Climate Opinion Research Exchange

Research Note

Do businesses and the public hold differing views on climate and energy?

Research Findings

We investigated whether European business leaders and the general public hold differing perspectives regarding climate policy, renewable energy, energy security, and European competitiveness. Specifically, we examined whether the business community perceives the energy transition as an impediment or enabler of their, and Europe's, competitiveness.

Across the countries surveyed, business leaders demonstrated strong support for reducing Europe's dependence on imported energy and expanding renewable energy investment, with business sentiment often matching or exceeding that of the public.

We found a high degree of consensus between business leaders and the general public on Europe's top priorities, with the cost of living, the environment and climate change, and immigration prioritised by both groups. The public also prioritised health whereas business leaders prioritised economic growth. When asked about Europe's energy system, both the public and business leaders wanted to see lower costs, greater security, and reduced reliance on energy imports.

We found an overwhelming consensus that investing more in renewable energy will strengthen Europe's competitiveness, security, and reduce exposure to energy price shocks. Business leaders held this view even more strongly than the general public, including 83% of Italians, 78% of Dutch, 77% of French, 76% of Danish, and 74% of German business leaders. Support among businesses was notably higher than the public in France. Business leaders are also more confident that Europe's global energy position will become more competitive than the general public across all countries surveyed.

There is a strong consensus among both business leaders and the public respondents that Europe should reduce its reliance on imported energy over the next decade. In the surveyed countries, over three-quarters of European citizens view reducing energy import dependency within the next ten years as important or very important with support particularly high in Italy (83%), Poland (82%), Spain (82%), Denmark (80%), and France (80%).

Once again sentiment was stronger among business leaders, 83% of whom view reducing European energy import dependency over the next decade as important or very important. Over 80% supported this in Spain (87%), Denmark (87%), France (86%), Italy (85%), Greece (85%), the Netherlands (85%), Germany (84%), and Poland (83%). Business leaders also showed greater urgency, with over 60% in Italy, Spain, Germany, and France calling it very important.

Both sets of respondents identified clean energy as a sector where Europe had the greatest

opportunity to be more competitive, and the sector Europe should prioritise for competitiveness.

A majority of both the public and business respondents believe Europe should require all new data centres to be powered by renewable energy and not take existing water capacity.

Business leaders report greater or similar levels of support for gas suppliers having consistent standards for detecting and reducing methane leakage, regardless of where gas is produced, and are substantially more likely to believe that reducing methane leakage is one of the quickest and most cost-effective ways to reduce energy waste.

Methodology

The research was conducted through public opinion polling commissioned via Norstat in July - August 2026. The sampling strategy targeted two distinct demographic cohorts across 10 European nations: the general public and business executives.

We surveyed a nationally representative sample of 2000 general public respondents in each of France, Germany, Italy, Spain, Poland, Denmark, the Netherlands, Hungary, Bulgaria, Greece.

Additionally executive interviews (CEOs, VPs, Directors or senior level management) were conducted across all 10 markets, scaled according to population size. 500 business leaders were interviewed in each of Germany, France, Poland, Spain, Italy, and the Netherlands and, due to smaller population sizes, 250 business leaders were interviewed in Denmark, 100 in Hungary, 100 in Bulgaria, and 150 in Greece.

The margin of error for the general public sample is ±2.2% at the national level at a 95% confidence interval. For the business leader sample, statistical precision varies by cohort size: ±4.4% for markets with 500 respondents and ±9.8% for markets with 100 respondents. Data presented reflects the proportion of respondents within each respective national sample. Data was collected using computer assisted web based interviewing via Norstat's online panels.

About CORE

The Climate Opinion Research Exchange (CORE) shares high-quality opinion research related to climate change and the energy transition. We believe in accurately measuring trends in opinion and sharing this information openly with the public, researchers, civil society and the media, so we can all better understand the social, community, policy and business dynamics influencing opinion around these issues.

Finding 1: Public and business respondents demonstrate a high degree of consensus regarding top priorities and concerns across Europe.

Across Europe, both public and business respondents share broad alignment on their primary concerns, with rising prices and inflation representing the foremost priority for both groups. The public subsequently prioritises health, environment and climate change, and immigration. In contrast, businesses emphasize immigration, environment and climate change, and economic growth.

Top priorities for Europe over the next decade - % selected - General Public

	Overall	Bulgaria	Denmark	France	Germany	Greece	Hungary	Italy	Netherlands	Poland	Spain
Rising prices / inflation / cost of living	29	32	24	33	30	38	22	32	33	25	25
Health	25	29	21	28	17	28	39	23	20	23	26
The environment and climate change	24	16	32	31	27	20	20	29	25	17	23
Immigration	23	11	29	24	22	24	16	21	33	21	28
Defence and security	17	14	32	18	14	11	8	12	20	33	12
Economic growth	14	23	10	8	11	21	18	16	7	11	11
Housing	13	3	5	9	12	12	13	2	26	8	39
Crime	12	14	12	15	13	17	7	15	11	7	12
Affordable energy	11	15	7	6	13	7	13	16	12	15	7
Pensions	11	14	4	11	18	9	13	11	5	8	14
Energy security	11	14	11	5	8	10	17	10	8	18	4
Unemployment	10	14	3	8	4	18	12	13	3	8	14
The education system and skills development	10	15	6	9	17	9	11	9	8	7	9
Reducing dependence on foreign countries	9	10	11	8	9	7	6	10	11	9	8
The war in Ukraine	8	9	13	5	7	4	9	6	8	16	4
Energy supply	8	6	11	5	9	6	11	11	9	6	5
Taxation	8	3	5	5	9	13	7	10	7	7	9
Terrorism	7	6	8	10	8	6	5	5	8	8	4
Government debt	5	4	1	14	4	6	7	6	1	4	4
Innovation and research	5	5	5	4	5	3	2	7	3	4	5
The EU's influence in the world	4	5	7	3	3	3	4	4	7	4	3
Industrial competitiveness	4	3	3	4	8	2	3	4	2	5	3
The state of Member States' public finances	3	3	1	6	2	4	3	2	2	5	3

Top priorities for Europe over the next decade - % selected - Business

	Overall	Bulgaria	Denmark	France	Germany	Greece	Hungary	Italy	Netherlands	Poland	Spain
Rising prices / inflation / cost of living	24	25	22	27	21	40	24	24	25	23	20
Immigration	22	14	14	20	25	23	20	20	26	20	29
The environment and climate change	20	13	21	24	22	23	15	21	19	16	21
Economic growth	18	37	20	16	19	29	16	17	18	14	14
Defence and security	17	17	18	20	17	11	9	13	17	27	14
Health	16	26	10	21	12	20	23	14	13	16	18
Energy security	14	13	21	10	12	14	23	14	17	19	8
Affordable energy	13	9	16	6	14	8	14	16	17	15	9
Crime	12	19	9	15	15	18	5	15	8	9	13
Housing	12	3	2	7	9	12	14	3	17	7	36
Energy supply	12	4	25	7	12	11	14	12	17	9	7
Taxation	10	4	7	8	10	14	14	11	9	10	12
Unemployment	10	9	5	11	8	16	11	12	6	9	11
Pensions	8	9	3	9	12	6	9	8	5	7	11
Innovation and research	8	7	13	7	9	3	7	12	9	6	7
Technological leadership	8	4	11	6	9	3	8	8	8	7	9
Reducing dependence on foreign countries	8	10	8	7	6	8	9	8	11	7	8
Industrial competitiveness	8	8	10	8	11	2	7	9	7	6	7
The war in Ukraine	7	7	8	8	10	3	7	7	6	12	3
Terrorism	7	7	5	9	9	7	2	6	5	11	6
The education system and skills development	7	17	7	9	7	5	10	7	5	6	8
The EU's influence in the world	7	10	9	6	6	5	2	7	8	10	6
Government debt	6	3	6	13	5	5	4	9	3	6	4

The environment and climate change is the third top priority in both sets of respondents. The environment and climate change was selected most by public respondents in Denmark (where it was also the top concern), and the second most selected priority for both public and business segments in France, Italy and Germany.

