

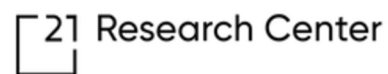
JUSTGREEN

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 V4 COUNTRIES**





About the project

Emerges at a time when the EU faces numerous challenges

- war at its borders, shifting geopolitical power balances
- issues of the rule of law, growing inequality

Responds to the challenges associated with the EU's green transition

The 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 + accompanying research

- Identifying specific obstacles in implementing climate-friendly measures or adapting to EU decarbonization policies
- Conveying their feedback to local, national, and EU policymakers
- Strengthening citizens' sense of shared responsibility for the EU's climate and environmental policies



About the project

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 IN V4 COUNTRIES.

METHODOLOGY - QUANTITATIVE SURVEY

	SK	CZ	PL	HU
Population	Slovak population, citizens aged 18 and over	Czech population, citizens aged 18 and over	Polish population, citizens aged 18 and over	Hungarian population, citizens aged 18 and over
Data collection method	Online survey (CAWI); face-to-face interviewing (CAPI)	Online survey (CAWI); face-to-face interviewing (CAPI)	Online survey (CAWI); face-to-face interviewing (CAPI)	Online survey (CAWI); face-to-face interviewing (CAPI)
Sample size	N = 1013 (701 CAWI; 312 CAPI)	N = 1036 (700 CAWI; 336 CAPI)	N=1000 (700 CAWI, 300 CAPI)	N = 1005 (605 CAWI; 400 CAPI)
Main quota	Age; Gender; Education; Region; Municipality size	Age; Gender; Education; Region; Municipality size	Age; Gender; Education; Region; Municipality size	Age; Gender; Education; Region; Municipality size
Data collection	10.10. – 29. 10. 2024	10. 10. – 27. 10. 2024	October 2024	27. 09. – 15. 10. 2024



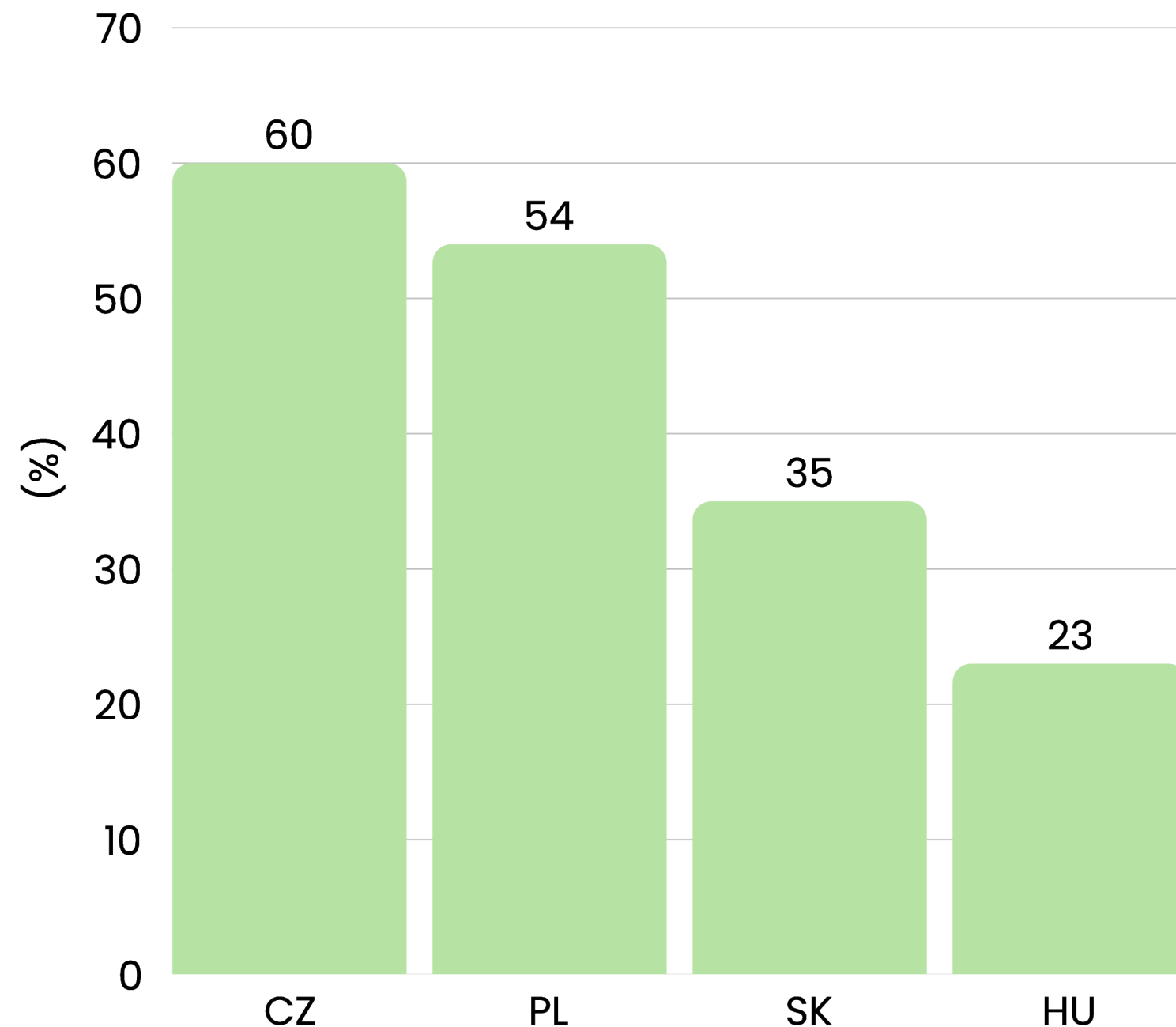
THE PERCEPTION OF CLIMATE CHANGE IN THE V4 REGION



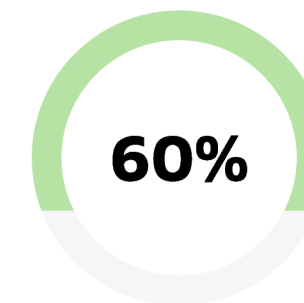
THE PERCEPTION OF CLIMATE CHANGE IN THE V4 REGION

G01 Have you heard about the [national translation of 'European Green Deal'], also known as Green Deal?

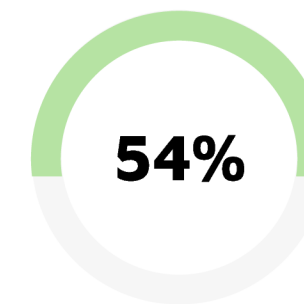
3 = 'I've heard of it and I roughly know what its aims are'; 4 = 'I've heard of it and I know well what its aims are' (%) N = 4054



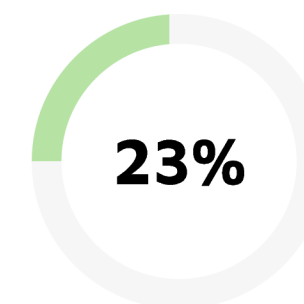
SIGNIFICANT DIFFERENCES BETWEEN COUNTRIES IN TERMS OF AWARENESS OF THE GREEN DEAL



60% of Czechs have heard of the Green Deal and know at least roughly what its aims are.



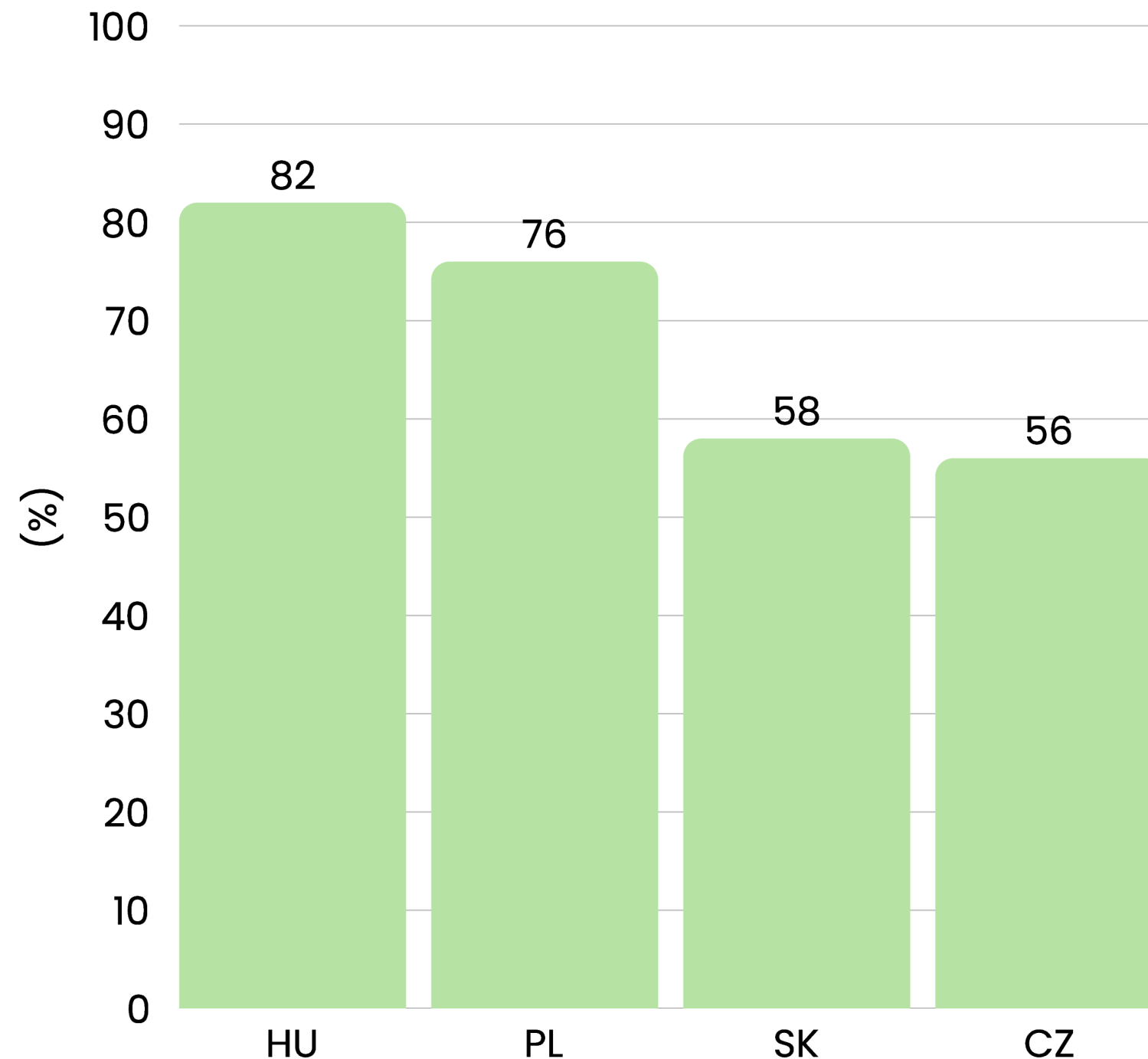
Poles are coming in the second place. 54% of them have heard of the Green Deal and know at least roughly its aim.



In contrast, only 23% of Hungarians have heard of Green Deal.

THE PERCEPTION OF CLIMATE CHANGE IN THE V4 REGION

C02 How interested are you in the topic of climate change and its implications on our society?
1 = 'Strongly interested'; 2 = 'Rather interested' (%) N = 4054



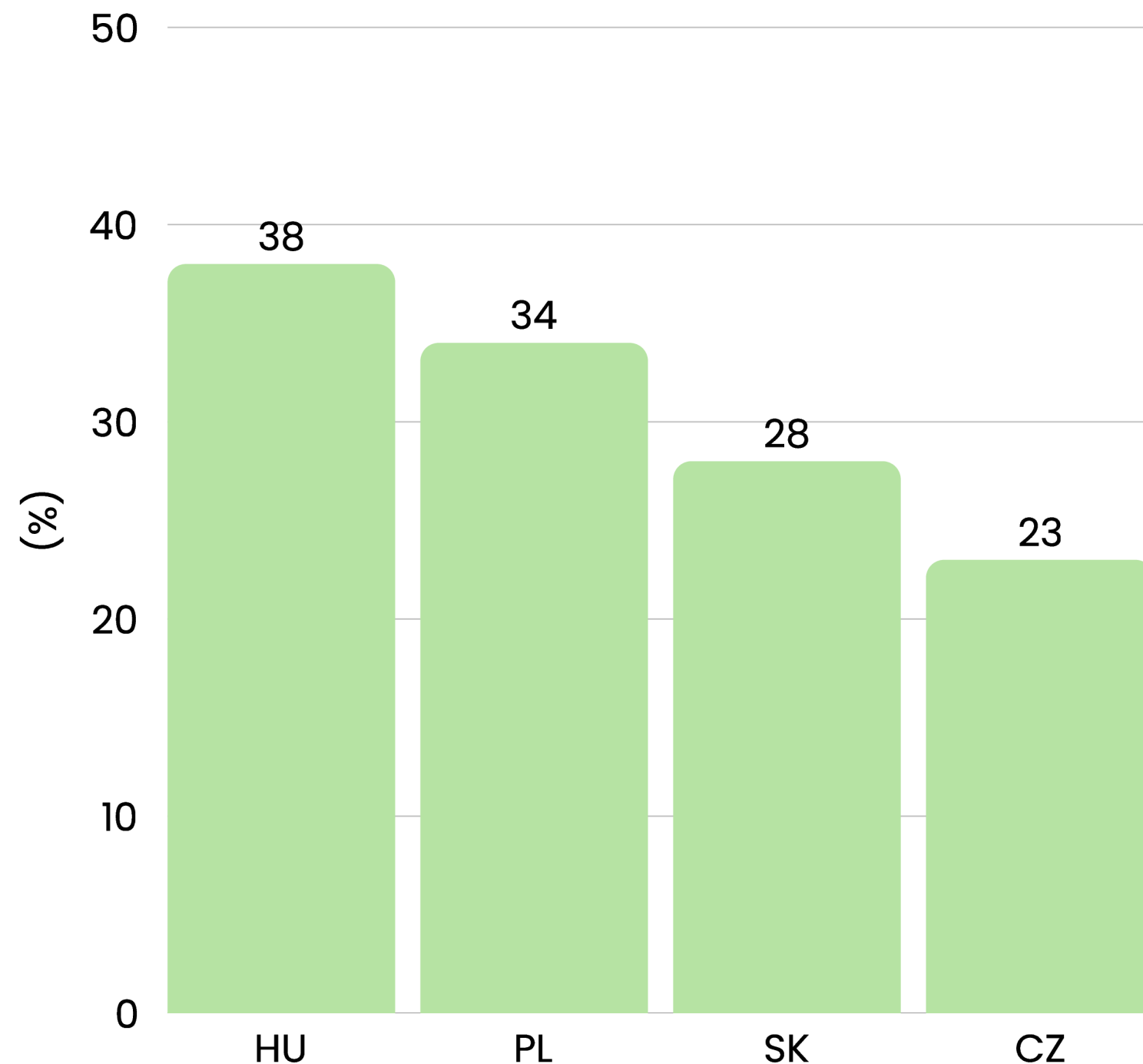
HUNGARIANS SAID THEY WERE INTERESTED IN THE TOPIC OF CLIMATE CHANGE IN THE HIGHEST PROPORTION WHILE CZECHS IN THE LOWEST PROPORTION

While the Czechs **lead the way** in terms of awareness of the Green Deal, it is important to note that the Czechs are **the least likely** to say they are rather interested or very interested in the topic of climate change.

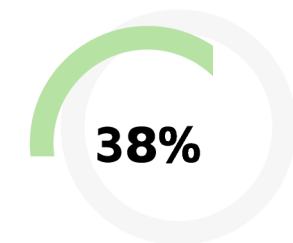
By contrast, 82% of Hungarians said they were interested in the topic of climate change.

THE PERCEPTION OF CLIMATE CHANGE IN THE V4 REGION

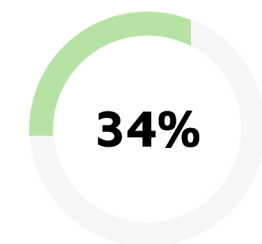
C03 What is your opinion on climate change? Would you say it is a very serious problem, a rather serious problem, not that serious problem or not a problem at all? – 1 Very serious problem (%) N = 4054



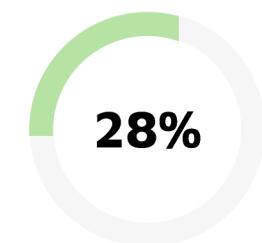
SIGNIFICANT DIFFERENCES BETWEEN COUNTRIES



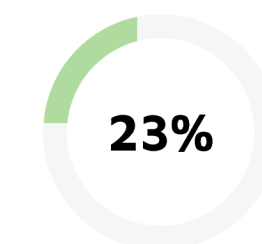
Similar to the interest in climate change, Hungarians are the most likely of the V4 countries to think that climate change is a very serious problem



In second place, similar to the interested in climate change, are Poles



While Czechs are the least likely of the V4 countries to think that climate change is a very serious problem



While Czechs are the least likely of the V4 countries to think that climate change is a very serious problem

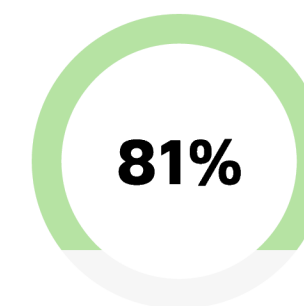


THE PERCEPTION OF CLIMATE CHANGE IN THE V4 REGION

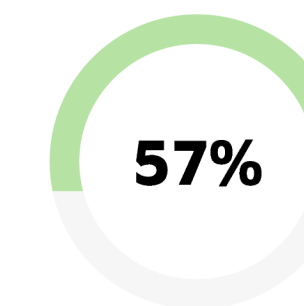
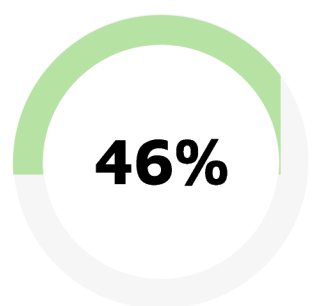
C04 In what timeframe do you think it is necessary to start working on problems of climate change? - 1 Immediately (%) N = 4054



