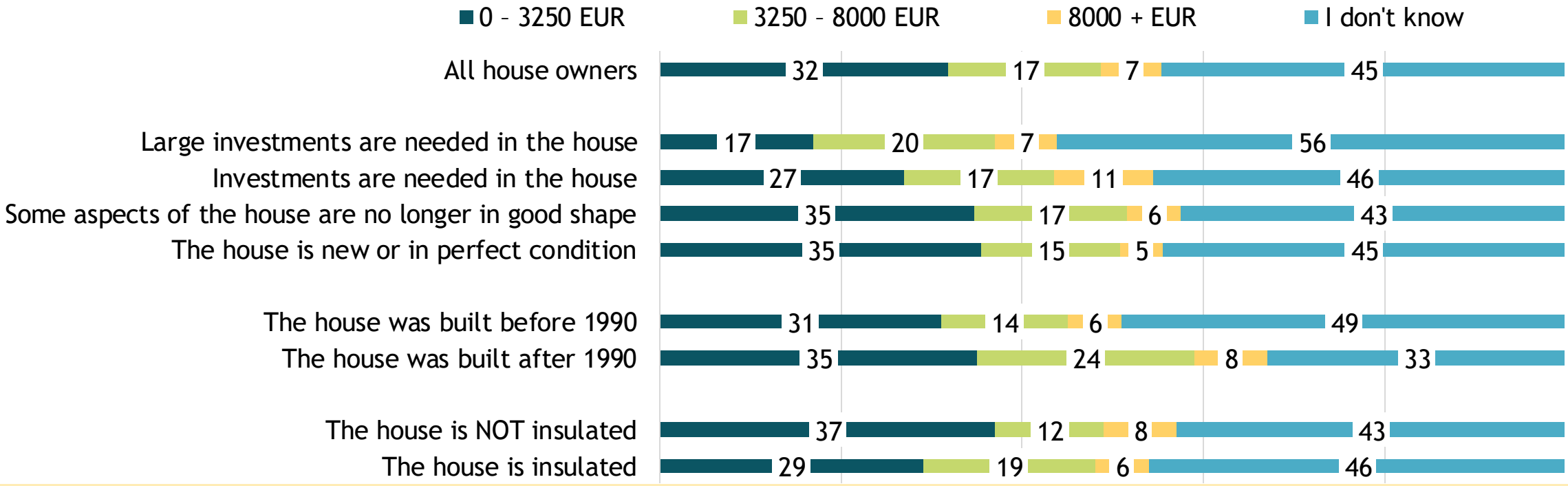


In terms of specific amounts of money, the largest proportion of people (45%) were those who could not specify how much money they were willing to invest in improving the energy efficiency of their homes. The proportion of people who did not know how much money they had available for this purpose was particularly high among the poorest (74% for the basically poor and 51% for the poorly financially secured). The poorest either don't know how much they could invest or would invest the lowest amount (20%). Up to 75% of the well or very well financially secured could invest between €3250 and €8000.

H18 How much money are you willing to invest in the next five years in reducing the energy consumption of your house? – within home owners who are planning or might plan to apply (%) N= 567

The amount of money that can be invested in the energy modernisation of a house depends less on the condition of the house, and more on the financial stability of the homeowner

21 Research Center



The amount available for investment depends less on the condition of the house. 27% of those whose house is in the worst condition could invest between €3250 and €8000, while 20% of those whose house is in the best condition could invest between €3250 and €8000. These data also paint the picture that the amount of money that can be invested in the energy modernisation of a house depends less on the condition of the house or the insulation of the house, and more on the financial stability of the homeowner. People in financial stability are willing to invest in houses in very poor and very good condition.

H18 How much money are you willing to invest in the next five years in reducing the energy consumption of your house? – within home owners who are planning or might plan to apply (%) N= 567

Investment
Main take-aways (1)

21 Research Center

The willingness to invest in reducing the energy consumption of the housing in the next 5 years does not statistically depend on the condition of the house, the age of the house, the type of the house or whether the house is insulated or not. But it has a statistically significant relationship with the respondent's educational level and whether the respondent has savings. Thus, the data show that the willingness for investment does not seem to depend on the need for renovation and the condition of the house. There is a part of the Hungarian society who is rather middle-class with university degree and savings, who can afford to think about these kind of investments. The rest of the population cannot, regardless the energy efficiency of the house.

57% of the respondents who are not planning to invest in insulation or renewable energy sources indicated that that the reason of this is that they do not have the financial capacity to do so. The main barrier is that even if households are aware of the need for modernization, they do not have the means to make any changes.

Regarding the different schemes, the higher the level of education, the more savings someone has, and the greater someone's subjective financial security, the more likely they have already applied for or considered applying for a scheme meant to decrease the energy consumption of their housing. Regarding the condition of the house, the worse the condition of someone's property, the less likely is that they have applied or ever considered applying for a scheme. On the other hand, respondents whose house is in the best condition were the most likely to apply successfully.

Investment
Main take-aways (2)

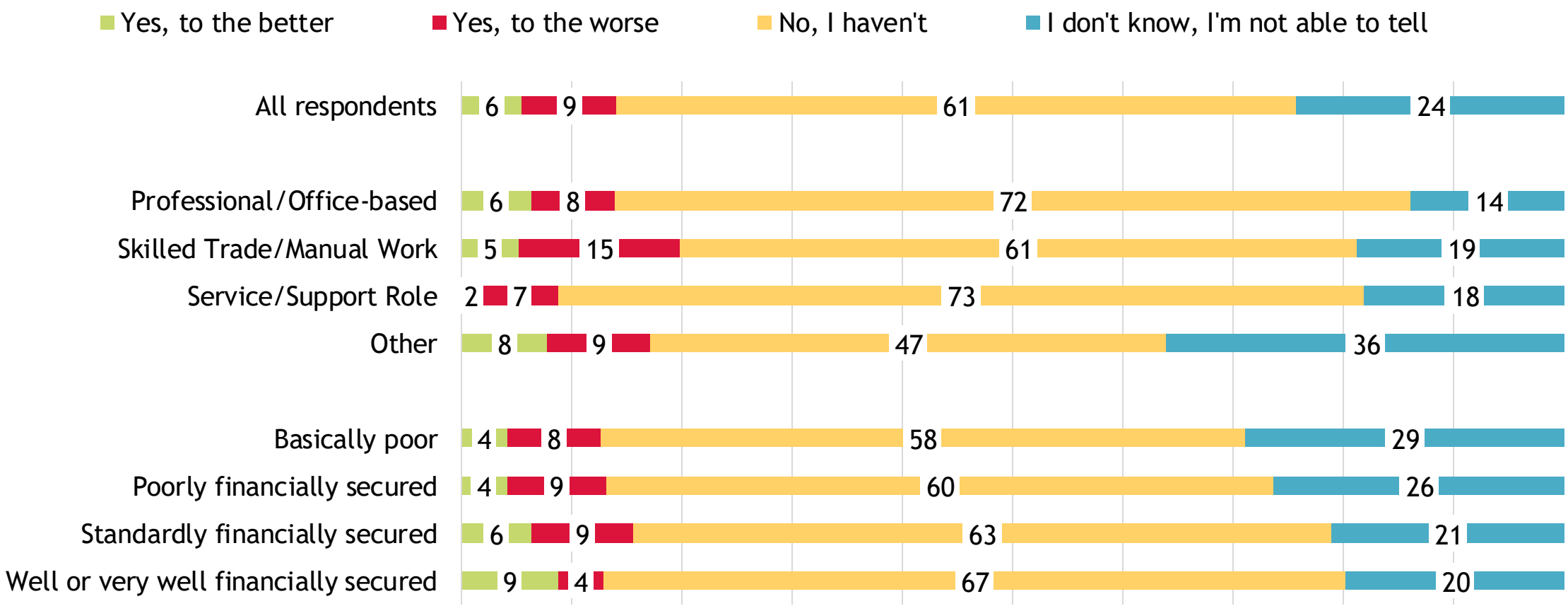
The perception of success in applying for a grant shows that those whose house is most in need of renovation are the most likely to feel that it is completely not realistic that they would receive a grant to reduce the energy consumption of their housing (49%). The better condition someone's property is in, the lower the proportion who thinks they would definitely not receive a grant. Those whose house is in the best condition are the most likely to believe they would definitely get a grant (8%).