Distinct priorities also appear at the national level alongside these broader trends. Defence and security, for instance, proved to be the primary concern in Poland among both the general public and business respondents. Similarly, housing stood out as the leading issue for both respondents in Spain. In Denmark business placed the highest emphasis on energy supply reliability.

When asked to evaluate a narrower set of specific issues, the rising cost of living and international conflict dominate top concerns across both segments. Energy prices rank as the next top concern for business leaders, while climate and extreme weather take precedence among the public, although both groups rate both issues as highly concerning. Both the public and business leaders are clearly concerned about external events (international conflict, economic uncertainty, climate change and extreme weather) driving up the costs they face (cost of living and energy prices).

Issues most concerning over the next ten years - % selected - General Public

	Overall	Bulgaria	Denmark	France	Germany	Greece	Hungary	Italy	Netherlands	Poland	Spain
Rising living costs	54	58	42	55	55	64	49	51	52	52	58
International conflicts	40	42	52	37	46	27	27	41	44	53	36
Climate and extreme weather events	37	27	42	46	40	31	42	41	41	29	36
Energy prices	33	29	23	36	34	37	39	32	33	38	30
Economic uncertainty	31	36	27	27	29	46	35	36	20	23	33
Dependence on other countries	22	20	27	21	24	16	21	21	28	19	22
Loss of jobs to new technologies	17	21	13	15	12	20	21	17	10	17	20
Don't know	2	2	4	3	3	1	2	2	2	2	2
None of the above	1	1	2	1	1	0	1	1	2	1	1

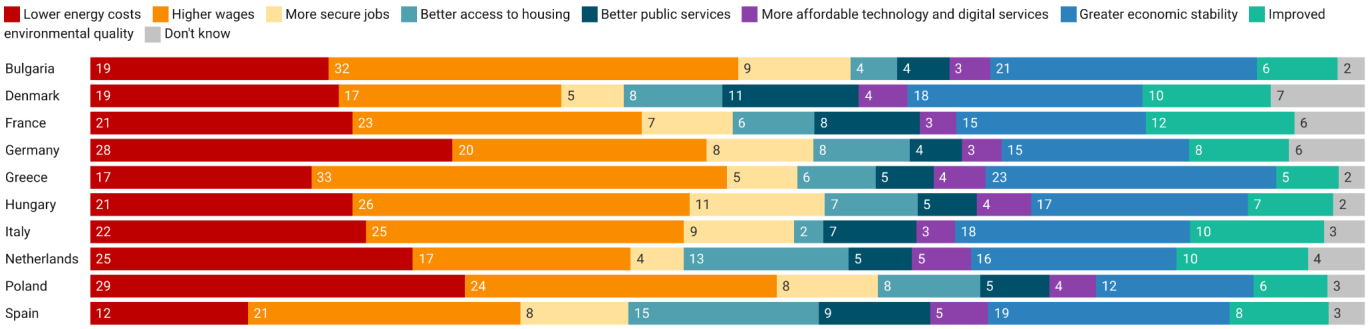
Issues most concerning over the next ten years - % selected - Business

	Overall	Bulgaria	Denmark	France	Germany	Greece	Hungary	Italy	Netherlands	Poland	Spain
Rising living costs	47	44	41	44	49	62	38	43	46	47	51
Energy prices	43	34	45	44	47	37	51	44	45	47	34
International conflicts	40	48	35	40	41	35	31	38	36	50	37
Economic uncertainty	36	41	36	33	44	40	38	37	32	30	34
Climate and extreme weather events	35	33	37	44	31	33	35	34	36	28	37
Dependence on other countries	28	25	31	27	30	17	22	32	28	25	29
Loss of jobs to new technologies	19	21	21	18	19	18	23	16	19	17	21
None of the above	1	1	0	1	1	2	1	2	1	0	1
Don't know	0	0	0	0	1	0	1	0	1	1	1

It is interesting to note that both the French public and business respondents were the most likely to identify climate and extreme weather events as a top issue of concern across the countries surveyed.

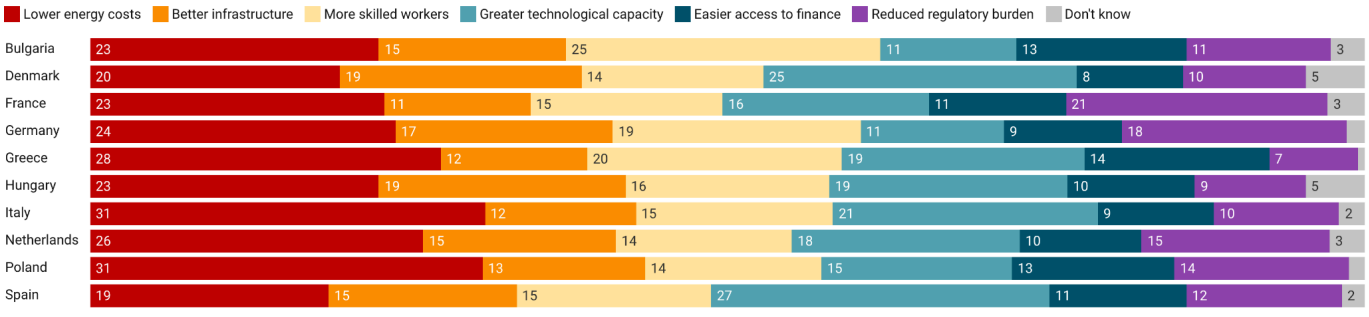
The focus on living costs, energy prices and uncertainty also shapes what Europeans believe would make the greatest impact on their household or business. Europeans view higher wage growth, lower energy costs, and enhanced economic stability as offering the greatest benefits to their households. Lower energy costs were the most selected in Germany, Poland and the Netherlands, whereas Greek and Bulgarian households were most likely to choose higher wages. Across the countries surveyed, greater economic stability was the third most chosen factor seen to have the greatest positive impact on households.

Which of the following would have the greatest positive impact on your household over the next decade? (%) - General Public



The same themes were present among business leaders. Business leaders report that lower energy costs, more skilled workers, greater technological capacity, and better infrastructure would make their businesses more competitive. Lower energy costs were the most chosen by Italian and Polish business leaders. Spanish businesses had emphasized technological capacity most often.

Which of the following would most improve your company's competitiveness? (%) - Business



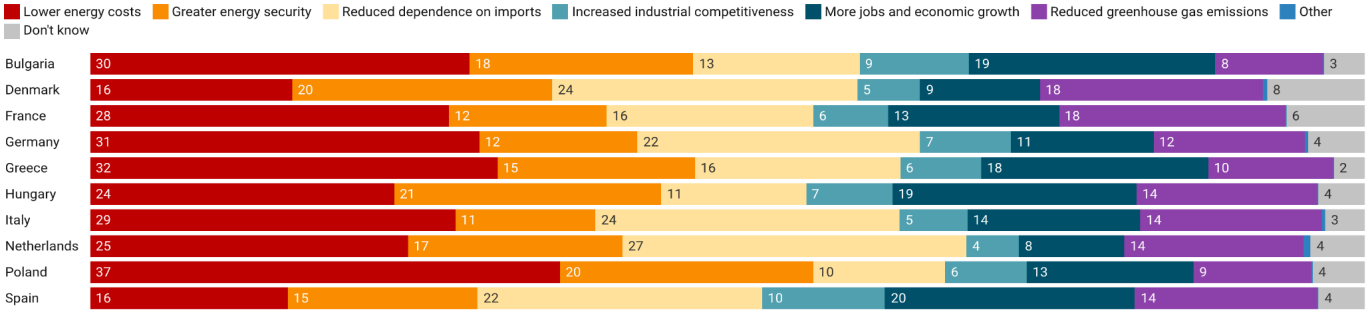
Finding 2: Public and business leaders agree on prioritizing lower energy costs, security, and reduced import dependency from energy investments.

