Perceptions of a just transition in the built environment

Research Report

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Authors

Demos Helsinki is a think tank. We conduct research, offer consulting services, and host a global alliance of social imagination. We intentionally strive to hold and balance exquisite tensions that pervade today's societal structures and actors. Our work conceptually and practically reflects our mission: that transformative change is needed. We believe this change includes a spectrum of partners, and the many unlikely alliances it manifests, across societal sectors and geographies. We work worldwide, each year collaborating on well over 100 projects in 20 to 30 countries.

89up was founded to create a powerful integrated communications agency for the world's most important causes. The agency is the European market leader in communications for non-profits and foundations with a specialism in influencing both EU decision-makers and EU citizens. We have an integrated team working across insights, analytics, PR, social media campaigns, paid creative campaigns and advocacy. 89up has a global team with colleagues from 7 different EU member states and a network of affiliates on the ground in 10 EU member states.

Laudes Foundation is an independent foundation joining the growing movement to accelerate the transition to a climate-positive and inclusive global economy. Responding to the dual crises of climate breakdown and inequality, Laudes supports brave action that inspires and challenges industry to harness its power for good. Founded by the Brenninkmeijer family business owners, it builds on six generations of entrepreneurship and philanthropy and works collaboratively alongside a wider network of philanthropic organisations, to both influence finance and capital markets and transform industry with a focus on the built environment and fashion. For more information visit Laudes Foundation.org.

Foreword:
A summary presentation

89up | DEMOS HELSINKI /

This research has built...

Perceptions of a just transition within the built environment

The largest polling conducted on this issue: 20,229 people across 10 European countries

The largest data-set of social and media perceptions in Europe

Three test narratives based on unprecedented insight and analysis

Many meetings, workshops, and interviews

A growing network of industry, stakeholder, and partner experts

Develop narratives that can help shift the policy dial as we enter 2024

Czechia, France, Germany, Italy, the Netherlands, Poland, Romania, Spain, Sweden, UK

This predicted the fallout of 15-minute cities

Pragmatic, Futurist, Insecurity

Covering Switzerland, Germany, Finland, and the UK

Get in touch!

Buildings account for nearly 40% of all carbon emissions versus 16% transport

Yet we found that building decarbonisation faces an uphill challenge in achieving mainstream recognition

78.6K

Mentions in news articles around decarbonising and transitioning the built environment

215k

Mentions in news articles around decarbonising transport systems

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The inside view

The view from stakeholders and experts is that we need to:

Embrace systemic **behavioural change** over technocratic solutions

Resolve a **perceived tension** between social justice and Net Zero

Create an **incentivised mindset** that rewards industry

Focus on **20?0**, not just now

The outside view

The public view the issue through the lens of:

Attacks on freedom personal choice, lifestyle
+++

Scale of cost
+++

Different factors driving opposition nationally
(Germany = gas industry, tabloids
UK = home ownership
US = cars and homes) ++

Distrust in political elites / institutions
+

Big business taking advantage
+

Inertia / Distrust of change
+

Media review and social listening

	🇬🇧	🇫🇷	🇪🇸	🇩🇪
Media	**Heat pumps / gas boilers**	**Rénovation énergétique** Villes intelligentes	**Renovación y restauración** Ciudad del futuro	**Wärmepumpen / Gaskesse**
Engage	**15-minute cities**	**La pollution de l'air**	**Ciudades de los 15 minutos**	**Wärmepumpen / Gaskesse**
Social	**15-minute cities** NIMBY	**Rénovation de bâtiment** Villes intelligentes	**Ciudades de los 15 minutos**	**Wärmepumpen / Gaskesse**
Engage	**15-minute cities**	**Rénovation de bâtiment**	**Ciudades de los 15 minutos**	**Wärmepumpen / Gaskesse**

89up

Pragmatic

We need to make Europe's homes fit for the future.

Europe's buildings leak heat in the winter and are too warm in the summer. Buildings make up 40% of Europe's carbon emissions. We can't stop climate change unless we fix the roof while we still can. At the same time, there's a housing crisis that means young people are locked out of a secure place to live. It's hard to start a family. It's hard to even find somewhere to call home.

But, building our way out of the housing crisis will cause even more climate harm. In fact, we have to conserve the best, and fix up the rest.

There is a solution: We can restore empty homes and use all the new technologies we have - from heat pumps, to solar panels, to smart insulation - to make every home more comfortable as our earth keeps warming. If we fix up, we can fix other problems too. More nature in our towns and cities will lead to better air, better communities, and fewer cars, whereas more children and adults out walking means we'll live longer too.

We know what to do, we just need politicians to find the will to make it happen. Our gift to future generations can be homes fit for the next century.

Futurist

Another future is possible in Europe.

We can lead the world in building smart cities that combine the latest technologies: from artificial intelligence reimagining transportation, to smart thermostats that reduce household emissions, to solar panels and heat pumps that make every home net zero. We need to think big about how we share our most limited resource: buildings.

Collectively, we make decisions that mean no families have zero space and we build incentives for people with too much space to downsize. It's stark but buildings make up 40% of Europe's carbon emissions. We can't stop climate change unless we fix buildings while we can.

We need to insulate, remove gas completely from homes, and use new recycled building materials that are only just emerging. Our streets will be cleaner and greener, our air quality better, making it easier for children to walk and play outside. We will live longer and better lives.

Using technology, the engineering skills of European industry and better local decision making, we can create the cities of the future and rethink what is possible for communities and homes at the same time.

Together, we can build a future safe and secure for future generations. This is our generation's moon landing: smart homes for everyone. Let's fix the future.

Insecurity

Governments promised they would provide us with comfortable, secure housing, but that promise has been broken.

Too many people have too little space. Families find it hard to find suitable homes in their local area. People are being pushed out of cities as rents go up and up each year. Pensioners face homes that are too cold in winter and too hot in summer. Meanwhile, many buildings lie empty and unused.

We need a fairer deal for buildings. A deal that means more Europeans don't feel worried about ever increasing housing costs. A deal that means we fix up old buildings with solar panels, heat pumps and insulation. A deal that ensures that children can play outside with safer and greener streets and better options to get around than getting in the car.

Today, 40% of all our carbon emissions come from leaky buildings. The war in Ukraine has shown Europe's badly insulated housing stock isn't just bad for our climate: it has highlighted that unexpected events hurt the incomes of the poorest the most.

We don't have the time, or the energy, to waste. We need to take back control of Europe's buildings and make them work for everyone.

Sample size

A representative sample of **20,299** people across 10 European countries

NETHERLANDS
2,033

GERMANY
2,009

SWEDEN
2,031

UK
2,032

POLAND
2,004

FRANCE
2,013

SPAIN
2,049

ITALY
2,007

ROMANIA
2,042

CZECHIA
2,009

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We asked two types of questions in the polling, the results of which are measured in different ways

Q.1-8

World View

Measuring how the narrative has influenced a respondent in comparison to the control group

Q.9-10

Narrative Perceptions

Directly asking respondents of their perceptions of the narrative they received at the start of the survey

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When prompted, Europeans are more likely to agree with the **Pragmatic** narrative

On average, respondents are more likely to agree that 'it is what they believe should happen' and that it 'reflects values they believe in'.

It was more likely to be considered 'practical' and that 'politicians should get on and do this'.

73% of respondents across Europe who read this narrative agreed with it, compared to 63% and 65% agreement with the Futurist and Insecurity narratives

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... but are more influenced by the **Insecurity** narrative

*An Insecurity narrative was the most influential in **7 of the 10 countries surveyed**: France, Germany, Italy, the Netherlands, Poland, Romania, and Sweden*

*Tenants, those aged 18 - 40, and people **across the political spectrum** were highly impacted by this narrative*

How did the narratives <mark>influence</mark> respondents from different countries versus the control group?

The results show us that the **Insecurity narrative** was actually the most influential narrative across Europe overall, rather than the Pragmatic narrative which was perceived as the most effective.

	Czechia	France	Germany	Holland	Italy	Poland	Romania	Spain	Sweden	UK	Average
Pragmatic	71%	7%	20%	22%	11%	18%	40%	18%	22%	36%	**26%**
Future	62%	7%	20%	22%	18%	9%	42%	38%	27%	36%	**28%**
Insecurity	53%	22%	22%	33%	33%	24%	42%	18%	27%	31%	**31%**

However, the narrative that had the most single influence on any country was the **Pragmatic narrative** in **Czechia**.

The **Futurist narrative** was also clearly the most influential narrative in **Spain**, compared to the other narratives, but much less effective in France and Poland.

How did the narratives influence respondents from different demographics versus the control group?

The results show a **clear difference** between the narratives that are more likely to influence opposing demographic groups.

	18-40	40+	Owner	Tenant	Left	Centre	Right
Pragmatic	29%	40%	47%	31%	47%	38%	31%
Future	31%	38%	38%	44%	53%	42%	29%
Insecurity	53%	31%	24%	71%	51%	49%	33%

The **Pragmatic narrative** is more likely to influence older people age **40+ and homeowners**.
On the other hand the **Insecurity narrative** is more likely to influence younger people age **18-40** and **tenants**.

Overall among the political subgroups, the **left-leaning** participants were overall more likely to be influenced by the narratives.

What issues did each narrative particularly influence?

Each question in the poll aligned with a specific topic, theme, or issue. Below is an overview of the issues each narrative influenced participants to change their thinking on (in comparison to the Control Group).

Pragmatic	Futurist	Insecurity	

Pragmatic

Social Equity

- More likely to agree with improving building so there is equal housing space for families.
- More likely to agree with government action to turn empty buildings into family homes.
- More likely to agree that 'richer people should contribute more to fixing up their homes to stop climate change and the government should insulate the homes of poor people'.
- More likely to agree with national governments investing in Increasing the density of cities so it is easier to find everything you need within a short walk.

Futurist

Security

- Ranked terrorism, immigration, or the international situation in top three issues.
- Agreed with the statement 'the war in Ukraine has shown that we need to take urgent action on reducing our energy use'.

Jobs

- Ranked unemployment in top three issues.
- Ranked the education system in top three important issues.

Insecurity

Climate

- Ranked energy supply in top three issues.
- Agreed with moving to a smaller home to reduce greenhouse gas emissions.
- Agreed with governments investing in more trees and parks in cities.
- Agreed with proactive urban planning for cities and towns to ensure they are climate friendly.

Health

- Agreed that local governments should work to make towns or cities more healthy through better urban planning.

Economy

- Ranked government debt in top three issues.
- Ranked rising prices/inflation/cost of living in top three issues.
- Ranked taxation in top three issues.
- Ranked pensions in top three issues.

Housing

- Supported governments investing in building more housing.

What are the audience personas that we found?

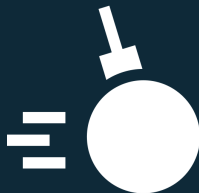## CIVIC HOMEOWNERS

Who are they?
Homeowners of all ages
Cross-political

Where are they?
Most prominent in northern and eastern Europe

What do they care about?
More equal housing space
More housing for families
Better conditions for the poorest in society
Greater burden for the richest in society

THE SOMETHING MUST BE DONES

Who are they?
Aged 18-40 and tenanted
Self-described as politically central

Where are they?
Present across all corners of Europe

What do they care about?
Government debt and taxation
Rising prices and inflation
Housing as a shortage and human right
The environment, and Impacts on health

OLDER PROGRESSIVES

Who are they?
Aged 40+
Left-leaning

Where are they?
Across Europe but strikingly present in Spain

What do they care about?
Unemployment, jobs,
and education
Security and foreign policy including
immigration and the war in Ukraine

Objective & Approach

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Buildings account for nearly

40%

of all carbon emissions

16% transport

18% agriculture

However, there is a **housing crisis** in Europe as well as a climate one

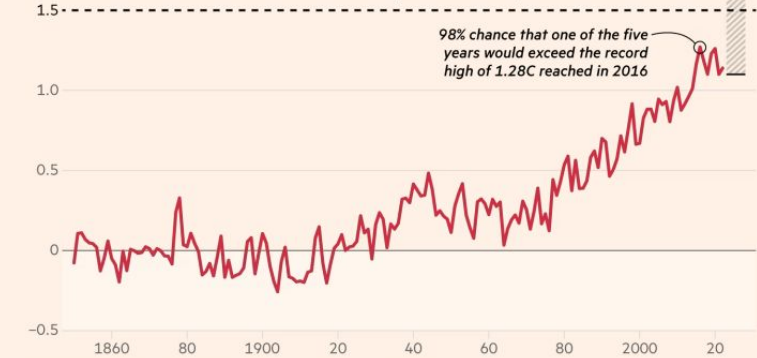Europe's housing market has turned

EU house price index (2010 = 100)

Source: Eurostat
© FT

Global warming likely to temporarily exceed 1.5C in one of next five years

Global annual mean temperature anomalies compared with 1850–1900 baseline, C

66% chance that temperatures could temporarily exceed 1.5C in at least one year between 2023-27. Temperatures could reach as high as 1.8C above pre-industrial levels

98% chance that one of the five years would exceed the record high of 1.28C reached in 2016

Anomaly is based on WMO analysis of the HadCRUT5 dataset   Source: WMO
© FT

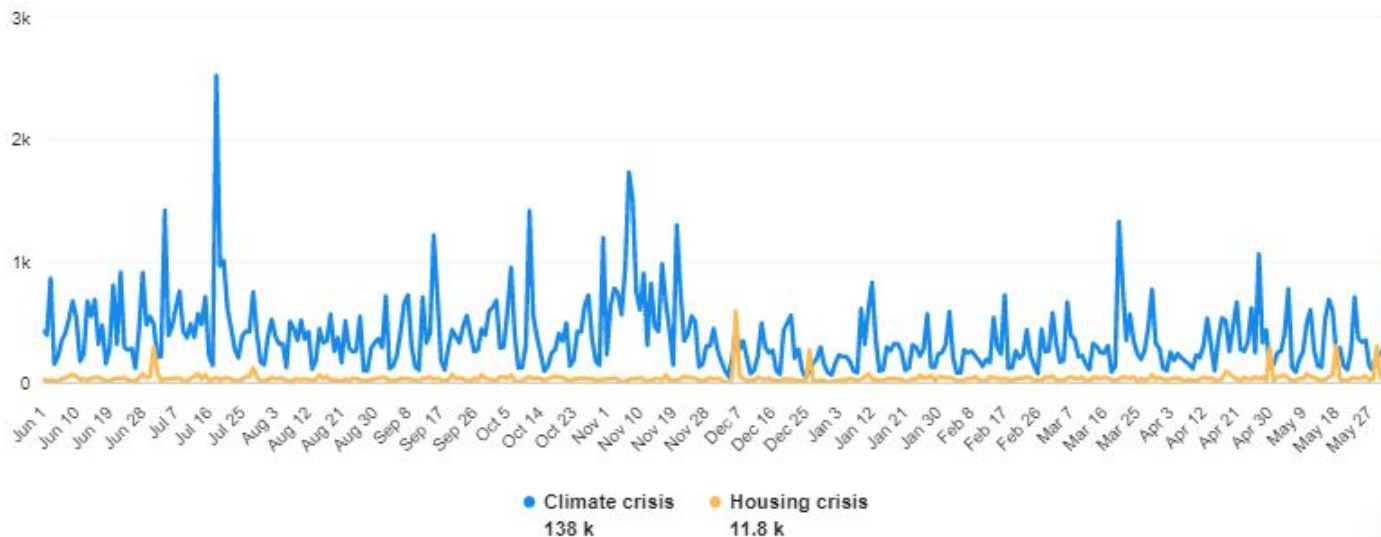# Global worries about both have grown in the past 5 years