Overall, both past applications for schemes and future application plans depend less on the need for renovation and more on the financial situation of the homeowner. With the right financial background, people are willing to invest in both properties that need to be very much renovated and those that are in perfect condition. At the same time, the research shows that often those who need renovation subsidies the most are the ones who do not have access to them. The poorest people with the lowest quality properties mostly do not even consider applying, or even if they do, their application is unsuccessful. However, it may be worthwhile for future applications to focus more on those whose home need large renovations and are relatively financially stable (i.e. have some savings), and are able to allocate some money for the energy modernisation of their property.

Impact of climate change on everyday life

Only 9% of Hungarians have personally already experienced impacts of climate change on the labour market

21 Research Center

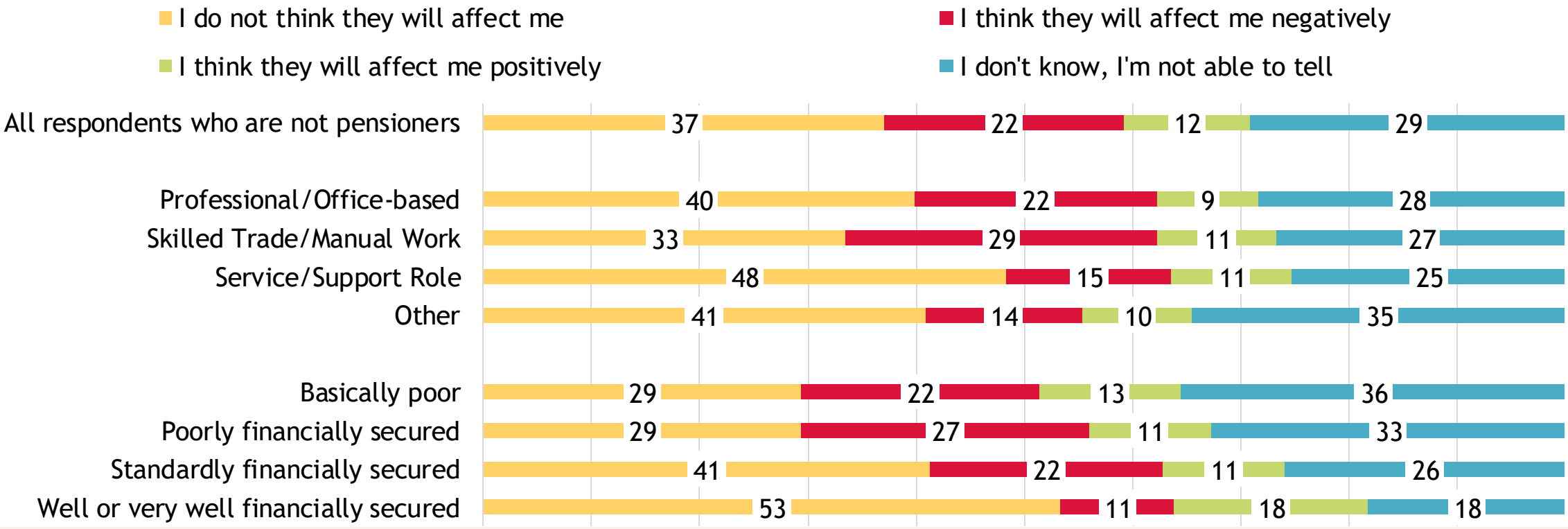


The proportion of the total population who has personally experienced the effects of climate change in the labour market is almost negligible, 15%. 9% of them have experienced the negative effects of climate change and 6% have experienced the positive effects of climate change. The proportion of those who have experienced the negative effects of climate change is slightly higher among people in manual and skilled jobs (15%). Furthermore, the best financially secured respondents have experienced the least negative effects.

J04 Have you personally already experienced impacts of climate change on the labour market? (%) N= 1005

Most Hungarians don’t think that the effect of climate change on the economy and the job market will affect them personally

21 Research Center

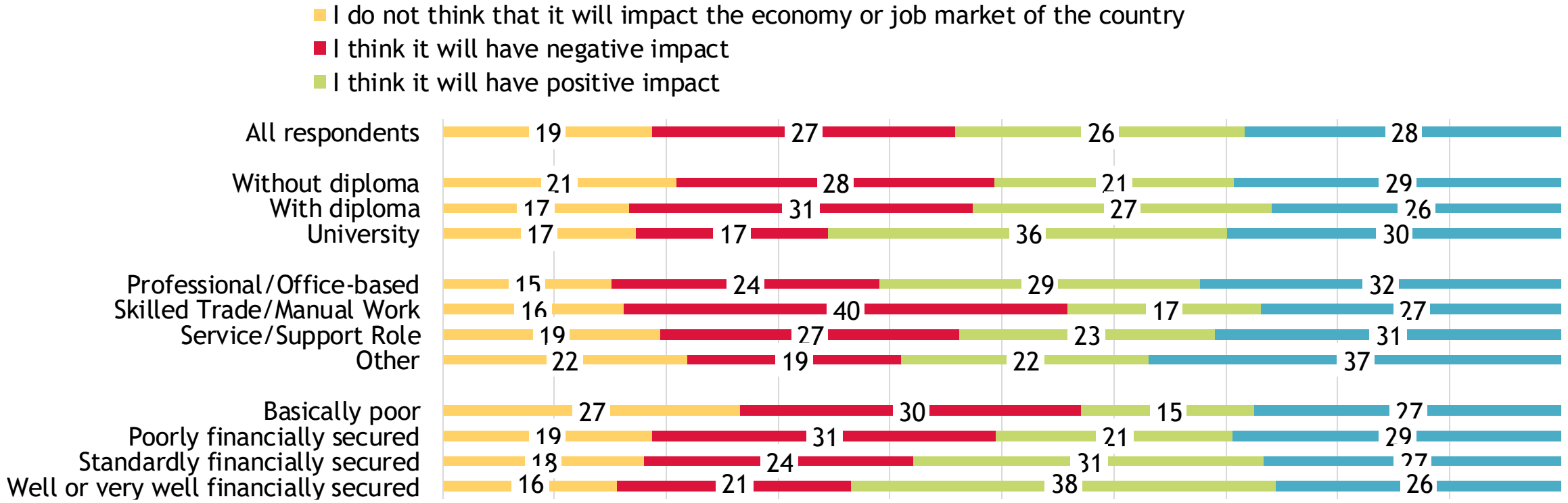


The highest proportion of the respondents think that they will not be personally affected by the effects of climate change on the labour market (37%), followed by those who do not know whether they will be affected or not (29%). Only 22% of respondents think that climate change will affect them negatively on the labour market. Regarding the different types of jobs, skilled trade and manual workers are the most likely to think that climate change will negatively affect them in the labour market. In terms of financial situation, the more financially secure someone is, the less likely they are to think that climate change will affect them in the labour market. Existential insecurity therefore seems to translate into fear of the labour market impacts of climate change.

J05 Do you think that the effect of climate change on the economy and the job market will affect you personally? And if yes, how? (%) N= 1005

Nearly the same number of people believe climate change will positively impact the labor market as those who believe it will have a negative impact