With both households and businesses identifying lower energy costs as making a significant difference to their household or competitiveness, it follows that the general public and business leaders are aligned in wanting lower energy costs, greater security or reduced dependence on

imports from investments in the energy sector.

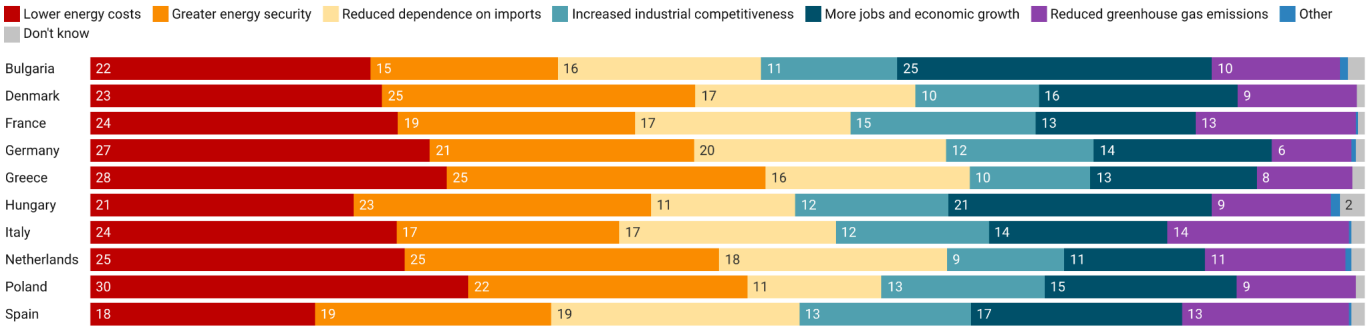
Among the general public, lower energy costs were the most desired outcome from investments in the energy system in all countries, except Denmark and Spain, where reduced dependence on imports was the most selected. There was a clear consensus across all countries surveyed for lower energy costs, security, and reduced import dependency.

Which of the following changes do you want to see from investments in the energy system most? (%) - General Public



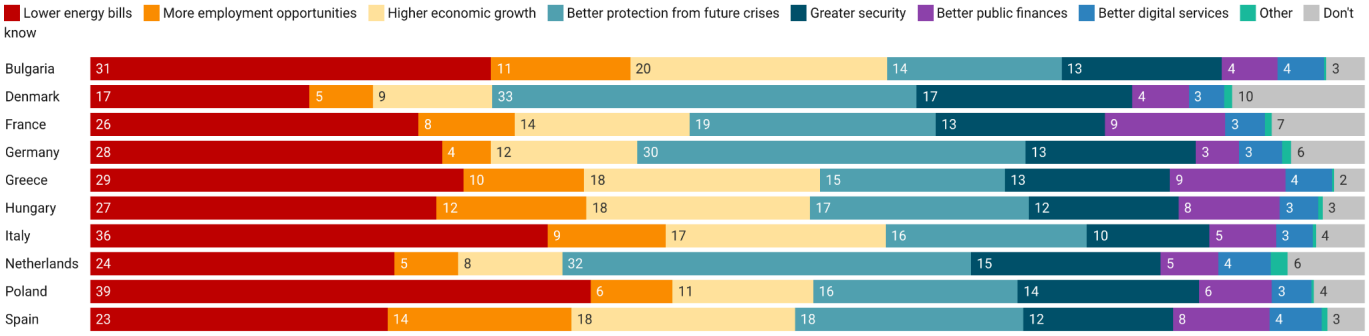
The same consensus is clear among business leaders, with Bulgarian business leaders standing out as the sole outlier, prioritizing job creation and economic growth.

Which of the following changes do you want to see from investments in the energy system most? (%) - Business



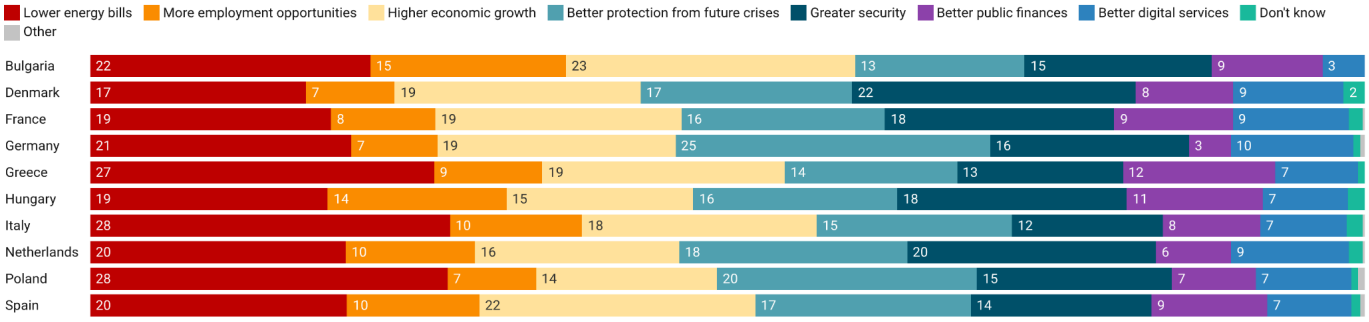
When tested against a slightly different set of priorities, European households and businesses once again wanted investments in the energy system to deliver reduced energy bills and stronger safeguards against future crises. Polish, Bulgarian, Greek, Hungarian and French respondents identified lower energy bills as what they most want from investments in Europe's energy system. German respondents were relatively evenly split between lower energy bills and better protection from future energy crises. Dutch and Danish respondents identified better protection from future energy crises as their top outcome.

Which of the following would you want most from investments in Europe's energy system? (%) - General Public



Lower energy costs was the most important outcome for investment in Europe's energy system for Polish, Italian, Greek, Dutch and Bulgarian business leaders. French business leaders were evenly split between lower costs and higher economic growth. Higher economic growth was the most chosen outcome for Spanish business leaders, while German business leaders sought better protection from future crises.