Number of Google searches over the last five years

Housing crisis
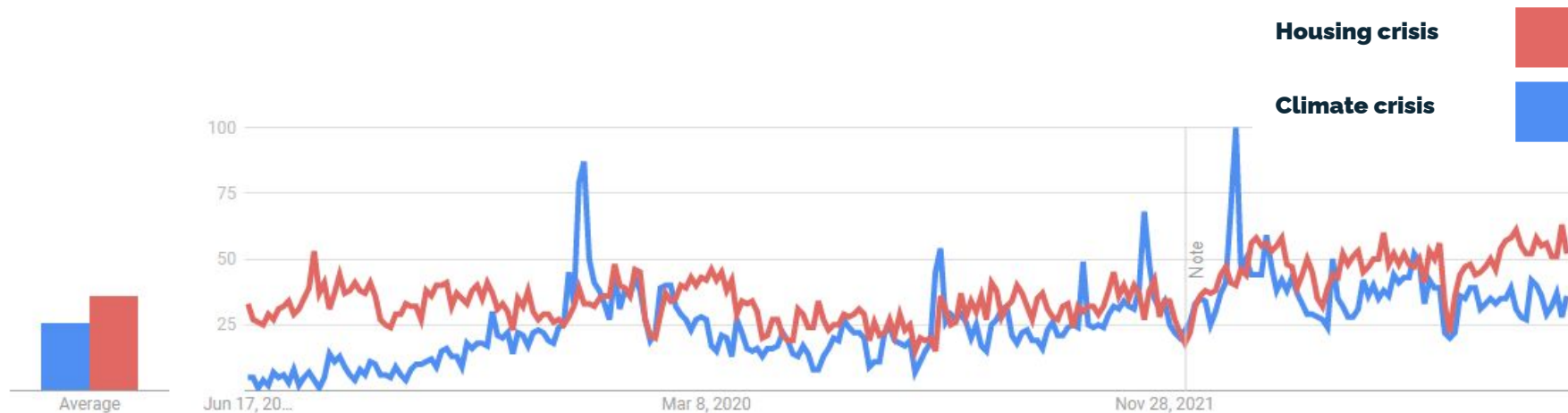
Climate crisis

While the media talk about the climate crisis and the housing crisis separately

Climate crisis
138 k

Housing crisis
11.8 k

Objective

Laudes Foundation sought an independent research team to undertake a review of the perceptions of narratives on a just transition to net zero in the built environment across Europe.

Laudes Foundation looked to develop a new high-level narrative, set of key messages, proof points (research, data, solutions) and calls to action which can be used primarily by European partners, industry leaders and policymakers in relation to the built environment transition.

The successful consortium appointed to undertake this included Demos Helsinki, a leading European think tank, and 89up, Europe's leading communications agency for civil society and foundations.

From May to October 2023, the consortium undertook unprecedented deep research to establish the inside and outside views relating to the just transition within the built environment. This analysis informed three test narratives placed into the field across 10 European countries and 20,000 people. The results are presented in this Research Report.

Our Approach

Phase 1: The Inside View *May - July*
We sought to properly and comprehensively engage key stakeholders in the industry in order to understand narrative tensions and opportunities, as well as where power and the capacity for change lay within these stakeholder groups. This involved deep research as well as interviews, roundtables, and workshops.

Phase 2: The Outside View *June - July*
From this foundational understanding, we created a built environment taxonomy that we used to underpin our social media and media audit across European languages, using the huge datasets that social media listening and data-analytical tools enabled.

In these initial phases, we sought to build out themes which would inform our test narratives:
- **Red**: understanding the messaging and frames that have failed to resonate and/or are negative.
- **Green**: understanding the known unknowns: the messaging and frames that could resonate with audiences, and those that already show promise regionally or sectorally.

Phase 3: The Narrative Factory *July - August*
Following our comprehensive understanding of the Inside and the Outside view, we created a series of test narratives that would be put into the field: Pragmatic, Futurist, Insecurity. Alongside, we developed the polling questionnaire and methodology that would lead to the insights presented in this report.
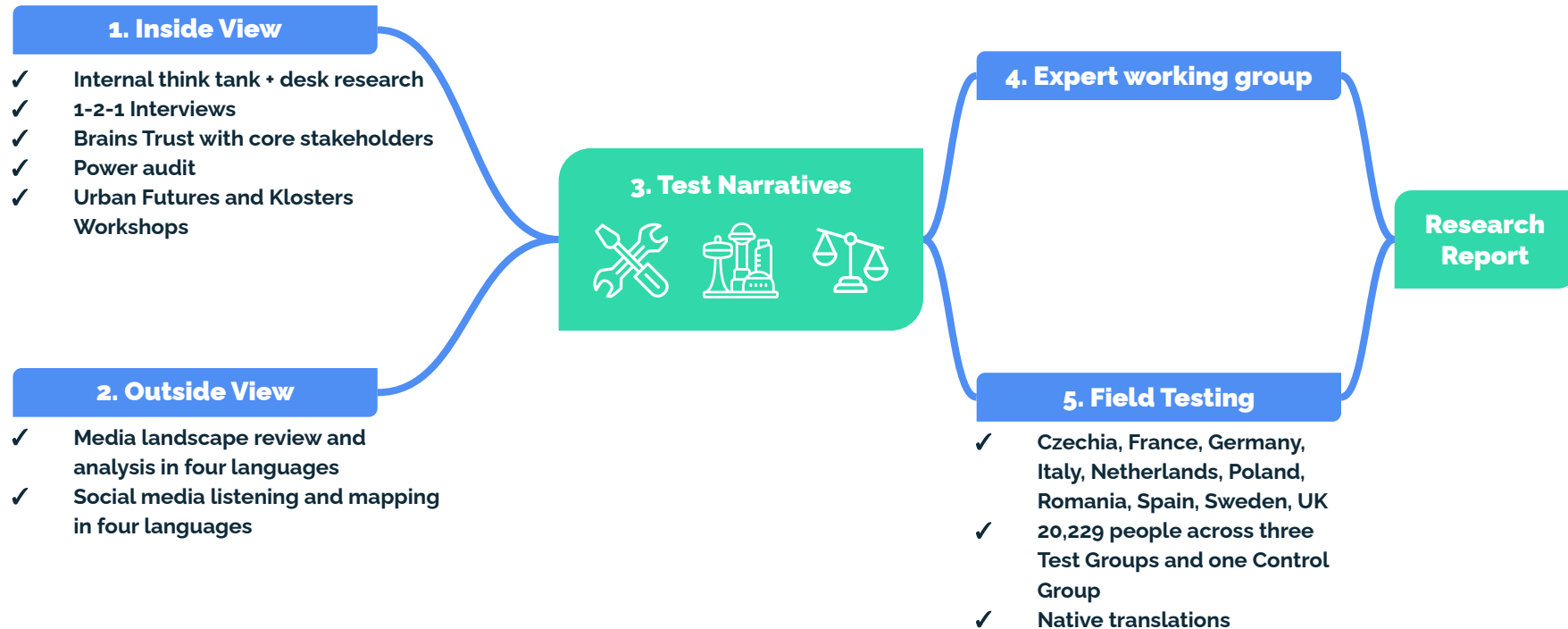
Phase 4: Field Testing *August*
Over 20,000 individuals were polled across 10 European countries, in arguably the largest poll of its type on this issue. We tested the narratives but also asked attitudinal questions about how people perceived changes to the built environment to reach net zero, to test our assumptions.

Phase 5: Expert Working Group and Partner Feedback *September*
We'd tested the outside view, but wanted to test the inside view as well. Assembling stakeholders from Phase 1 and elsewhere, we sought feedback on the test narratives and their ability to advocate for policy and support change.

Project Phases

1. Inside View

- ✓ Internal think tank + desk research
- ✓ 1-2-1 Interviews
- ✓ Brains Trust with core stakeholders
- ✓ Power audit
- ✓ Urban Futures and Klosters Workshops

2. Outside View

- ✓ Media landscape review and analysis in four languages
- ✓ Social media listening and mapping in four languages

3. Test Narratives

4. Expert working group

5. Field Testing

- ✓ Czechia, France, Germany, Italy, Netherlands, Poland, Romania, Spain, Sweden, UK
- ✓ 20,229 people across three Test Groups and one Control Group
- ✓ Native translations

Research Report

How to use this research

Digest

Our aim has been to distil the key insights into this report to create a quick and easy document for partners to pick-up and apply in their communication activities in 2024.

#1

Request

We know there's a lot of information here, and plenty more that could have been disclosed! Feel free to email the team to request a briefing or additional insights:

laudes@89up.org

#2

Consider

There are limitations to any piece of research. We are only able to present conclusions based on the quantitative and qualitative data collected. Any interpretations therein are down to the reader.

#3

Deploy

This resource contains the largest data-set of European perceptions of the just transition within the built environment. Use it. It predicted the fallout of 15-minute cities. It can inform your advocacy and media strategies ahead of a busy 2024.

#4

Research Phases

The Inside View

Phase 1: The Inside View

1. Inside View

- Internal think tank + desk research
- 1-2-1 Interviews
- Brains Trust with core stakeholders
- Power audit
- Urban Futures and Klosters Workshops

2. Outside View

- Media landscape review and analysis in four languages
- Social media listening and mapping in four languages

3. Test Narratives

4. Expert working group

5. Field Testing

- Czechia, France, Germany, Italy, Netherlands, Poland, Romania, Spain, Sweden, UK
- Three narratives and one control group of 500 demographically split
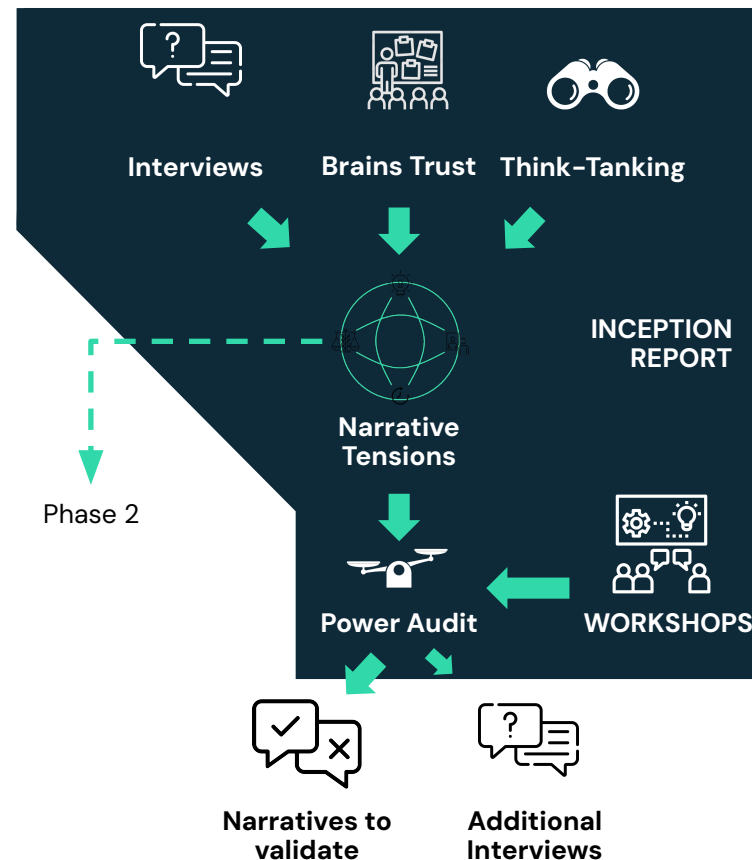- Native translations

Research Report

Synthesis

Demos Helsinki has studied the narrative relationship between built environment and just climate transition through interviews, which we have termed a 'brains trust', desk research and an internal think tank session (see next slide for detail).

The main finding is that there is no clear narrative combining built environment and climate (that resonates outside the industry itself) as there is with other big emitter sectors (e.g., energy, transportation and food) where symbols, narratives and political positions are widely shared among the population at large.

However, it is safe to assume that a powerful narrative will emerge and it will be politically "heavier" than with other big emitter sectors. The built environment is the core of people's financial lives, is symbolically significant for people (homes are seen as foundationally private and safe, and thus not easy to interfere with) and is central to many social justice issues (from financialisation to work).

The missing narrative link between these two world views (the inside view of the industry and the outsider view from communities and themes on the fringes of the industry), is agency. But who can take agency on social justice and decarbonisation simultaneously? And how is agency shared between government, industry and people?

There is a real opportunity to build new kinds of alliances, cohesion, meanings and movements around climate politics at large with the politicisation of the built environment. However, in order to do that, the issues of the redistribution of wealth and social justice need to have a leading role in the narrative and someone has to take agency in combining these issues.

Interviews Brains Trust Think-Tanking

Narrative Tensions

INCEPTION REPORT

Phase 2

Power Audit WORKSHOPS

Narratives to validate Additional Interviews

What do stakeholders think are the routes to change?

1. An internal **think-tanking session** to explore other societal transitions and contextualise the conversations and narratives collected.
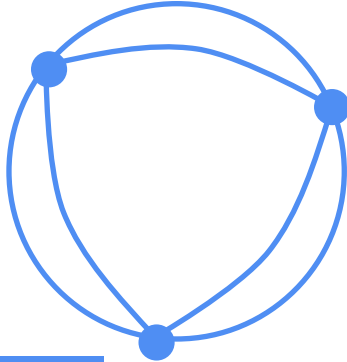
2. **14 interviews** spanning many of the sector's perspectives and stakeholders

3. A **Brains Trust** session to complement the perspectives gathered through interviews and start building a more tactical and strategic pairing of narratives and stakeholders.