SIMILAR TO THE INTEREST IN CLIMATE CHANGE AND THE EXTENT TO WHICH PEOPLE CONSIDER CLIMATE CHANGE TO BE A BIG PROBLEM



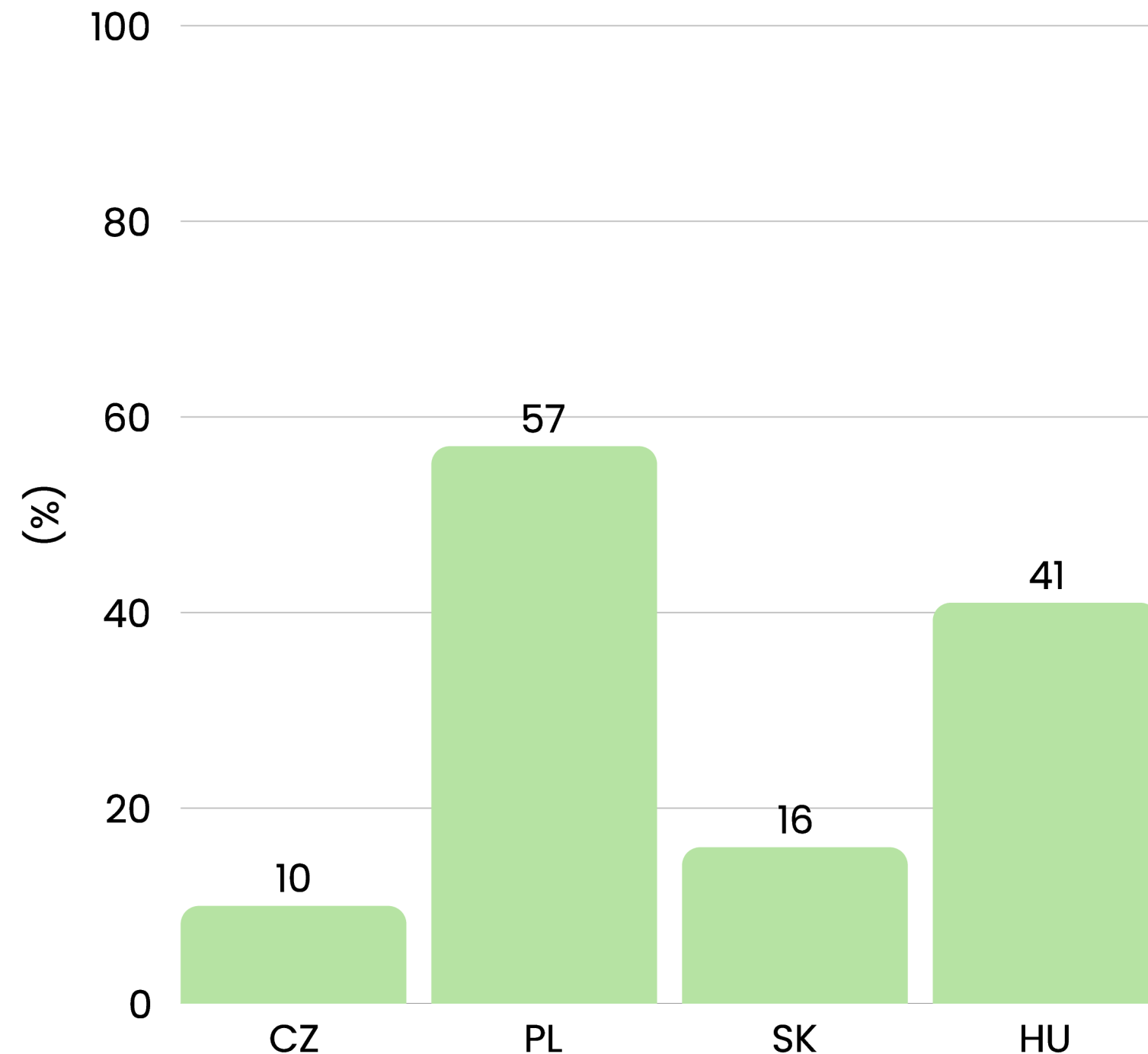
81% of Hungarians think that the problem of climate change should be tackled right now, compared to only 46% of Czechs



Again, Poles are the second most likely to think that the problem of climate change needs to be tackled now

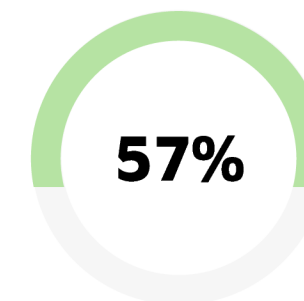
THE PERCEPTION OF CLIMATE CHANGE IN THE V4 REGION

C05 Has climate change had a discernible impact on your daily life? – 1 Definitely yes (%) N = 4054

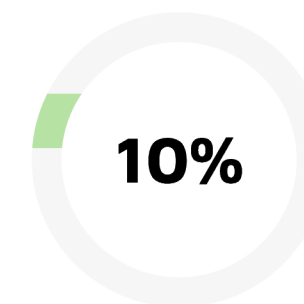


SIGNIFICANT DIFFERENCES BETWEEN COUNTRIES

There are huge differences between the V4 countries in the extent to which people feel climate change has a discernible impact on their daily lives.



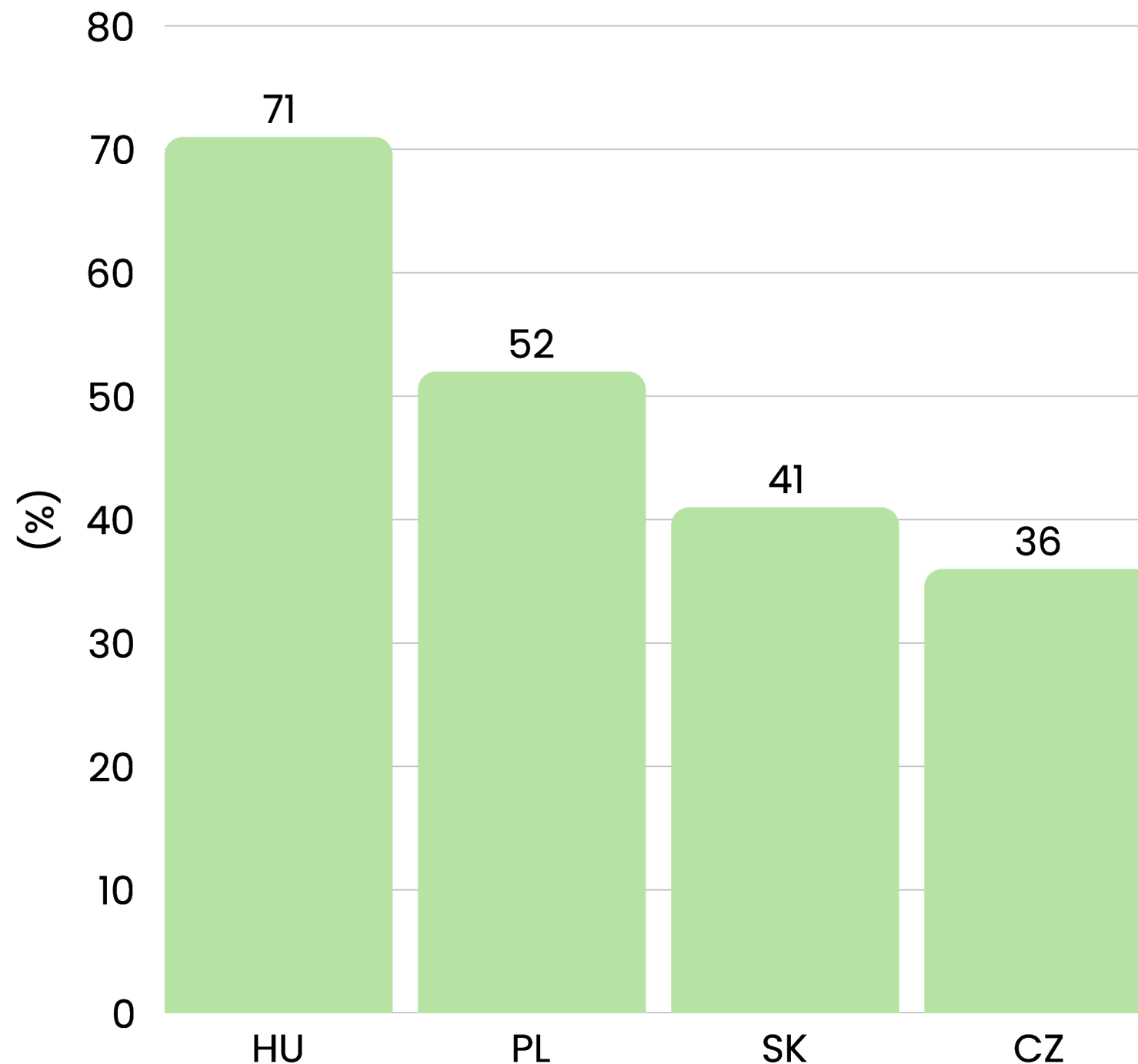
Poles are the most likely to think that climate change has a discernible impact on their lives



While Czechs are the least likely to think that

THE PERCEPTION OF CLIMATE CHANGE IN THE V4 REGION

C06 Do you think that solving climate change-related issues requires changes in human behaviour, or will nature sort the issues by itself? –
1 Change in human behaviour is definitely required (%) N = 4054



HUNGARIANS ALSO THINK IN THE HIGHEST PROPORTION THAT CHANGE IN HUMAN BEHAVIOUR IS DEFINITELY REQUIRED (71%), COMPARED TO THE CZECHS (36%)

Overall, the data shows that **there is a pattern among countries** in terms of how interested they are in climate change, how big problem they think it is, over what timeframe they think action is needed and whether they think nature will solve these problems on its own or whether human activity needs to change.

According to the data, Hungarian society considers climate change the most pressing issue. Poland ranks second, followed by Slovakia and the Czech Republic. The explanation behind this phenomenon require further research.

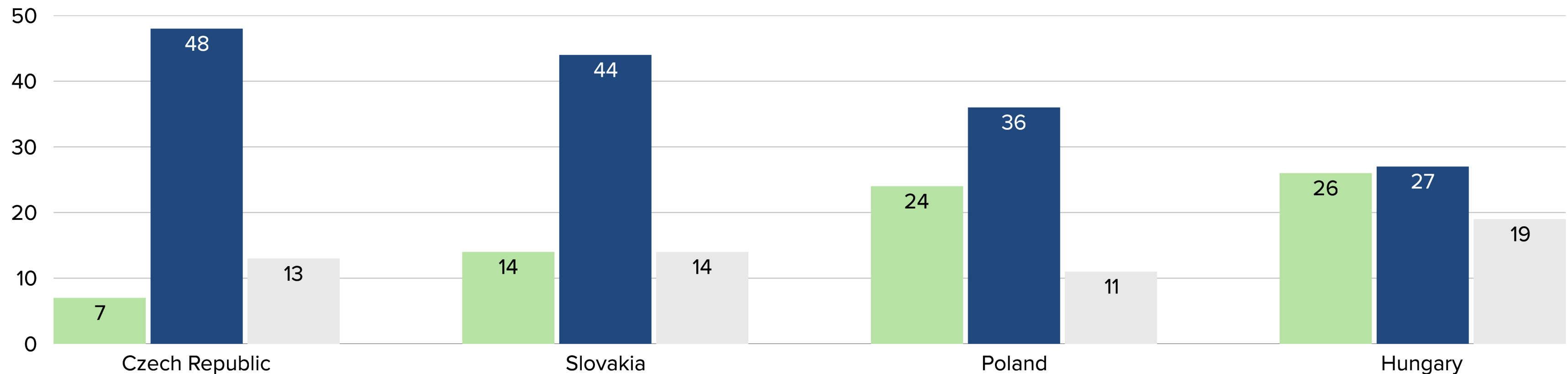


THE PERCEPTION OF CLIMATE CHANGE IN THE V4 REGION

J08 Do you think that there will be significant impacts on [country]'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 = 4054

- I think it will have positive impact
- I think it will have negative impact
- I do not think that it will impact the economy or job market of the country

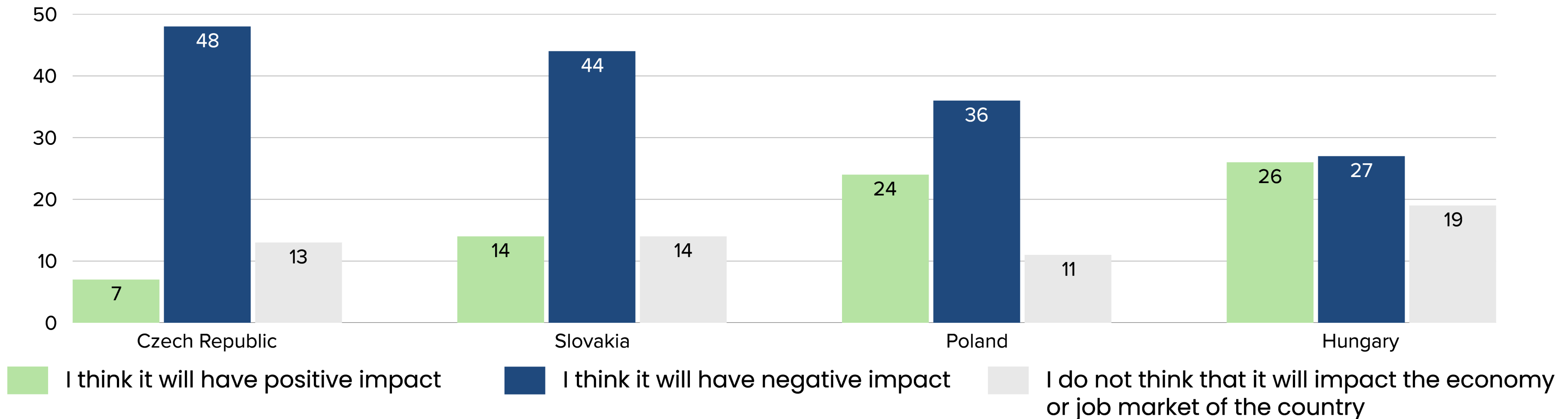
THERE ARE HIGH DIFFERENCES AMONG COUNTRIES REGARDING HOW MANY PEOPLE EXPECTS CLIMATE CHANGE TO HAVE A POSITIVE OR NEGATIVE IMPACT ON THE LABOUR MARKET.





THE PERCEPTION OF CLIMATE CHANGE IN THE V4 REGION

- Nearly the same percentage of Hungarians think that climate change will have negative effects on the labour market (27%) as think it will have positive effects (26%).
- At the same time, in Hungary, the highest proportion of people believe that climate change will not have an impact on the labor market and the economy (19%). These proportions are more tilted toward negative perceptions in other countries.
- In Poland, slightly fewer people, 24%, think that climate change will have a positive impact and 36% that it will have a negative impact. In the Czech Republic, the highest proportion of people think that climate change will have negative effects on the labour market (48%) and only 7% think it will have positive effects.

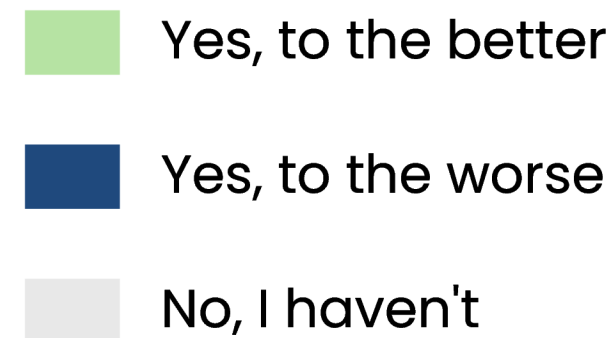




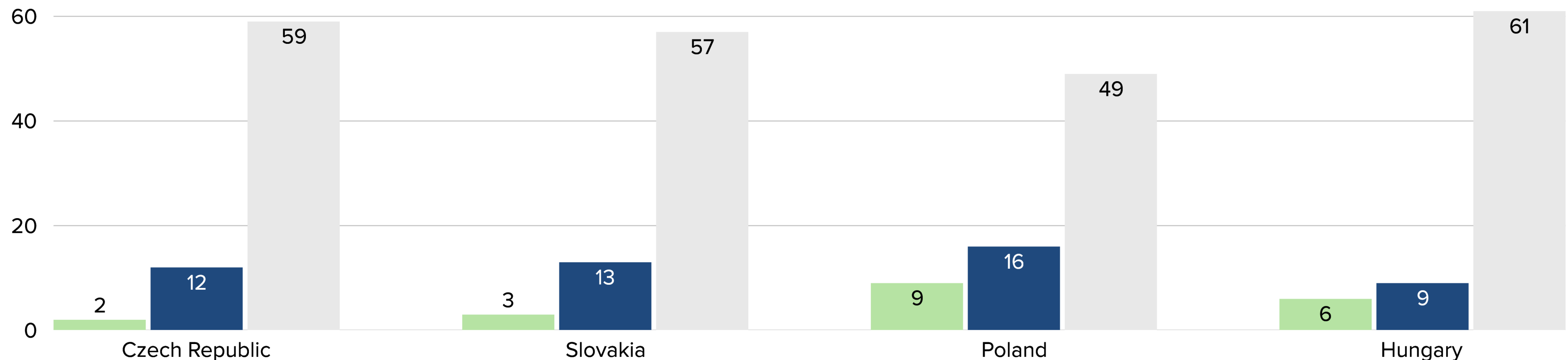
THE PERCEPTION OF CLIMATE CHANGE IN THE V4 REGION

J04 Have you personally already experienced impacts of climate change on the labour market? (%) N = 4054

CURRENTLY, FEW PEOPLE IN ANY V4 COUNTRY ARE EXPERIENCING THE NEGATIVE EFFECTS OF CLIMATE CHANGE ON THE LABOR MARKET



- Currently, few people in any V4 country are experiencing the negative effects of climate change on the labor market.
- In Poland, the highest proportion of people perceive these negative effects (16%), while it also has the highest proportion of people who perceive positive effects (9%).

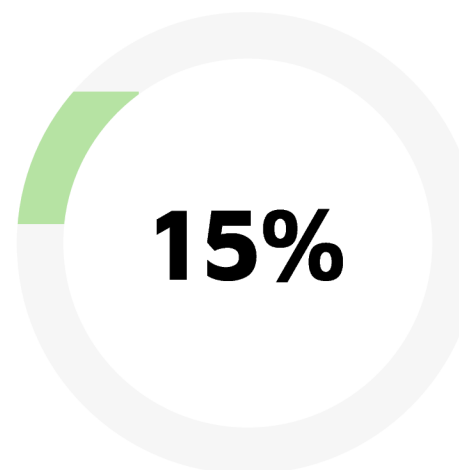
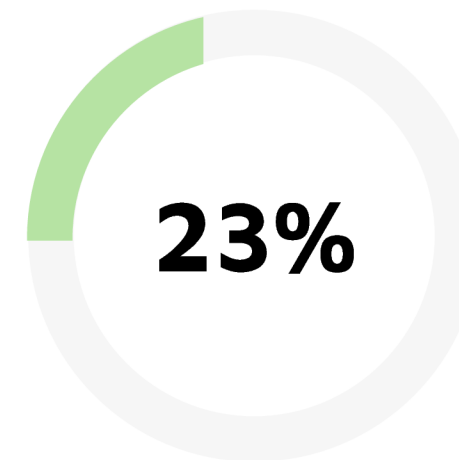




THE PERCEPTION OF CLIMATE CHANGE IN THE V4 REGION

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? – within those who are not pensioners (%) N = 2780

- Poland also has the highest proportion of people who think that climate change will have a negative impact on their personal position on labour market.
- Also in Poland, the highest proportion of people expect climate change to have a positive impact on them on the labour market.
- Hungarians expect the negative effects of climate change on the labor market in the lowest proportion.



OVERALL, IN NONE OF THE V4 COUNTRIES DO A LARGE PROPORTION OF PEOPLE EXPECT CLIMATE CHANGE TO AFFECT THEIR LABOUR MARKET SITUATION, AS EVEN IN POLAND THE PROPORTION IS LESS THAN A QUARTER OF THE POPULATION.

THE PERCEPTION OF CLIMATE CHANGE IN THE V4 REGION



- The data shows differences between the V4 countries in terms of how they assess the importance of the issue of climate change and how they interpret its current and future impacts on their daily lives. **The Czech Republic has the highest awareness of the Green Deal, and the Czechs and Slovaks were the most likely to say that climate change will have negative impacts on the labour market.**
- At the same time, the negative impacts of climate change on their personal lives and labour market are not yet perceived to a large extent among the Czechs and Slovaks, and they were also the least likely to say that they are interested in climate change and that climate change is a serious problem. They also indicated in the lowest proportion that changes in human activity are necessary and it is needed immediately. This suggests that the Czech and Slovak public opinion seems to be less focused on the symbolic importance of climate change, but more aware of concrete climate change policies and more concerned about the concrete impacts of climate change on a broader structural level, i.e. the labour market, than the Hungarian and Polish public.
- In contrast, **Hungarian society is more dominated by the symbolic importance of climate change**, i.e. the extent to which it is perceived as an urgent and important problem to be solved. At the same time, in Hungary, there is much less emphasis on the Green Deal, i.e. concrete policies or the structural effects of climate change, like its effect on the labor market.
- **Poland has the highest proportion of people who say that climate change affects their current life**, and they think in the highest proportion that climate change will have a negative impact on them on labour market. In Poland, climate change is therefore slightly more visible at the level of everyday life than in the other V4 countries, but the symbolic issue of climate change is also a major concern for them.