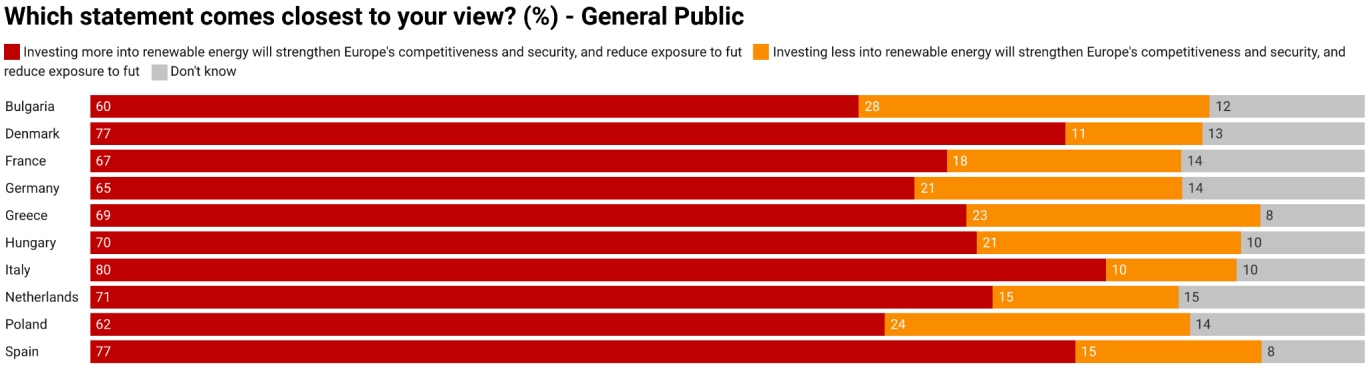
Which of the following would you want most from investments in Europe's energy system? (%) - Business



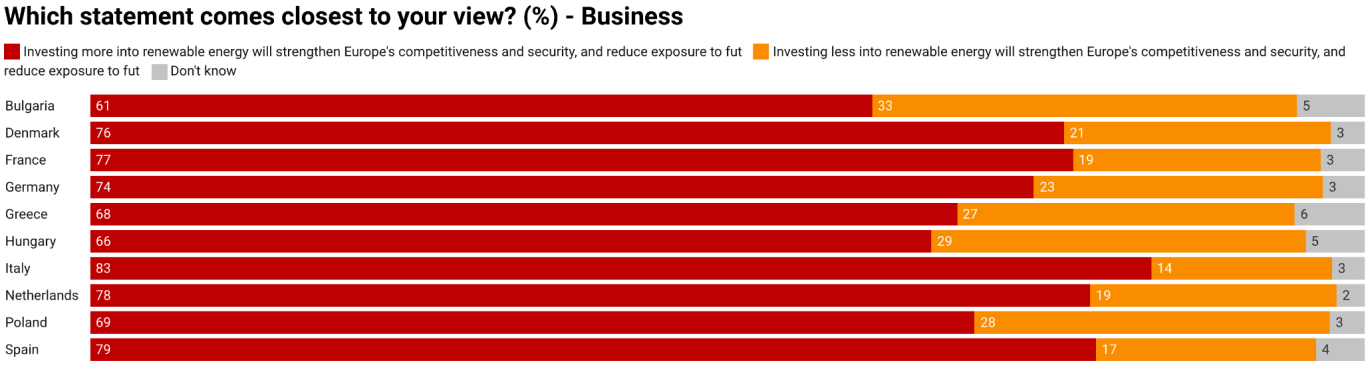
Finding 3: There is an overwhelming consensus that investing more into renewable energy will strengthen Europe's competitiveness, security, and reduce exposure to future crises

When considering how best to deliver on this desire to reduce energy costs and better protect European households and businesses from future crises, both business and public respondents believe that investing more in renewable energy will make Europe more secure and competitive in every country surveyed.

Sentiment is strongest across both sets of respondents in Italy, with 80% of Italians believing that investing more into renewable energy will strengthen Europe's competitiveness, security, and reduce exposure to future crises, followed by more than three-quarters of Danish and Spanish respondents and majorities in all other countries.



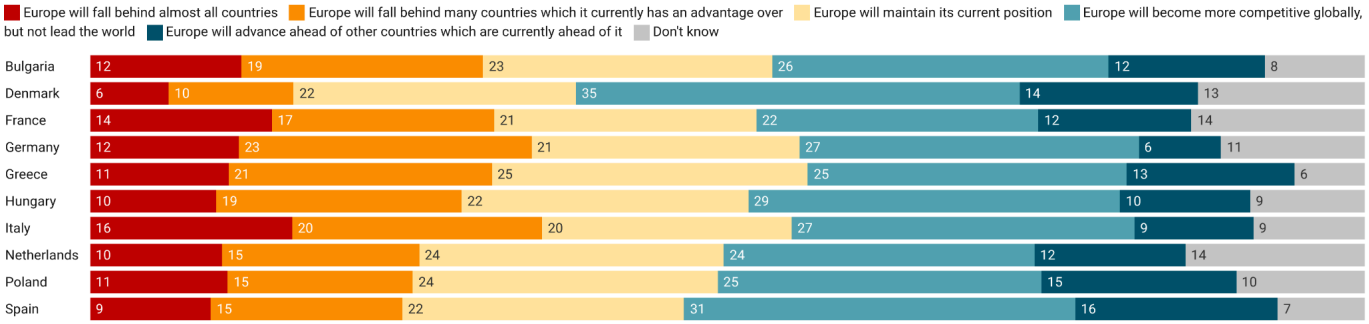
Businesses are more strongly of the view that investing more into renewable energy will strengthen Europe's competitiveness, security, and reduce exposure to future price crises. In total, 83% of Italian, 78% of Dutch, 77% of French, 76% of Danish and 74% of German business leaders believe that investing more into renewable energy will strengthen Europe's competitiveness and security.



Finding 4: Business leaders are more confident that Europe's global energy position will become more competitive than the general public

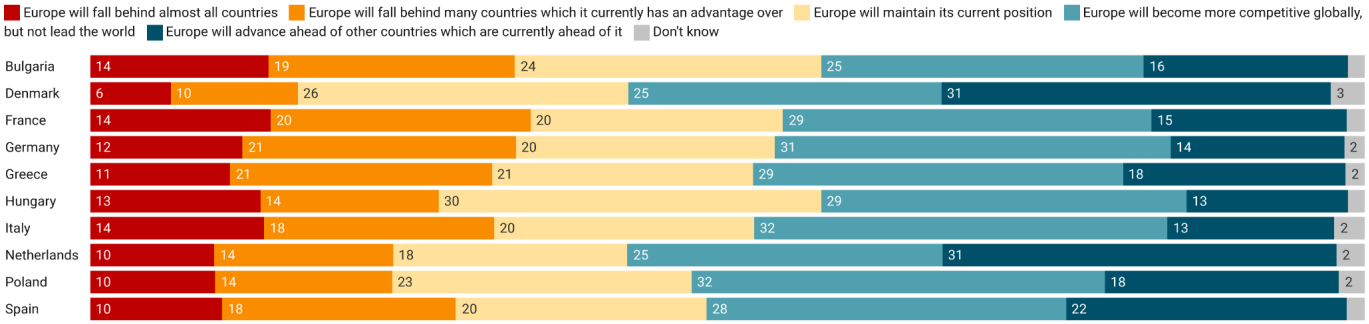
The public and business leaders both lean towards the belief that Europe's global energy position will become more competitive globally. 49% of Danish, 47% of Spanish, and 40% of Polish respondents expect Europe to become more competitive globally or advance ahead of other countries that are currently ahead of it.

Which of the following best describes your expectations about Europe's global position in energy in ten years? (%) - General Public



Across all countries, business leaders are more likely to expect Europe to become more competitive globally or advance ahead of other countries that are currently ahead of it than to believe that Europe will fall behind. In total, 56% of Danish and Dutch and a majority of Polish and Spanish business leaders expect Europe to become more competitive globally or advance ahead of other countries that are currently ahead of it.