- Technology
- Cities and urban development
- New economic thinking
- Just transition
- Climate governance
- Public perceptions of climate policies
- Industrial policy

- Arena for Journalism
- Arup
- ECOS
- E3G
- Ecodes' Energy and People Area
- THE SHIFT
- European Climate Foundation
- Climate KIC
- WeCanMake
- The Solidarity Economy Center

- 103 Ventures
- Build Reuse
- City of San Antonio's Office of Historic Preservation
- Built By Nature
- C40 Cities
- Carbon Neutral Cities Alliance CNCA
- City of Paris
- Community Land Trust Brussels
- FIEC
- Elioth
- European Environmental Bureau
- Habitat for Humanity
- Moratorium of New Construction
- NREP
- Space & Matter

Main narrative tensions from stakeholder engagement

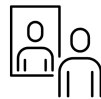Embrace systemic **behavioural change** over technocratic solutions

Resolve a **perceived tension** between social justice and Net Zero

Create an **incentivised mindset** that rewards industry

Focus on **20?0**, not just now

89up DEMOS HELSINKI/

Embrace systemic behavioural change over technocratic solutions

"If we develop a projects with a super high technical solution, will we have caused a more sustainable behavioural change? I think not.

Low tech solutions will encourage agency in people"

Behavioural Change

This narrative tension came from nearly all interviewees having a similar premise to the transition: changes in the built environment are too complicated and above all urgent (whether social or environmental) for individuals to take on the responsibility of transition themselves.

With this premise, solutions usually tended to encourage concentration of decision-power in the hands of fewer and fewer organisations (including states) and top-down scalable and technocratic or technologic solutions. For instance, enabling the private sector to achieve a viable market of refurbishment or new building materials (based on growth and existing sectoral and economic dynamics and actors, not redefining those), or on the public sector concentrating responsibility through regulation and public land ownership schemes.

A consequence of these solutions rarely reflected, is that both fear and the new schemes suggested reduce individual and community agency (either by taking away the legal responsibility or transfering the economic means to act), discouraging initiative or alternative/local solutions.

The narrative tension comes here from very few voices in the ecosystem suggesting transition as a result of a process aimed at helping people to build resilience and decision-making ability. Possible schemes or solutions could then be, for example, simplifying regulations, strengthening the financial stability of households, changing attention-draining IT, rethinking education levels, strengthening democratic decision-making in building owner assemblies, encouraging local alternatives. Most of which are outside of the built environment sector.

Resolve a **perceived tension** between social justice and Net Zero

> Everybody talks about just transition but very little is done. **Yes, there is the climate crisis, but there is a housing crisis too**

> **The market will buy whatever quality** of housing because there is such high demand.

> Overall, **more sustainable home means less affordable homes**

Social justice and Net Zero

The second narrative tension we have seen is between just and sustainable transitions. There seemed to be an opposition made in the built environment between sustainability and social issues, and within sustainability itself (between climate and biodiversity).

Though, social and economic tensions in the built environment were seemingly considered more pressing by individuals, communities and local politicians, there was a feeling in those working on social issues that climate considerations are attracting more focus in policy changes, communication in the construction sector and funding in general. It is true that Interviewees working on environmental issues rarely mentioned social issues, whereas those dealing with social mandates always mentioned climate change.

Several interviewees considered that changes in the built environment to alleviate social challenges could constitute an opportunity to also change construction to be more sustainable. However, nobody suggested the opposite approach: that a more sustainable built environment could also constitute an opportunity to alleviate socio-economic issues.

Alignment between those two transitions was rarely made explicitly, though many issues linked the two. Furthermore, the conversations mostly focused on how the built environment was currently an issue (social or environmental), rarely was there a suggestion that it could be the solution to the topics (only one person suggested our built environment could be humanity's carbon sink).

Create an **incentivised mindset** that rewards industry

Money decides. If regulation and market incentives change, the industry will follow.

The industry is changing. It is moving to low-carbon steel and cement

The industry needs to rethink its value chains completely to integrate reused and biosourced materials, and focus on refurbishment not new construction

The industry changes its business models from linear construction towards degrowth

Incentivising industry

There seems to exist a spectrum of perception around the role of the construction sector in the transition, which goes from a purely passive industry, only reacting to market and regulatory forces (a narrative in part pushed by some in the industry itself and its lobbies), to one that reinvents itself to serve and lead the transition (see a simplified spectrum below).

Though, other industries have had to go through similar transitions, the construction industry seems some ways from following suit. This is maybe in part due to its make-up where initiative-taking is rarely incentivised or rewarded, because of high specialisation, atomisation and optimisation of every step of the value chain. No one actor is able to initiate a systemic change.

It was also noted that the industry and its entire ecosystem (including architectural schools and municipal urban development administrations) is faced with a deep upskilling need in terms of sustainable construction in particular.

The "end of construction" narrative is seemingly mostly dismissed by the industry and not conducive to change, even though several interviewees recognised that if fewer new buildings were built it would force what few new ones were created to follow responsible long-term design principles.
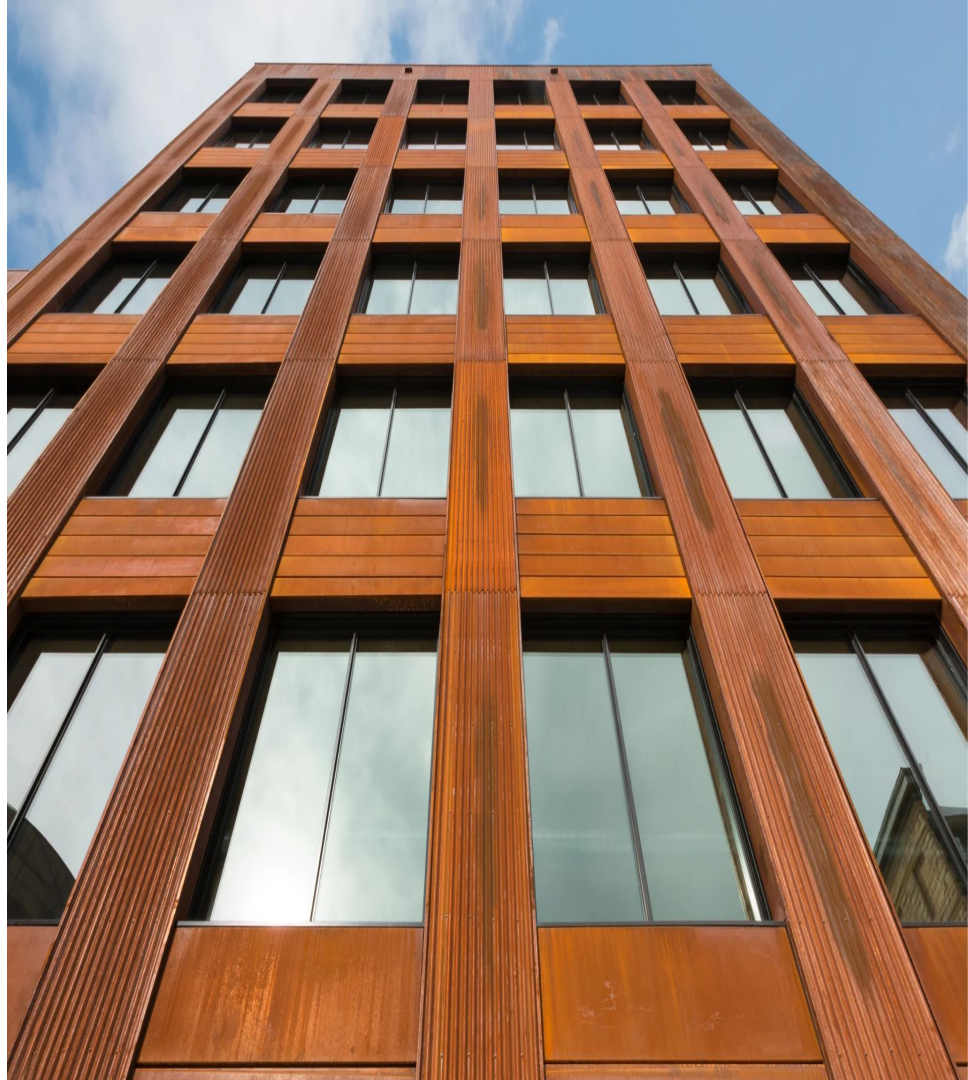
Focus on 20?0, not just now

Changes in work practices

Climate refugees and migration

Universalism

Construction in the Global South

Mobility transition

Materials security and geostrategic dependence

Demographic changes

Polarisation of debate

Focus on 20?0

The final narrative tension revealed in this first phase of the project concerns the lack of consideration of parallel transformations affecting the transitions at hand.

When talking about the future of the built environment, nobody mentioned changes in populations or social phenomena: differences in the age makeup of the European population and thus the different infrastructure needs between schools and hospitals for example, nobody mentioned climate migration, urbanization or rural exodus of the population, the energy production sources of the continent. Few people even mentioned changes in sea levels for coastal cities or heat waves for Southern Europe.

Most of the conversation was focused on what we do and know today, not in 2025 or 2050: the social issues the housing crisis leads to, the technical solutions we have to build more sustainably, the impact of the Ukrainian conflict on the energy prices and inflation, etc.

The built environment will not change in a vacuum. We need to be mindful of the opportunities and challenges other societal transitions will bring.

The importance of present consideration can also be seen in the difficulty for most people interviewed to have a vision for the future of the sector, which when it exists is usually a future without our current issues, not one that brings new benefits.

Thematic tensions among stakeholders

In the expert working group, participants were asked to select the stakeholders that they thought needed encouragement to take action. Investors and regulators were the two most common stakeholders chosen.
Participants were then asked to select narrative threads that would be a compelling way to engage these groups.

The following slides outline the possible narrative approaches suggested by the working group, and the possible tensions which could arise from using them.

Investors

1. houses as homes not sites of extraction

2. reducing risk to increase profit

3. the benefits of early engagement with regulation

Regulators

1. the importance of construction and materials

2. regulation in support of legitimacy and soft power

3. just transition for the built environment can support wider policy objectives

Participants discussed both the opportunities and challenges of each narrative thread...

Investors (1) Houses as homes not sites of extraction

Opportunities

This narrative thread aimed to pose the question: "what are houses for?". The following sub-narratives were discussed:

Working group participants noted that the built environment is traditionally thought of as an ESG friendly investment, particularly when compared to e.g. extractive industries. The narrative made parallels between the built environment and "dirty and extractive industries" like mining, showing these are not ethically "safe haven" assets. This could be used to appeal to patient capital to change tack and sit down with just climate initiatives to co-plan the development of real, clean, homes.

More so than even just ESG credentials, was the idea that homes should not be something to extract profits from. Note this seemed like a narrative which could influence groups to pressure institutional investors (e.g. shareholder activism type initiatives) rather than the investors themselves.

Challenges

Ordinary homeowners also benefit from the extractive nature of the current system, so they may be hard to turn into shareholder activists. There was a big cognitive gap between anger at slumlords and an overall view of financialised housing as extractive which seemingly must be closed for impact, and this will be difficult.

Renovation is costly, and these costs will be passed on to further struggling tenants as institutional investors must (almost by definition) prioritise ROI.

Further Considerations

This narrative's impact can be supported through transparency e.g. about beneficial ownership of housing - bringing to light who is profiting.

It's notable that 'human rights' hasn't worked so far as a narrative of this type (e.g. right to good housing). However rather than abandon this frame entirely, we should consider other more effective ways of using it.

Investors (2) reducing risk to increase profit

Opportunities	Challenges
This narrative appeals to the profit motive by which investors operate. The following sub-narratives were discussed:	Linking risk to profit means that if riskier investments turn out more profitable this narrative fails. This seems likely under certain circumstances (e.g. expected utility theory, discount rates favouring short-term returns). Relatedly, fiduciary duty to shareholders binds actors to maximise profit (in the short run) even to the detriment of climate and social goals.
Investing in built environment projects which are "just transition proof" makes a long term, steady ROI possible even through wider systemic changes.	
The case can also be made that it is better to guard against future uncertainty now: climate litigation could put certain investments/investment strategies at risk and more stringent capital risk requirements seem highly possible in the near future.	This narrative defines risk from capital's perspective. While appealing to the self-interest of many investors does require this - acknowledging that investors are not homogeneous in their motivations - participants raised concern that this could create the wrong incentives. For example, de-risking under green capitalism can be achieved via state underwriting which isn't a desirable approach to an environmental just transition. Risk from a people/ecology centric perspective looks very different.
Simply put, climate risk is investment risk. Extreme weather poses significant and unpredictable risks to fixed assets such as buildings.	
Investors can also be notified that their risk exposure may be greater than they realise due to assumptions in risk modelling (e.g. not including tipping points, interaction effects etc). Building climate and socially friendly housing will be shown as necessary by better risk assessments.	
Investing in built environment projects which are environmentally and socially sustainable would lead to higher value assets which could be more profitable. These assets may also have reduced liability on investors' balance sheets, improving their creditworthiness and perhaps opening up more capital to be invested elsewhere (e.g. via leveraging these assets).	

Investors (3) the benefits of early engagement with regulation

Opportunities	Challenges
This narrative aims to convince investors to support regulation efforts and acquiesce to the power of regulation more broadly. The following sub-narratives were discussed:

Involvement in the process of developing regulation, and the regulations themselves, can be beneficial to investors on their own terms. Regulation can be framed as providing long term stability to investors, who will be able to adopt long time horizons without concern that sudden shifts in the political winds will hinder the profitability of their assets.

Amenable regulation can act as a carrot for sustainable investments. Tax breaks for sustainable investments is an obvious example, and concretely the Mortgage Portfolio Standard was raised as an example of working with financiers for mutual gain (profit from renovation loans and ESG credentials which are more appealing to investors for banks, and household renovations actually being undertaken at scale for regulators).

Policy direction around climate neutrality is clear, and the inevitability of increasingly stringent regulations limiting the profitability of holding unsustainable assets. This reality can be used to convince investors to get ahead of this curve, both to reduce "negative" impacts on their portfolios from these regulations but also to profit as the shifting regulatory environment prompts a mass exodus towards sustainable assets, whose value will likely increase significantly if held for sometime in advance. | A sense may exist among some of the finance community that they should not be "doing government's job for it" by engaging with regulation; their purpose is to maximise shareholder profits under regulatory conditions, not do the work of shifting those conditions in the name of social benefit.