ENERGY EFFICIENCY AND INVESTMENTS IN HOUSING IN THE V4 REGION

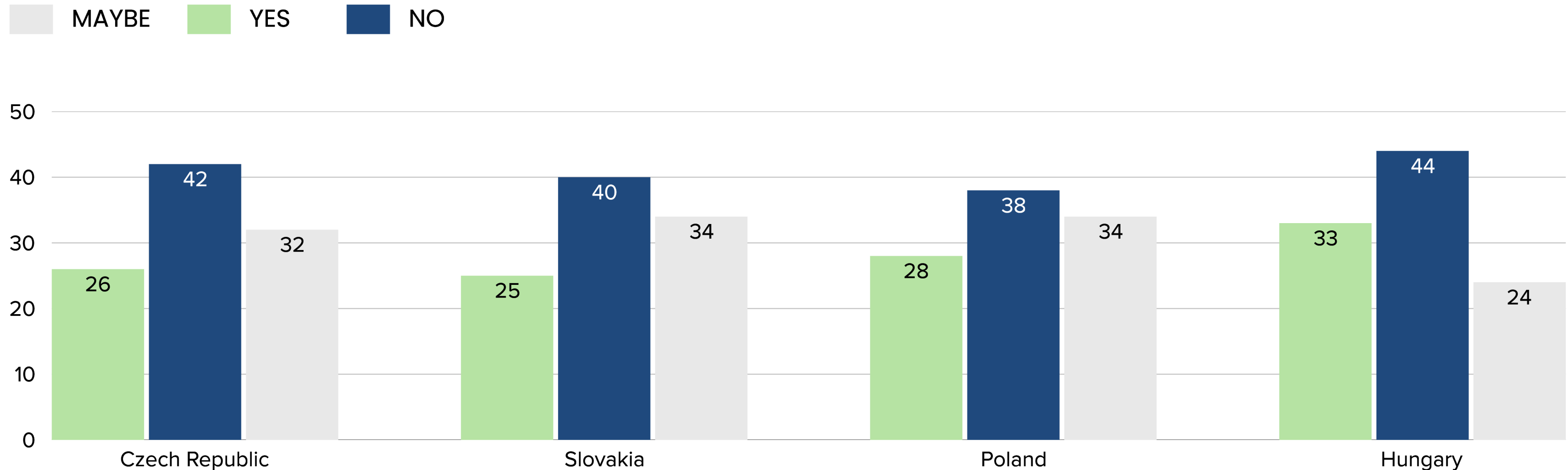
ENERGY EFFICIENCY AND INVESTMENTS IN HOUSING IN THE V4 REGION



W03 Are you planning to invest in lowering the energy consumption of your housing in the next five years? (%) N= 4054

HUNGARIANS ARE THE MOST LIKELY TO DO SO, FOLLOWED BY POLES, CZECHS, AND SLOVAKS

When asked whether they plan to invest in improving the energy efficiency of their homes in the next five years, Hungarians are the most likely to do so, followed by Poles, Czechs, and Slovaks.



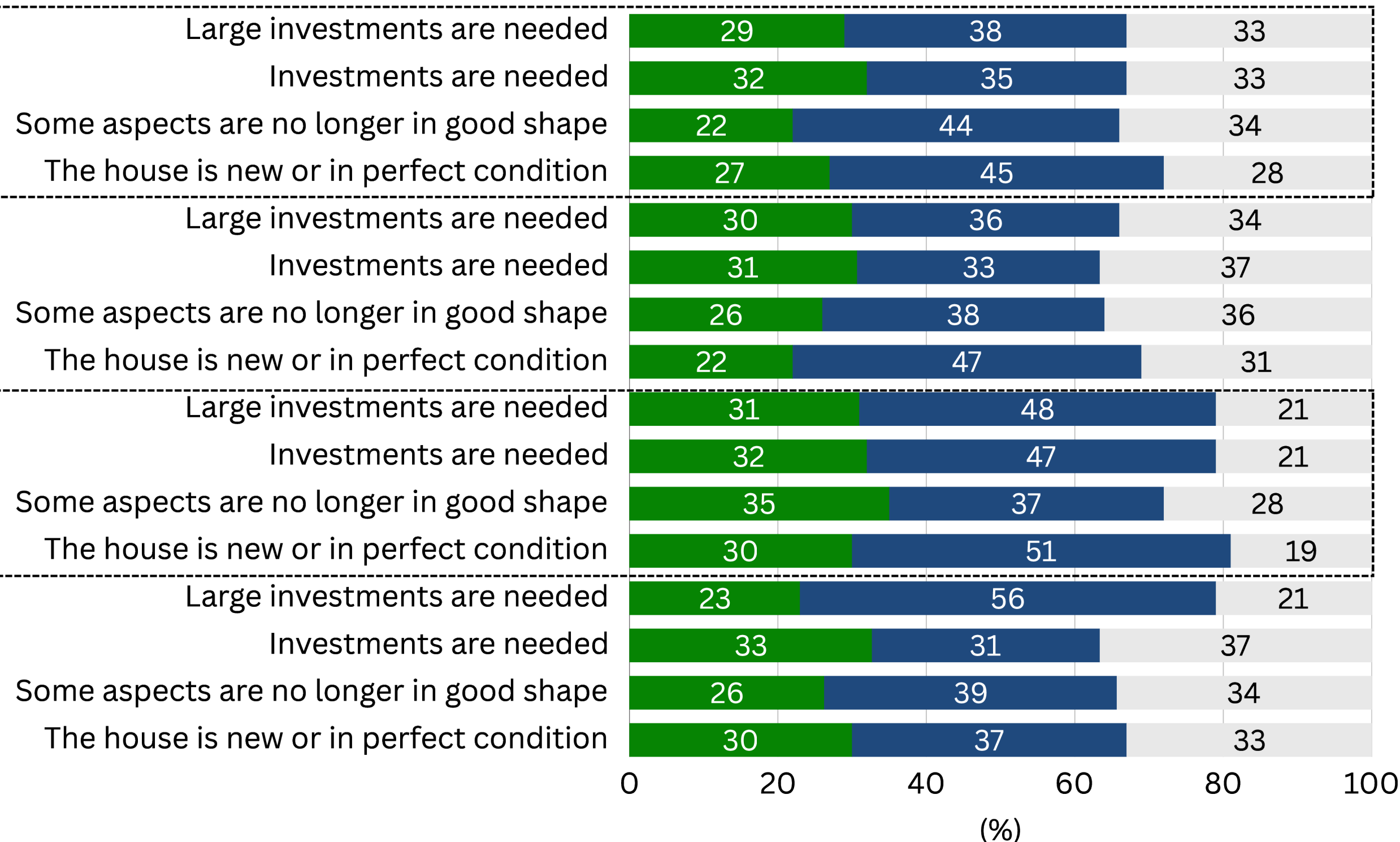
ENERGY EFFICIENCY AND INVESTMENTS IN HOUSING IN THE V4 REGION

JUSTGREEN



W03 Are you planning to invest in lowering the energy consumption of your housing in the next five years? (%) N= 4054

● YES ● No ● MAYBE



**IN 3 OUT OF 4 COUNTRIES,
THOSE WHOSE HOUSES ARE
IN THE WORST CONDITION
ARE NOT MUCH MORE
LIKELY TO INVEST IN
REDUCING THEIR ENERGY
CONSUMPTION THAN THOSE
WITH HOUSES IN THE BEST
CONDITION**

ENERGY EFFICIENCY AND INVESTMENTS IN HOUSING IN THE V4 REGION

JUSTGREEN



W03 Are you planning to invest in lowering the energy consumption of your housing in the next five years? (%) N= 4054



- Only in Slovakia, there is a consistent, statistically significant relationship between the willingness to invest in lowering the energy consumption of the house and the condition of the house.



- In the Czech Republic and Hungary, there is no significant difference in the willingness to invest between those who have the best and the worst condition of their property.



- In Poland, there is an inverse relationship compared to what one would expect: 30% of those with the best condition property are definitely planning to invest, compared to only 23% of those with the worst property conditions.

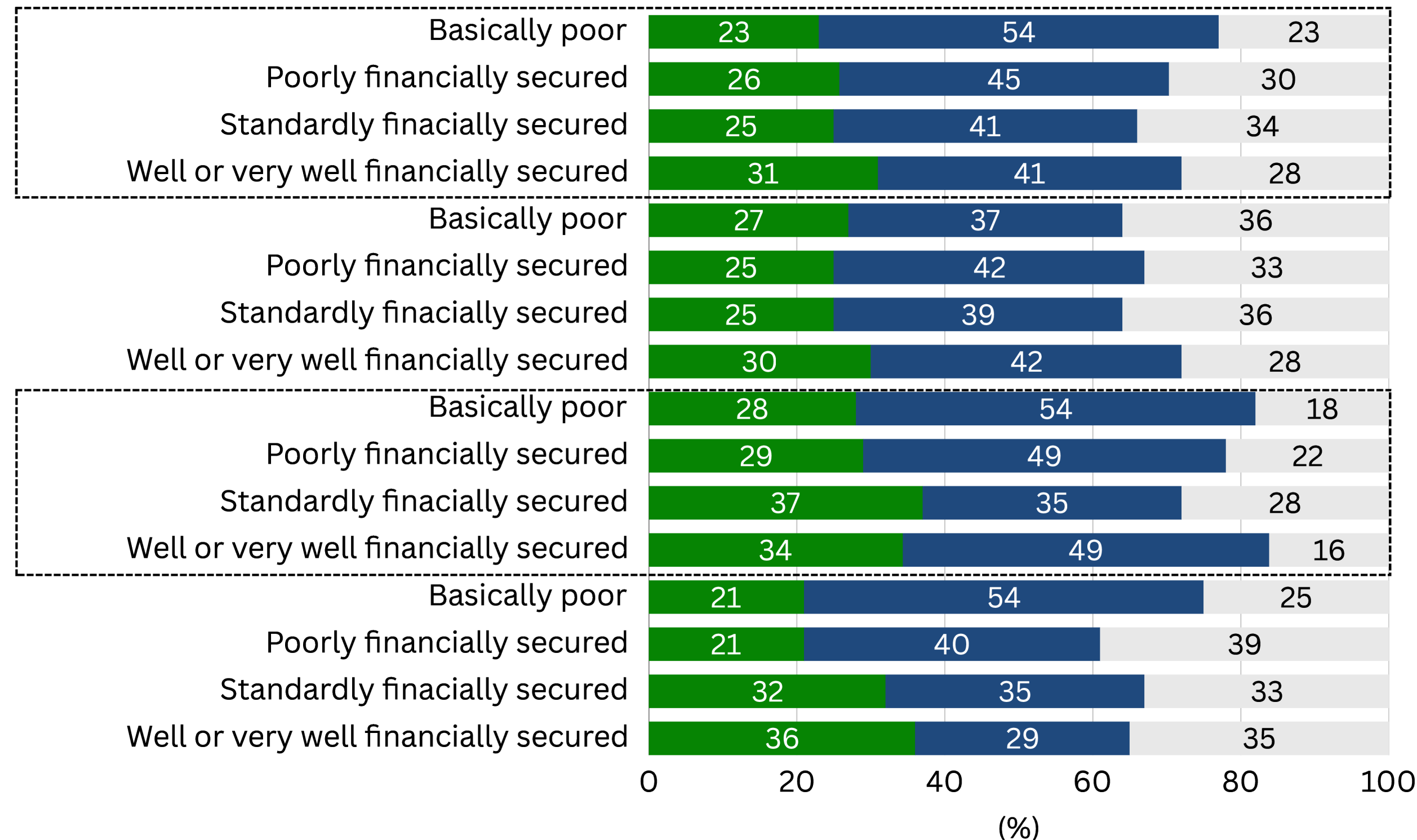
ENERGY EFFICIENCY AND INVESTMENTS IN HOUSING IN THE V4 REGION

JUSTGREEN



W03 Are you planning to invest in lowering the energy consumption of your housing in the next five years? (%) N= 4054

● YES ● No ● MAYBE



**IN ALL V4 COUNTRIES,
THOSE WHO HAVE THE
BEST FINANCIAL
BACKGROUND HAVE THE
HIGHEST WILLINGNESS TO
INVEST IN REDUCING THE
ENERGY CONSUMPTION OF
THEIR HOUSING IN THE
NEXT 5 YEARS**

ENERGY EFFICIENCY AND INVESTMENTS IN HOUSING IN THE V4 REGION



W03 Are you planning to invest in lowering the energy consumption of your housing in the next five years? (%) N= 4054

IN ALL V4 COUNTRIES, THOSE WHO HAVE THE BEST FINANCIAL BACKGROUND HAVE THE HIGHEST WILLINGNESS TO INVEST IN REDUCING THE ENERGY CONSUMPTION OF THEIR HOUSING IN THE NEXT 5 YEARS.



- In Hungary, the share of those who are sure to invest is higher among the standardly financially secured than among the well or very well financially secured, but in both groups it is far ahead of those with a poorer income situation.



- In Poland, 21% of the basically poor and 36% of the well or very well financially secured people plan to invest. The gap between different income groups are the highest in Poland.

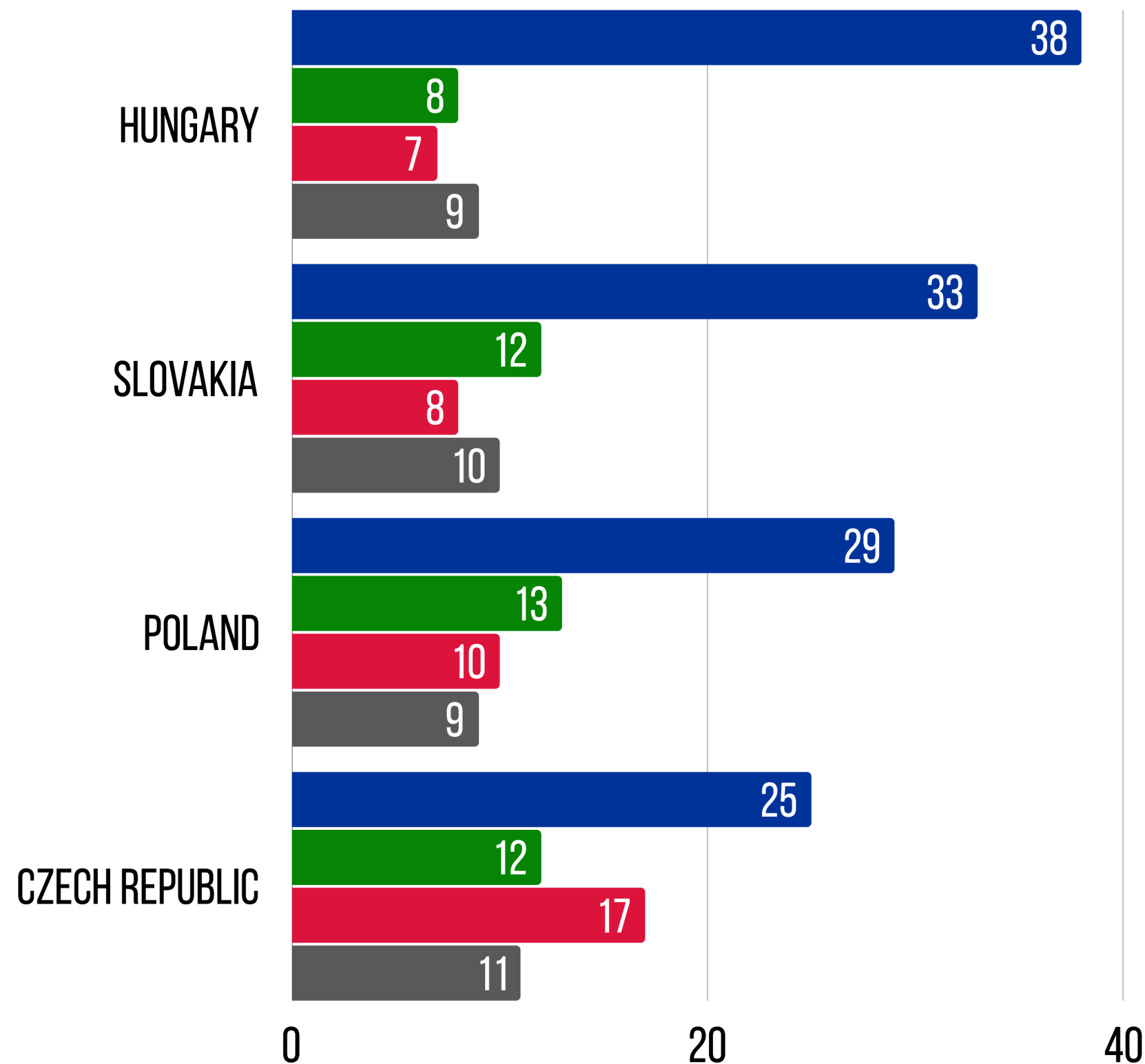
ENERGY EFFICIENCY AND INVESTMENTS IN HOUSING IN THE V4 REGION

JUSTGREEN



W04 What is the main reason which prevents you from investing in lowering the energy consumption of your housing?

– within those who are not or maybe not planning to invest in lowering the energy consumption of their housing in the next five years (%) N= 2922



THE PRIMARY REASON PREVENTING PEOPLE IN ALL COUNTRIES FROM PLANNING TO INVEST IN REDUCING THE ENERGY CONSUMPTION OF THEIR HOME WAS A LACK OF FINANCIAL RESOURCES

- Do not have the financial capacity to invest in insulation or renewable energy sources
- Other things are more important for me right now
- I'm renting and cannot do anything to the property
- I don't think it's necessary to lower my impact

ENERGY EFFICIENCY AND INVESTMENTS IN HOUSING IN THE V4 REGION

JUSTGREEN



W04 What is the main reason which prevents you from investing in lowering the energy consumption of your housing?

– within those who are not or maybe not planning to invest in lowering the energy consumption of their housing in the next five years (%) N= 2922

- When we asked respondents what the main reason was that prevented them from planning to invest in reducing the energy consumption of their home, the primary reason in all countries was that they did not have the financial resources to do so.
- Hungarians had the highest proportion of respondents who did not invest because they did not have the financial resources. They were followed by the Slovaks, then the Poles and the Czechs.
- However, the Czechs have the highest proportion of people who do not plan to invest because they rent the property they live in.