21 Research Center



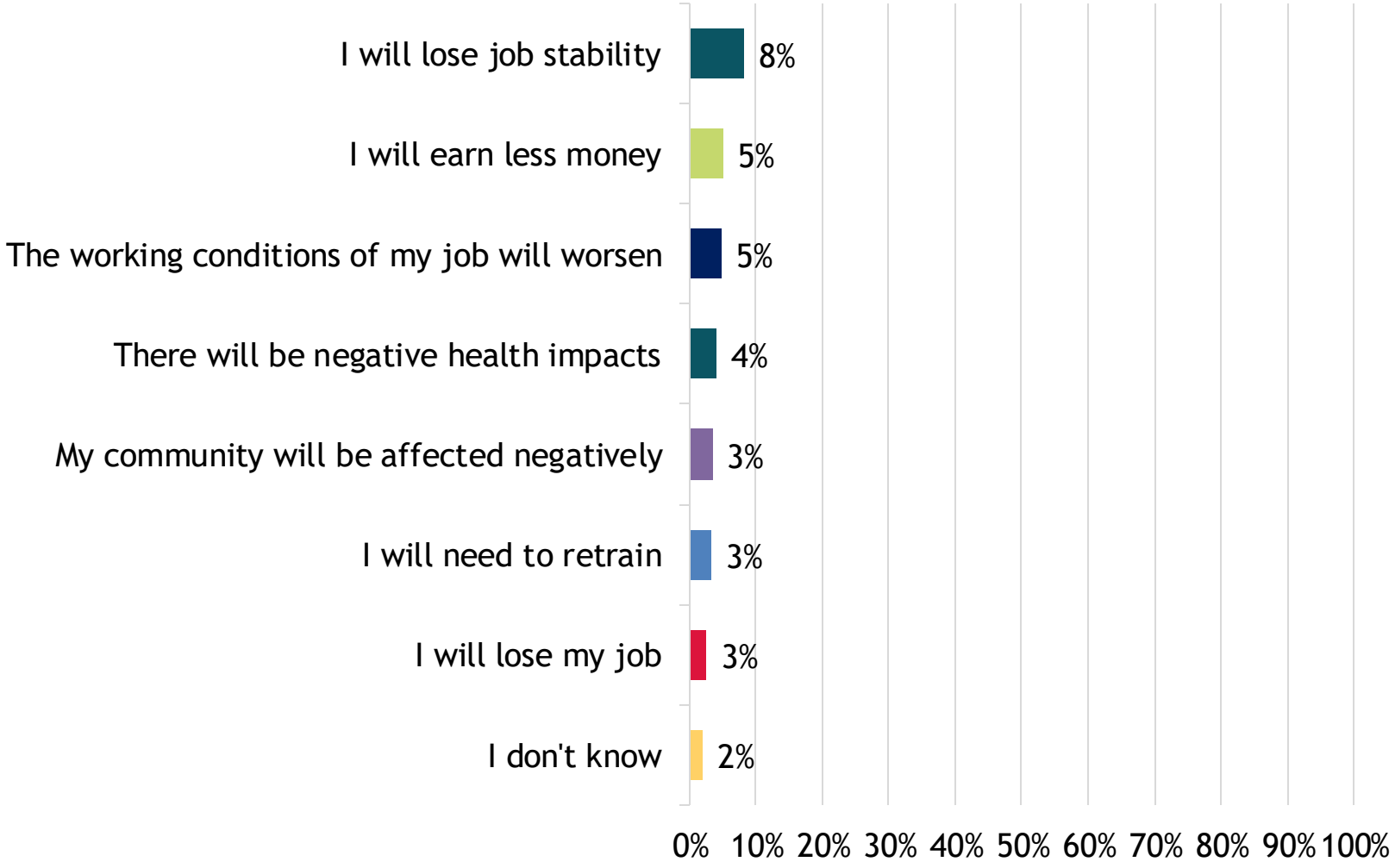
While a small proportion of respondents think that climate change will affect them personally in the labour market, on a global scale, 27% of the respondents think that climate change will have a negative impact on the Hungarian labour market and the economy. Almost as many people, 26%, think that climate change will have a positive impact. Those who are most confident about the positive outcomes of climate change are those who are standardly or very well financially secured. People in the worst financial situation are the most likely to think that climate change will have a negative impact on the Hungarian economy. Greater existential insecurity seems to generate greater fears in people at the level of their personal lives and wider processes.

J08 Do you think that there will be significant impacts on Hungary'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? (%) N= 1005

Only 8% of Hungarians think the they will lose their jobs because of cliamte change

21 Research Center

Although, as we have seen, climate change is seen as a serious problem by the majority of the respondents, they feel its negative effects less so far in their daily lives. It does not affect their position in the labour market. The loss of job stability was picked most frequently as the biggest threat, but only by 8% of the respondents.

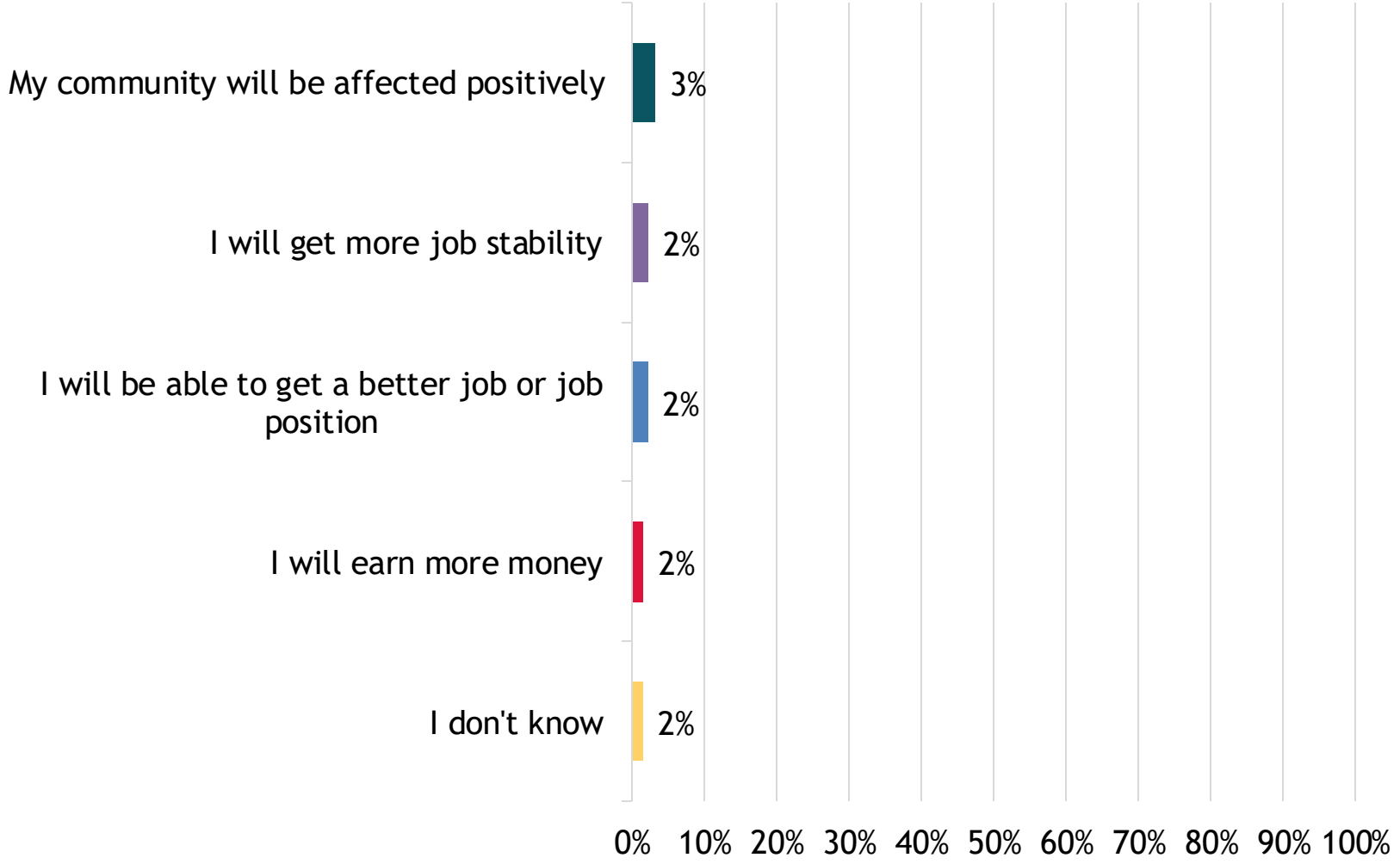


J06A J06B J06C J06D J06E J06F J06G J06H What negative impacts of climate change on the economy and job market have you experienced or expect to experience? – total pop (%) N= 1005

Very few people envision the positive impact of climate change on the labour market

21 Research Center

Very few people envision the positive impact of climate change on the labour market. The highest proportion, 3% of the respondents indicated that they expect their community to be affected positively.