The financial sector is incredibly powerful. The increasing financialisation of the global economy and global competition for investment means finance often escapes regulation, and lobbies for the sector are in a significantly stronger position than most. This creates significant capacity to cling to business as usual even in the face of cajoling framed around regulation.

Finally the public sentiment of "my home is my castle" may create caution in institutional investors around publicly supporting regulation, even if they agree with it. Where profits are tied to consumer or investor support investors may be reticent to risk being conveyed as encroaching on people's private decisions. |

Regulators (1) the importance of construction and materials

Opportunities	Challenges
This narrative draws attention to construction and materials as a high leverage target for regulation. The following sub-narratives were discussed:	The general dominance of construction over renovation, and continuing preference for concrete, present two ongoing trends in the built environment more generally which may hinder narratives focused on shifting the construction sector.
Presenting construction and renovation as an economic niche which is impossible to delocalise. Policies around just and sustainable housing have the potential to support job creation and wider economic benefits across the member states.	Possible counter narratives that more carbon intensive businesses create more jobs may also hinder reform to the construction and materials sectors.
Discussions of materials as a key component of just transition may be used. Narratives may flag the risk of squandering scarce resources to emphasise the need to explore the most powerful leverage points around materials use.	Narratives around timber may be undermined by lobbying efforts both from conservationists averse to cutting down trees for building materials and the steel and concrete industries pushing for "neutrality" between building materials.
Debunking some of the current myths around timber may be an effective way to reframe this sustainable material and elevate it as a focus of policy and regulation.	

Regulators (2) regulation in support of legitimacy and soft power

Opportunities	Challenges
Analogies may be drawn with other occasions where the EU has taken a global leadership role around positive and innovation supporting regulation - for example in Big Tech - to make the case that the built environment presents another opportunity for impactful leadership. It can also be noted that the real possibility of 2, 3 or even 4+ degrees of global heating is sparking increasing public anger and calls for accountability, given this will render a large part of the EU outside of the liveable climate zone. Taking powerful action in an area as significant and prominent as the built environment demonstrates a meaningful commitment to respond to public sentiment. Even more broadly, a just approach to climate action will minimise the backlash against states, EU institutions and other stakeholders stemming from social disruption, and minimise long-term risk across the public and private sectors. Finally, a just renovation wave led by EU institutions can legitimate the EU Governance system, particularly in peripheral Europe where this legitimacy is lacking. The investment involved in these and related initiatives will also pay dividends in preventing costs and reputational risks over the longer term.	National, regional and local attachments to self-governance may hinder joined up EU action, even if regulators are convinced that there are benefits to the EU overall. Meritocracy narratives linking poorer living conditions to citizens being less hard working may undermine the plausibility of a just renovation wave as a source of legitimacy. The transparency which may support the legitimating narrative is undermined by a wider battle against (lobby) transparency at the EU level and beyond.

Further Considerations

As in the case of institutional investors, efforts to increase transparency can further bolster narrative frames which focus on legitimacy and soft power.

Regulators (3) just transition for the built environment can support wider policy objectives

Opportunities	Challenges
This narrative emphasises that EU action on the built environment can also bring about a range of other social benefits which policymakers, and EU citizens at large, desire. The following sub-narratives were discussed:	Perceptions that action is simply too expensive even when accounting for its benefits.
A systematic approach to a just transition for the built environment can have many layers of benefit beyond emissions reduction, ranging from enhancing health and wellbeing to improving outcomes in the economy and even perhaps financial sectors.	Siloing and inconsistency: Policy and regulatory responses which are not effectively joined up prevent the wider benefits of regulating the built environment being realised.
The particular emphasis on a more holistic approach which this narrative advances can also be presented as more likely to succeed, more likely to encourage innovation than more limited or siloed interventions, even if it may be more complex.	Unclear solutions and obligations for different stakeholders and organisations undermine collective action, as does a varying level of enthusiasm among member states, and outright opposition from some.
As well as focusing on benefits, this narrative frame may also emphasise addressing risk. Climate impacts such as floods, heatwaves and crop failures are already being felt, and are cascading through societies contributing to effects ranging from increased inflation to direct loss of life. Future scenarios such as massive climate migration can also underpin the gravity of the threats faced. A just transition of the built environment can be presented in this context as a necessary response to addressing these intersystemic risks, and averting huge policy problems in the future.	Conventional investment and payback models leave a large gap between upfront capital costs and long tail benefits, requiring EU regulation to also take on the (significant) burden of closing this gap if it is to be effective.

Emergency relief of climate impacts takes up the majority of attention and resource, undermining the resonance of narratives which target longer term benefits and leaving little room for long term infrastructure investment even where they do land. |

as determined by stakeholders in our research

Whose voices are we not hearing?

The middle class

"Moveable middle" - aka associations or groups that may be a barrier but might be convinced to move to "our side". We tend to talk to the converted, but do not necessarily include detractors. We will never move the most extreme detractors but may persuade a moveable middle.

Asset and landowners

Housing associations, local authorities, build to rent land owners. Landlord associations (IUPI, Haus und Grund, the IT association). They are against making investments that they are not sure they can recover / differences between organisations, with some only interested in short term return on investment.

Households

Vulnerable households: regarding regulative tools such as MEPS, they can fear being obliged to renovate when they don't have the resources to do so. Certainties need to be established (requirements, communication, incentives, etc.). Rights holders - tenants, those experiencing housing precocity and homelessness and their representative bodies. In so far as finance controls housing and housing affordability these groups are most affected.

Local officials

Urban planners, under-equipped public administrations: More regulations can mean more work for them, and they might not have enough workers to carry out the needed follow-up.

Health

European Public Health Association (EPHA). Health-related costs because of poor indoor air quality are dramatically weighting on households and countries.

Insurance companies

In 15-20 years, insurance models could stop because of climate uncertainty

Professionals

Renovation professional and installers associations on how to make their profession more attractive and accelerate training and upskilling (training centers closer to home etc.) Building SMEs. A change of paradigm is always more difficult to face by smaller/more traditional businesses.

Global South

The issues we discuss are very western centric and the West will not be alone in shaping the future (demography, business landscape...)

Summary: the Inside View

The built environment is not yet "climate politicized" in the way that energy, food or transportation have been.

The narrative themes that have previously not worked just focused on the upside of climate change (better urban lifestyles, buildings, more investments) or depoliticised it as a technical issues without a tangible delivery on either.

At the same time, the tonality of climate politics have changed to one of emergency and crisis. The built environment has become central to other burning political issues, such as financialisation, social and economic justice, cost of living, renters and homeowners rights.

In general climate politics perception studies show that there is a connection between these two in people's attitudes: people think companies should pay for decarbonisation and politicians have the power. This has gown in a situation where personal financial worries triumph over climate worry.

The real challenge here is to bring together the worry over personal finance and worry over climate, especially as income and worry over climate change go hand in hand.

We facilitated two **workshops** during June 2023 to help inform the narratives

Urban Future

Narrative & Perceptions workshop:
Communicating a new narrative for the just transition of the built environment

89up and Demos Helsinki facilitated a workshop with activists, influencers and leaders across urban planning, tech and public administration to present initial research findings and discuss how to communicate a new narrative for the just transition in the built environment:
Stuttgart, June 21st - 23rd 2023

Klosters Forum

Narrative & Perceptions Brains Trust:
how we build powerful and engaging narratives for a just climate transition in the built environment

89up and Demos Helsinki facilitated a workshop with visionary thought leaders and change-makers to present ongoing research findings and explore whether a new narrative help us achieve the built environment we want to see:
Davos, June 27th - 29th 2023

Urban Future

The session welcomed dozens of communications, policy, and built environment experts spanning a wide array of knowledge bases and specialities.

In June 2023, the facilitator team were able to present findings from Phases 1 and 2 which were very much 'hot off the press'. The purpose of the workshop was to further dig down into the Red and Green themes that would help inform the eventual Test Narratives that would form part of the next phase.

It was the first time that the research had been presented to external partners. Following detailed coverage of the insights uncovered in Phases 1 and 2, exercises focused on establishing the missing red and green themes, the audiences and geographies that certain themes would appeal or struggle.

The discussion reaffirmed many of the narrative tensions faced in Phase 1 of the research, and the red themes that had been collected.

A similar exercise had been held for Green themes, in which the group pushed for more impetus to be placed on 'social equity and justice' as well as 'reclaiming buildings for the people'.

The task of the research team became incorporating this into the Test narratives that would follow. We're extremely grateful for all partners that attended the session.

Klosters Forum

There was a clear consensus in the room that we needed a stronger narrative frame to take citizens along with us in the journey to reimagine our urban realm and fix buildings to achieve net zero.

There was real interest in the types of data that were useful in informing our process of narrative development. Participants debated both the audiences that we should engage with and the types of messaging that would engage our audiences.

This workshop took place during the process of compiling the final report for the Laudes Foundation and therefore acted as a space for additional narrative feedback from expert stakeholders. Many participants - as leading experts in their field - had important insights into the data we presented which supplemented the existing research we shared.

Crucially, the workshop also acted as a way of pressure testing some of the assumptions we already had including our pre-existing Red and Green narrative frames.

The group - with significant specialisation and expertise - understood the challenge of any form of unifying narrative that covered the breadth of the fundamental scale of change required to reach net zero, while inspiring policymakers and aligning all the stakeholders from civil society to industry.

THE KLOSTERS FORUM

OPENING MINDS

89up **DEMOS HELSINKI/**

Conclusion: Phase 1

1. Inside View

- ✓ **Internal think tank + desk research**
- ✓ **1-2-1 Interviews**
- ✓ **Brains Trust with core stakeholders**
- ✓ **Power audit**
- ✓ **Urban Futures and Klosters Workshops**

2. Outside View

- **Media landscape review and analysis in four languages**
- **Social media listening and mapping in four languages**

3. Test Narratives

4. Expert working group

5. Field Testing

- **Czechia, France, Germany, Italy, Netherlands, Poland, Romania, Spain, Sweden, UK**
- **20,229 people across three Test Groups and one Control Group**
- **Native translations**

Research Report

Phase 2: The Outside View

1. Inside View

- ✓ Internal think tank + desk research
- ✓ 1-2-1 Interviews
- ✓ Brains Trust with core stakeholders
- ✓ Power audit
- ✓ Urban Futures and Klosters Workshops

2. Outside View

- Media landscape review and analysis in four languages
- Social media listening and mapping in four languages

3. Test Narratives

4. Expert working group

5. Field Testing

- Czechia, France, Germany, Italy, Netherlands, Poland, Romania, Spain, Sweden, UK
- 20,229 people across three Test Groups and one Control Group
- Native translations

Research Report

The Outside View

We took learnings from the Inside View and started to build phrases into a built environment taxonomy to inform our social listening and media analysis,

By conducting analysis across four languages (English, French, German, and Spanish), we mapped the pan-European conversation on social media and the news over the past year - analysing who and what were driving cultural flashpoints by understanding how they were engaged compared to how often.

As a result, we constructed the largest ever social media and media dataset of built-environment perceptions amongst European citizens.

The data data set allowed us to make predictions about narrative trends which then played out later in the year including fallout over *15-minute cities* and *gas boiler phase-out* that would unfurl in the summer of 2023.

Throughout, we were developing red themes (negative, or tried and failed) and green themes (unknown with potential) which would ultimately set the framing of the narratives that we would put into field testing.
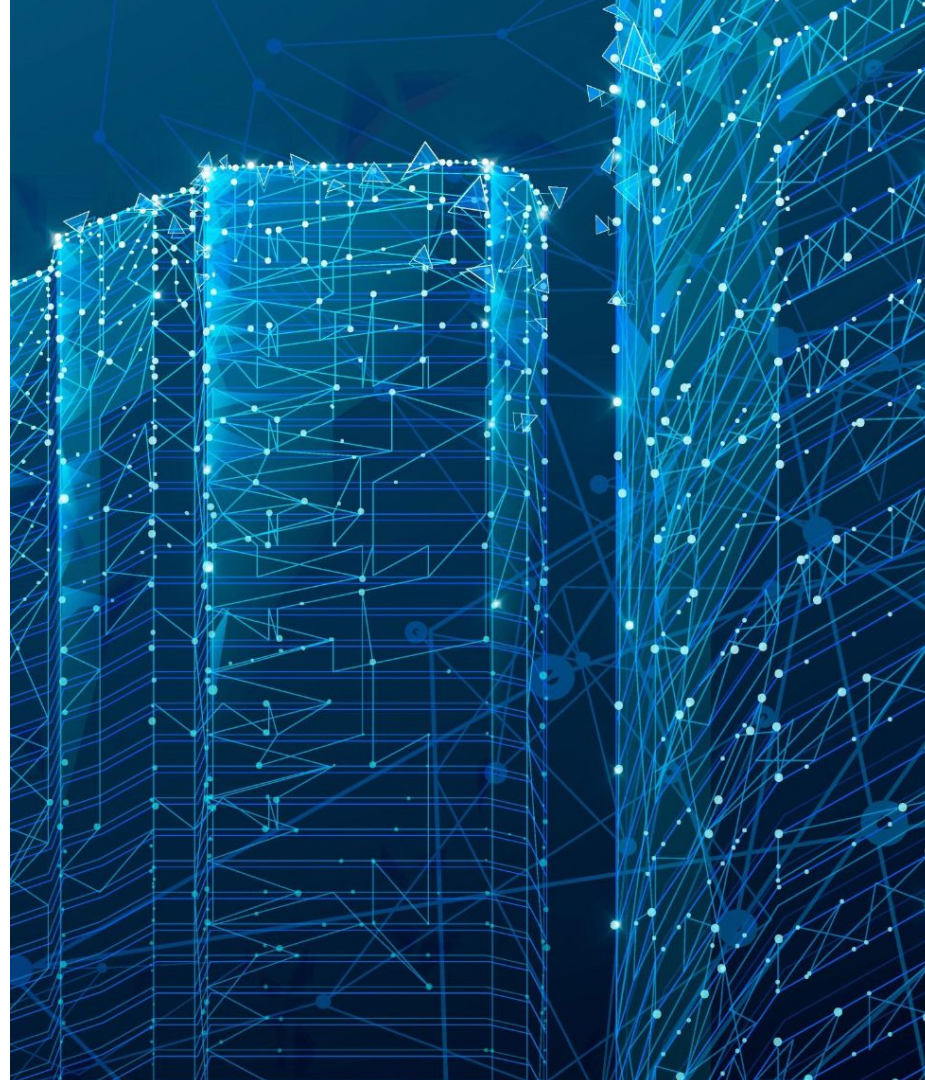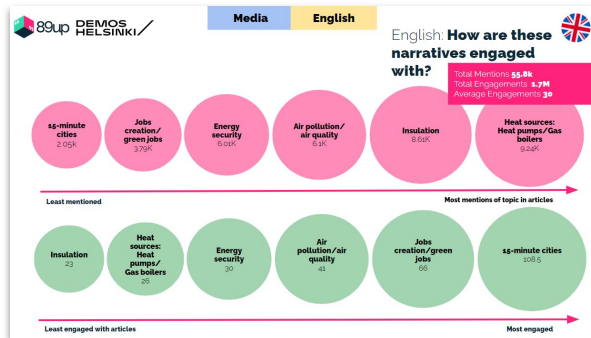
How to navigate this section

Each slide will contain insights from the media or social media across one of the four languages

This data tracked mentions and coverage of the built environment in the media or social media. Each 'spike' is explained.