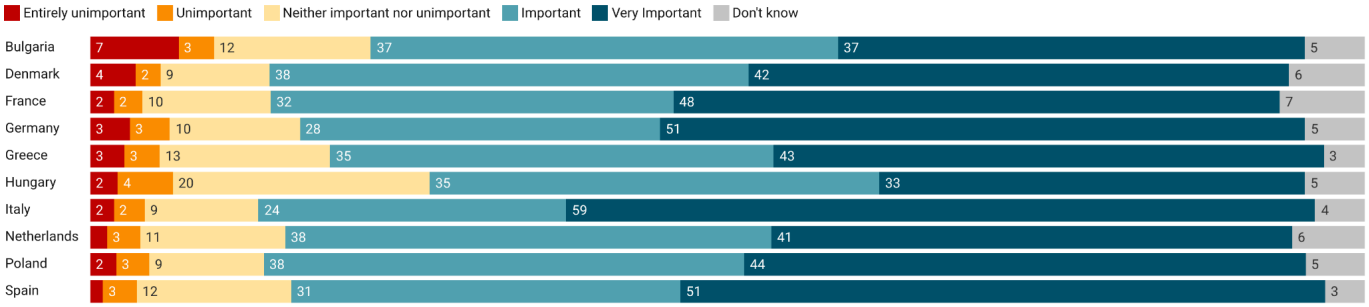
Which of the following best describes your expectations about Europe's global position in energy in ten years? (%) - Business



Finding 5: Business leaders' and the public agree that it is important for Europe to reduce its dependence on imported energy over the coming decade.

There is a strong consensus on the necessity for Europe to curb its reliance on energy imports over the upcoming decade. In the surveyed countries, over three-quarters of European citizens view reducing energy import dependency within the next ten years as important or very important. Support for this objective is particularly high in Italy (83%), Poland (82%), Spain (82%), Denmark (80%), and France (80%). The sentiment is most pronounced in Italy, where close to 60% of participants regard it as very important, with majorities in Spain and Germany echoing this high level of urgency.

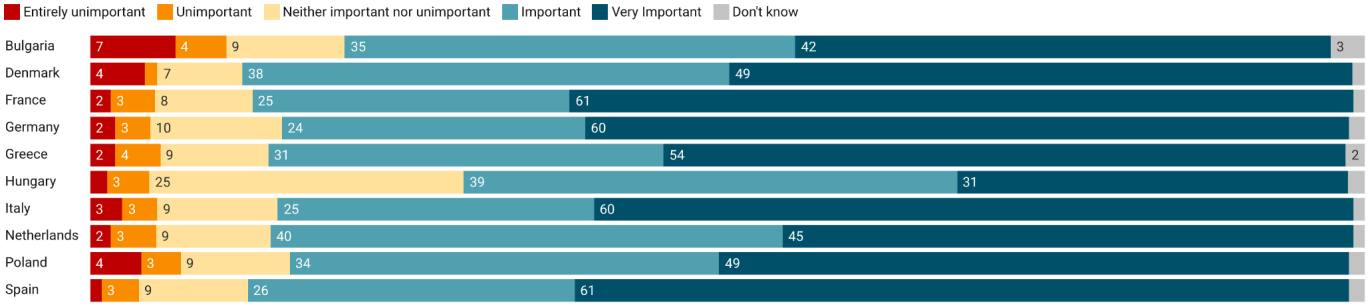
How important or unimportant is it that Europe reduces its dependence on imported energy over the next decade? (%) - General Public



This view was more strongly held by business leaders. Overall 83% of European business leaders believe it is important or very important for Europe to reduce its dependence on imported energy over the coming decade. Support for this objective is particularly high among business leaders in nearly all of the countries surveyed with more than 80% of business leaders in Spain (87%), Denmark (87%), France (86%), Italy (85%), Greece (85%), the Netherlands (85%), Germany (84%), and Poland (83%).

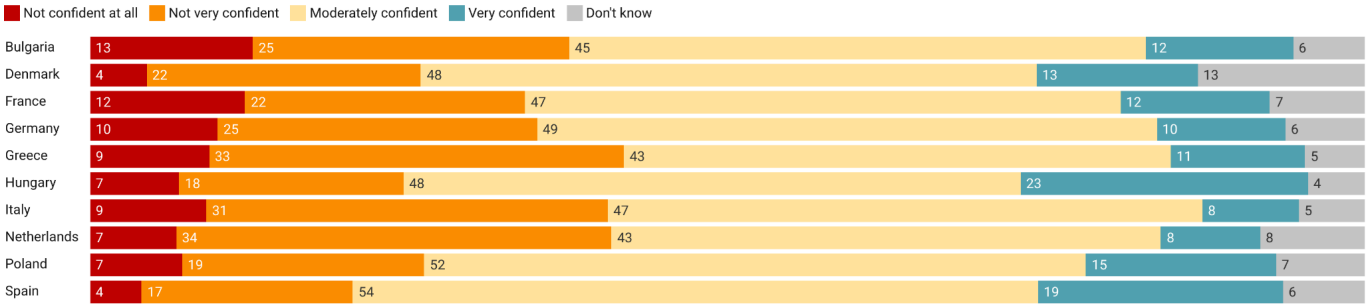
Business leaders had a greater sense of urgency than the general public with more than 60% of business leaders considering it very important in Italy, Spain, Germany and France.

How important or unimportant is it that Europe reduces its dependence on imported energy over the next decade? (%) - Business



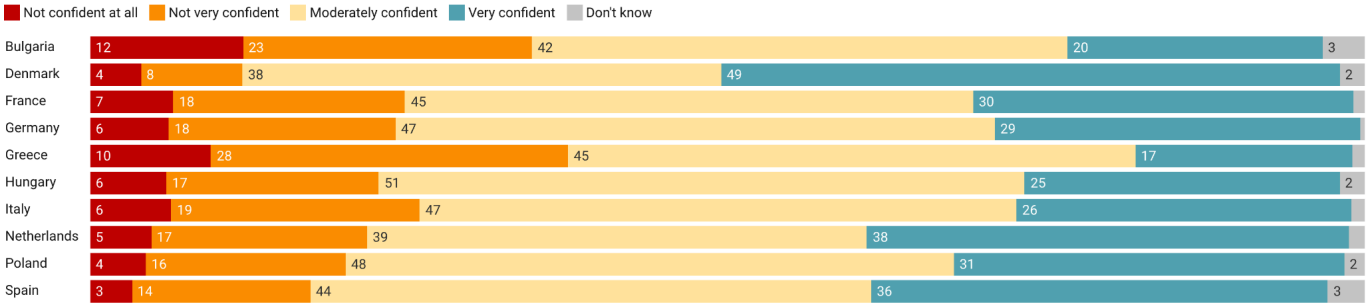
A plurality of Europeans are moderately confident that Europe can improve its energy security over the coming decade. Spanish people were the most confident, followed by Hungarian, Polish and Danish respondents.

How confident are you that Europe can significantly strengthen its energy security within the next decade? (%) - General Public



Business leaders are much more confident in Europe's capacity to do so, particularly in Denmark.

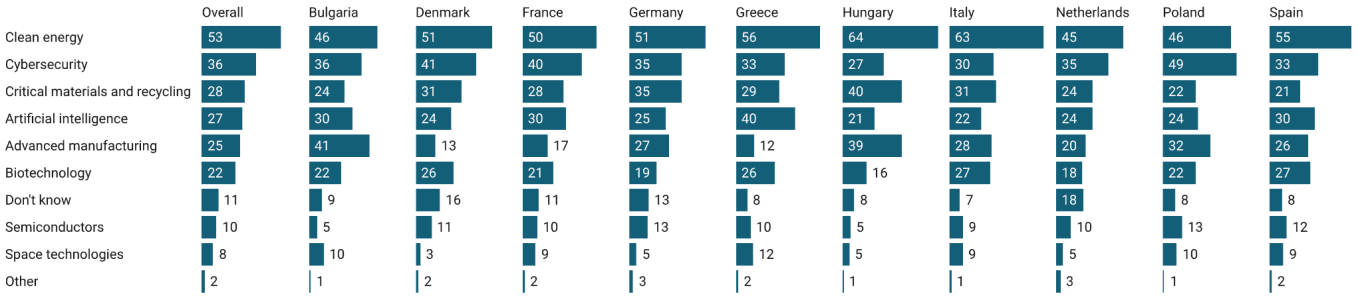
How confident are you that Europe can significantly strengthen its energy security within the next decade? (%) - Business



Finding 6: Public opinion and business leaders view clean energy as essential to enhancing European competitiveness and a key area for global leadership.