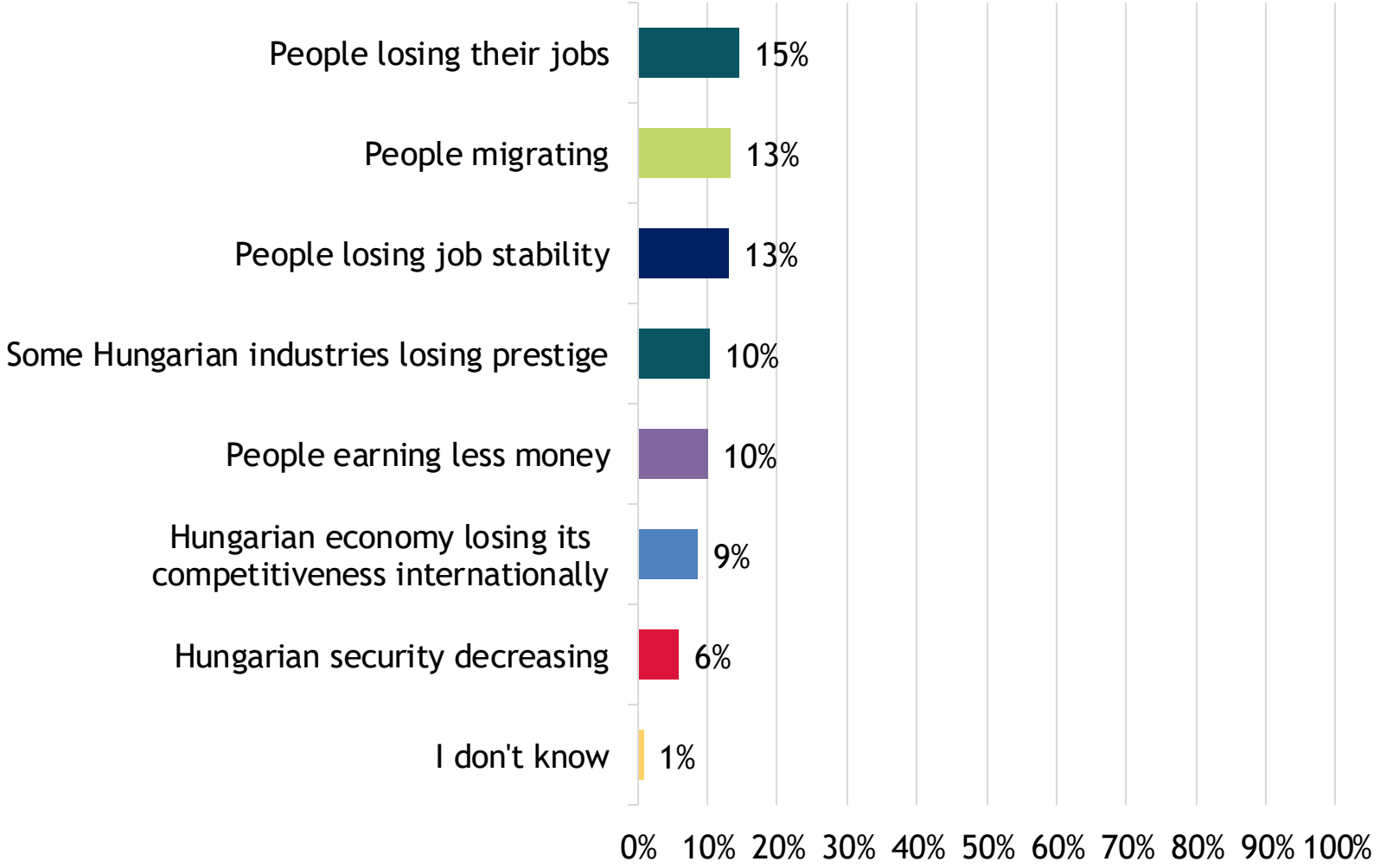


J07A J07B J07C J07D J07E J07F What positive impacts of climate change on the economy and job market have you experienced or expect to experience? – total pop (%) N= 1005

It seems that at a global level, loss of existential security is also the biggest fear

21 Research Center

When it comes to the negative impacts of climate change on the national labour market, the biggest risk identified by respondents was people becoming unemployed (15%), followed by migration (13%) and the loss of labour market stability for people in general (13%). It seems that at a global level, loss of existential security is also the biggest fear. However, it is important to note that only a small proportion of people mentioned these fears currently.

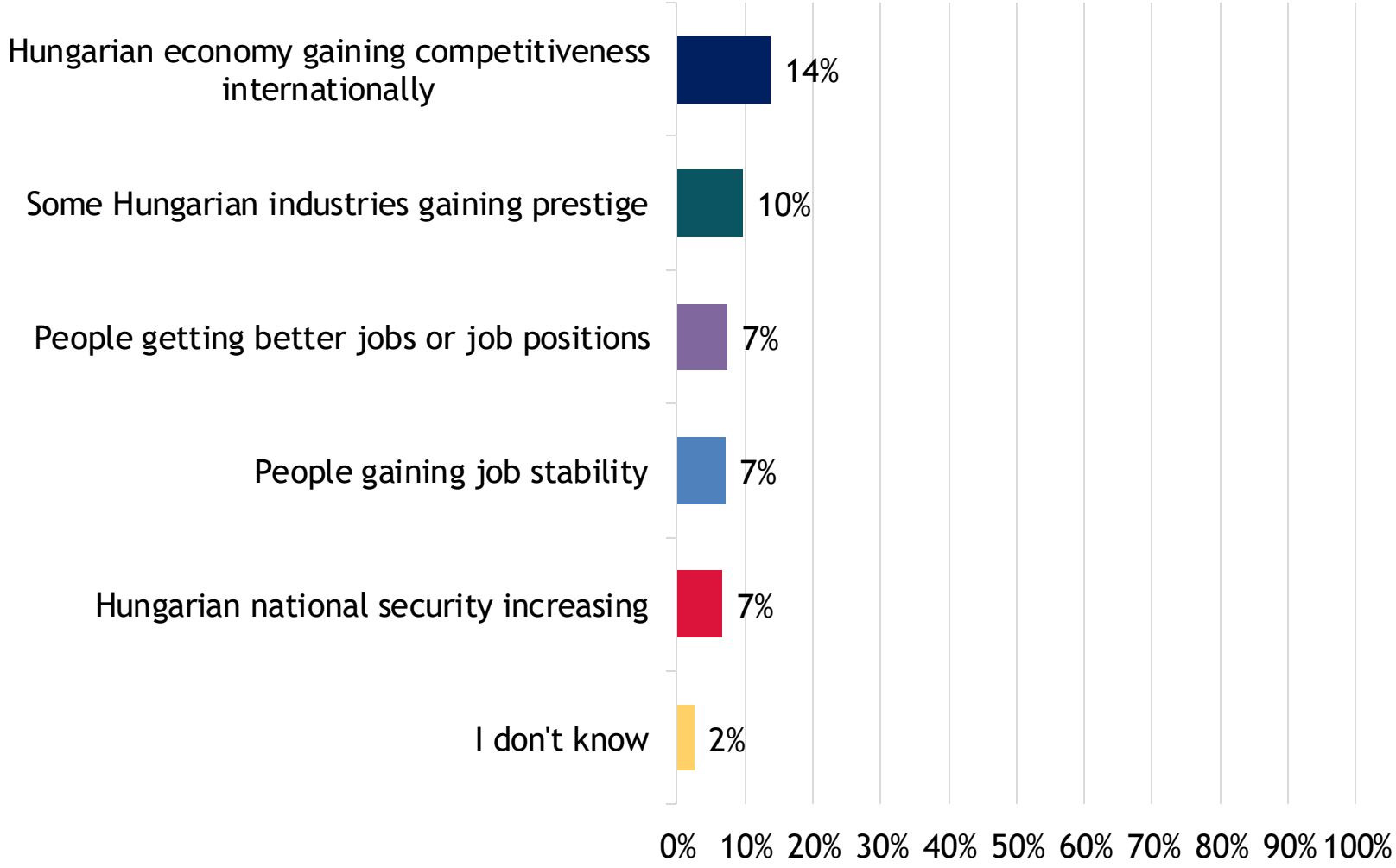


J09A J09B J09C J09D J09E J09F J09G J09H What negative impacts of climate change on the economy and job market do you think are going to happen or are already happening in Hungary? – total pop (%) N= 1005

The highest expectation is for Hungarian economy to gain international competitiveness

21 Research Center

In terms of positive expectations, the highest proportion of respondents picked that the Hungarian economy would gain competitiveness internationally (14%), followed by some Hungarian industries gaining prestige (10%). The least positive expectations were for an increase in Hungarian national security.



J10A J10B J10C J10D J10E J10F J10G What negative impacts of climate change on the economy and job market do you think are going to happen or are already happening in Hungary? – total pop (%) N= 1005

Impact of climate change on everyday life
Main take-aways

Although, as we have seen, climate change is seen as a major problem by the majority of the respondents, they feel its negative effects less so far in their daily lives. The proportion of the total population who has personally experienced the effects of climate change in the labour market is almost negligible, 15%. Also, only 22% of respondents think that climate change will affect them negatively on the labour market in the future.