Media headlines were taken from our analysis in June 2023

The larger the red bubble, the more mentions in articles or posts for that term. The larger the green bubble, the more engagement with media articles or social posts containing that term
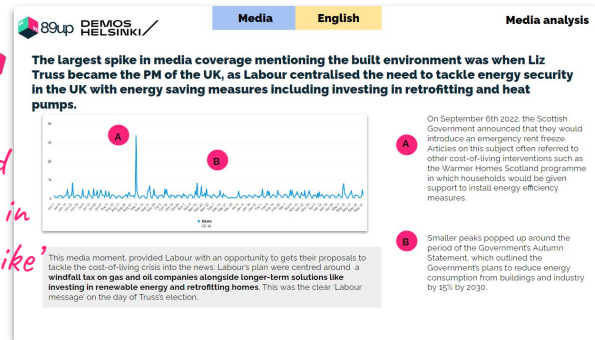
Built Environment Taxonomy

*We curated a built environment taxonomy to inform our social listening and media analysis between **1st June 2022 - 1st June 2023**. Each term was informed by the first phase of work - the inside view - and cross-referenced with the European Union's own taxonomy of smart sustainable city indicators. They are a product of the debates and topics informing perceptions of the just transition and built environment in the summer of 2023: such as 15-minute cities and the Energy Performance of Buildings Directive (EPBD). Individual terms were then shortlisted by the team based on their replicability in the four languages (English, French, Germany, and Spanish).*

Transformation	Conservation		Regeneration	Refurbishment
Sustainability	Net zero	Intensification	Public realm	Retrofit
Circular economy	Community	Greenbelt	Co-design	Restoration
Passivhaus	Green growth	Listed	Brownfield	Energy Security
YIMB	Health and wellbeing	Density	Placemaking	Carbon offset
Biophilic	Trees	scale	Masterplan	Modular
Urban greening	Town	Neighbourhood Character	Gentrification	Renovation (wave)
15 minute cities	City	Conservation Area	Social value	Nearly net zero
New urbanism	Urban	Right to light	Connectivity	Gas boilers
Materials	Car-free	(daylight/sunlight)	Accessibility	Heat pumps
Wood	Overdevelopment	rewilding	Mixed-use	EPBD (energy performance of buildings directive)
Construction	Social cleansing	Biodiversity / ecology	Town Centre	Envelope and passive energy efficiency
District heating	Overlooking	environmentalists	Rural community	Insultation
Infrastructure	Eyesore	Heritage	Smart solutions	draught proof
Net zero cities	Decanting	Habitat	Smart metres	Windows
Climate neutral cities	Overcrowding	Privacy	Energy balancing	Lofts
Zero energy buildings	Greenwashing		Climate justice	
Placemaking	Viability		Green gentrification	
Urban greening	NIMBY		Green jobs	

The most engaged with red themes

Theme	Heat pumps/Gas boilers	15-minute cities	Retro fitting
Red themes	- In the UK, messaging around heat pumps had low engagement. There's a comparatively low uptake of heat pumps in UK - due to both a lack of skills and media reporting undermining **consumer confidence.** - Public anger and concern over gas boilers appeared in Germany earlier than other countries. **A red narrative around heat pumps emerged because consumers were viewed as being penalised by the government;** heat pumps were seen as expensive and ineffective. Public still not convinced, and so this had become a partisan issue: positive incentives weren't seen as strong enough. - In Germany, another narrative was that many feel the EU are **'imposing' unrealistic policies** on them and that Germany was being singled out, while other nations weren't pulling their weight on climate change. There was a sense of unfair sacrifice.	- In academic circles the concept of 15 min cities was widely accepted, as evidence showed we needed to stop short car journeys to drastically reduce carbon emissions. - However it had become a **culture war issue** - particularly in UK and Spain. - A red narrative around 15 minute cities was mostly shaped by a perceived **threat to personal freedom** by measures to disincentive car-use or promote sustainable transport. - The rhetoric in conservative press was relatively mild, only **hinting at authoritarianism and the imposition of these policies**. However, these articles were frequently shared alongside alarmist or conspiratorial rhetoric on social media. - Conversation moved from more hardline / conspiratorial circles to **larger cultural anxieties on the centre right about state intervention.** - Policy was seen not so much as a nudge / but as a punishment for people who had cars. Cars = freedoms.	**'Stick' policies received negative coverage in the conservative press.** Fines for having log burners, fines for driving older vehicles, banning certain heat sources etc - these were framed in populist terms and focused on the 'hit' consumers would receive. **A red narrative emerged in France where the construction industry was also seen as one that 'takes advantage'** - in France the Minister of energy transition had to announce they would be tough on scammers.

Drivers of red themes and polarisation:

Attack on freedom personal choice, lifestyle

+++

Cost

+++

Different factors driving opposition nationally
(Germany = gas industry, tabloids
UK = home ownership
US = cars and homes)

++

Distrust in political elites / institutions

+

Big business taking advantage

+

Inertia / Distrust of change

+

The most engaged with green themes

Theme	Heat pumps/Gas boilers	15-minute cities	Retro fitting
Green themes	• **In some markets, customers who switched to alternative energy were perceived as 'plucky'** because they were escaping rising energy bills - not the same for gas boilers. Here, narratives become green because consumers perceived **they had agency in their energy choices.** • Narratives became green when there were perceived 'Carrot' policies that gave individuals grants, and heat pumps became less of an individual burden or risk. • Green narratives also broke through when heat pumps were seen as 'aspirational'.	• When positively positioned / engaged with - 15 minutes cities were seen as **synonymous with social equality and justice,** as well as sustainability. • The phrase '15-minute city' became toxic to some, however the core elements of 15 minutes cities were still popular. Instead of just a mere rebrand to 'smart cities', **green narratives emerged when citizens had confidence in the impact of re-designing their area** - including support for clean air, accessible amenities, nearby schools.	• Green narratives around retrofitting were often framed around **consumer money-saving,** or **were aspirational showcases that leaned heavily into design quality and innovation**. These were seen mostly positively. • **Green narratives often emerged when jobs/skills and economic benefits were particularly highlighted in liberal press**, and in the right-wing press stories about individual savings were more likely to be highlighted. • **Where incentives were offered - there tended to be more positive framing:** The French government introduced a number of incentives and financial assistance schemes, particularly in terms of thermal renovation.

Southend rules out signing up to '15-minute cities' scheme

How retrofitting the UK's old buildings can generate an extra £35bn in new money

Prof Chris Whitty's damning report unveils how energy-saving wood burners are 'deadly'

Households face net zero penalty for sticking with gas

Net Zero is trapping us in the dungeons of state control

Low Traffic Neighbourhoods have been imposed too often without consul[t]
curtailing our freedom of movement

Renewable energy jobs growing four times faster than rest of UK market

Data shows 2.2% of all new UK jobs are classified as 'green' - but one-third are in London and south-east

Most Britons would like their area to become a '15-minute neighbourhood'

Man 'facing £7,000 energy bill' after switching to £25,000 government-backed 'green' heat pump

Energy-saving measures could boost UK economy by £7bn a year, study says

Birmingham's version of Ulez is in chaos: Drivers get nearly 70,000 clean air zone fines overturned in road scheme that will net council £50million profit

'I bought a wind turbine – now I pay £1.50 a month for energy'

Log burner warning as owners told to DITCH home staple – new evidence comes to light

In the year analysed, the largest spike in media coverage mentioning the built environment was when Liz Truss became the PM of the UK, as Labour centralised the need to tackle energy security in the UK with energy saving measures including investing in retrofitting and heat pumps.
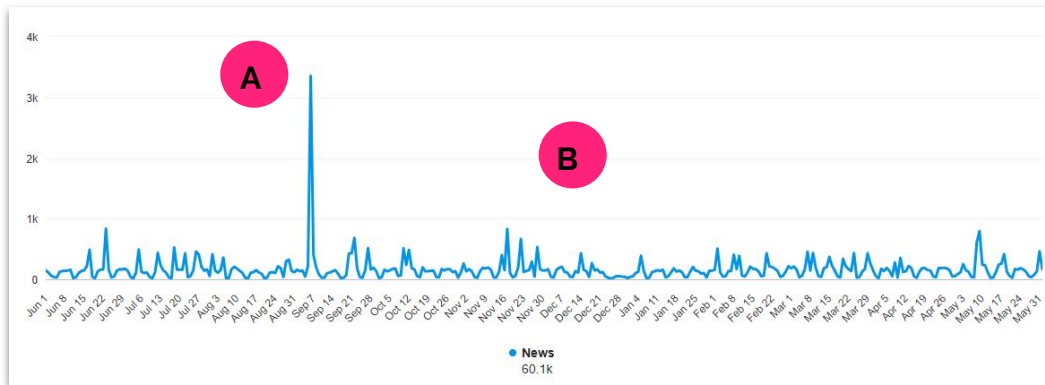

This media moment provided opposition party UK Labour with an opportunity to get their proposals to tackle the cost-of-living crisis into the news. Labour's plan were centred around a **windfall tax on gas and oil companies alongside longer-term solutions like investing in renewable energy and retrofitting homes**. This was the clear 'Labour message' on the day of Truss' election.

A On September 6th 2022, the Scottish Government announced that they would introduce an emergency rent freeze. Articles on this subject often referred to other cost-of-living interventions such as the Warmer Homes Scotland programme in which households would be given support to install energy efficiency measures.

B Smaller peaks popped up around the period of the Government's Autumn Statement, which outlined the Government's plans to reduce energy consumption from buildings and industry by 15% by 2030.
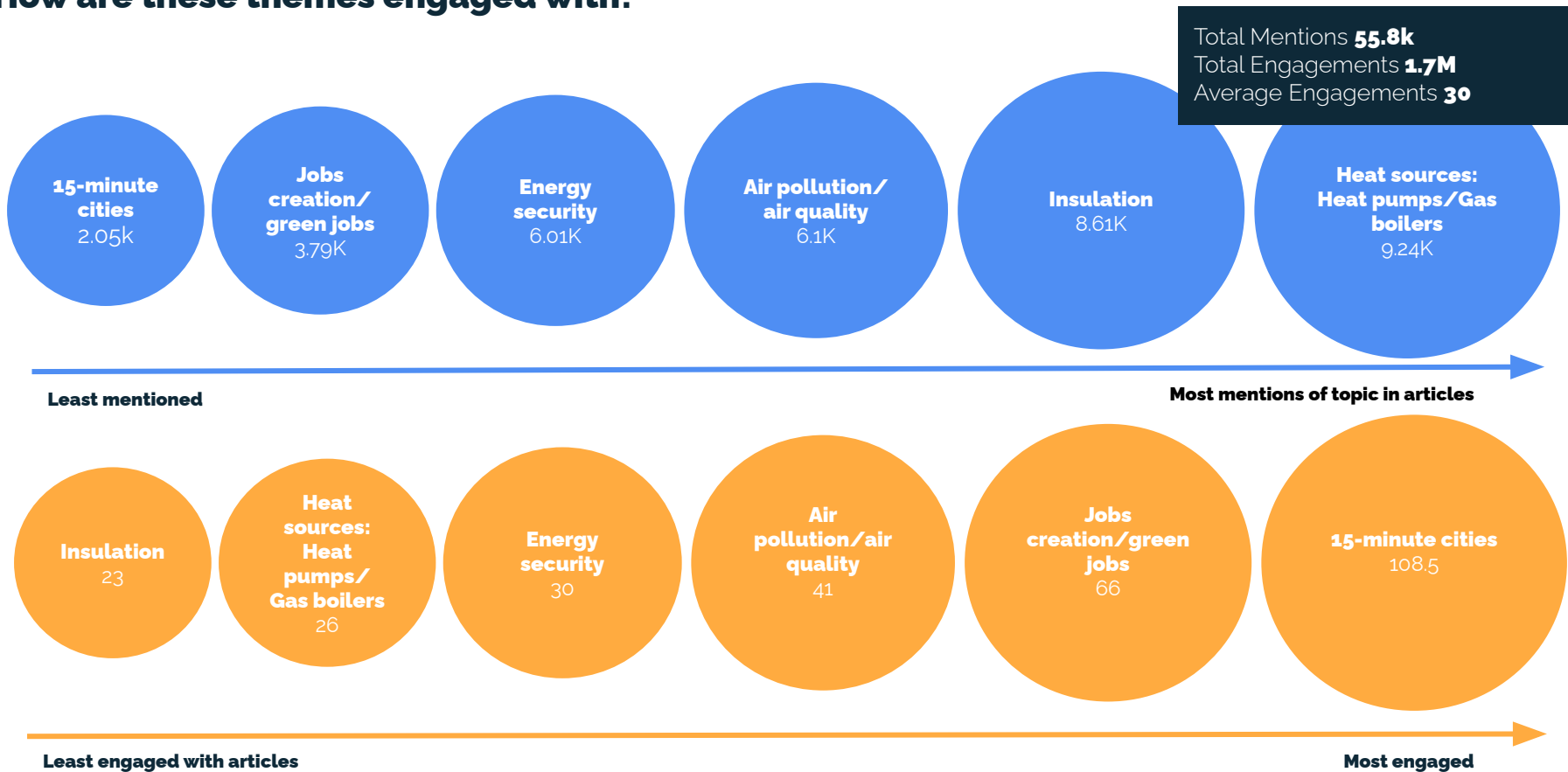
While there were smaller peaks across the year, these were dwarfed by the growth in conversation in early 2023, driven by an increase in interest in 15 minute cities, and in particular, conspiracy theories around this.

A There was an elongated peak around 15 minute cities from January to March 2023, which has continued to drive a high level of conversation into mid 2023. The largest peak was around the anti-15 minute city protests in Oxford.