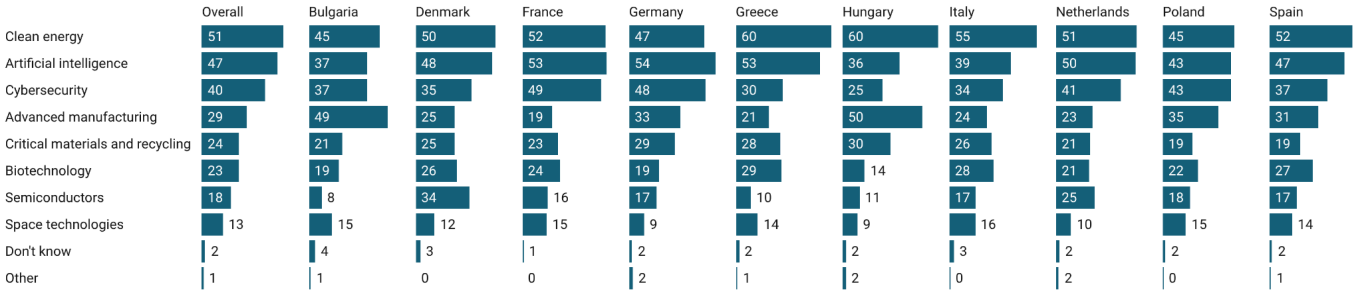
In nearly every country surveyed, clean energy was the sector most identified by the general public as the area where Europe should lead globally, with majorities in every country surveyed except Bulgaria, the Netherlands and Poland. 64% of Hungarians, 63% of Italians, and a majority of Danish, French, German, Greek, and Spanish respondents considered clean energy as the sector where Europe should seek to lead globally.

Sectors Europe should aim to lead globally - % selected - General Public



This is matched by business respondents in every country surveyed except Germany and France, which prioritised AI. While Polish businesses identified clean energy, Polish public respondents were more likely to choose cybersecurity.

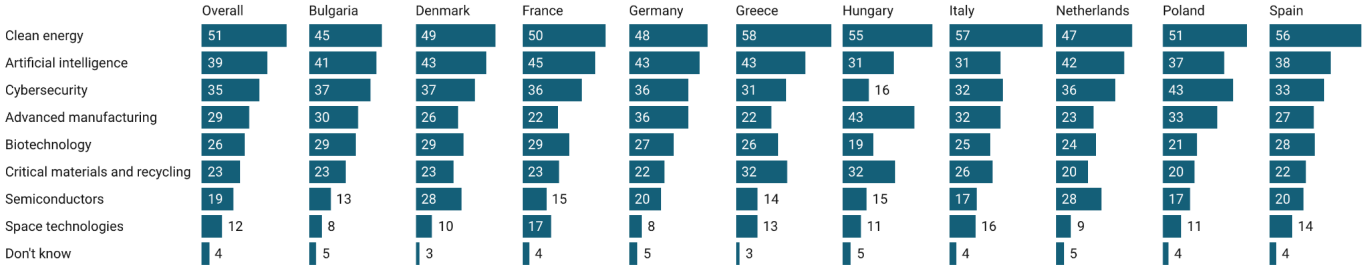
Sectors Europe should aim to lead globally - % selected - Business



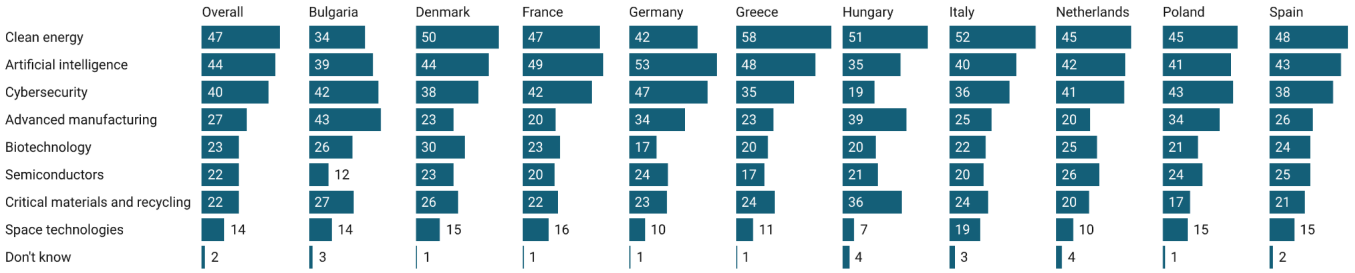
The emphasis on artificial intelligence was the main difference between the two sample groups. It was the second most identified sector Europe should aim to lead in by business respondents, but only the fourth for public respondents.

Developing this further, clean energy, artificial intelligence, and cybersecurity are the top sectors business leaders believe have the greatest opportunities for Europe to be more competitive in, and consequently should be prioritised for competitiveness.

Sectors with greatest opportunity to be more competitive - % selected - Business



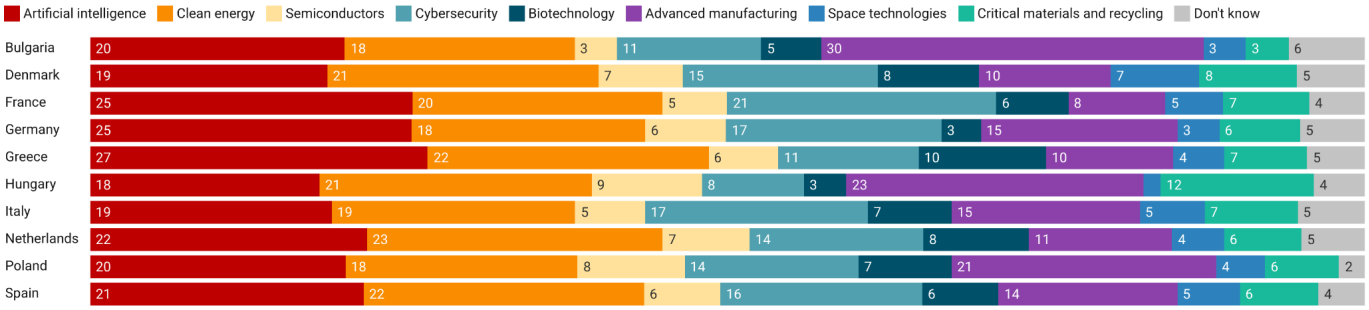
Sectors Europe SHOULD prioritise for competitiveness - % selected - Business



When asked to consider the benefit of these sectors on the business leaders' own businesses, the largest benefits would generally be seen in AI, cybersecurity and clean energy. Clean energy was seen as having the greatest benefit for the business leaders' companies in Italy (equal with

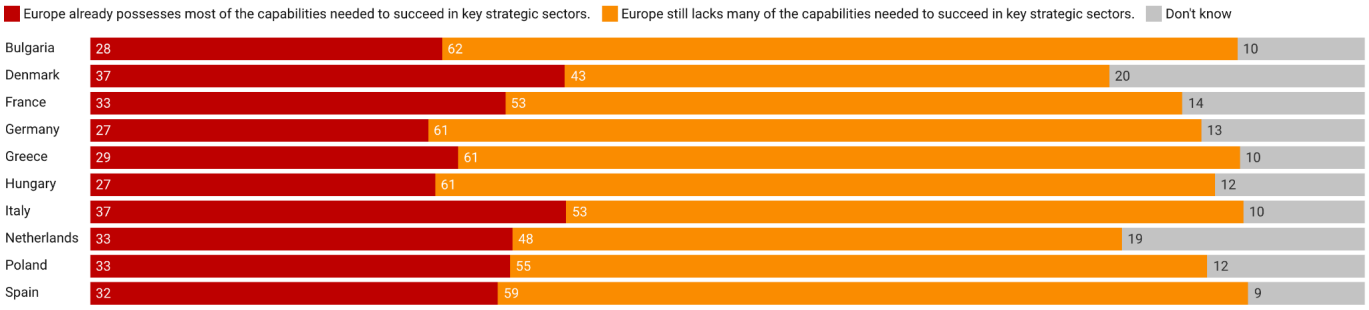
AI), Spain, the Netherlands and Denmark. Notable shares in Bulgaria, Hungary, and Poland name advanced manufacturing.