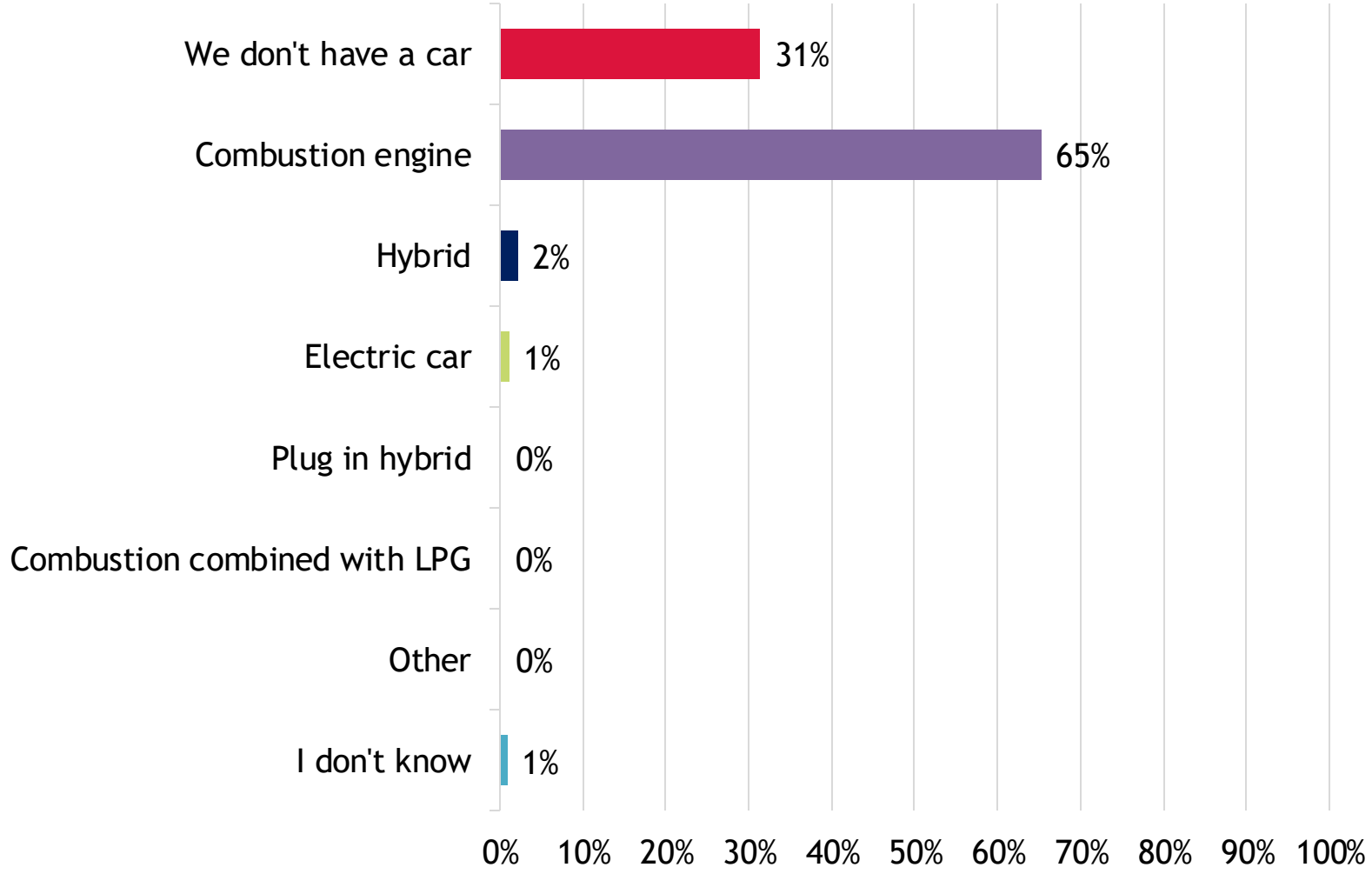
Respondents expect negative impacts of climate change more at the level of the national economy. 27% of the respondents think that climate change will have a negative impact on the Hungarian labour market and the economy. Almost as many people, 26%, think that it will have a positive impact. Those who are most confident about the positive outcomes of climate change are those who are standardly or very well financially secured. People in the worst financial situation are the most likely to think that climate change will have a negative impact on the Hungarian economy and on their personal position in the labour market. Greater existential insecurity seems to generate greater fears in people at the level of their personal lives and wider processes.

Transportation

The proportion of Hungarians who have a car other than combustion engine is almost negligible

21 Research Center

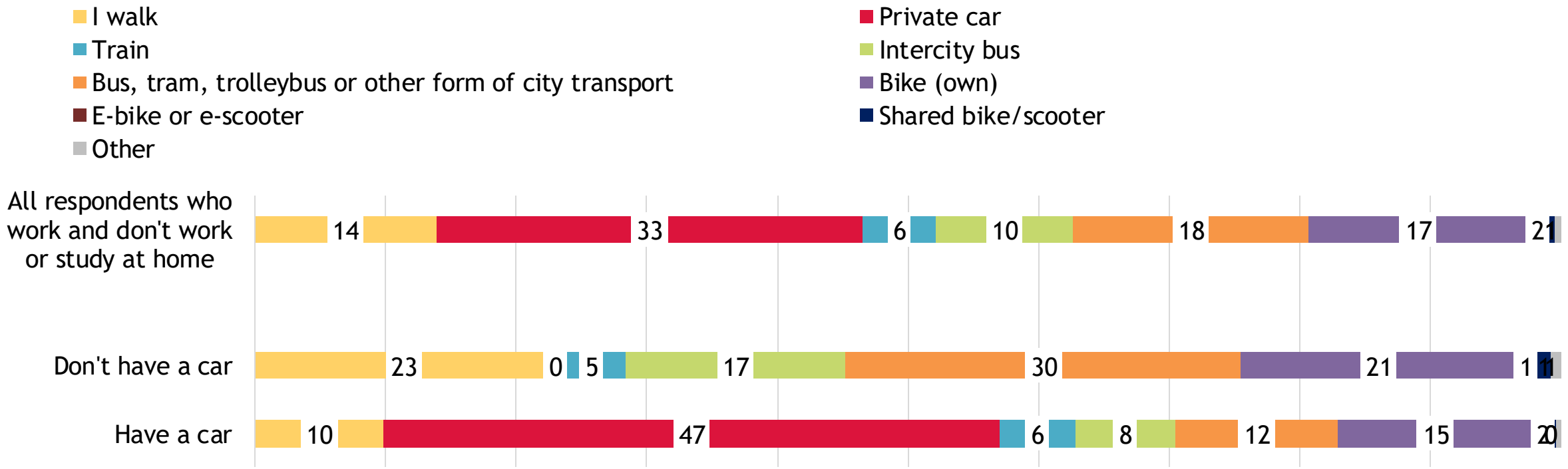
The proportion of respondents who have a car other than combustion engine is negligible. 31% of the respondents' households do not have a car.



T01A T01B T01C T01D T01E T01F T01G T01H T01I What type of engine is the car that your household uses? – total pop (%) N= 1005