B When 15 minute cities were removed, the main peak in conversation was the passing of the Energy Performance of Buildings Directive in the European Parliament in March 2023.

Conversations around 15 minute cities were driven by those against the concept, who saw them as a proxy for state surveillance and control. Peaks were in particular driven by specific in-person protests about LTNs and emissions controls, such as in Oxford and Haringey, London.
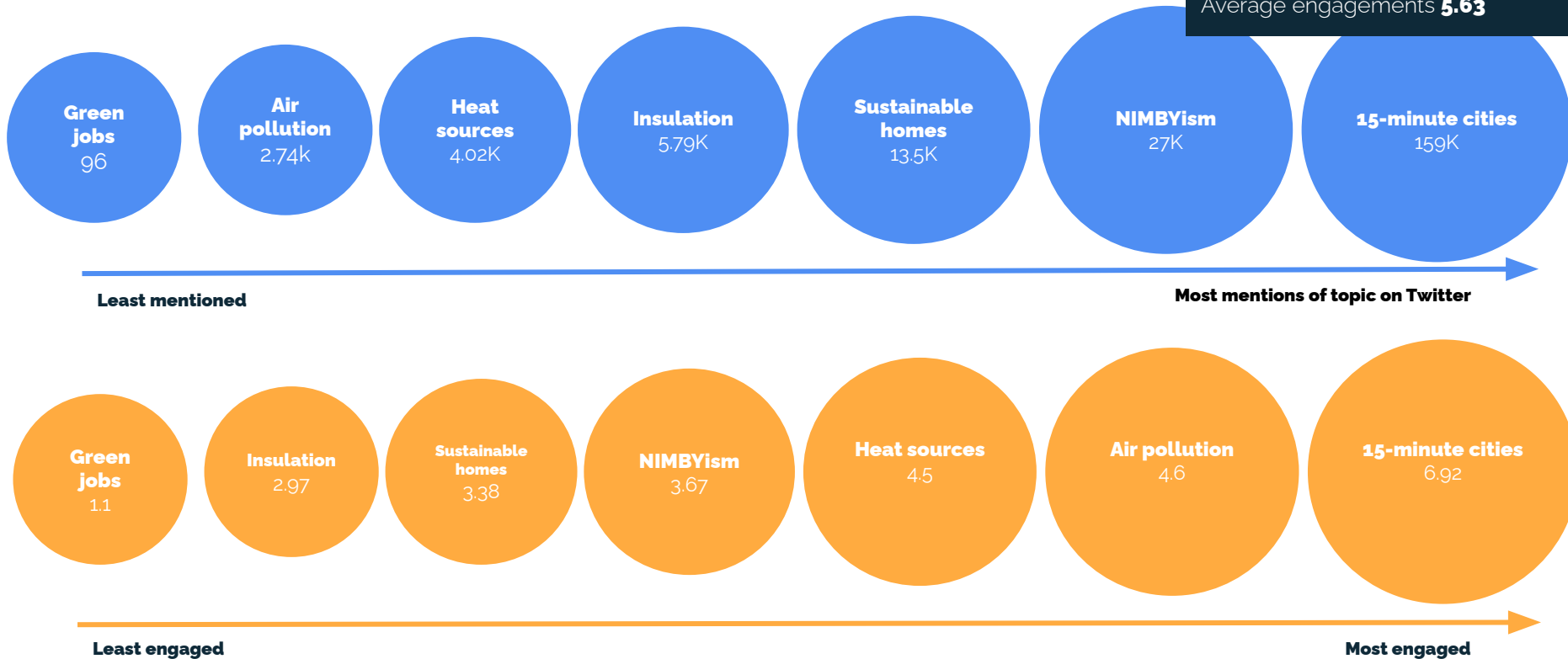
How are these themes engaged with?

Total Mentions **247k**
Total Engagements **1.39M**
Average engagements **5.63**

Green jobs 96

Air pollution 2.74k

Heat sources 4.02K

Insulation 5.79K

Sustainable homes 13.5K

NIMBYism 27K

15-minute cities 159K

Least mentioned → Most mentions of topic on Twitter

Green jobs 1.1

Insulation 2.97

Sustainable homes 3.38

NIMBYism 3.67

Heat sources 4.5

Air pollution 4.6

15-minute cities 6.92

Least engaged → Most engaged

#744 Tout savoir sur la rénovation énergétique des appartements en copropriété avec Michaël Nogal et Thierry Vignan (Masteos)

Rénovation énergétique : les Français prêts à investir 3 400 euros par an

Gouvernement Borne : les ministres connaissent enfin leurs périmètres d'action. Qui fait quoi?

Arnaques à la pompe à chaleur : le gouvernement promet d'être «intraitable»

Par Le Figaro avec AFP
Publié le 03/03/2023 à 12:51

Un nouvel accord de distribution pour des solutions IoT durables entre Mouser et EnOcean

Budget 2023 : forte augmentation des budgets pour les transitions écologique et énergétique

Club de l'économie du « Monde » : « Il faut dramatiquement accélérer » la rénovation énergétique
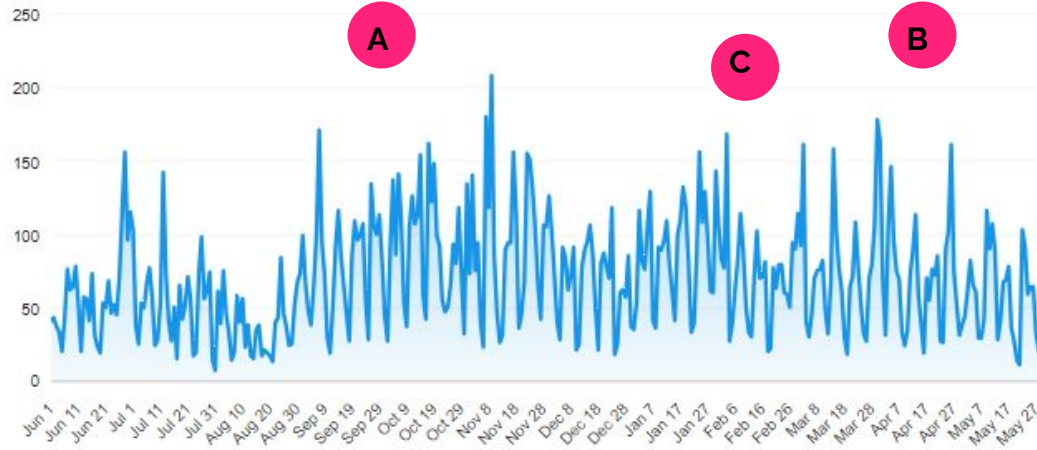
Compteurs d'énergie : l'État va collecter les données d'un million de foyers, les Français concernés

Rénovation énergétique : Saint Gobain souhaite une «logique d'investissement» à 10 ans

Les réseaux 6G vont tout changer

89up | DEMOS HELSINKI/

Most spikes in media mentions centred retrofitting and energy transition policies, core tenets of Macron's climate agenda

A — On October 19th 2022, several articles were published about several topics all related to climate on : future cities, energy consumption of current buildings, green houses and Smart cities.

B — On March 30th 2022, the articles published were revolving on huge investments (from various sources: Banks, citizens) in renovating new or old buildings

C — On March 3rd 2022, the French Ministry of Energy Transition released a statement about how heat pump scammers will be severely punished

Since 2020, and the Climate and Resilience Act, the French Government took measures to support and invest in retrofitting. More recently, the private sector also began to step up its involvement, a commitment that it was receiving a positive echo in the French media as the private sector invested in retrofitting and projects.

How are these themes engaged with?

Total Mentions **35.7k**
Total Engagements **1.74M**
Average Engagement Rate **32**

Villes à 15 minutes // 15 minute cities
188

La pollution de l'air // Air pollution
395

Efficacité énergétique // energy efficiency
2.09k

Transition énergétique // energy transition
3.41k

Technologie d'immeuble intelligent // Smart cities
5.42k

Rénovation énergétique // thermal renovation
22.9k

Least mentioned

Most mentions of topic in articles

Villes à 15 minutes//15 minute cities
11

Efficacité énergétique // Energy efficiency
18

Technologie d'immeuble intelligent //Smart cities
24

Transition énergétique // energy transition
34

Rénovation énergétique//thermal renovation
56

La pollution de l'air//Air pollution
128

Least engaged with articles

Most engaged

Peaks in conversation were driven by political engagement around energy and heating renovation of buildings

A This peak in conversation was driven by a protest by activists from Derniere Renovation calling for energy renovation of buildings, blocking the road, with some violence from police and others in response.

B Peak around budget day, when Prime Minister Elisabeth Borne moved away from the government's commitment to 12 billion euro for Thermal Renovations

C This represents a peak in conversation after a protestor was tackled by Macron's bodyguard after shouting "The Thermal Renovation Plan!".
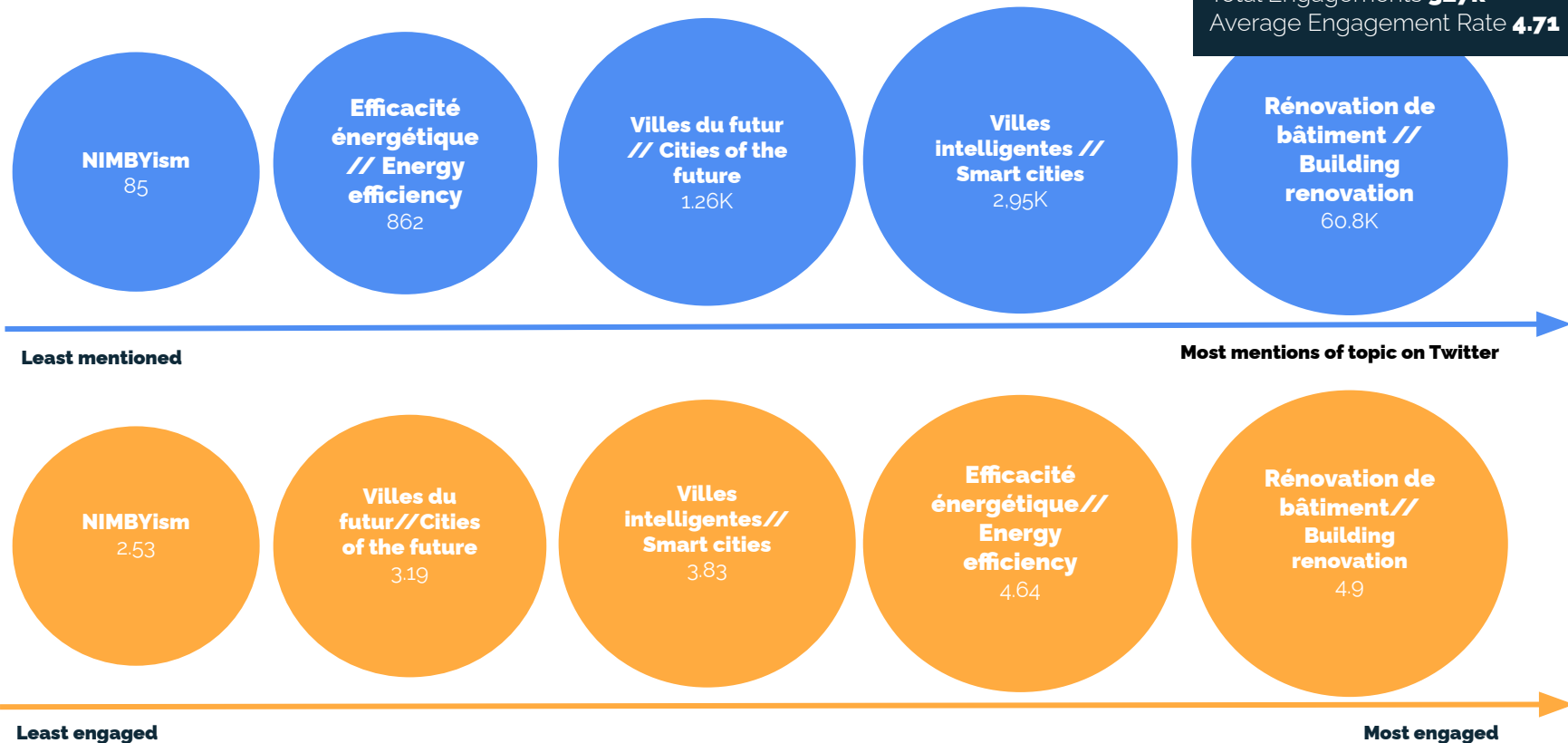
These conversations were around politically divisive actions. On budget day, the top Tweets were questioning either the wisdom or practicality of Borne's move away from the government's commitment to 12 billion euro for Thermal Renovations.

89up   DEMOS HELSINKI/

Redes locales de energía: el poder de la gente al servicio de una energía más limpia y barata

El programa del PSOE para las ciudades: Servicios públicos a 15 minutos y tres árboles desde la ventana

Estas son las etapas de la Vuelta a España con peor calidad de aire

Adiós a las calderas de gas: bombas de calor o hidrógeno verde, el futuro de la calefacción

Calidad del Aire, ventilación y renovación de aire, sistemas, equipos y procesos

CAMBIO CLIMÁTICO

¿Cómo que nos prohíben tener coches de gasolina?

Los árboles delatan contaminantes del tráfico urbano que no se miden

Carlos Moreno, creador de la ciudad de los 15 minutos: "Es un delirio decir que queremos encerrar a la gente en guetos"

Por qué las bombas de calor pueden ahorrarte hasta un 90% de electricidad

Nueva bomba de calor reduce factura energética y emisiones de carbono

In Spanish speaking media, 15 minute cities became highly polarised and dominated most of the media coverage on topics around the built environment
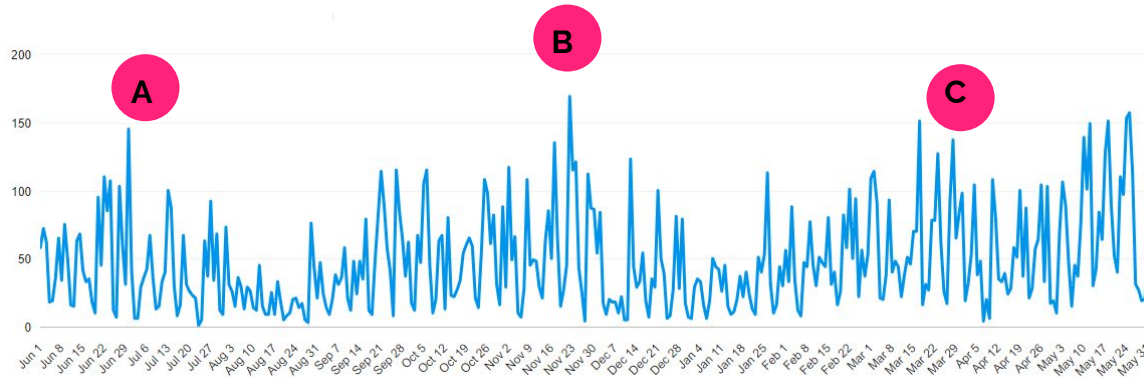
Spain's National Recovery and Resilience Plan (NRRP) - to prepare Spain for green and digital transitions - is one of the biggest programs financed by the EU, with 40% of the plan carved out to support reaching climate objectives. The narrative of sustainable cities has been particularly pushed by the Spanish Socialist Workers' Party (PSOE) and the left-wing media.