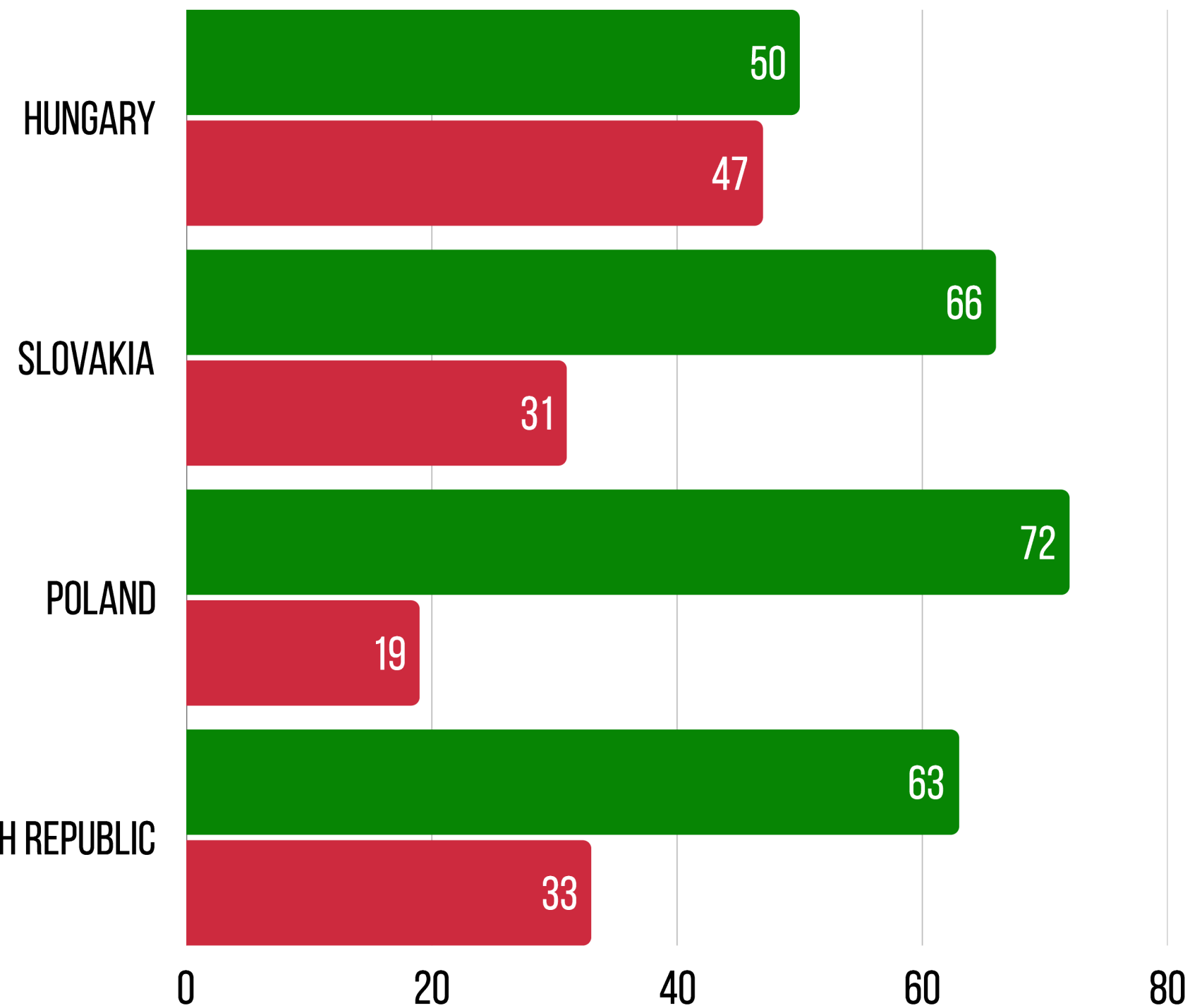
ENERGY EFFICIENCY AND INVESTMENTS IN HOUSING IN THE V4 REGION

JUSTGREEN



H03 Is the house you live in insulated? (%) N= 4054

● YES ● NO



POLAND HAS THE HIGHEST PROPORTION OF INSULATED HOUSES

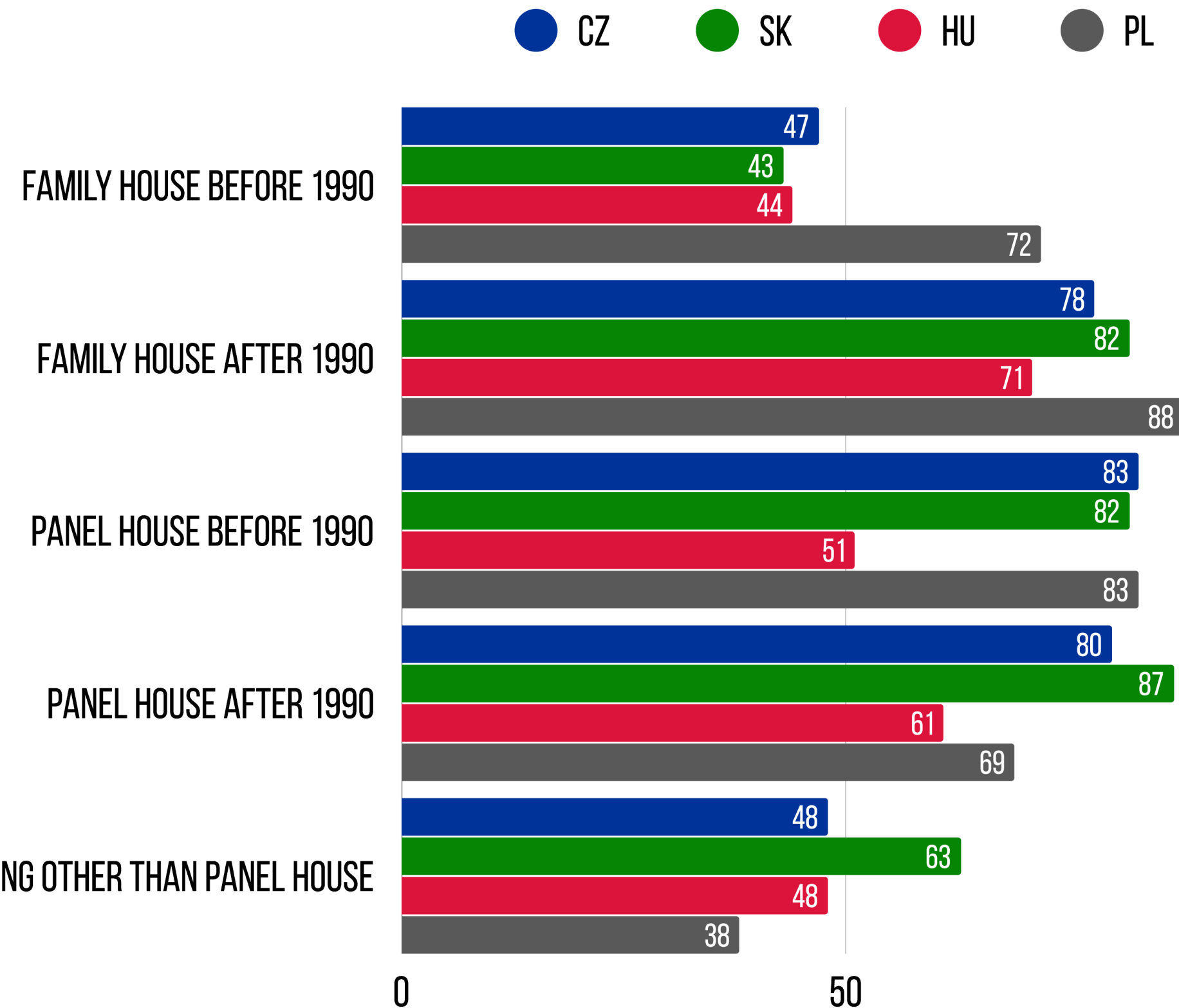
- Poland has the highest proportion of insulated houses (72%), followed by Slovakia (66%) and the Czech Republic (63%).
- The lowest proportion of insulated houses is in Hungary where only 50% of the housing stock is insulated.

ENERGY EFFICIENCY AND INVESTMENTS IN HOUSING IN THE V4 REGION

JUSTGREEN



H03 Is the house you live in insulated? (%) N= 4054



IN POLAND, FAMILY HOUSES BUILT BEFORE 1990 ARE REMARKABLY WELL INSULATED

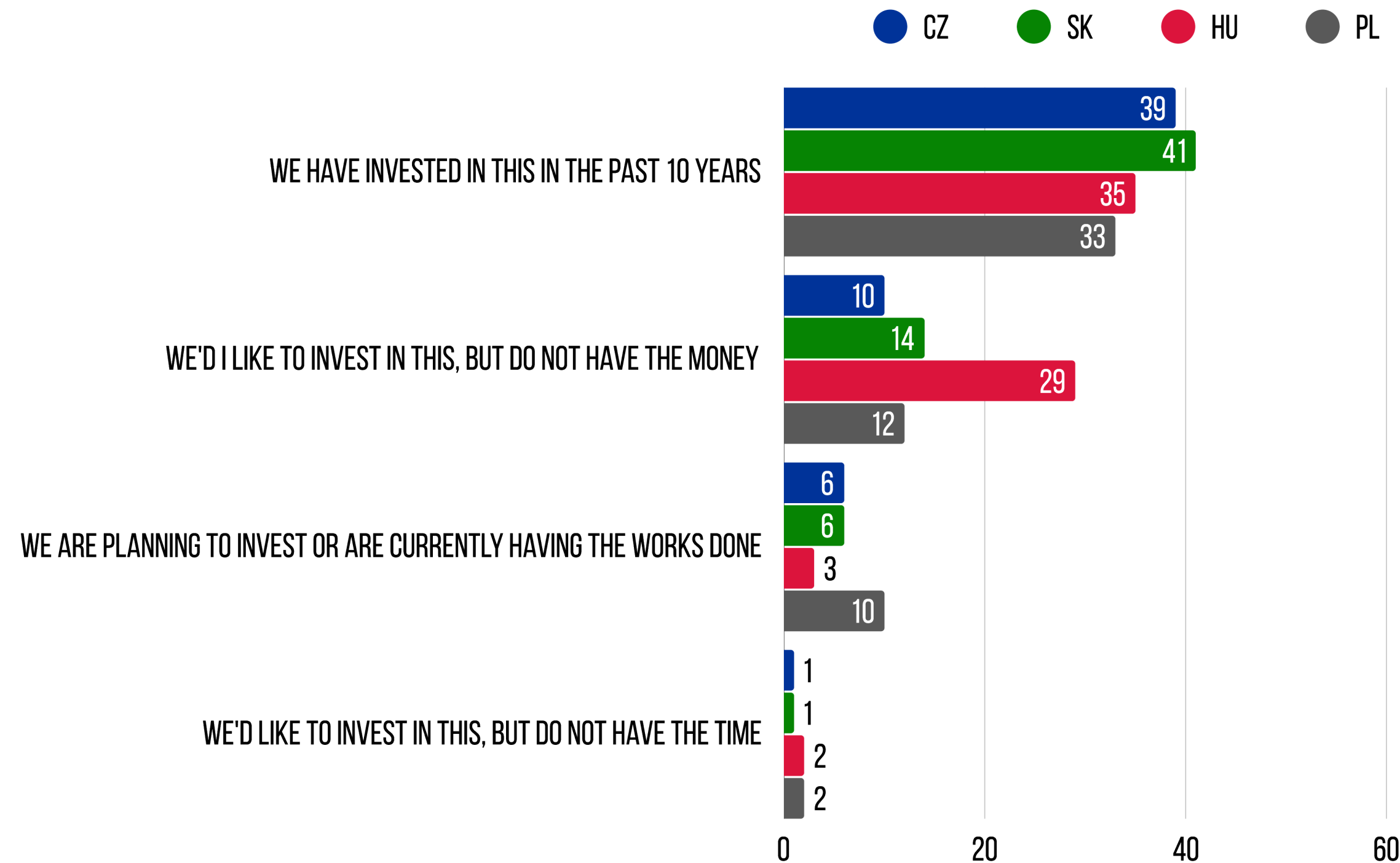
- In Poland, family houses built before 1990 are remarkably well insulated.
- In Hungary, the insulation of panel houses built before 1990 is remarkably low compared to other countries, but the insulation of panel houses built after 1990 is also lower than in other countries

ENERGY EFFICIENCY AND INVESTMENTS IN HOUSING IN THE V4 REGION

JUSTGREEN



H14A Please indicate whether you plan to renovate or invest in the following things... : New windows (%) N = 4054



A REMARKABLY HIGH PROPORTION OF HUNGARIANS, NEARLY 30%, SAID THEY WOULD INVEST IN NEW WINDOWS BUT COULD NOT AFFORD IT

- We asked respondents about their willingness to invest in new windows.
- A remarkably high proportion of Hungarians, nearly 30%, said they would invest in new windows but could not afford it, compared to only 10 - 14% in other countries.
- Slovakia had the highest proportion of people indicating they had already invested in this in the last 10 years.

ENERGY EFFICIENCY AND INVESTMENTS IN HOUSING IN THE V4 REGION

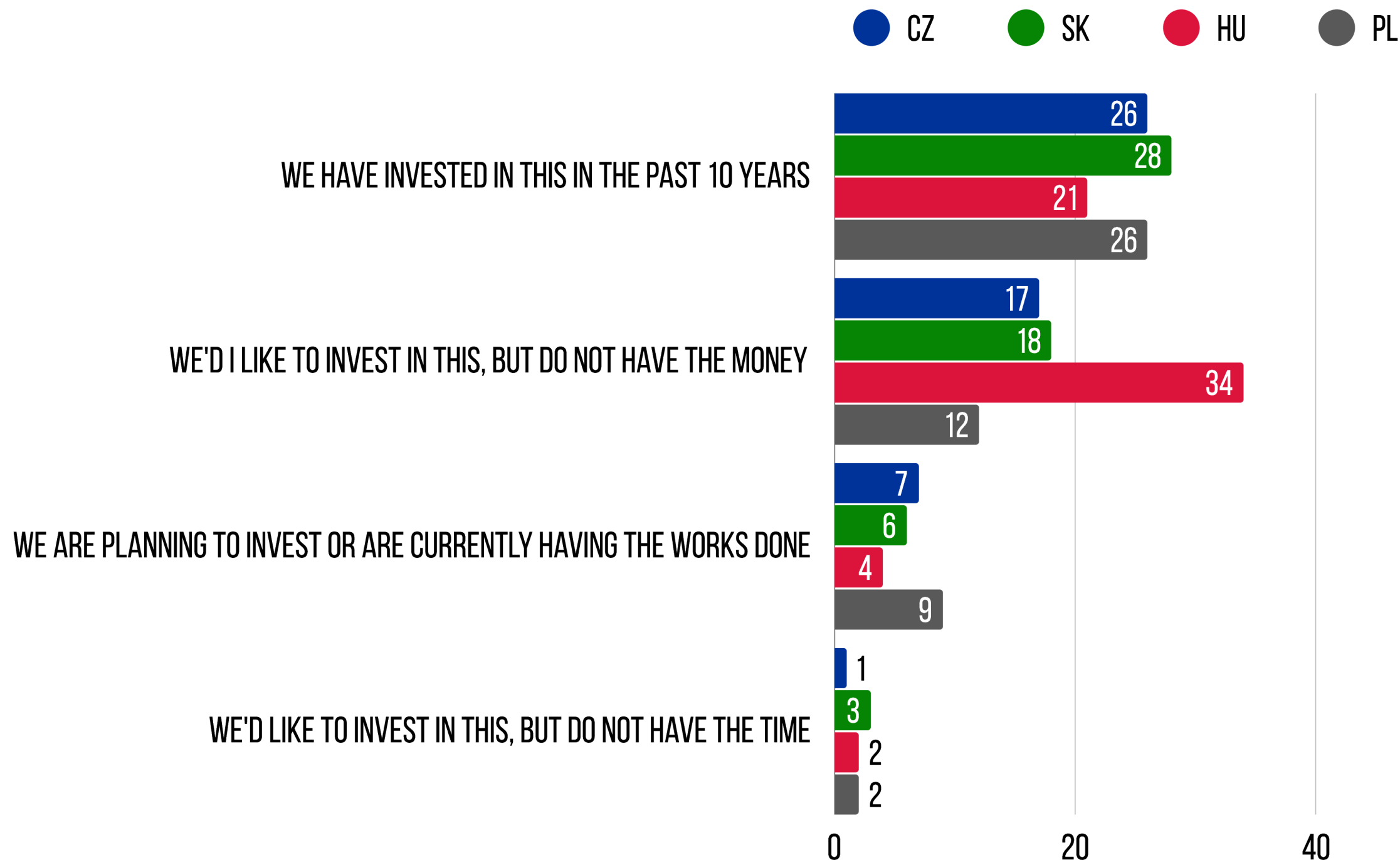
JUSTGREEN



HI4B Please indicate whether you plan to renovate or invest in the following things... : Wall insulation (%) N = 4054

THE PROPORTION OF PEOPLE UNABLE TO AFFORD INSULATION IS HIGHER AMONG SLOVAKS AND CZECHS COMPARED TO THOSE FACING FINANCIAL BARRIERS TO REPLACING WINDOWS

- Regarding house insulation, Hungarians, in an exceptionally high proportion, stated that they would like to invest in it but lack the financial means.
- However, the proportion of people unable to afford insulation is also higher among Slovaks and Czechs compared to those facing financial barriers to replacing windows. • 17% of Czechs would invest in this but do not have the financial means, and 18% of Slovaks.

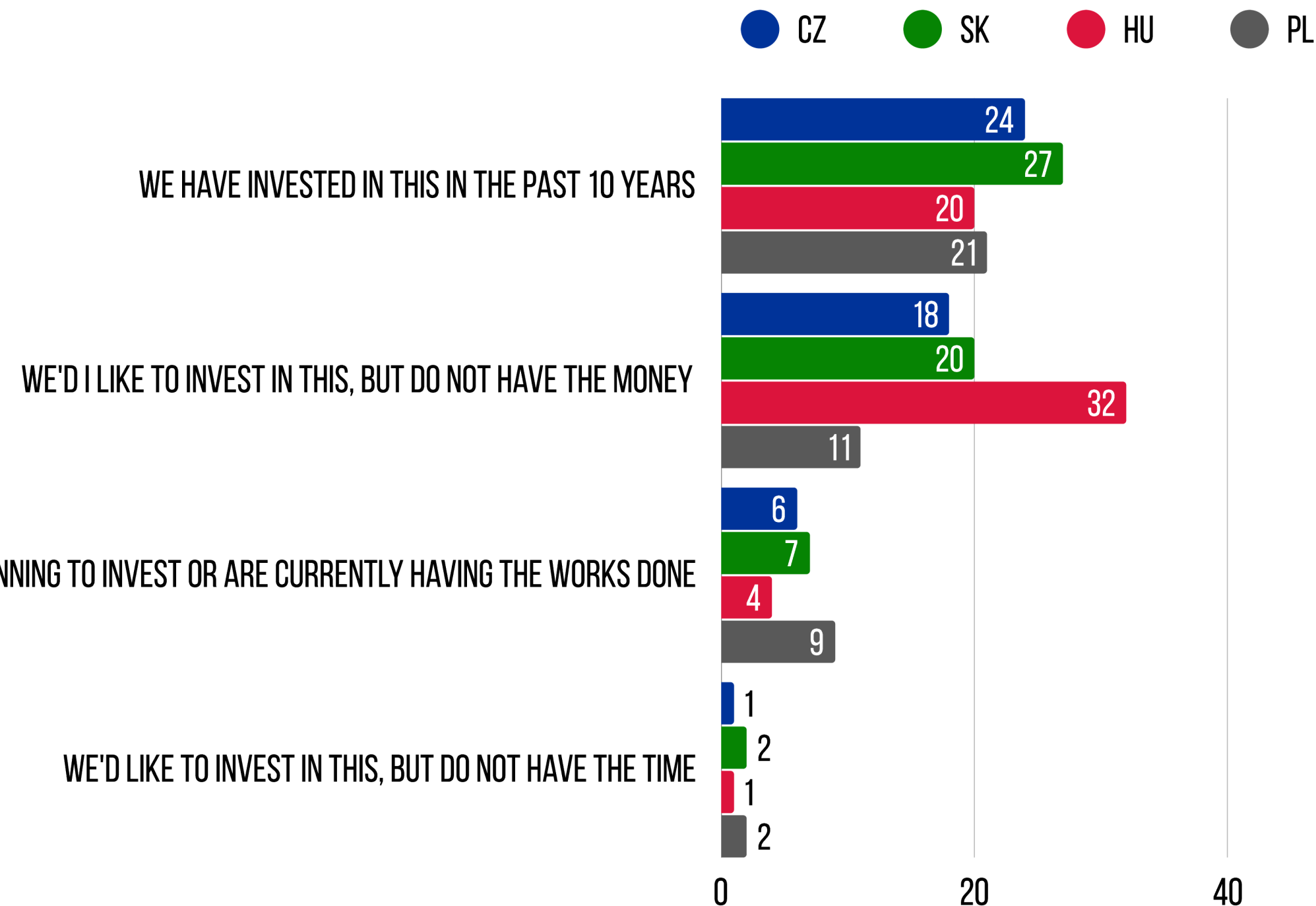


ENERGY EFFICIENCY AND INVESTMENTS IN HOUSING IN THE V4 REGION

JUSTGREEN



H14C Please indicate whether you plan to renovate or invest in the following things... : Roof insulation (%) N = 4054



REGARDING ROOF INSULATION, HUNGARIANS WERE ALSO THE MOST LIKELY TO SAY THEY WOULD INVEST IN IT BUT LACK THE FINANCIAL MEANS

- Regarding roof insulation, Hungarians were also the most likely to say they would invest in it but lack the financial means (32%), while 18% of Czechs and 20% of Slovaks indicated the same.
- The proportion of people who have invested in this over the past 10 years is highest among Slovaks (27%), as is the case for window replacement and wall insulation.