47% of those who have a car use this transportation mode to get to work/school

21 Research Center



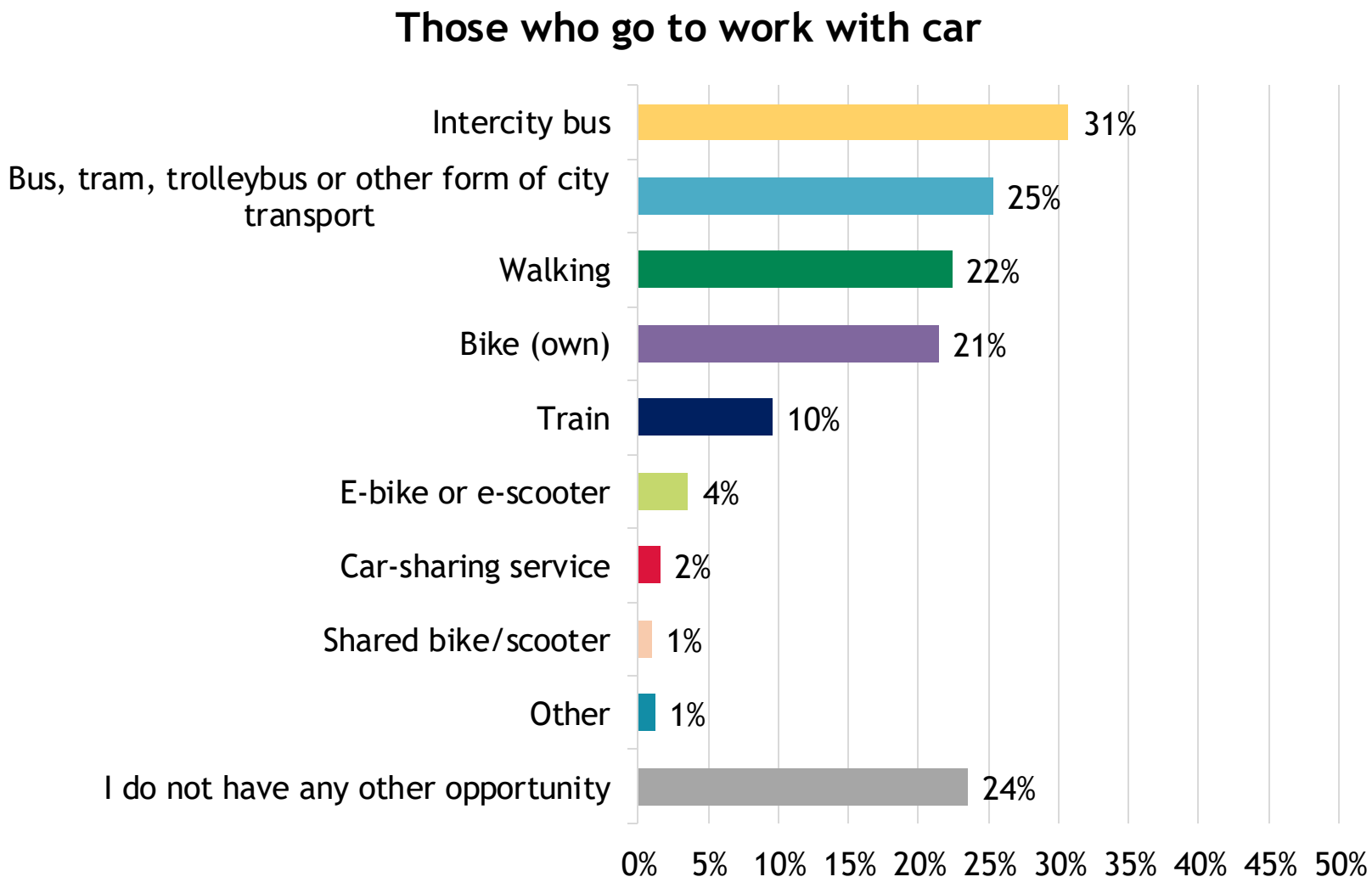
33% of the total population travel to work/school by car. The second most common mode of transport is bus/tram/trolley/other urban transport (18). Walking is the third most common mode of transport (14%). 47% of those who have a car use this transportation mode to get to work/school. The second most common mode of transport among them is cycling. This suggests that they are likely to have to travel longer distances, as only 10% walk. 30% of people without cars use public transport in urban areas, 23% walk and 17% cycle.

T02 Which mode of transport do you personally use the most often for travelling to work or school? (%) N= 1005

31% of the people who commute to work by car choose this mode of transportation over intercity bus

21 Research Center

Among those who commute to work/school by car (33% of respondents, as previously noted), 24% have no alternative means of transportation. For most of them, the intercity bus is the alternative (31%). This suggests that people in rural areas tend to avoid intercity buses by opting to drive instead. 25% could choose some form of urban transport, so they prefer to choose the convenience of the car in the city during transport. The lowest proportion of people sees the different sharing services as an alternative.

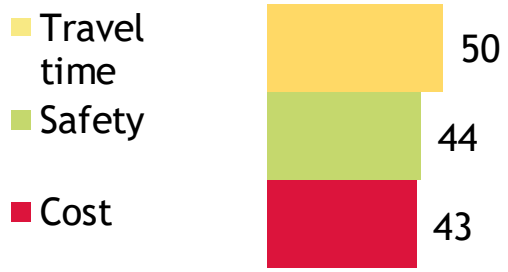


T03A T03B T03C T03D T03E T03F T03G T03H T03I T03J T03K T03L If your primary mode of transport would not be available, would you be able to use another type of transport? (%) N= 1005

Top 3 motives behind deciding on which mode of transport to use

21 Research Center

Who walk to work



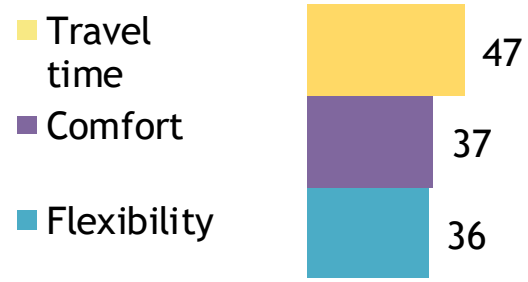
Who go to work with car

Who go to work by train

Who go to work by intercity bus

Who go to work by bus, tram, trolleybus, etc.

Who go to work by bike (own)



Travel time is one of the top 3 most important aspects for all modes of transport. For both cars and bicycles, the top 3 drivers are travel time, comfort and flexibility. Thus, bicycles are perceived by their users as being as comfortable. Similarly to the users of cars, bikers choose this type of transport because of its flexibility.

T05A T05B T05C T05D T05E T05F T05G T05H T05I T05J When deciding on which mode of transport to use, how important are the following aspects to you? Please pick the three most important. (%) N= 1005

Availability in Budapest is rated much higher than in rural areas [mean]

If we compare the evaluation of public transport by settlement type, we see that there is no very significant difference in the perception of safety and price. However, in Budapest, respondents rated accessibility much higher, and in cities with county rights availability was also rated higher. This confirms the well-known fact that public transport infrastructure outside of Budapest and the largest cities in Hungary is inadequate, since buses are not frequent enough.

T07A T07B T07C Please rate public transport services at your place of residence on a scale from 1 to 4, according to the following aspects: (%) N= 1005

Transportation
Main take-aways

21 Research Center

47% of those who have a car use this transportation mode to get to work/school. The second most common mode of transport among them is cycling. This suggests that they are likely to have to travel longer distances, as only 10% walk.

Hungarians do not see the different sharing services as an alternative of their current mode of transportation.

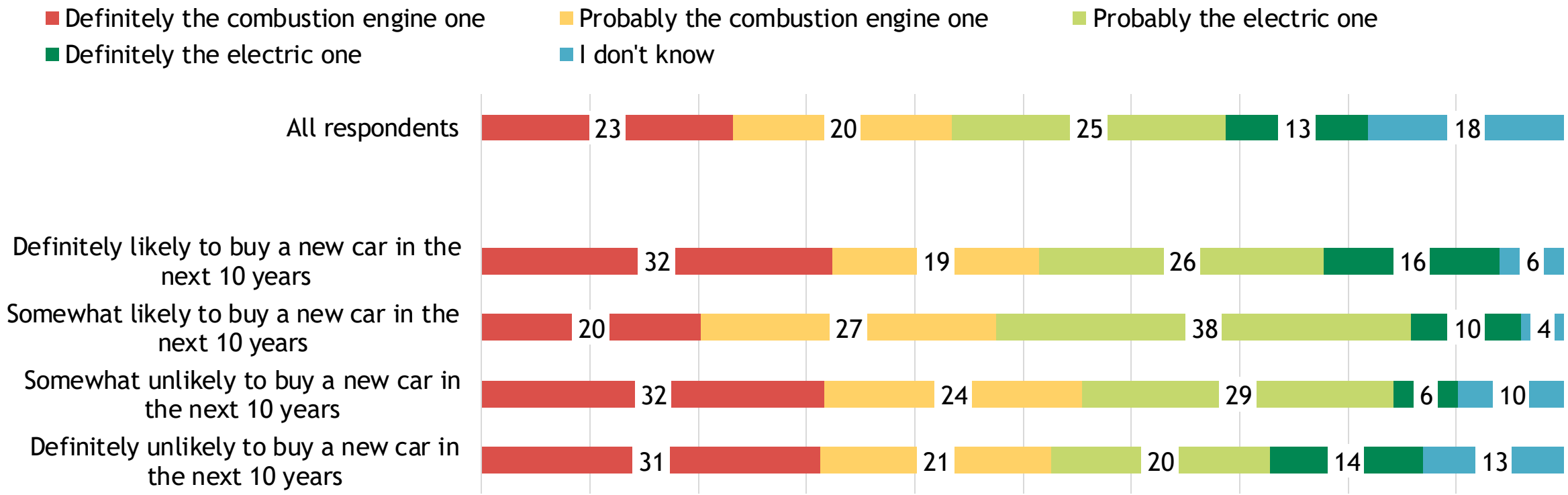
For most of the respondents who commute to work by car, intercity bus would be the alternative (31%). This suggests that people in rural areas tend to avoid intercity buses by opting to drive instead.