A The media was saturated with various articles on sustainable housing and cities of the future. In particular, mentioning how Castilla-La Mancha will receive 58.8 million euros for the rehabilitation of homes into sustainable housing.

B The main articles here were about the transformation of cities, showcasing Valladolid as a 15 minute city, and how the mayors of Valencia, Victoria and Zaragoza - three Mission Cities - presented their advances in sustainability at the National Environmental Congress (CONAMA 2022).

C The media focused on articles about the atomisation of buildings and application of technology to smart cities, and the use of AI for efficient management of technology in smart territories.

How are these themes engaged with?

Media   Spanish

1st June 2022 - 1st June 2023

Total Mentions **17.5k**
Total Engagements **334k**
Average Engagements **19**

Contaminación atmosférica y calidad de aire // Air pollution
533

Bombas de calor y calderas de gas // Heat pumps and gas boilers
533

Ciudades de los 15 minutos // 15-minute cities
1.9K

Ciudad del futuro // Cities of the future
1.34K

Renovación y restauración// Renovation and restoration
4.32K

Least mentioned   Most mentions of topic in articles

Renovación y restauración //Renovation and restoration
16

Bombas de calor y calderas de gas//Heat pumps and gas boilers
23

Ciudad del futuro //Cities of the future
31.6

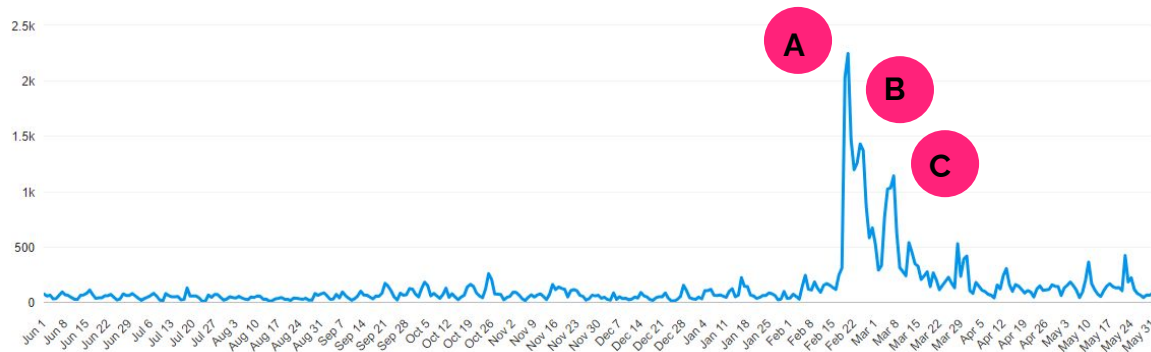Contaminación atmosférica y calidad de aire //Air quality
38

Ciudades de los 15 minutos //15-minute cities
51.

Least engaged with articles   Most engaged

15-minute cities dominated the conversation on Twitter, in particular by conspiracy theories who labeled the idea as "open air prisons".

A — The largest peak in conversation online was about 15-minute cities and was dominated by conspiracy theories around the initiative. However, some people argued that a lot of Spanish cities are already laid out in a similar style to this model and that there is no need to panic.

B — The protest in the UK against 15-minute cities was the focus of this peak, with a lot of people online supporting the protest.

C — Conspiracy theories around 15-minute cities continued to dominate the conversation and was often linked to anti-vaxxers and the pandemic. There was also some backlash to a comment by Sadiq Khan on 15-minute cities.

In Spain, the **15-minute cities was the main topic** of conversation online **and made up almost 75% of all mentions** on Twitter. The conversation was predominately made up of conspiracy theories and there was a strong interest in the UK's position on this. However, there was some support for 15-minute cities and those who discredited the conspiracy theories.

Wärmepumpe: Alles, was Sie wissen müssen, im Überblick

8 FAKTEN ÜBER WÄRMEPUMPEN, DIE BILD & CO. VERTUSCHEN WOLLEN

EQS-News: Wienerberger AG: Lösungen für die Zukunft des städtischen Bauens

Wassermangel: Wärmepumpen-Besitzer aus München müssen „überraschend" auf Gasheizung wechseln

Grüne wollen aus Hamburg 104 Dörfer machen!

Die Stadt des Mannes wird Vergangenheit

Bundesverband Wärmepumpe (BWP) e.V.
Energiekosten: Umstieg auf Wärmepumpen kann hunderte Euro im Jahr sparen

Pluggit GmbH
"Wir heizen buchstäblich zum Fenster raus"
8 Fragen an Dr. Burkard Schulze Darup

Woran es bei Wärmepumpen gerade hakt

Overall, the media focused on political stories ranging from interviews with the Mayor of Berlin on climate neutrality to EU parliament's decisions on heat pumps.
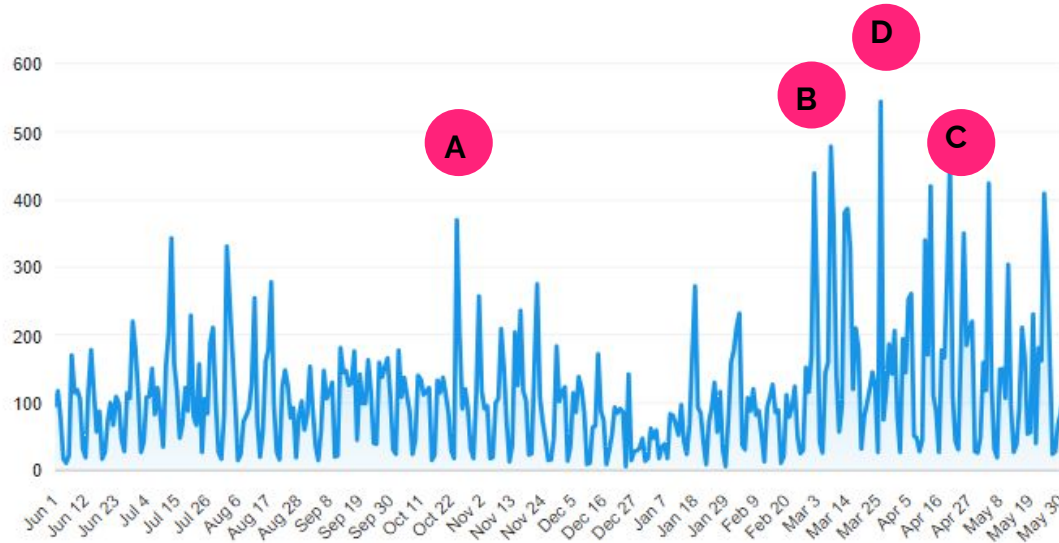
The German Government has been pushing for climate neutrality in Berlin by 2045 which is extremely high on the political and media agenda in Germany. German politicians are preparing for not only Berlin but cities across Germany to start the energy transition to cleaner methods such as heat pumps, hydrogen houses and energy supply.

A Articles focused on large energy companies such as EON, Uniper and RWE who decided to "hibernate" in the winter to reduce energy by asking employees to work from home and reducing the heating in the buildings. The other key story from this period is an interview with Franziska Giffey who spoke of the need to prepare cities for the energy transition.

B The main news story was around the importance of using heat pumps to increase energy efficiency and save money.

C The media focused on multiple different stories such as the EU parliament's plans for heat pumps, hydrogen houses and the EU's new regulatory framework for renovations.

D The media focused on the response from the Federal Economics Minister, Robert Habeck, who responded to backlash for the draft law on the replacement of heating systems.

How are these themes engaged with?

Total Mentions **40.6k**
Total Engagements **1.08M**
Average Engagements **26**

Energiesi cherheit: Energy security
1.51K

Luftverschmutzung: Air pollution / air quality
2.7K

Cities of the future: Städte der Zukunft
3.77K

Isolierung: Insulation
3.99K

Energy consumption Energieverbrauch
11K

Heat sources: Wärmepumpen / Gaskessel // Heat pumps / Gas boilers
26k

Least mentioned → **Most mentions of topic on Twitter**

Energiesi cherheit/ Energy security
10

Isolierung Insulation
16

Luftverschm utzung: Air pollution / air quality
19

Städte der Zukunft/ Cities of the future
21

Heat sources: Wärmepumpen / Gaskessel // Heat pumps / Gas boilers
24

Energy consumption Energieverbrauch
28

Least engaged → **Most engaged**

The conversation on social media was particularly dominated by the debate around heat pumps and their effectiveness.

A Tweets around this peak focused on a variety of topics from wind energy expansion to heat pumps.

B Tweets coalesced around this article by Fritz Vahrenholt who claimed that heat pumps are not as effective as the Government and scientists say.

C The conversation online was focused on a new study by Cambridge Econometrics that showed switching to heat pumps not only benefits the climate but also the economy.

D Tweets around this focused on the future of cities and what people would like them to look like and the potential to make Hamburg a 15-minute city.

On social media in Germany heat pumps were a contested subject with the two highest peaks being on polar ends of the heat pump debate. Peak B was around the ineffectiveness of heat pumps, which many people called out the Government for having heat pumps so high in their agenda. Whereas peak C, focused on the positive research that showed the economic benefits of heat pumps, this was met with some slight criticism online but also a lot of support.

How are these themes engaged with?

Total Mentions **18.6K**
Total Engagements **146K**
Average Engagements **5.8**

Isolierung / Insulation
131

Energiesicherheit: Energy security
209

Luftverschmutzung
Air pollution / air quality
1.12k

Cities of the future
Städte der Zukunft
1.91k

15 minute cities/
15-Minuten-Städte
2.55k

Wärmepumpen / Gaskessel
Heat sources/ Heat pumps
7.47k

Least mentioned → **Most mentions of topic on Twitter**

Isolierung
Insulation
1.9

15 minute cities/
15-Minuten -Städte
2.9

Energiesicherheit
Energy security
3.5

Cities of the future:
Städte der Zukunft
4.31

Luftverschmutzung
Air pollution / air quality
7.8

Wärmepumpen / Gaskessel
Heat sources/ Heat pumps
9.1

Least engaged → **Most engaged**

Media Analysis & Social Listening

Click the link to follow

June 2023

Key Red & Green Themes

After we had undertaken both research phases interrogating the inside view and the outside view, we were able to build out the key red and green themes that were driving perceptions of the just transition within the built environment. These themes would next go on to inform our test narratives.

Attack on freedom, choice and lifestyle	Social equity and justice
Cost	Health and wellbeing
Imposition versus agency	Carrots: incentives & personal gain
Individual vs collective responsibility	Security
Disruption	Aspiration and lifestyle
Tension between social justice and net zero	Prosperity
Business opportunism, short-termism	Reclaiming buildings for the people

Conclusion: Phase 2

1. Inside View

- ✓ Internal think tank + desk research
- ✓ 1-2-1 Interviews
- ✓ Brains Trust with core stakeholders
- ✓ Power audit
- ✓ Urban Futures and Klosters Workshops

2. Outside View

- ✓ Media landscape review and analysis in four languages
- ✓ Social media listening and mapping in four languages

We gained a deep understanding of the thematic opportunities and challenges to a just transition in the public mind-set. Together with the Inside View, these learnings were used to write our Test Narratives.

3. Test Narratives

4. Expert working group

5. Field Testing

- • Czechia, France, Germany, Italy, Netherlands, Poland, Romania, Spain, Sweden, UK
- • 20,229 people across three Test Groups and one Control Group
- • Native translations

Research Report

Message Testing

Our Test Narratives

Phase 3: The Narrative Factory

1. Inside View

- ✓ **Internal think tank + desk research**
- ✓ **1-2-1 Interviews**
- ✓ **Brains Trust with core stakeholders**
- ✓ **Power audit**
- ✓ **Urban Futures and Klosters Workshops**

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3. Test Narratives

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- • **Czechia, France, Germany, Italy, Netherlands, Poland, Romania, Spain, Sweden, UK**
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- • **Native translations**

Research Report

Our test narratives

Pragmatic

People are sceptical of wholesale radical change and those driving it. Mortgages, interest rates, assets and insurance contain significant power - all demand confidence.
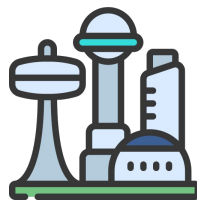
➢ *Positive, incremental, non-radical change*

➢ *Fixer uppers use what we have, a sensible, rational response to reality*

➢ *The preservation of health, community, and assets*

Futurist

People are willing to adapt if the incentives and tools are readily available: recycling, LED light bulbs, electric cars all evidence this.

➢ *Wholesale systematic change is needed, interconnected, and a good thing*

➢ *Technology and progress are to be embraced*

➢ *Big picture optimism for a smarter future*

Insecurity

Our lives have rarely been this unstable and forces outside of our control are driving this uncertainty. From heating bills, to air-con, having enough space, and health impacts: we're let down by broken promises and inadequate building stock.

➢ *Security maximises comfort*

➢ *The war in Ukraine has shown how vulnerable we are*

➢ *A new deal by and for people is needed to address growing inequalities*

Pragmatic Narrative Pillars

Social listening and media analysis *in the past year has shown us that BE policy changes need to be 'common sense' and incentivised. The difference between how 'heat pumps' were reported on in Germany and 'retrofitting' has been reported on in France, is that while both are part of a 'fix what exists' narrative - the German government failed to position 'heat pumps' as anything other than a personal imposition. Retrofitting in France was contextualised as a much wider climate policy in 2021, but then crucially was re-enforced by being part of the collective 'sobriety' plan in the face of rising energy costs post the Ukraine invasion - leading to a narrative that was much less polarising.*

Positive, incremental, non-radical change
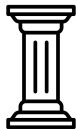
People are sceptical of wholesale radical change and those driving it. Mortgages, interest rates, assets and insurance contain significant power - all demand confidence.