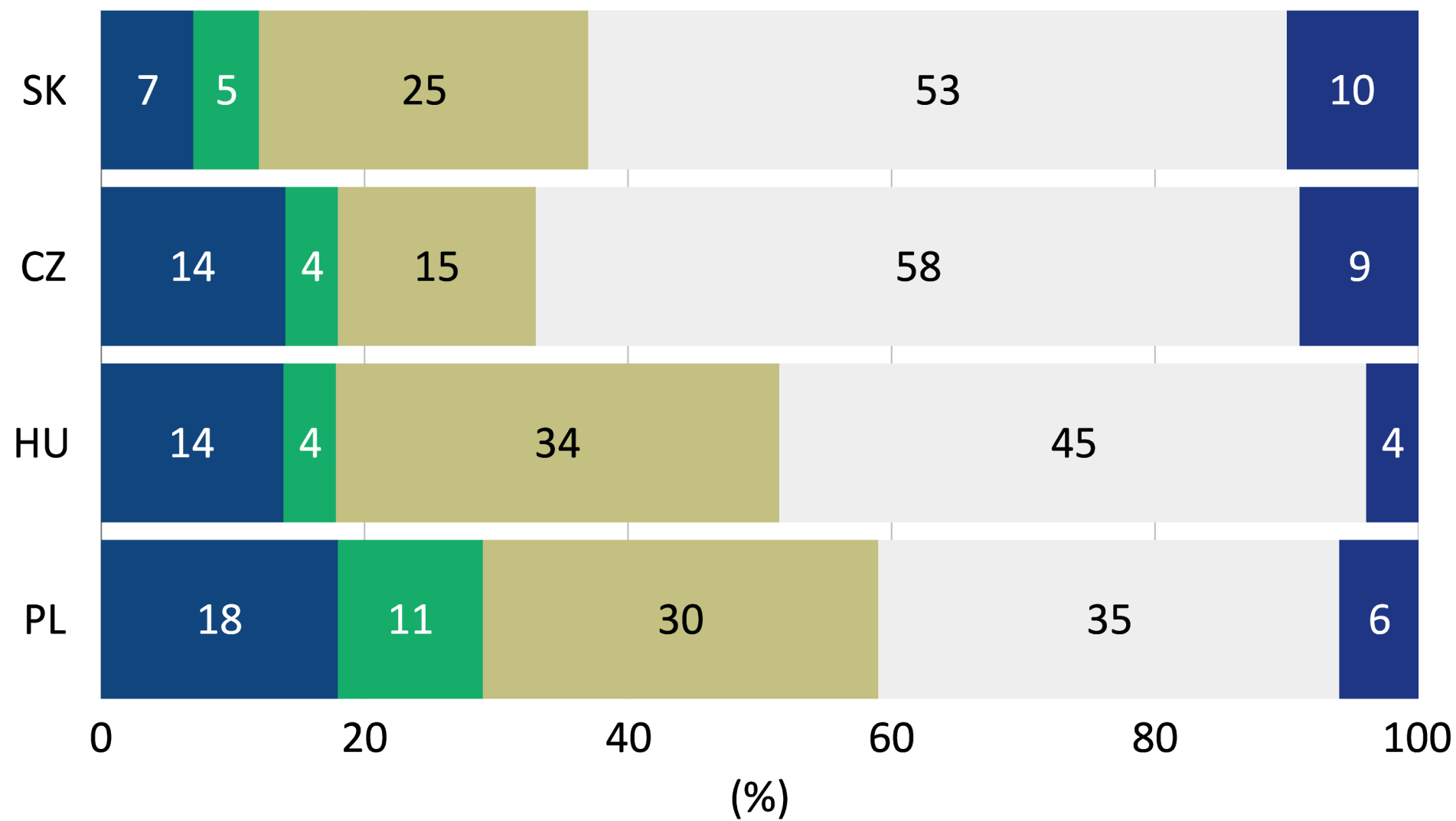
ENERGY EFFICIENCY AND INVESTMENTS IN HOUSING IN THE V4 REGION

JUSTGREEN



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= 3165

- Yes, at least once successfully
- Yes, unsuccessfully
- No, but I was considering it
- No and I never considered it
- I don't know



POLAND HAVE THE HIGHEST PERCENTAGE OF SUCCESSFUL APPLICANTS WHO HAVE APPLIED FOR A SUPPORT FROM A SCHEME MEANT TO DECREASE THE ENERGY CONSUMPTION OF THEIR HOUSING

- Poland have the highest percentage of successful applicants who have applied for a support from a scheme meant to decrease the energy consumption of their housing in the past (18%).
- Furthermore, in Poland, the percentage of people who have never considered applying for a scheme is the lowest (35%). This suggests that the uptake of such grants is highest in Poland.
- The proportion of those who have never considered applying is highest in the Czech Republic.

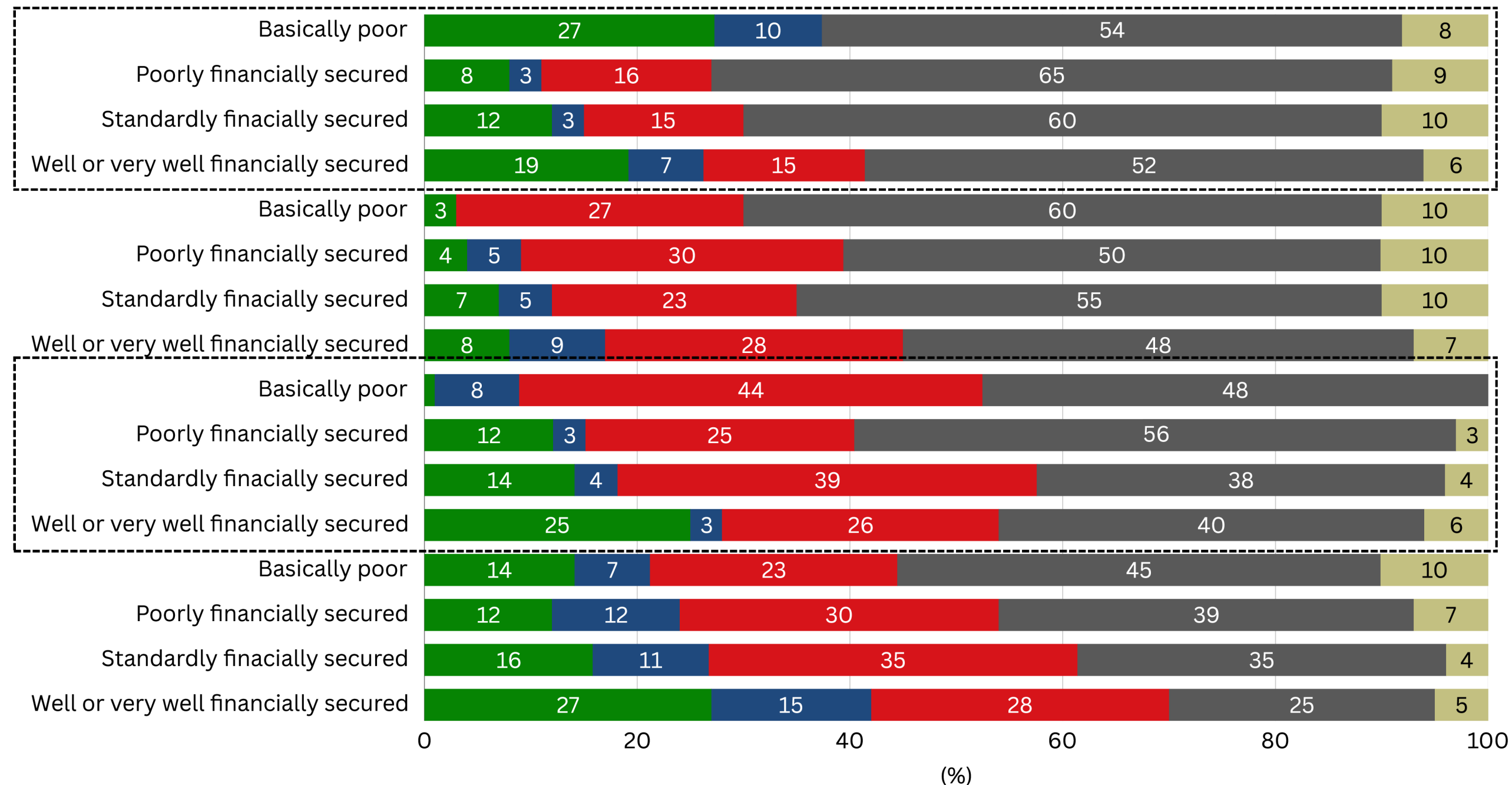
ENERGY EFFICIENCY AND INVESTMENTS IN HOUSING IN THE V4 REGION

JUSTGREEN



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= 3165

● Yes, at least once succesfully ● Yes, unsuccessfully ● No, but I was considering it
● No and I never considered it ● I don't know



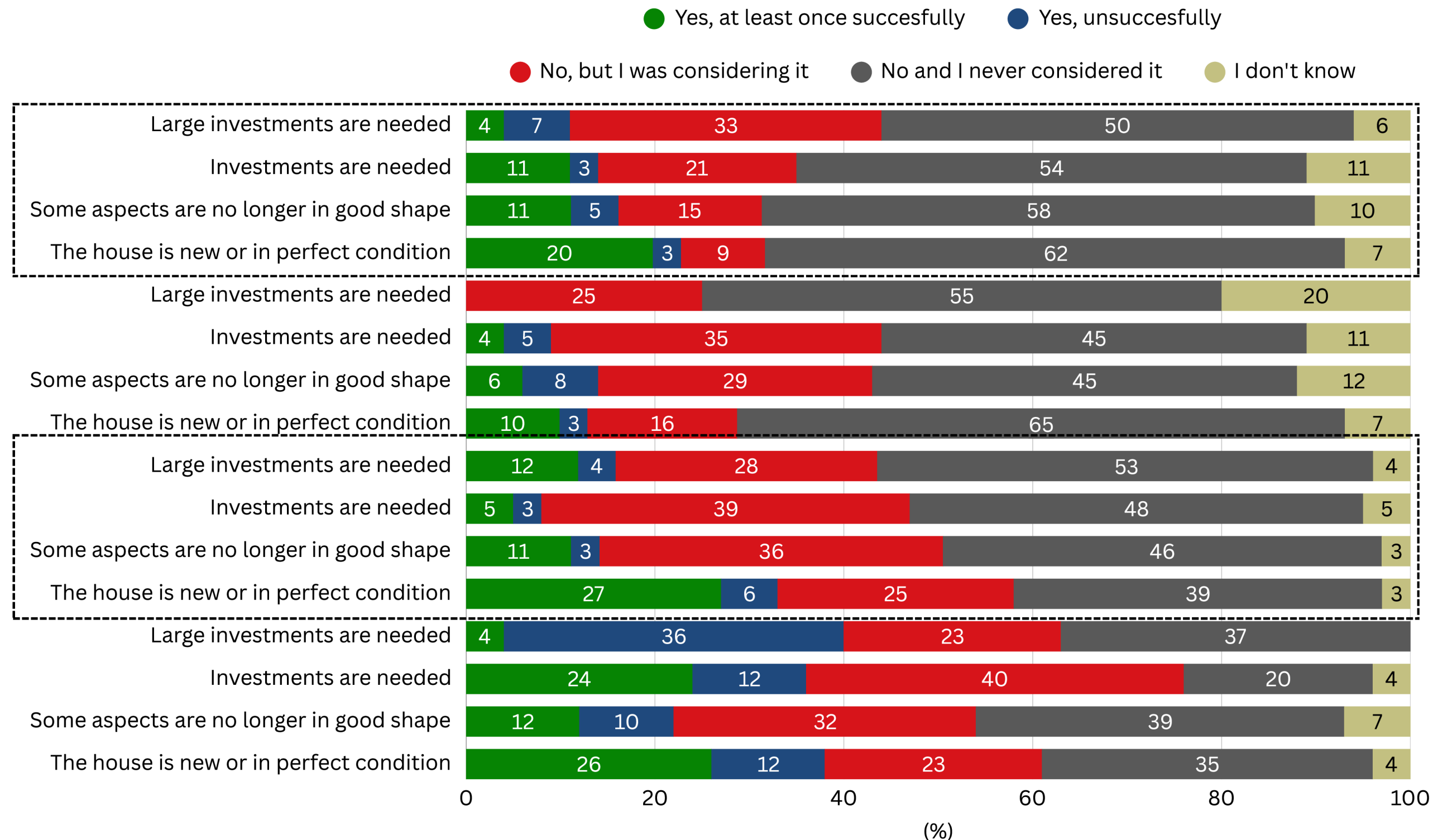
- In all V4 countries, those with the highest incomes have in the past been the most successful in applying for a scheme to decrease the energy consumption of their housing, except in the Czech Republic.
- In the Czech Republic, people in the poorest income group applied successfully in the highest proportion. It is important to note, however, that the number of respondents in the poorest category was very low in the Czech Republic.
- Hungary has the largest difference in the proportion of successful applications between the poor and the well or very well financially secured. Only 1% of the poorest applied successfully compared to 25% of the well or very well financially secured respondents.

ENERGY EFFICIENCY AND INVESTMENTS IN HOUSING IN THE V4 REGION

JUSTGREEN



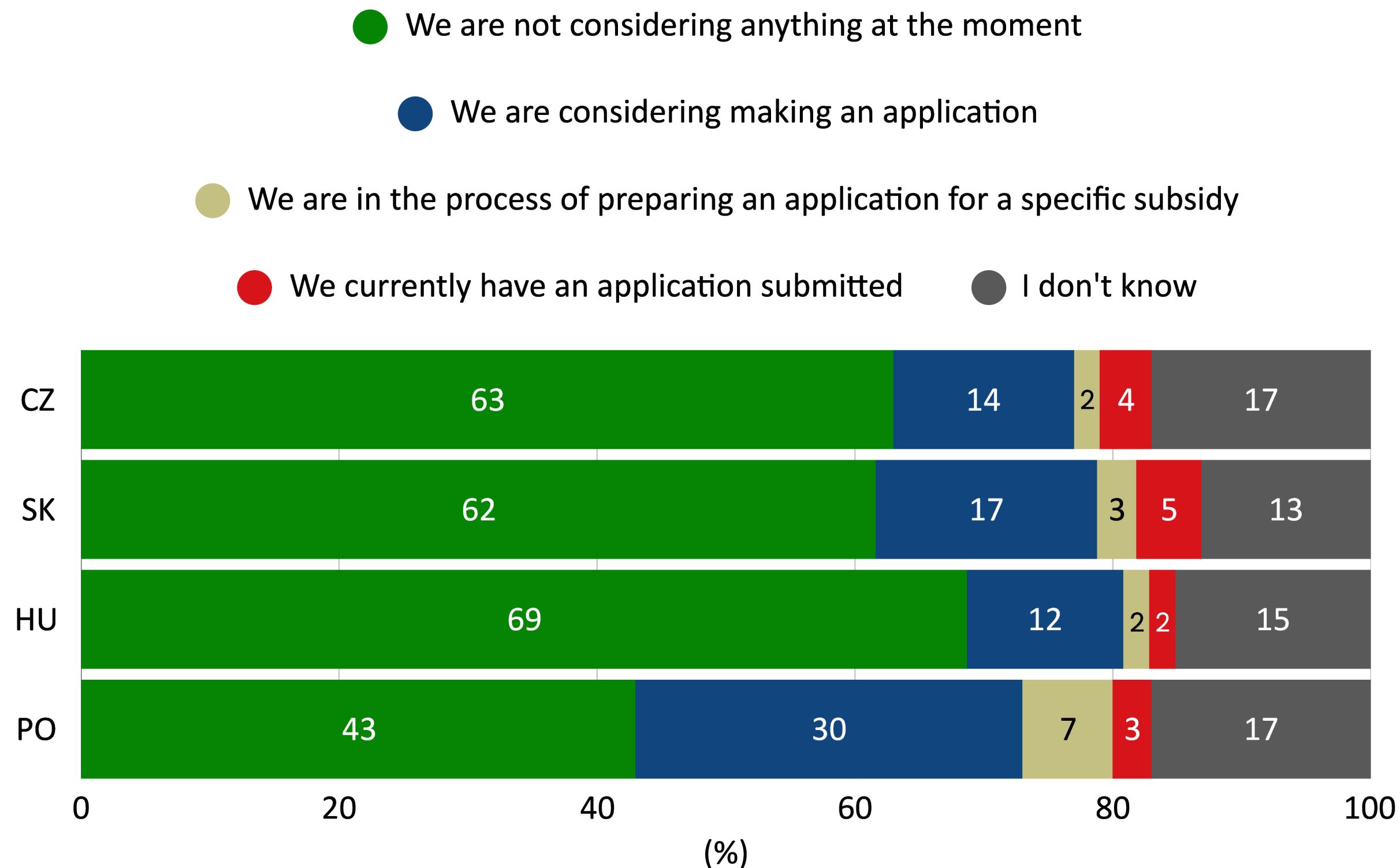
H06 Have you or people from your household ever applied for support from a scheme meant to decrease the energy consumption of your housing?
– within house owners (%) N= 3165



- In all V4 countries, those whose house are in the best condition are the ones who have applied for a scheme to decrease the energy consumption of their housing in the highest proportion.
- In Poland, those whose property required bigger investments also applied successfully in high proportion. Thus, in all V4 country, we can see the counter selective nature of these schemes: the most successful applicants are not necessarily those who need these grants the most.
- However, it is difficult to distinguish from the data whether one's property is in good condition because they applied for a scheme in the past or if it was already in good condition beforehand.
- It is also notable that, while in Hungary, the better the condition of someone's house, the less likely they that they have never applied for a scheme, there is no such clear trend in other countries.

ENERGY EFFICIENCY AND INVESTMENTS IN HOUSING IN THE V4 REGION

Poland had the highest proportion of people who said they were planning to apply for support to improve the energy efficiency of their housing.



- Of the V4 countries, Poland had the highest proportion of people who said they were planning to apply for support to improve the energy efficiency of their housing, and the highest proportion of people who said they were in the process of applying.
- Hungary has the highest proportion of respondents who are not currently considering such an application, and Poland has the lowest. This also suggests that the uptake of these subsidies is high in Poland.

ENERGY EFFICIENCY AND INVESTMENTS IN HOUSING IN THE V4 REGION

JUSTGREEN

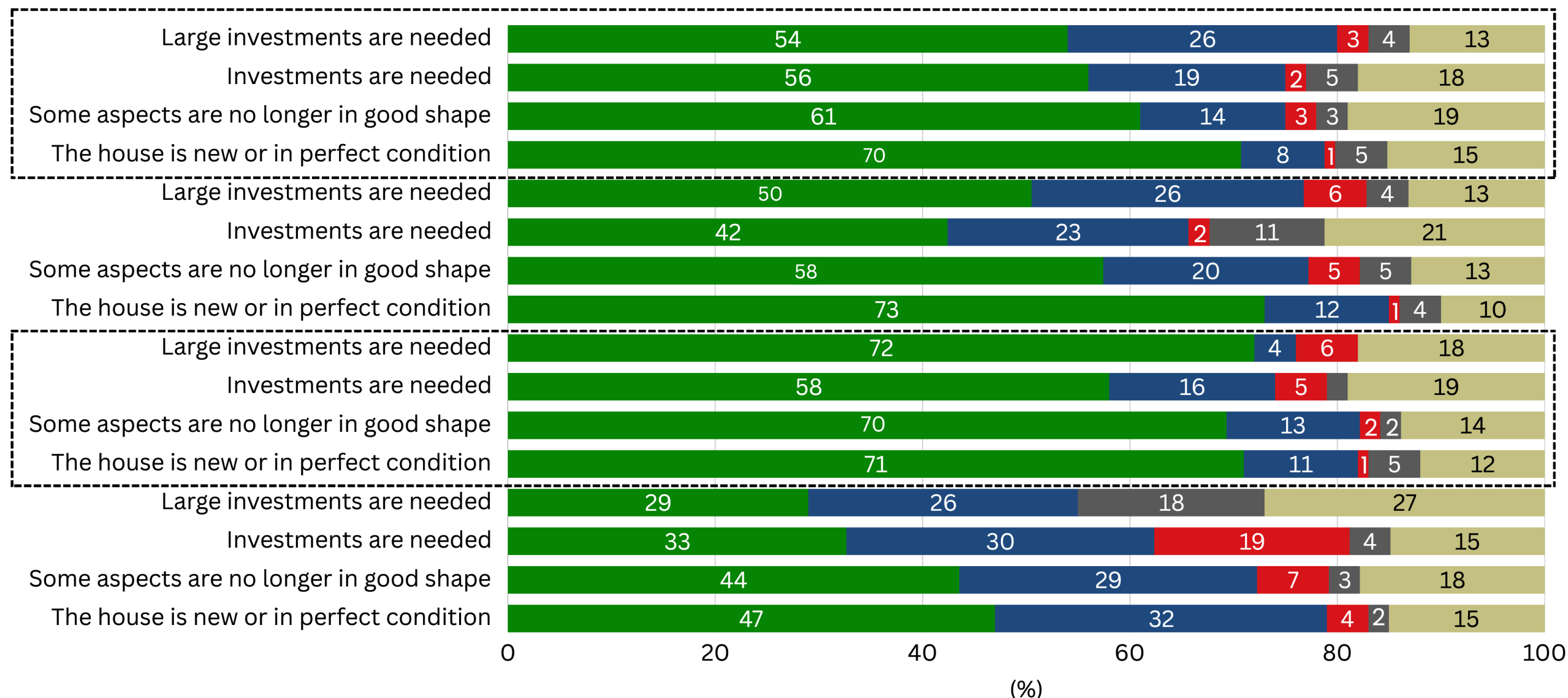


H15 How does your household feel about applying for subsidies to reduce the energy consumption of your property in the future? – within house owners (%) N= 3165

IN HUNGARY AND POLAND, THERE IS A TENDENCY FOR THOSE WHOSE PROPERTIES ARE IN THE WORST CONDITION TO BE THE LEAST LIKELY TO APPLY FOR A GRANT.