If Europe strengthened its position in the following sectors, which would have the greatest benefit for your company? (%) - Business

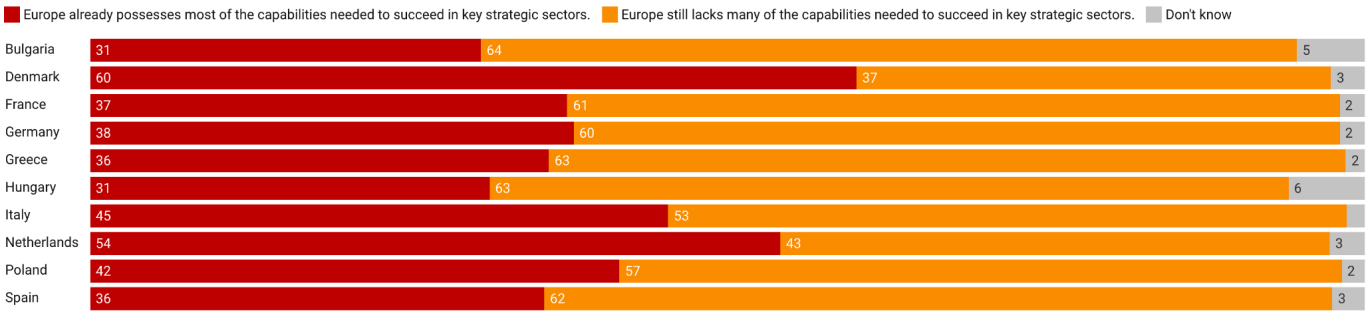


For these sectors, both sets of respondents believe Europe lacks many of the capabilities to succeed. Denmark is a key exception to this view, where business is more optimistic than not.

Which statement comes closest to your view? (%) - General Public



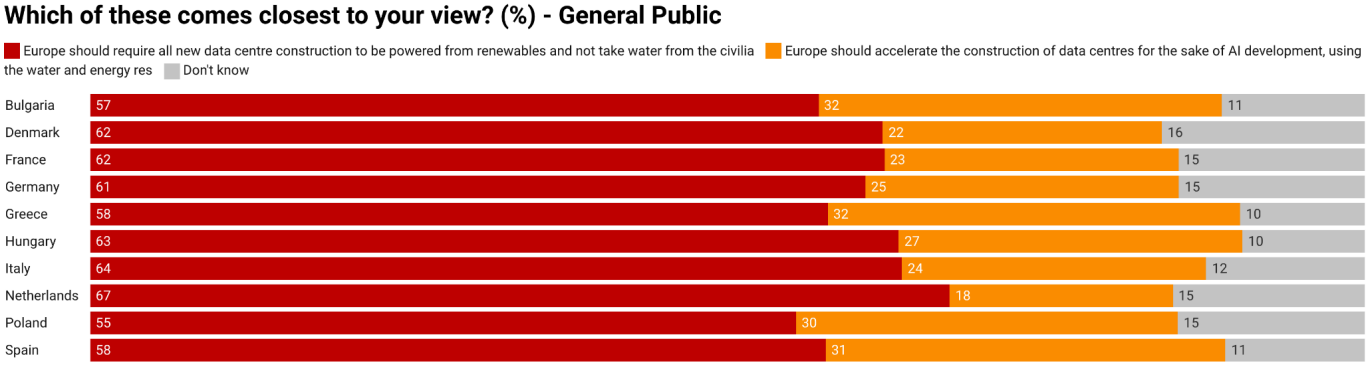
Which statement comes closest to your view? (%) - Business

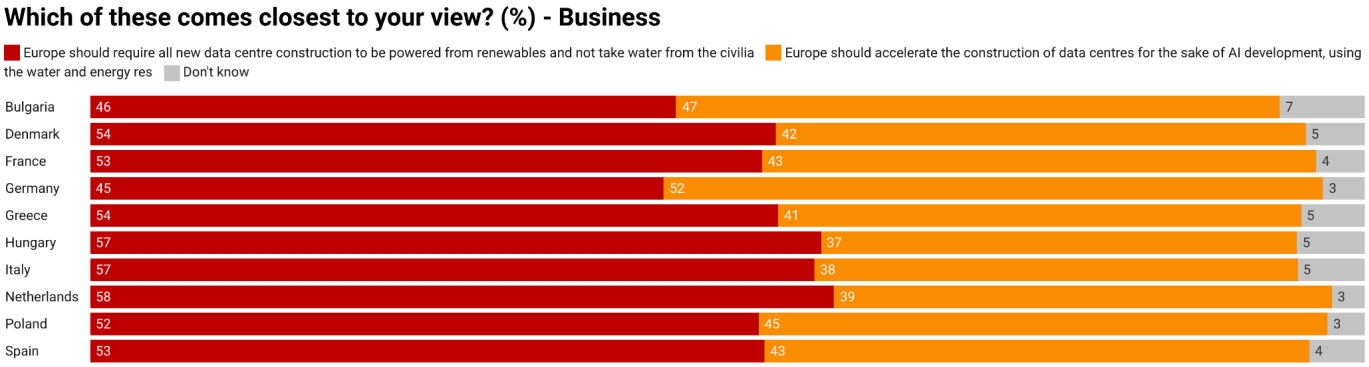


Finding 7: A majority of both the public and business respondents believe Europe should require all new data centres to be powered by renewable energy and not take water from existing water capacity?

A majority of both the public and business respondents believe Europe should require all new data centres to be powered by renewable energy, although business leaders in Germany and

Bulgaria are more likely to prioritise AI development over these concerns.