In rural areas and smaller cities, the availability of public transportation was rated lower than in Budapest and in cities with county rights. This points at the fact that public transport infrastructure outside of Budapest and the largest cities in Hungary is inadequate, since buses are not frequent enough. In these spaces, public transportation has little alternative other than cars.

The impact of the transition to electric vehicles in everyday life

There is not yet a high level of public confidence in electric cars

21 Research Center

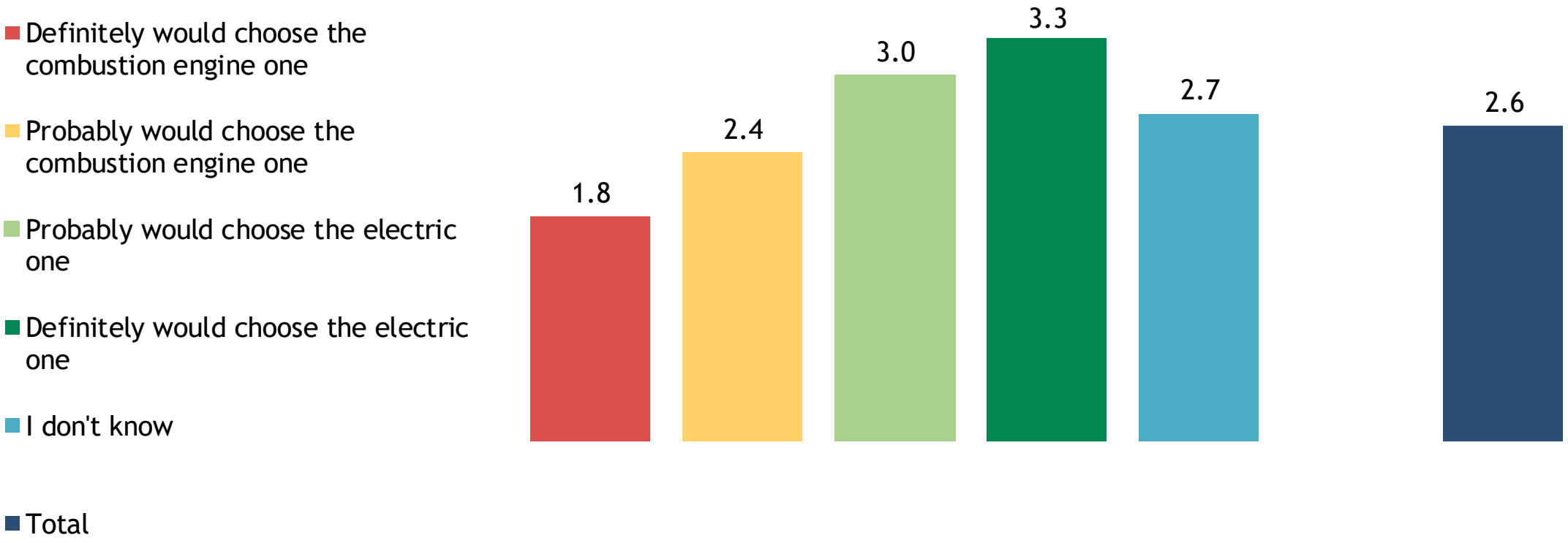


We asked respondents which type of car they would prefer if they could choose between a combustion engine and an electric car of the same type and price (new or used). Even if combustion engine cars and electric cars cost the same, 43% of the respondents would probably or definitely choose a combustion engine car and 38% would probably or definitely choose an electric car. 13% of all respondents would definitely or probably choose an electric car if it cost the same. Of those respondents who are definitely planning to buy a car in the next 10 years, 32% would definitely buy a combustion engine car and only 16% would choose an electric car. It is therefore clear that there is not yet a high level of public confidence in electric cars. A higher proportion of people would still choose a combustion engine car.

T14 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?
(%) N= 1005

Respondents who would choose an electric car are more likely to think that electric cars are more environmentally friendly [mean]

21 Research Center



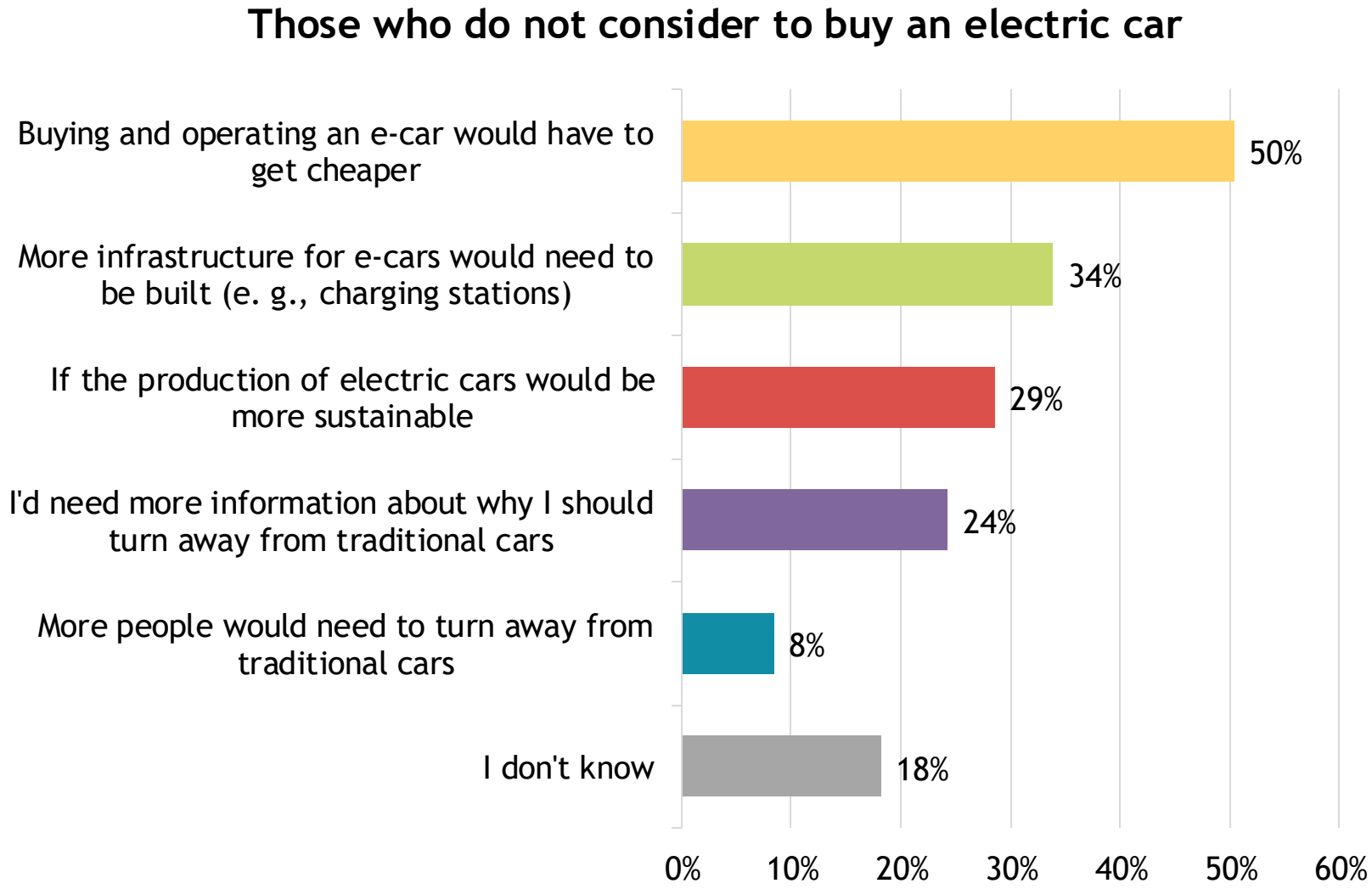
Respondents who would definitely choose an electric car, given the choice between a combustion engine car and an electric car for the same price, are more likely to think that electric cars are more environmentally friendly. Overall, the more likely someone is to choose an electric car, the more likely they are to think that electric cars are more environmentally friendly as well.