- We are not considering anything at the moment
- We are considering making an application
- We are in the process of preparing an application for a specific subsidy
- We currently have an application
- I don't know

- In the Czech Republic and Slovakia, there is no such relationship between the willingness to apply and the condition of the property. In these countries, the better the condition of one's property, the lower the proportion of people planning to apply.



ENERGY EFFICIENCY AND INVESTMENTS IN HOUSING IN THE V4 REGION

JUSTGREEN



H16 Why are you not planning on applying? – within home owners who are not planning to apply for a subsidy to reduce the energy consumption of their property (%) N= 585

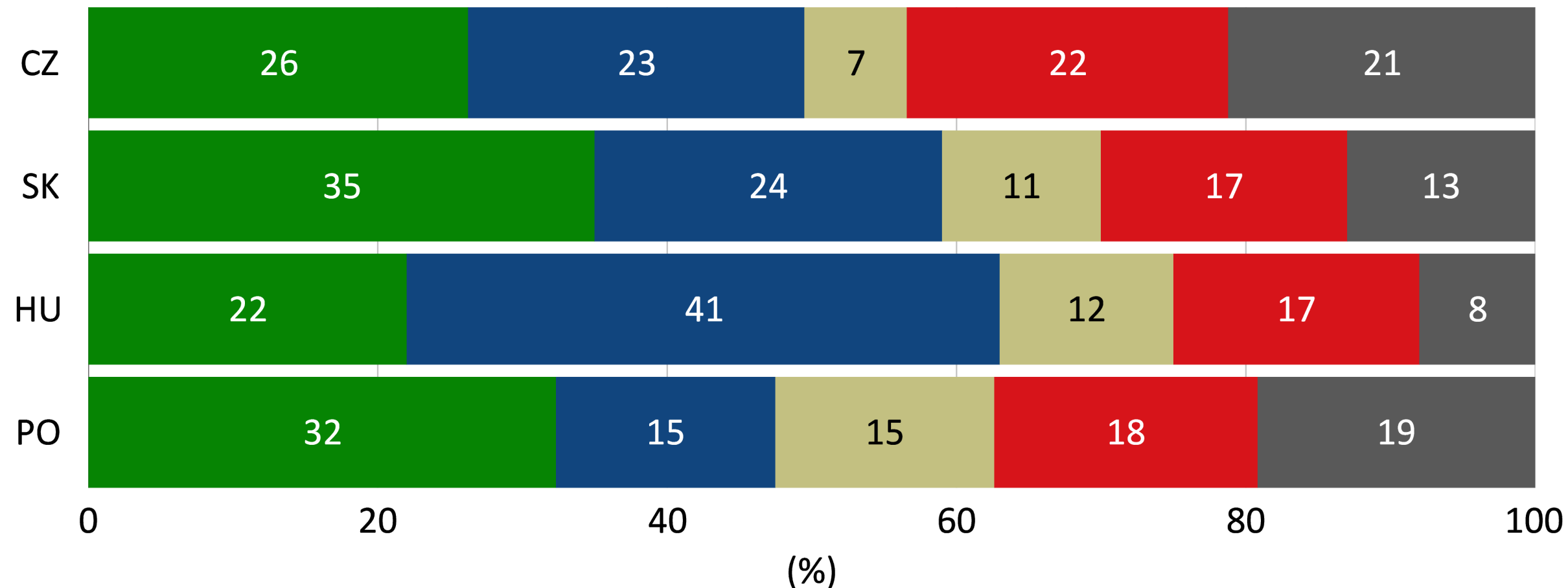
● I don't need to renovate my house/apartment

● I don't have enough funds for renovation even

● I don't have enough information

● I don't think I am eligible

● I am just not interested



IN THE CZECH REPUBLIC, SLOVAKIA, AND POLAND, THE LARGEST PROPORTION OF PEOPLE STATE THAT THEY DO NOT APPLY FOR A SCHEME BECAUSE THEIR PROPERTY DOES NOT NEED RENOVATION.

- In Hungary, the highest proportion of people who do not plan to apply for a scheme cite a lack of financial means as the reason.
- In contrast, in the Czech Republic, Slovakia, and Poland, the largest proportion of people state that their property does not need renovation.

ENERGY EFFICIENCY AND INVESTMENTS IN HOUSING IN THE V4 REGION

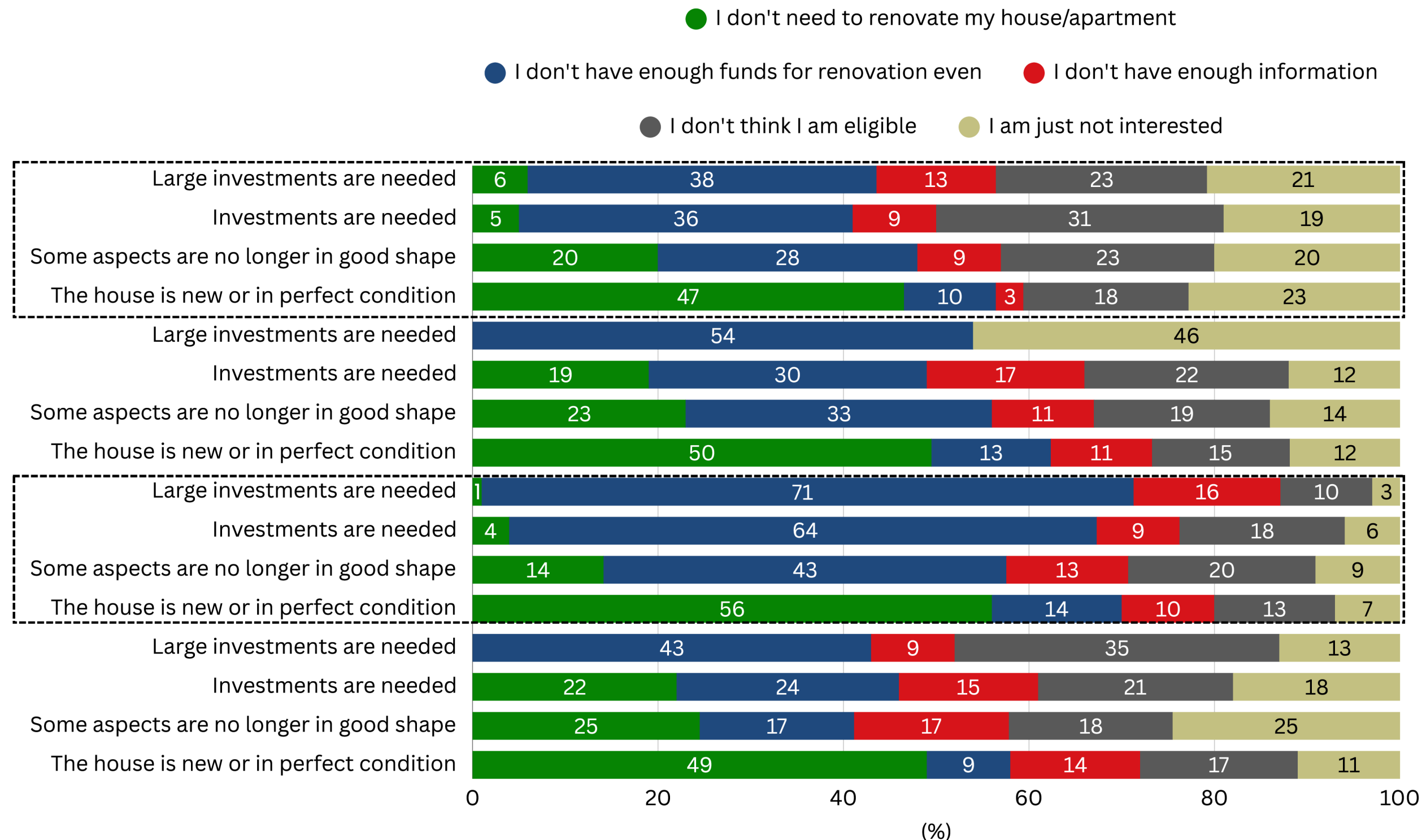
JUSTGREEN



H16 Why are you not planning on applying? – within home owners who are not planning to apply for a subsidy to reduce the energy consumption of their property (%) N= 585

IN ALL THE V4 COUNTRIES, THE HIGHEST PROPORTION OF PEOPLE WITH THE WORST CONDITIONED PROPERTIES RESPONDED THEY DO NOT PLAN TO APPLY FOR A SUBSIDY TO REDUCE THE ENERGY CONSUMPTION OF THEIR HOUSING BECAUSE THEY DO NOT HAVE THE FUNDS FOR RENOVATION

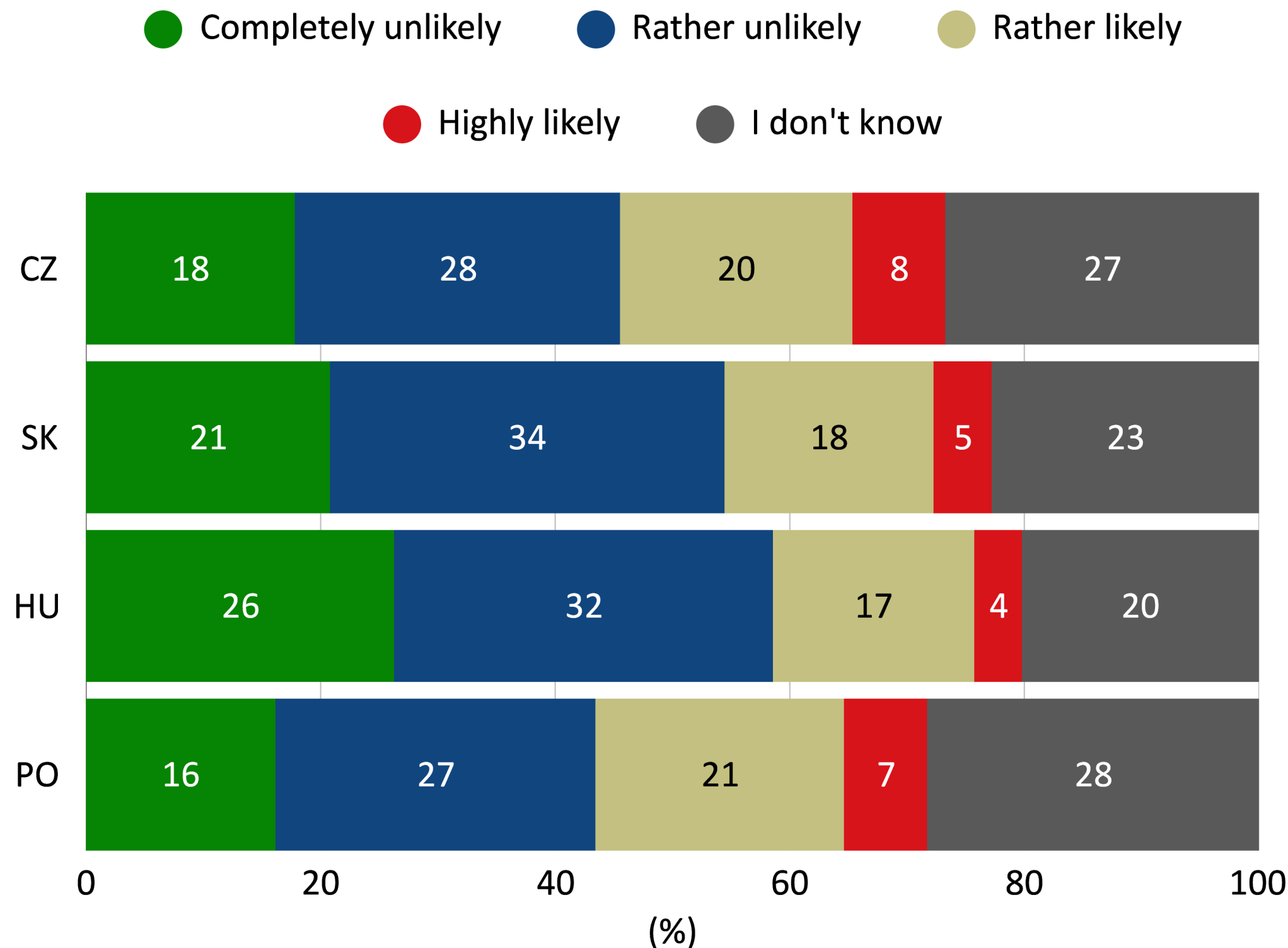
- Lack of sufficient equity is therefore the biggest obstacle for those with the worst conditioned property in all V4 countries.
- Hungary has a particularly high proportion of people in the V4 countries who do not apply for a scheme because they do not have the financial means to do so.



ENERGY EFFICIENCY AND INVESTMENTS IN HOUSING IN THE V4 REGION



H17 In your opinion, how likely it is that you would receive such support if you applied? – within home owners (%) N= 3165



IN POLAND, PEOPLE NOT ONLY HAVE THE HIGHEST UPTAKE OF SUCH GRANTS AMONG THE V4, BUT ALSO THAT CONFIDENCE IN RECEIVING AVAILABLE GRANTS APPEARS TO BE HIGH

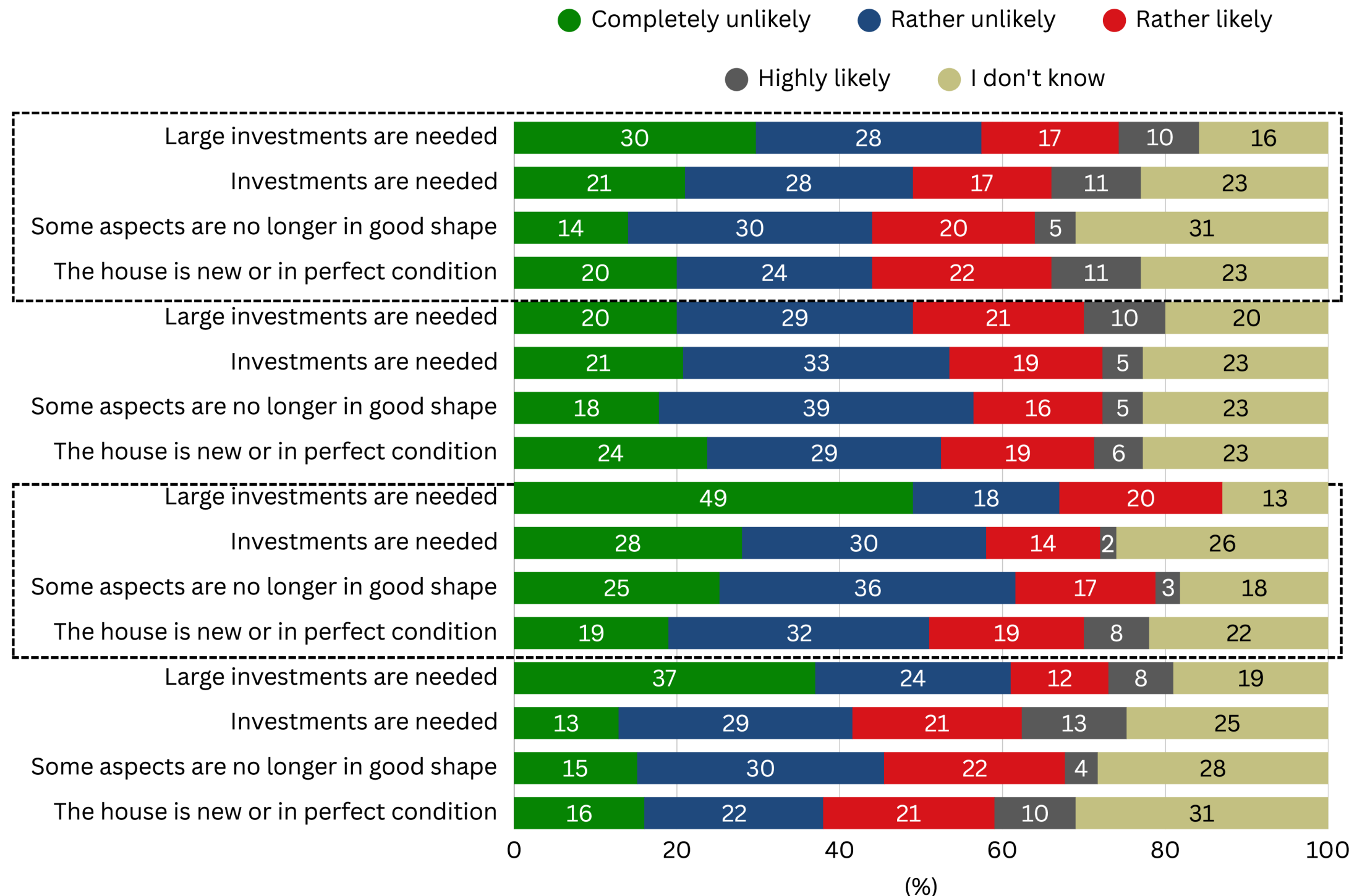
- Hungarian homeowners are the most likely to think that they would not receive a support to reduce the energy consumption of their housing if they applied. They are followed by the Slovaks, then the Czechs.
- In Poland, the highest proportion of people think they would receive a subsidy if they applied. This suggests that in Poland, people not only have the highest uptake of such grants among the V4, but also that confidence in receiving available grants appears to be high among the population.

ENERGY EFFICIENCY AND INVESTMENTS IN HOUSING IN THE V4 REGION

H17 In your opinion, how likely it is that you would receive such support if you applied? – within home owners (%) N= 3165

IN THE CZECH REPUBLIC, HUNGARY AND POLAND, THE PEOPLE MOST LIKELY TO THINK THAT THEY WOULD CERTAINLY RECEIVE A GRANT TO IMPROVE THE ENERGY EFFICIENCY OF THEIR HOUSING ARE THOSE WHOSE PROPERTY IS IN THE WORST CONDITION.