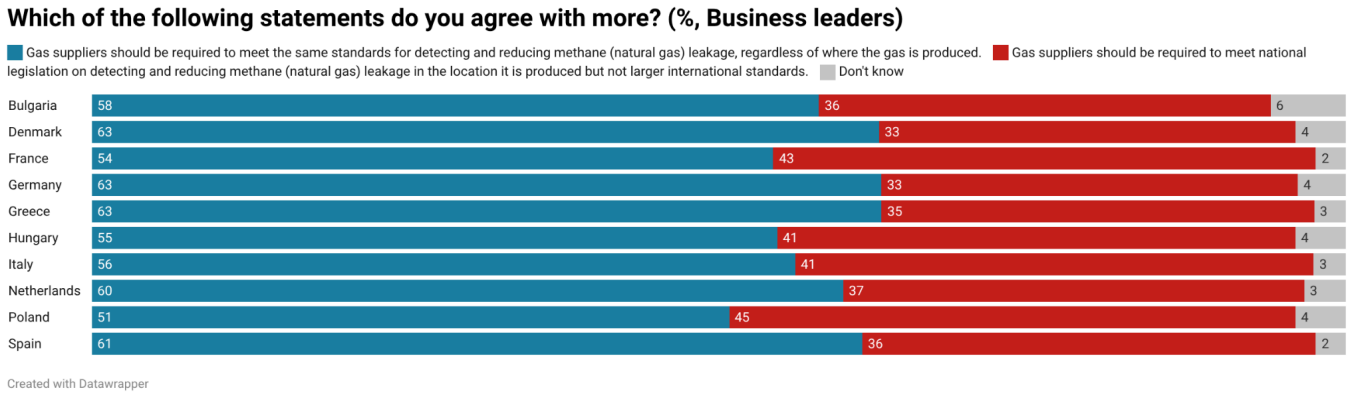


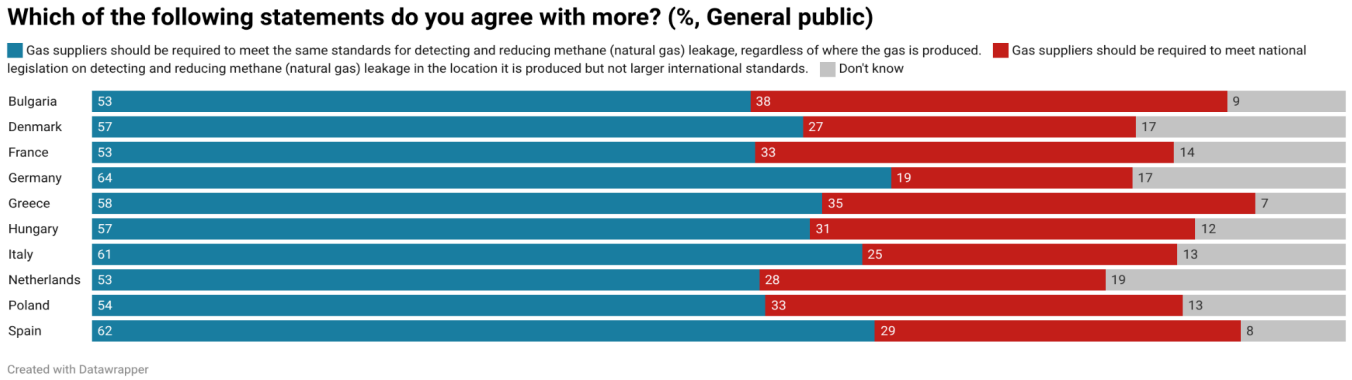


Key finding 8: Gas suppliers should be required to meet the same standards for detecting and reducing methane (natural gas leakage) no matter where the gas was produced.

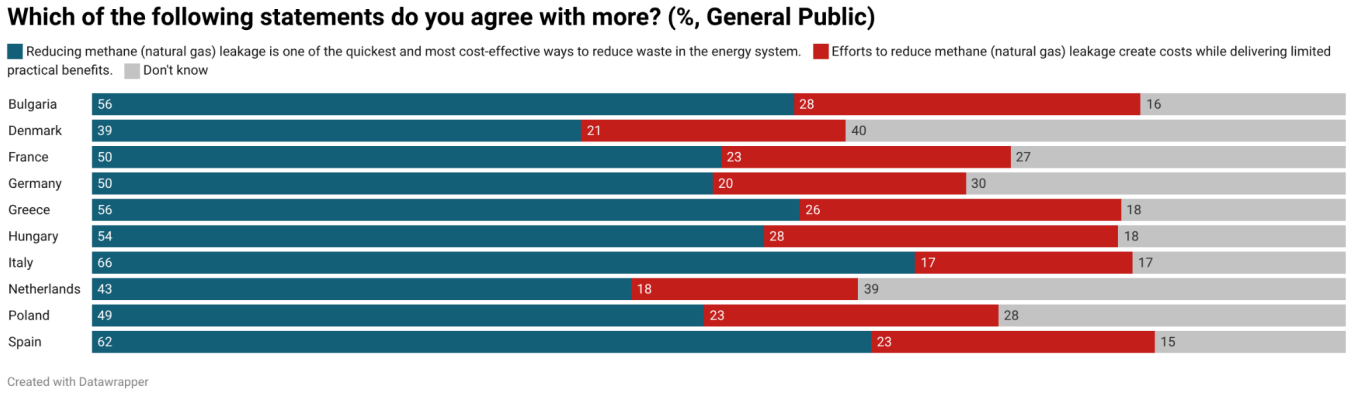
A majority of respondents across the countries and both samples believe that gas suppliers should be required to meet the same standards for detecting and reducing methane (natural gas leakage) no matter where the gas was produced.

Business leaders report greater or similar levels of support for this position to the general public in most countries, with attitudes within the margin of error in France, Germany, Hungary, Poland, and Spain. Business leaders were more supportive of gas suppliers meeting standards in Bulgaria, Denmark, Greece, and the Netherlands. The only clear exception to this broad pattern is Italy, where business leaders are five points less likely to support suppliers meeting the same standards.

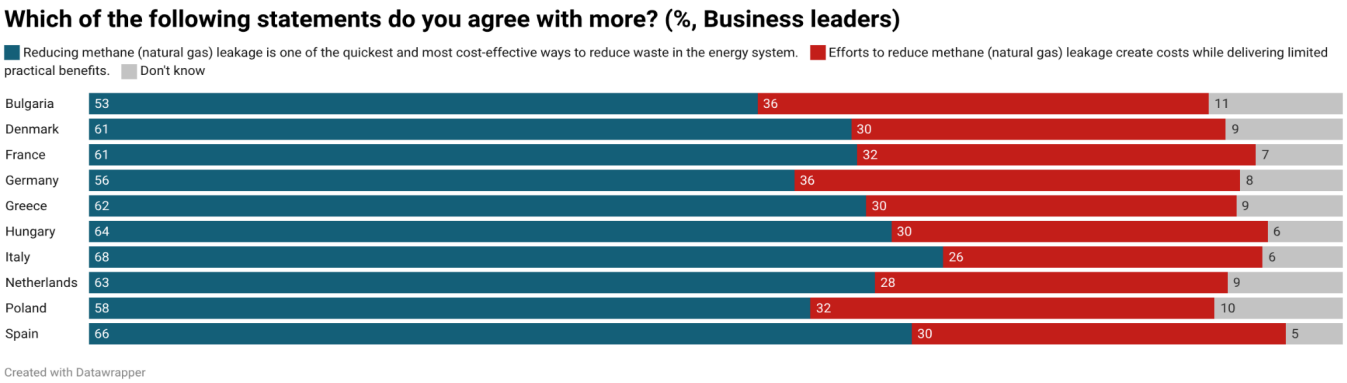




Indeed, in no country or sample is the belief that efforts to reduce methane leakage cost more than they are worth dominant.



Business leaders across most countries are substantially more likely to believe that reducing methane leakage is one of the quickest and most cost-effective ways to reduce energy waste.



There are relatively high levels of uncertainty on these issues, particularly among the general public, which tends to report not knowing what to think about the issue at 2-6 times the rate of business leaders. The high level of uncertainty means that rather than majorities, pluralities agree that reducing methane leakage is one of the most cost effective ways to reduce waste in the energy sector. For instance, 40% of the Danish public, 39% of the Dutch public, and 30% of the German public is uncertain about whether reducing leakage is cost effective or creates more costs than it is worth. Larger support for the current provisions of the EU Methane Regulation would probably be expressed if the subject had higher salience in public debate.