T15 How much do you agree with the following statement? Electric cars are more environmentally friendly than traditional (petrol/diesel) cars. (%) N= 1005

50% of those who would not choose an electric car find the purchase ar maintenance costs too much

21 Research Center

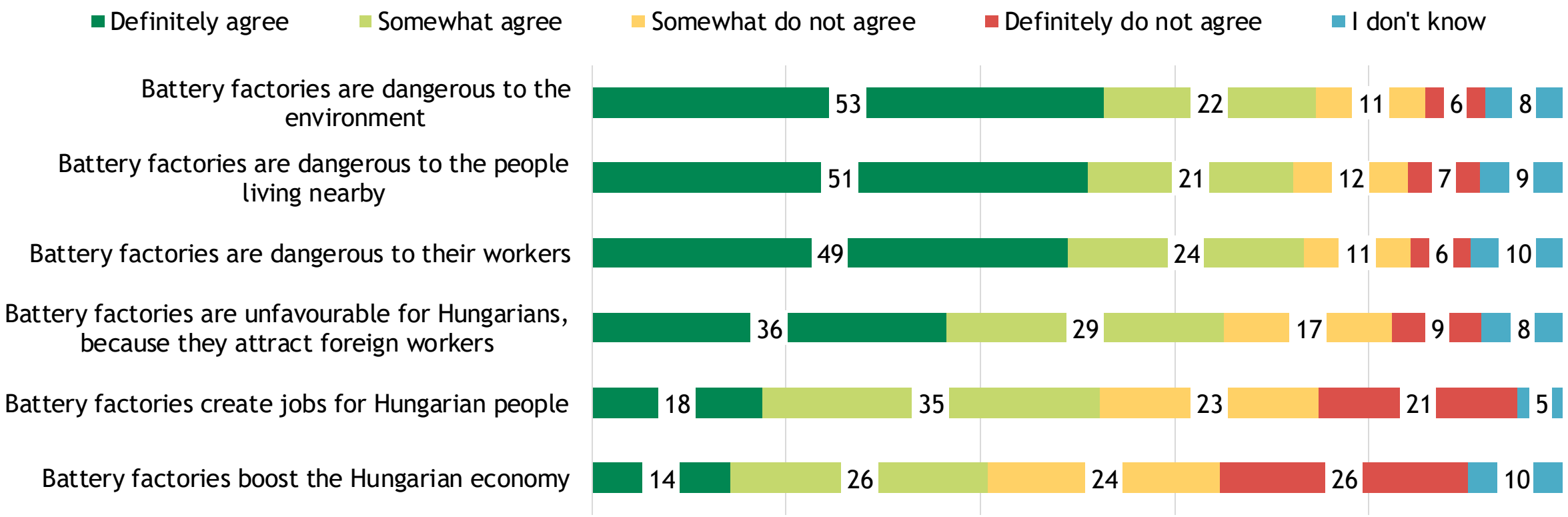
50% of those who would not choose an electric car find the purchase and maintenance costs too much. The second most common reason is the lack of adequate infrastructure for electric cars (34%). 29% do not consider the production of electric cars to be environmentally friendly enough. 24% do not have enough information on why electric cars are better than traditional cars.



T16A T16B T16C T16D T16E T16F What conditions would motivate you to consider buying an electric car? – within those who do not consider to buy an electric car (%) N= 869

Battery factories do not enjoy much support in the country

21 Research Center

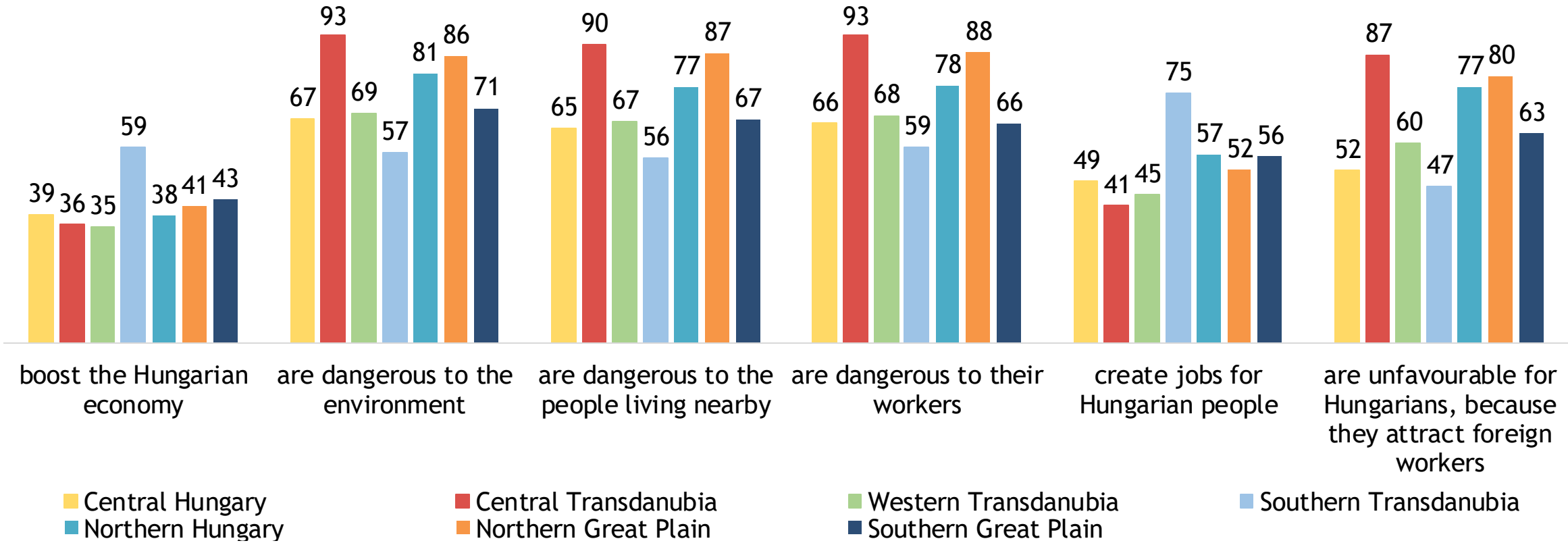


75% of the Hungarians think that battery factories are dangerous for the environment, 73% that it is dangerous for the people living nearby and 73% that it is dangerous for their workers. 55% perceive these factories to be harmful, because foreign people are employed there. On the other hand, 50% of the Hungarians think that these factories boost the Hungarian economy. In sum, these factories do not enjoy much support in the country.

T17A T17B T17C T17D T17E T17F How much do you agree with the following statements? Battery factories…[Rather agree: I agree completely.; I somewhat agree.] (%) N= 1005

Negative perceptions of battery factories are higher in regions where they operate

21 Research Center



The graph above shows that negative perceptions of battery factories are higher in regions where they operate and where they have an actual impact on the daily lives of people living there. It can therefore be seen that people living close to battery plants fear for their environment and health from the pollution caused by battery plants. Furthermore, in these regions, the migration impact of the factories is also more negatively valued, but the fear of this is less high than the fear of health and environmental degradation.

T17A T17B T17C T17D T17E T17F How much do you agree with the following statements? Battery factories...[Rather agree: I agree completely.; I somewhat agree.] (%) N= 1005

The impact of the transition to electric vehicles in everyday life
Main take-aways

Even if combustion engine cars and electric cars cost the same, 43% of the respondents would probably or definitely choose a combustion engine car and 38% would probably or definitely choose an electric car. There is is not yet a high level of public confidence in electric cars in the Hungarian society. A higher proportion of people would still choose a combustion engine car. 50% of those who would not choose an electric car find the purchase and maintenance costs too much. The second most common reason is the lack of adequate infrastructure for electric cars (34%).

75% of the Hungarians think that battery factories are dangerous for the environment, 73% that it is dangerous for the people living nearby and 73% that it is dangerous for their workers. Only, 50% of the Hungarians think that these factories boost the Hungarian economy. In sum, these factories do not enjoy much support in the country. They are the least supported in regions where they operate and where they have an actual impact on the daily lives of people living there. It can therefore be seen that people living close to battery plants fear for their environment and health from the pollution caused by battery plants. Furthermore, in these regions, the migration impact of the factories is also more negatively valued, but the fear of this is less high than the fear of health and environmental degradation.