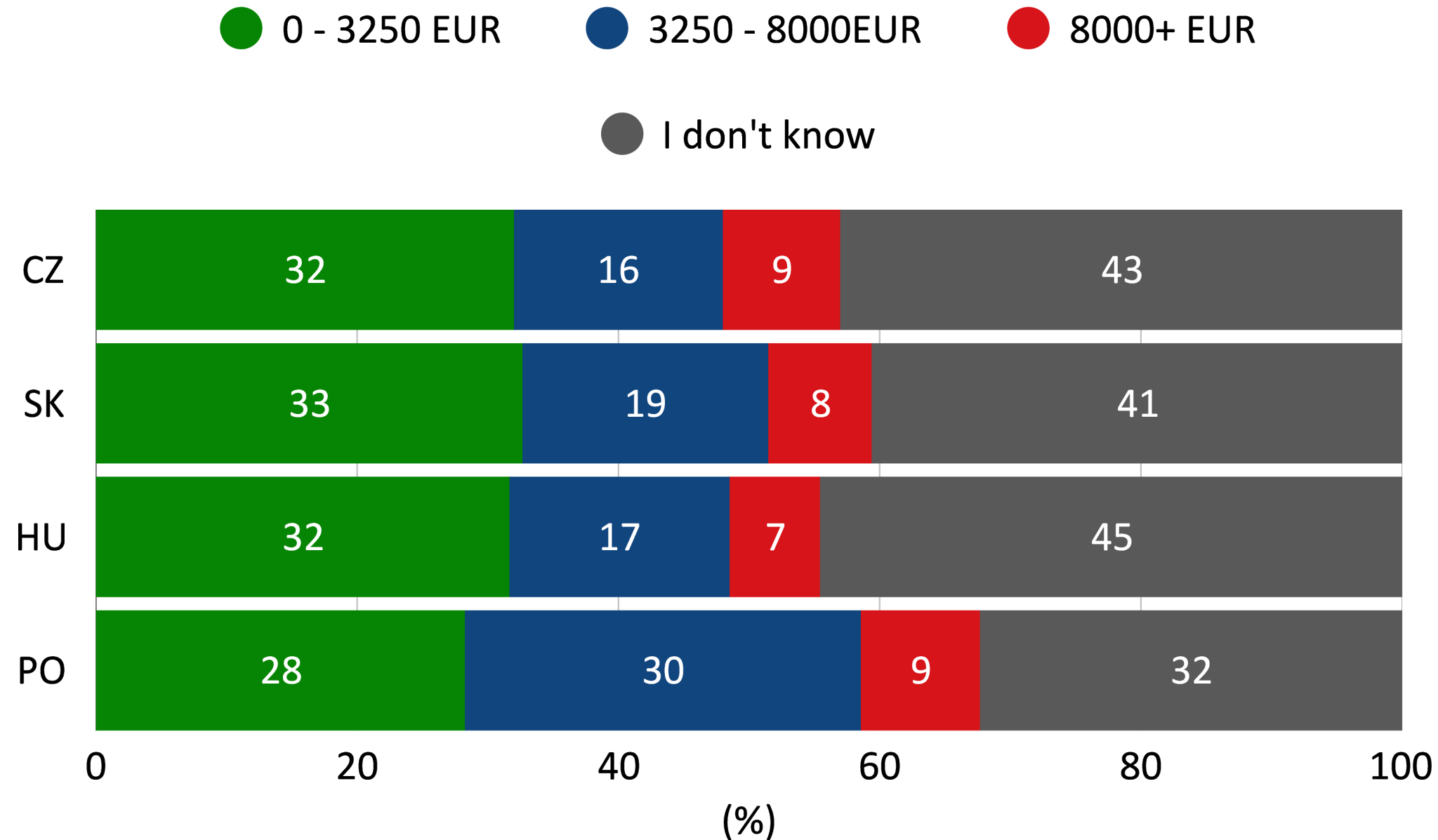
- In Slovakia, there is no such relationship between the condition of the property and the likelihood of receiving such support. In Slovakia, people with the best-conditioned properties think in highest proportion that they would definitely not receive a grant. In Hungary, the highest proportion of people with the worst-conditioned properties believe they would definitely not receive such a grant.
- At the same time, Hungary also has the highest proportion of people with the worst-conditioned properties who believe they would definitely receive such a grant.



ENERGY EFFICIENCY AND INVESTMENTS IN HOUSING IN THE V4 REGION



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= 2387



AMONG THE V4, POLAND HAS THE HIGHEST PROPORTION OF PEOPLE WHO WOULD INVEST EUR 3250 OR MORE TO REDUCE THE ENERGY CONSUMPTION OF THEIR HOUSING

- After the Poles, the Slovaks are in second place. 27% of them would be willing to invest 3250 EUR or more, and 25% of Czechs. 24% of Hungarians would invest 3250 EUR or more.

ENERGY EFFICIENCY AND INVESTMENTS IN HOUSING IN THE V4 REGION

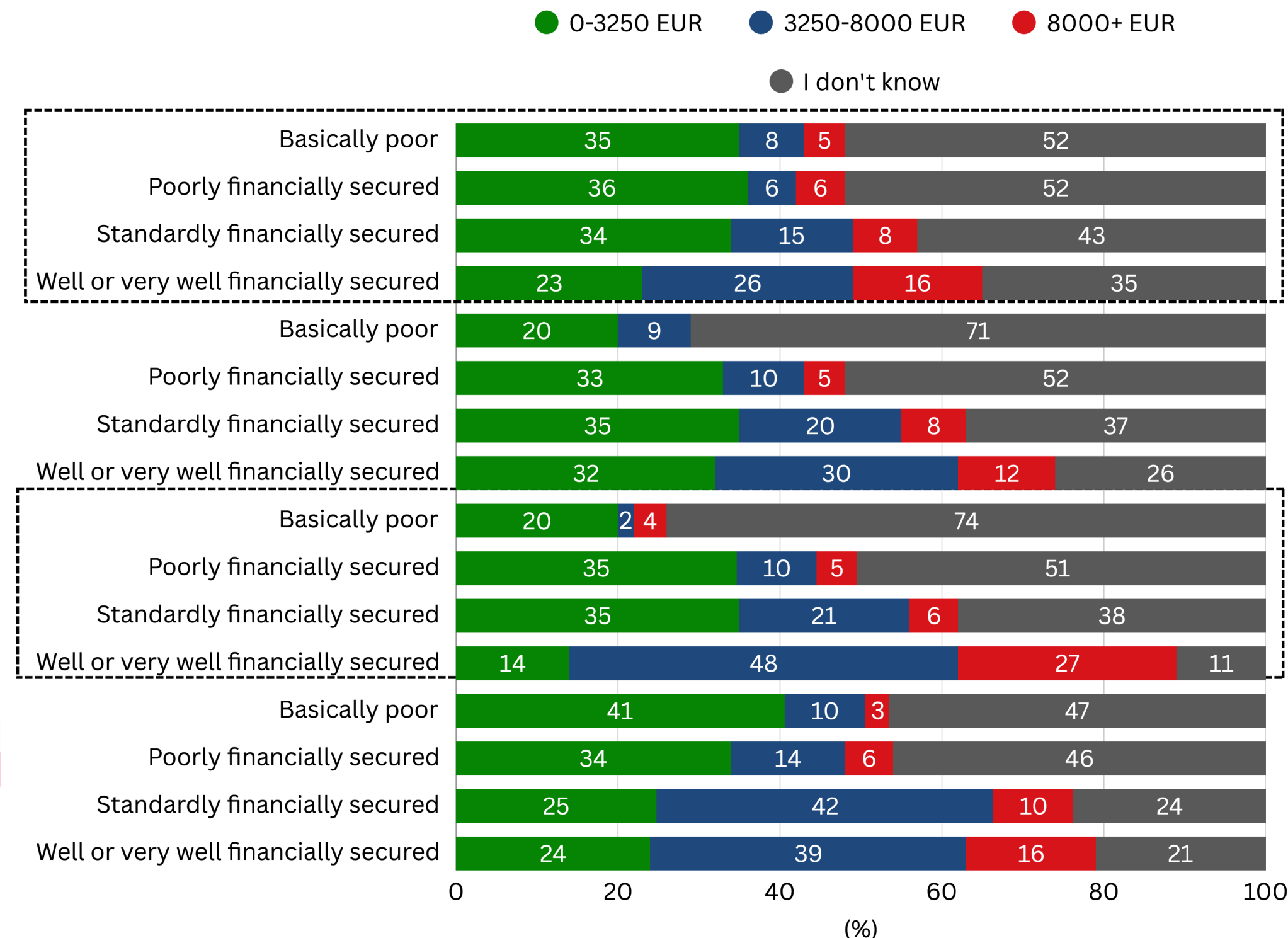
JUSTGREEN



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= 2387

IN ALL V4 COUNTRIES, THERE IS A TENDENCY FOR MORE AFFLUENT SOCIAL GROUPS TO WILLING TO INVEST MORE IN REDUCING THE ENERGY CONSUMPTION OF THEIR HOUSING

- In all V4 countries, there is a tendency for more affluent social groups to willing to invest more in reducing the energy consumption of their housing.
- The largest gap between the poorest and the well or very well financially secured social groups is in Hungary. 75% of the well or very well financially secured people are willing to invest 3250 EUR or more, compared to only 6% of the poorest.





ENERGY EFFICIENCY AND INVESTMENTS IN HOUSING IN THE V4 REGION

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= 2387

SLOVAKIA AND POLAND, THOSE WHOSE HOUSES ARE IN THE WORST CONDITION ARE WILLING TO INVEST THE LEAST AMOUNT OF MONEY IN REDUCING ITS ENERGY CONSUMPTION

- In the Czech Republic and Hungary, there is no statistically significant relationship between the condition of a respondent's house and how much they plan to invest in reducing its energy consumption.
- However, in Slovakia and Poland, there is a statistically significant relationship between the condition of a house and the amount of money someone is willing to invest. In these countries, those whose houses are in the worst condition are willing to invest the least amount of money.





ENERGY EFFICIENCY AND INVESTMENTS IN HOUSING IN THE V4 REGION

- In terms of the **willingness to invest** in housing, **Hungarians are the most likely to plan to invest** in reducing the energy consumption of their homes, but the data shows that this is probably because the Hungarian housing stock is the most inclined to invest in energy efficiency upgrades among the V4 countries.
- For example, based on questions on the insulation of houses, the proportion of insulated panel houses in Hungary is far behind the other V4 countries. Poland has the highest proportion of insulated houses. In terms of family houses, Poland has a particularly high proportion of insulated properties.
- However, in **all V4 countries except Slovakia**, the trend is that the **willingness to invest** in reducing the energy consumption of a property **depends less on whether the property is in poor condition** than on the **financial means of the owner**. Those who have the best financial background have the highest willingness to invest in reducing the energy consumption of their housing in the next 5 years. In Slovakia, those with a better conditioned property are less likely to plan to invest. However, there is also a trend in Slovakia that respondents with the best financial background are more willing to invest in reducing the energy consumption of their housing in the next 5 years.
- When we asked respondents what the main reason was that prevented them from planning to invest in reducing the energy consumption of their home, **the primary reason** in all countries was that **they did not have the financial resources to do so**. Hungarians had the highest proportion of respondents who did not invest because they did not have the financial resources. They were followed by the Slovaks, then the Poles and the Czechs. However, the Czechs have the highest proportion of people who do not plan to invest because they rent the property they live in.



ENERGY EFFICIENCY AND INVESTMENTS IN HOUSING IN THE V4 REGION

- For all types of investment, including window replacement, wall insulation and roof insulation, **Hungarians were the most likely to say that they did not have the money for the investment.** Regarding house insulation, Hungarians, in an exceptionally high proportion, stated that they would like to invest in it but lack the financial means. However, the proportion of people unable to afford insulation is also **higher among Slovaks and Czechs** compared to those facing financial barriers to replacing windows. 17% of Czechs would invest in this but do not have the financial means, and 18% of Slovaks. This shows that the biggest barrier to energy modernisation for the uninsulated housing stock in these three V4 countries appears to be **a lack of resources among the population.**
- In **Poland**, a better **energy-efficient** (insulated) **housing** stock may be related to the confidence in such subsidies and high willingness to apply. Poland have **the highest percentage of successful applicants** who have applied for a support from a scheme meant to decrease the energy consumption of their housing in the past (18%). Furthermore, in Poland, the percentage of people who **have never considered applying** to a scheme is the **lowest** (35%). Also, Poland has the highest proportion of people who said they were planning to apply for support to improve the energy efficiency of their housing, and the highest proportion of people who said they were in the process of applying.
- **Hungary** has the highest proportion of respondents who are **not currently considering such an application**, and Poland has the lowest. This suggests that the uptake of these subsidies is high in Poland. In Poland, also, the highest proportion of people thinks they would a support to reduce the energy consumption of their housing if they applied, and the highest proportion of people (39%) who would invest 3250 EUR or more to reduce the energy consumption of their housing in the next five years. Poles not only take up these grants but are also willing to allocate their own resources to such investments.



ENERGY EFFICIENCY AND INVESTMENTS IN HOUSING IN THE V4 REGION

- After the Poles, the **Slovaks are in second place**. 27% of them would be willing to invest 3250 EUR or more, and 25% of Czechs. 24% of Hungarians would invest 3250 EUR or more. This result suggests that in Poland, people not only have **the highest uptake of such grants among the V4**, but also that **confidence** in receiving available grants appears to be high among the population. Moreover, the level of own resources devoted to this type of investment is highest among Poles and lowest among Hungarians. This is linked to the lack of resources of the Hungarian population, which is a major obstacle to the modernisation of the Hungarian real estate stock.
- In all V4 countries, we can see **a counter selective nature** of the schemes aiming at **reducing energy consumption of the housing stock**. Those whose houses are in the best condition are the ones who have applied for a scheme meant to decrease the energy consumption of their housing in the highest proportion. (However, in Poland, those whose property required bigger investments also applied successfully in high proportion.) Thus, in V4 countries, the most successful applicants are not necessarily those who need these grants the most.
- However, it is difficult to distinguish from the data whether one's property is in good condition because they applied for a scheme in the past or if it was already in good condition beforehand.
- Furthermore, in V4 countries, **the highest proportion of people with the worst conditioned properties** responded they **do not plan to apply** for a subsidy to reduce the energy consumption of their housing because they **do not have the funds** for renovation even with subsidies. **Lack of sufficient equity** is therefore the biggest obstacle for those with the worst conditioned property in all V4 countries, even in Poland where the housing stock is in better condition and the uptake of these grants is better. Hungary has a particularly high proportion of people in the V4 countries who do not apply for a scheme because they do not have the financial means to do so.



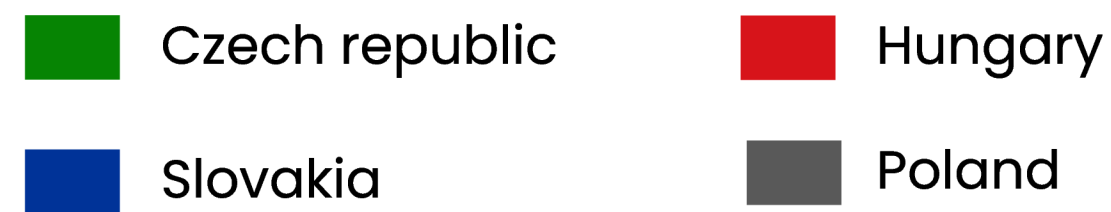
TRANSPORT

TRANSPORT



T02 Which mode of transport do you personally use the most often for travelling to work or school? (%) N= 4054

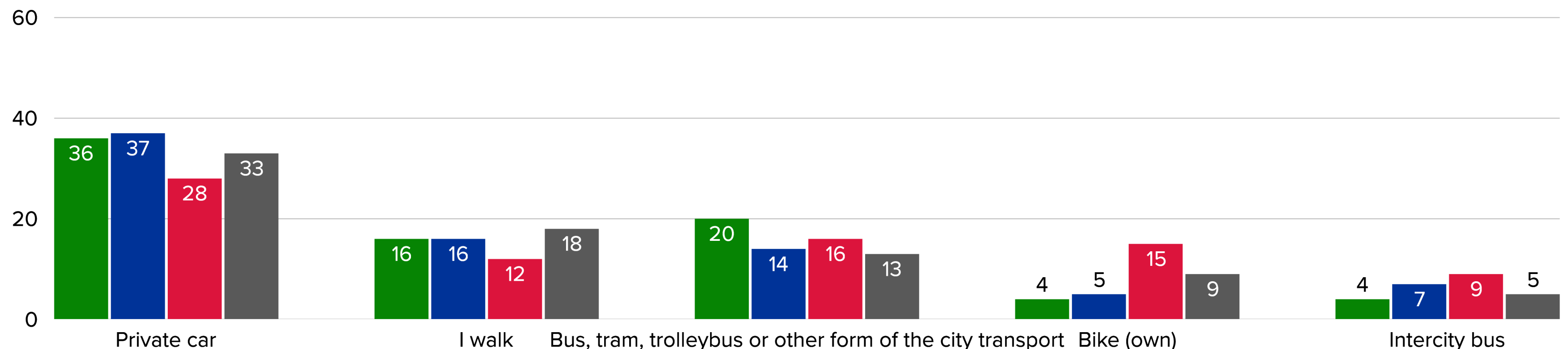
IN ALL V4 COUNTRIES, THE LARGEST PROPORTION OF PEOPLE COMMUTE TO WORK BY CAR



- In all V4 countries, the largest proportion of people commute to work by car. Intercity buses are not popular in either of the V4 countries.

- Hungary has the highest proportion of people choosing to travel by bike to work or school and the lowest proportion choosing to drive or walk among the V4 countries.

- Czechs are the most likely to choose bus, tram, trolleybus or other form of city transport.

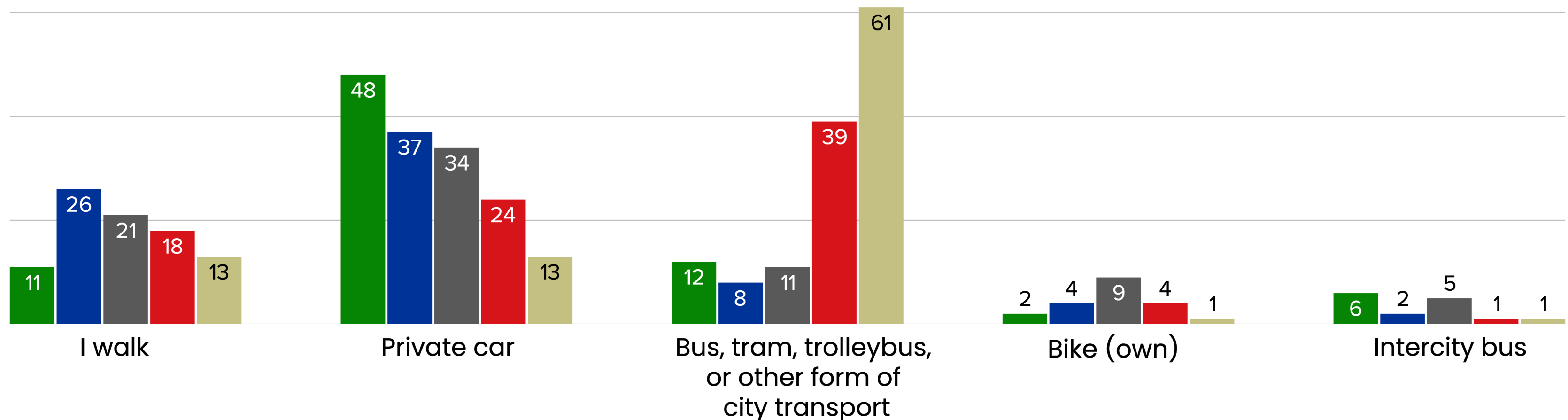
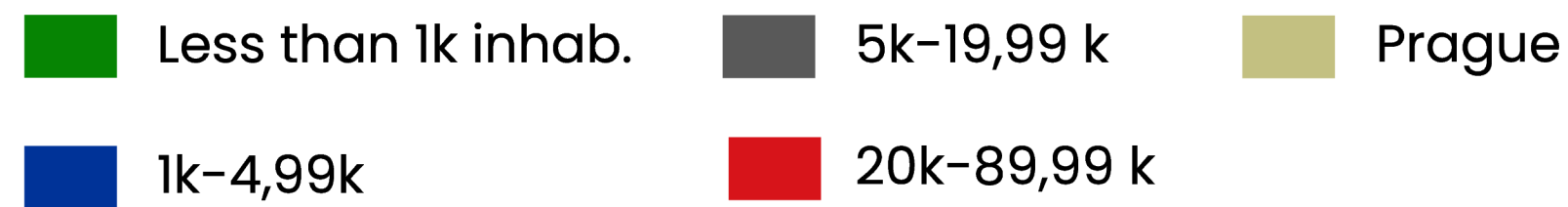


TRANSPORT



T02 Which mode of transport do you personally use the most often for travelling to work or school? (%) N= 1036

CZECH REPUBLIC - PRAGUE HAS THE LOWEST PROPORTION OF PEOPLE USING CARS TO GET TO SCHOOL/WORK AMONG THE V4 CAPITALS



- In the Czech Republic, across all types of settlements, bike use is not very popular, nor is long-distance bus travel. It can also be said that the larger the municipality, the lower the proportion of residents using cars to go to school/work.

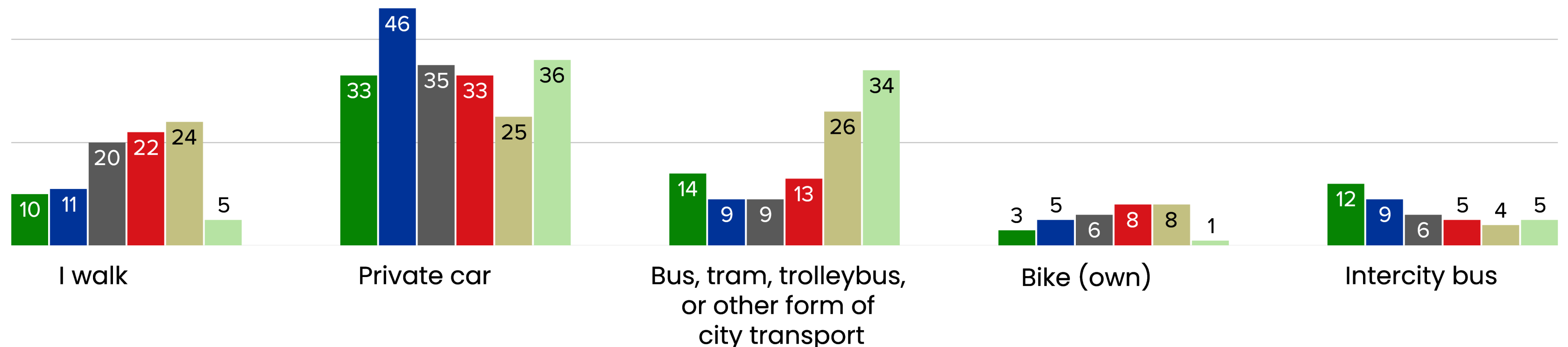
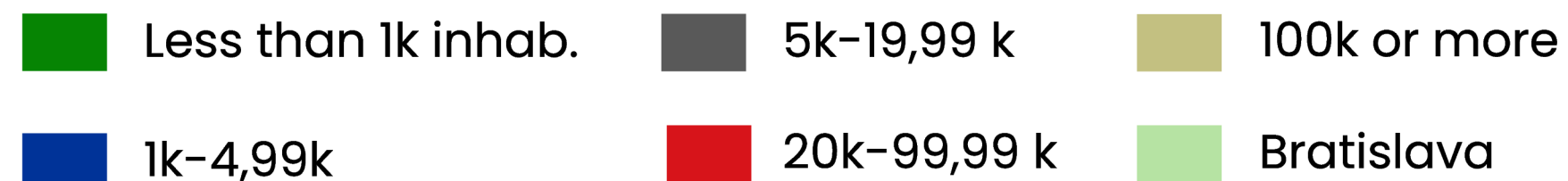
- Prague has the lowest proportion of people using cars to get to school/work among the V4 capitals, probably due to the high quality of local public transport. In the largest municipalities, the use of local public transport (bus, tram, trolleybus, etc.) is the dominant mode of transport.

TRANSPORT



T02 Which mode of transport do you personally use the most often for travelling to work or school? (%) N= 1013

SLOVAKIA - IN BRATISLAVA, CAR USE IS THE DOMINANT MODE OF TRANSPORT, CLOSELY FOLLOWED BY LOCAL PUBLIC TRANSPORT



- In Bratislava, the use of bicycles to get to school/work is not significant, since responses indicate that less than 1% of city residents use this option. However, in other municipalities, the larger the municipality, the more people use bicycles to get to school/work.

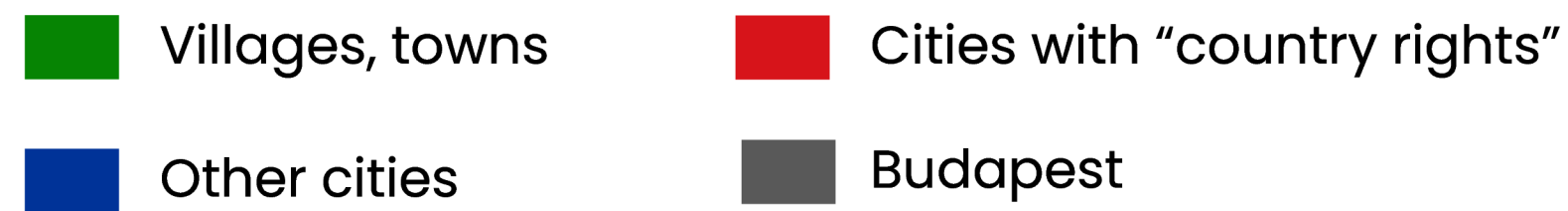
- In Bratislava, car use is the dominant mode of transport, closely followed by local public transport. Walking is a popular mode of transport in all larger municipalities except Bratislava.

TRANSPORT

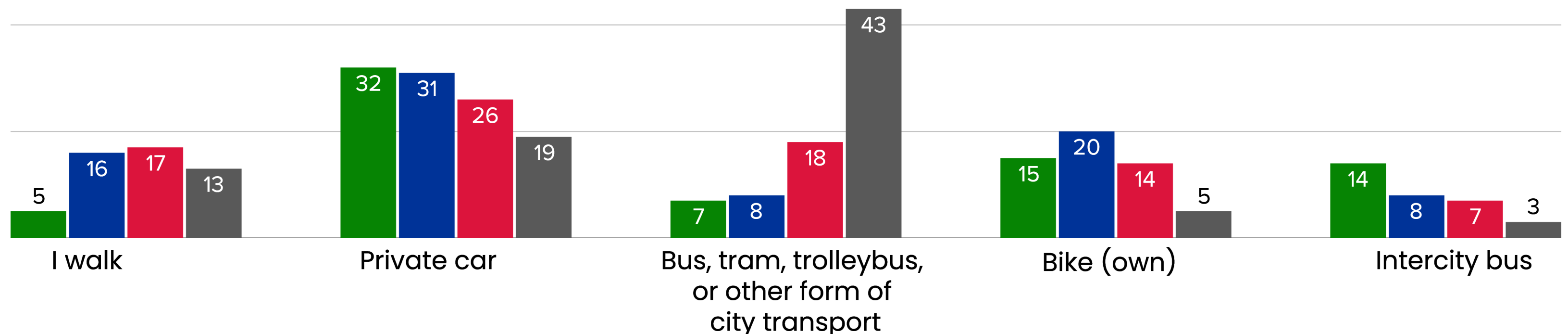


T02 Which mode of transport do you personally use the most often for travelling to work or school? (%) N= 1005

HUNGARY - IN SMALLER CITIES, BIKE USE IS RELATIVELY HIGH AMONG THE V4 COUNTRIES



- Budapest also has a high rate of over 40% of residents using public transport to get to school/work. In smaller cities, bike use is relatively high among the V4 countries (20%). Furthermore, the use of long-distance buses in rural areas is relatively high among the V4 countries.



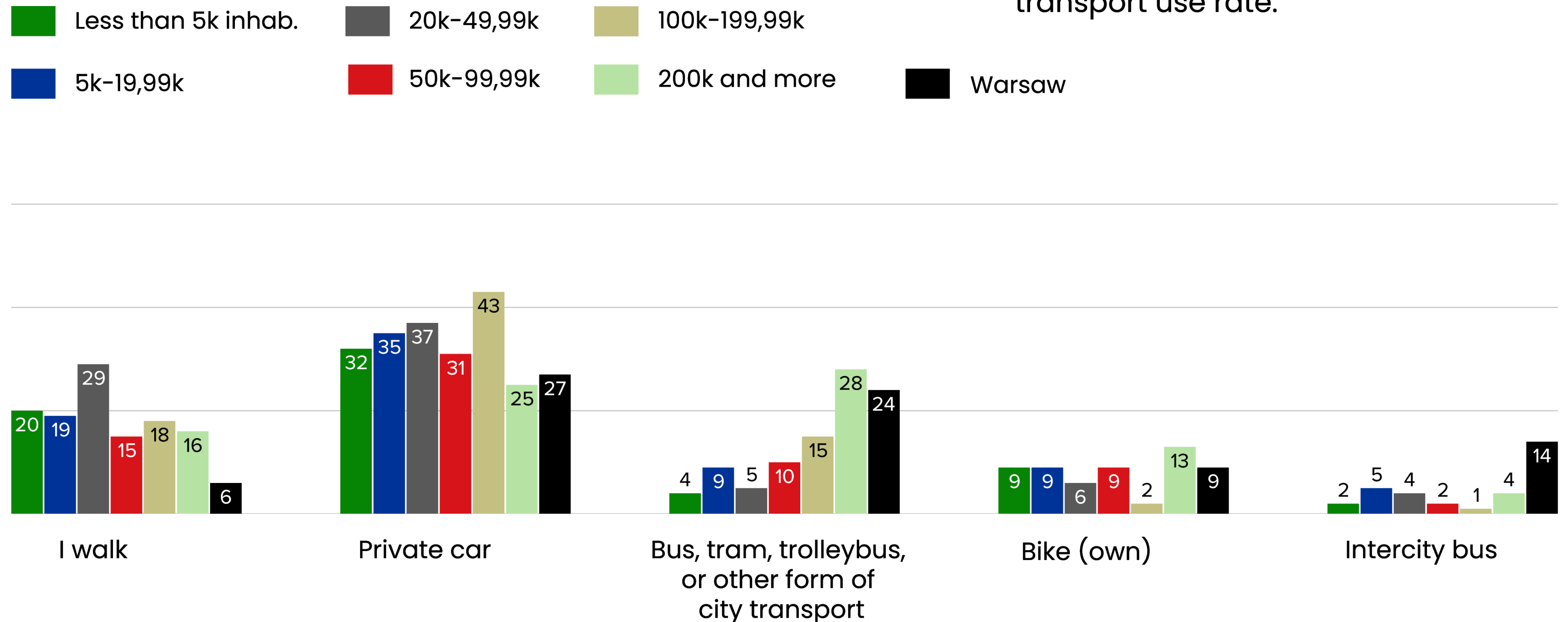
TRANSPORT



T02 Which mode of transport do you personally use the most often for travelling to work or school? (%) N= 1000

POLAND - WARSAW HAS THE HIGHEST PROPORTION OF CYCLISTS AMONG THE V4 COUNTRIES

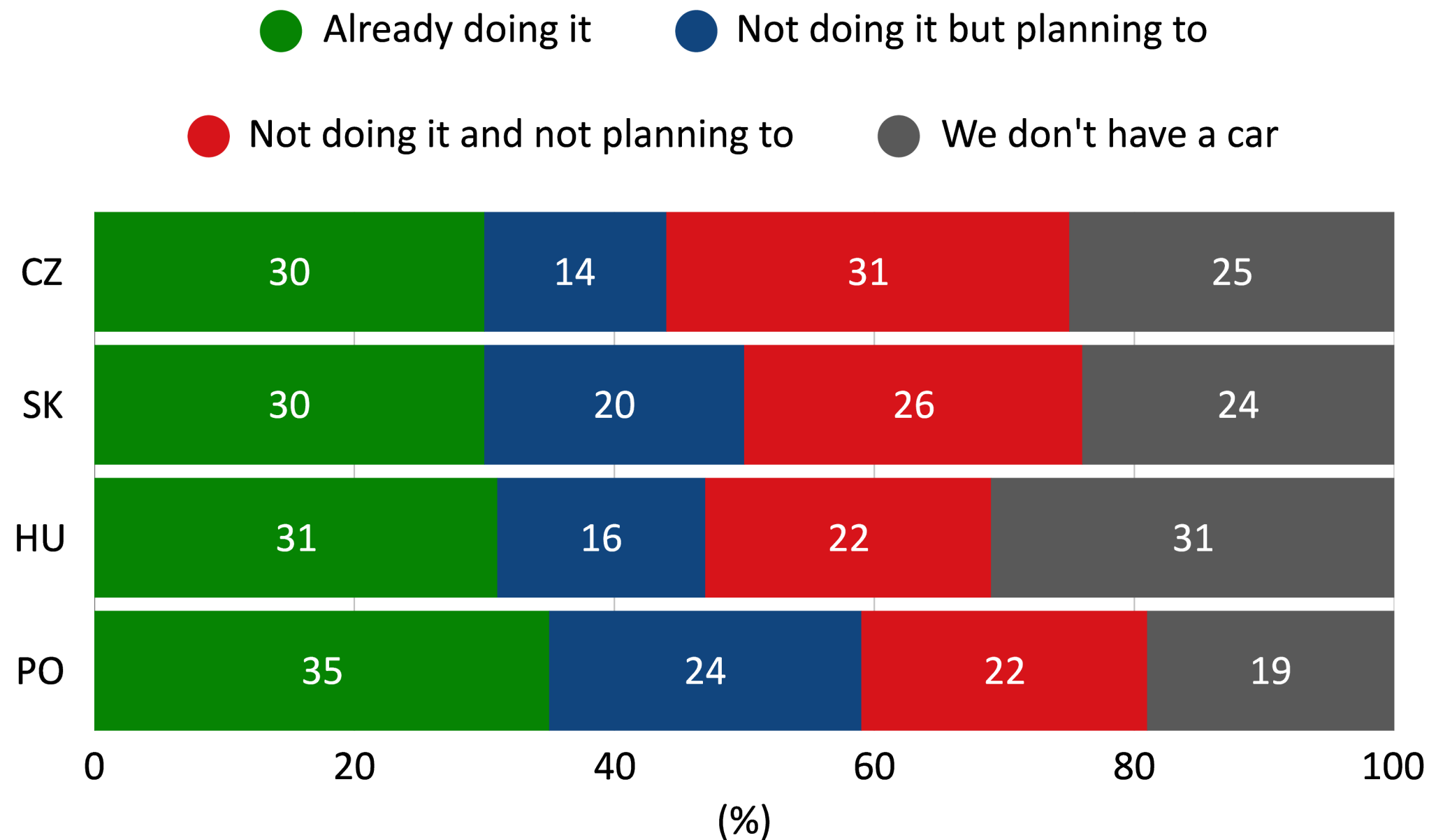
- Warsaw has the highest proportion of cyclists among the V4 countries based on the data. However, it has the lowest public transport use rate.



TRANSPORT



B02B W01B 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= 4054



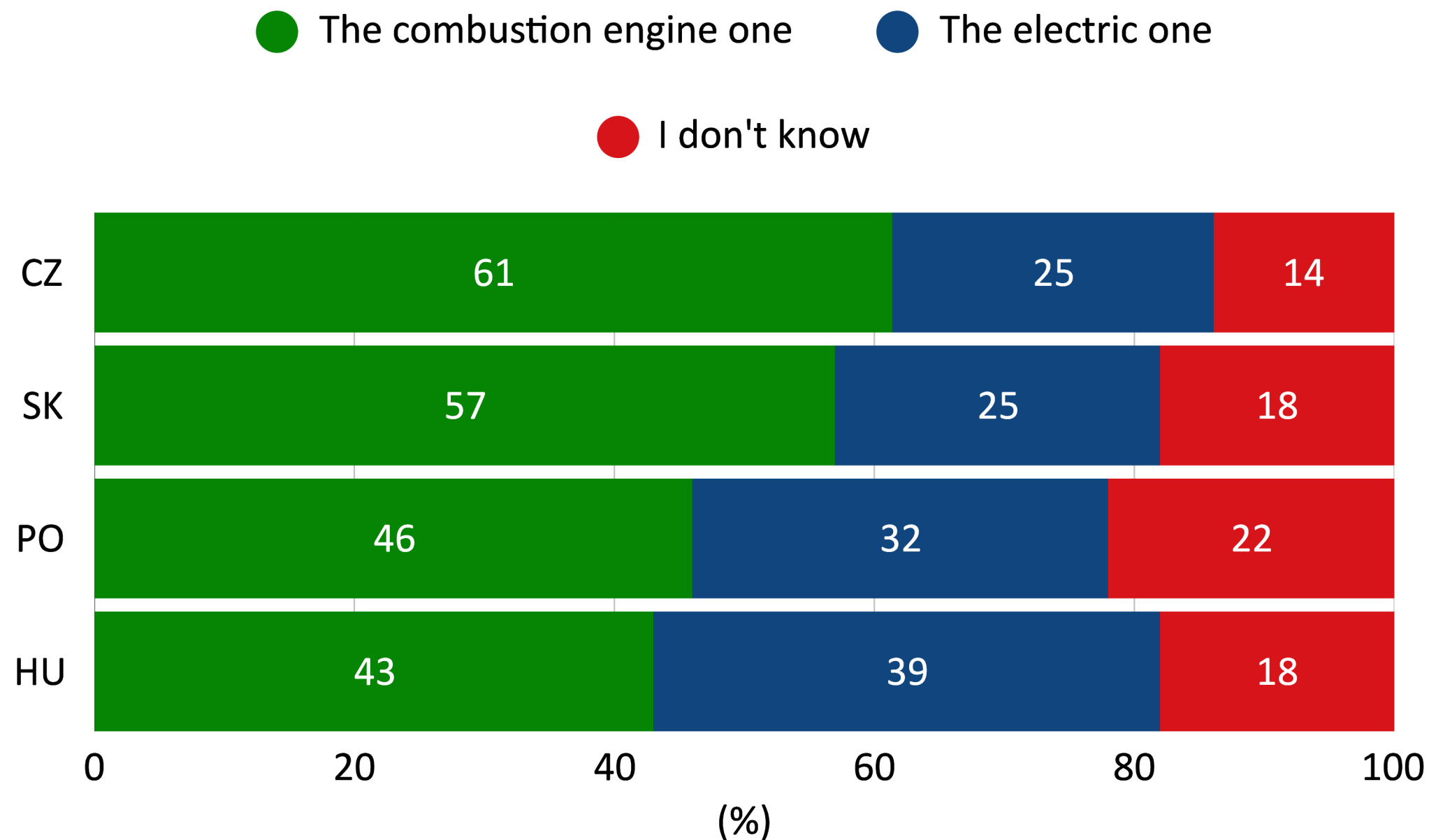
POLAND HAS THE HIGHEST PROPORTION OF CAR OWNERS WHO CONSCIOUSLY REFRAIN FROM USING THEIR CARS.

- Hungary has the lowest proportion of car owners among the V4 countries. Poland has the highest proportion of car owners who consciously refrain from using their cars, while the Czech Republic has the highest proportion of car owners unwilling to give up driving for environmental reasons.

TRANSPORT



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= 4054



THERE IS NOT YET A HIGH LEVEL OF PUBLIC CONFIDENCE IN ELECTRIC CARS IN THE V4 COUNTRIES

- Although electric cars are 40% more expensive than combustion engine cars on average, we asked respondents if electric cars and combustion engine cars cost the same, with the same conditions, which they would choose when buying a new car.
- The results show that people in neither country would choose an electric car in higher proportion, even if it cost the same. Hungary is the country with the highest share of people who would choose an electric car, but even there, people would choose a combustion engine car in higher proportion. It is therefore clear that there is not yet a high level of public confidence in electric cars in the V4 countries.



THE PERCEPTION OF CLIMATE CHANGE IN THE V4 REGION

- In **all V4 countries**, the largest proportion of people **commute to work by car**. Intercity buses are not popular in either of the V4 countries.
- **Warsaw** has **the highest proportion of cyclists** among the V4 countries based on the data. However, it has the lowest public transport use rate.
- **Prague** has **the lowest proportion of people using cars** to get to school/work among the V4 capitals, probably due to the high quality of local public transport.
- In **Bratislava**, the use of **bicycles** to get to school/work is **not significant**, since responses indicate that less than 1% of city residents use this option. However, in other municipalities, the larger the municipality, the more people use bicycles to get to school/work.
- **Budapest** also has a high rate of **over 40% of residents using public transport** to get to school/work. In smaller cities, bike use is relatively high among the V4 countries (20%).
- Regarding **the willingness to change for environmental reasons**, Poland has the highest proportion of car owners who consciously refrain from using their cars, while the Czech Republic has the highest proportion of car owners unwilling to give up driving for environmental reasons.
- It says a lot about the willingness to change consumer behavior that when we asked respondents which type of car they would choose if electric and combustion engine cars cost the same, neither country had a majority preferring an electric car. It is therefore clear that there is **not yet a high level of confidence in electric cars** in the V4 countries.



THANKS FOR ATTENTION