Use what we have, sensible and rational response to reality

People are willing to adapt if the incentives and tools are readily available: recycling, LED light bulbs, electric cars all evidence this.

Preservation of health, community, and assets

Buildings (assets) are becoming older and health implications are dire: more and more research is pointing to air quality and mental wellbeing suffering.

Pragmatic Test Narrative

"We need to make Europe's homes fit for the future.

Europe's buildings leak heat in the winter and are too warm in the summer. Buildings make up 40% of Europe's carbon emissions. We can't stop climate change unless we fix the roof while we still can. At the same time, there's a housing crisis that means young people are locked out of a secure place to live. It's hard to start a family. It's hard to even find somewhere to call home.

But, building our way out of the housing crisis will cause even more climate harm. In fact, we have to conserve the best, and fix up the rest.

There is a solution: We can restore empty homes and use all the new technologies we have - from heat pumps, to solar panels, to smart insulation - to make every home more comfortable as our earth keeps warming. If we fix up, we can fix other problems too. More nature in our towns and cities will lead to better air, better communities, and fewer cars, whereas more children and adults out walking means we'll live longer too.

We know what to do, we just need politicians to find the will to make it happen. Our gift to future generations can be homes fit for the next century."

Futurist Narrative Pillars

Social listening and media analysis *showed that while 15-minute cities have become a hugely polarising narrative in Spain and the UK (making up 64% of conversation around the BE on Twitter) - articles around 'cities of the future' which often speak to similar topics but in a different framing, tended to be positively engaged with when narratives paint an optimistic picture of existing cities that have policies or funding to become more prosperous and fit for future generations.*

Wholesale change is needed and is interconnected

This narrative emphasizes wholesale systems change in order to combat the emerging global polycrises: health and wellbeing, environment, inequality.

Technology and progress are to be embraced

This is a pro-technology narrative. Research, development, and investment in technologies that make it easier for us to achieve the green transition need to be embraced.

Optimism for a smarter future

Our social listening found that aspiration underpins the green themes of technological advancement at home and in cities

Futurist Test Narrative

"Another future is possible in Europe.

We can lead the world in building smart cities that combine the latest technologies: from artificial intelligence reimagining transportation, to smart thermostats that reduce household emissions, to solar panels and heat pumps that make every home net zero. We need to think big about how we share our most limited resource: buildings.

Collectively, we make decisions that mean no families have zero space and we build incentives for people with too much space to downsize. It's stark but buildings make up 40% of Europe's carbon emissions. We can't stop climate change unless we fix buildings while we can.

We need to insulate, remove gas completely from homes, and use new recycled building materials that are only just emerging. Our streets will be cleaner and greener, our air quality better, making it easier for children to walk and play outside. We will live longer and better lives.

Using technology, the engineering skills of European industry and better local decision making, we can create the cities of the future and rethink what is possible for communities and homes at the same time.

Together, we can build a future safe and secure for future generations. This is our generation's moon landing: smart homes for everyone. Let's fix the future."

Insecurity Narrative Pillars

Social listening and media analysis *showed that conversations about health inequalities, including topics such as air pollution, were often the least mentioned in the media but the most engaged with. For example, despite retrofitting making 64% of the BE mentions in French media, articles around air pollution were engaged with over twice as much. Framing is also essential - communities want cleaner air, but don't want to be unduly penalised for it.*

Security and control minimises risk and maximises comfort

This narrative openly talks about the risk from global events such as the war in Ukraine - at a time when rising heating and housing costs are making citizens less comfortable.

New deal to address growing inequalities

A new urban working class is emerging that is so economically insecure that it cannot afford to miss a month's rent. Resources are finite and not appropriately shared, redistribution of housing itself is needed.

Change happens to people rather than with people

Communities across the continent are more apathetic and tell us that they don't have a stake in what happens to their built environment. This narrative emphasises the need for strong intervention.

Insecurity Test Narrative

"Governments promised they would provide us with comfortable, secure housing, but that promise has been broken.
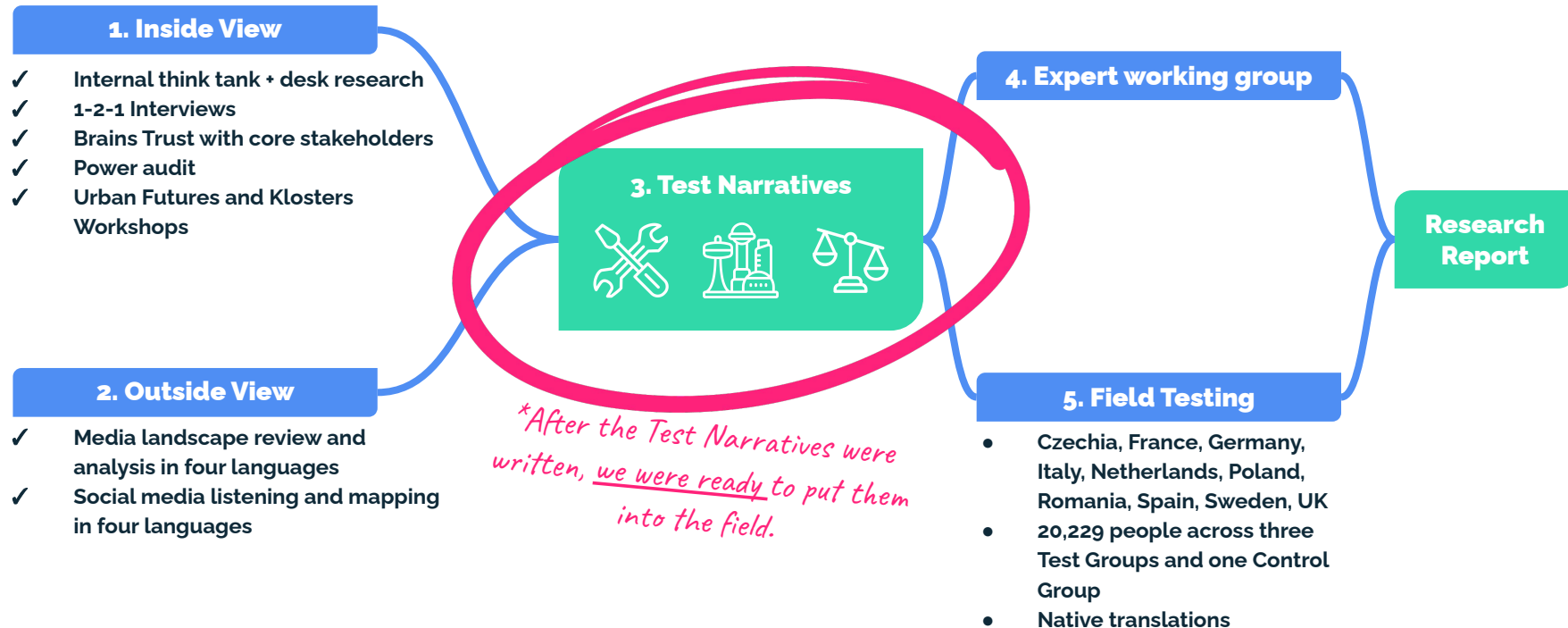
Too many people have too little space. Families find it hard to find suitable homes in their local area. People are being pushed out of cities as rents go up and up each year. Pensioners face homes that are too cold in winter and too hot in summer. Meanwhile, many buildings lie empty and unused.

We need a fairer deal for buildings. A deal that means more Europeans don't feel worried about ever increasing housing costs. A deal that means we fix up old buildings with solar panels, heat pumps and insulation. A deal that ensures that children can play outside with safer and greener streets and better options to get around than getting in the car.

Today, 40% of all our carbon emissions come from leaky buildings. The war in Ukraine has shown Europe's badly insulated housing stock isn't just bad for our climate: it has highlighted that unexpected events hurt the incomes of the poorest the most.

We don't have the time, or the energy, to waste. We need to take back control of Europe's buildings and make them work for everyone."

Conclusion: Phase 3

1. Inside View

- ✓ **Internal think tank + desk research**
- ✓ **1-2-1 Interviews**
- ✓ **Brains Trust with core stakeholders**
- ✓ **Power audit**
- ✓ **Urban Futures and Klosters Workshops**

2. Outside View

- ✓ **Media landscape review and analysis in four languages**
- ✓ **Social media listening and mapping in four languages**

3. Test Narratives

After the Test Narratives were written, we were ready to put them into the field.

4. Expert working group

5. Field Testing

- **Czechia, France, Germany, Italy, Netherlands, Poland, Romania, Spain, Sweden, UK**
- **20,229 people across three Test Groups and one Control Group**
- **Native translations**

Research Report

Expert Working Group

Phase 4: Expert Working Group

1. Inside View

✓ Internal think tank + desk research
✓ 1-2-1 Interviews
✓ Brains Trust with core stakeholders
✓ Power audit
✓ Urban Futures and Klosters Workshops

2. Outside View

✓ Media landscape review and analysis in four languages
✓ Social media listening and mapping in four languages

3. Test Narratives

4. Expert working group

5. Field Testing

● Czechia, France, Germany, Italy, Netherlands, Poland, Romania, Spain, Sweden, UK
● 20,229 people across three Test Groups and one Control Group
● Native translations

Research Report

Expert Working Group

A select group of expert stakeholders were brought together to react to the dummy narratives presented and discuss how the work might be carried forward.

The working group acted as a means of triangulating the public polling data - representing an "outside view" of the narratives - with an insider perspective. The group were given a brief overview of the work to date for context. **The group were not shown any of the polling responses** - to avoid prejudicing their response to the dummy narratives - **but this means the feedback is not linked to empirical data of how European citizens actually responded to the narratives.**

Next, they were split into breakout groups and were given the opportunity to respond to each narrative in turn via a world café discussion format. Each group would discuss a new narrative each round, and also a new question about the narrative. Responses were recorded on a shared jamboard so the groups could build on the prior work of their colleagues.

The three questions for each round were as follows:
- *Which contexts would the narrative work well in? With whom?*
- *What might block its effectiveness? Who might push back?*
- *What else should be considered to ensure this narrative is as effective as possible? How might it be adapted?*

Expert Working Group: Pragmatic Narrative

Appeal
The narrative was considered as 'middle of the road' and inoffensive, likely able to resonate across the political spectrum and particularly with "small c" conservatives. Specific demographics identified as being particularly good targets included:

Local authorities, DIY sector, wealthy pensioners/homeowners, the construction sector (although this was also identified later as a possible source of opposition).

It was noted that this narrative would probably resonate better nationally rather than as an international narrative, with broad agreement that it was probably even more suited to the regional municipality level.

Possible blockers and opponents
While the middle of the road framing was seen as useful by many, some participants pushed back, arguing it was unconvincing, and wouldn't work for more ambitious policies or to secure the necessary buy-in from communities themselves. Related concerns were raised that the narrative didn't present enough of a positive upside to its proposed approach. This applied both generally but also specifically around the economic benefits of restoration. This latter point is particularly pressing given the strong economic incentives involved in new construction, which this narrative would have to push back on.

Further, some elements of the narrative were felt to not line up clearly enough with the reality of the current situation and may have maximised impact three or four years ago. The narrative's reference to the housing crisis as a link to energy or climate policy was considered less impactful than tackling alternative causes such as economic dynamics of speculation. Similarly, the seeming focus on empty homes was identified as perhaps too blinkered, given occupied and in-use buildings are still very much sites of crisis in many countries.

Expert Working Group: Pragmatic Narrative

The frame that "we cannot build our way out of the crisis" was divisive, with some participants feeling it was particularly resonant while others identifying it as the main aspect that did not resonate with their view.

Participants noted that there may be a lack of major advocacy or interest groups who could carry forward a narrative of this kind, which may limit its efficacy, or groups that could pushback against its use. For example, property developers or alternative market drivers may push back against a narrative that doesn't definitively push for investment. The new build focused construction sector was identified as a possible source of similar pushback. However, many developers are eager to invest in commercial renovation and some urban areas are creating incentives around renovation, providing opportunities to overcome this potential blocker. Landowners may also be sceptical inasmuch as this narrative framing undermines their potential to monetise their assets.

Further considerations

One possible means of developing the narrative was identified as focusing on quality and standards. In considering buildings as a basic human need, some participants advocated that the narrative acknowledge a basic level of quality more strongly as an expectation or even right. Participants also noted that who delivers such a narrative will be just as crucial for impact as its content. Many agreed that it would be essential to find the right advocates to push it forward, and that the pragmatism at the heart of the narrative should be extended to selecting these messengers purely on the basis of their chance for impact. Impactful messengers were identified as likely being those who are trusted and credible in specific local contexts. These may or may not be political figures, depending on the context.

Finally, returning to the theme of upsides and aspiration touched on in the first round, it was noted that making the narrative aspirational enough would be difficult as it goes against the imperatives of growth and consumption which have become so deeply embedded throughout much of modern European culture. Pushing forward the idea that finite resources should shift how we treat what we already have thus requires a significant shift to cultural norms which extend far beyond the built environment. However, the examples of other sectors were noted as a possible path to increasing aspiration and pursuing such cultural shifts, with the "don't move, improve" campaign and Patagonia's clothes modification initiative both highlighted as possible sources of learning.

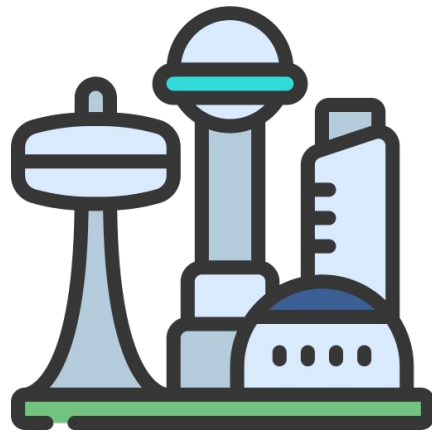# Expert Working Group: Futurist Narrative

Appeal

The narrative was identified as being potentially attractive and persuasive to a wide portion of the population due to its focus on major systems-level change and increasing efficiencies to deliver better lives. This appeal will be further bolstered if delivered by messengers with widely acknowledged scientific credentials. Those in the planning and architecture were particularly receptive targets, who would find the narrative's focus on the ends rather than the means of transformation appealing.

Possible blockers and opponents

The techno-futurist framing of the narrative concerned some participants, with one dubbing it "more technocratic than optimistic". Concerns were raised that it fuelled harmful trends of green growth solutionism, and that the focus on technology obscured other social and political issues. Real obstacles to such technological transformation persist around materials, power, agency, capital and distrust, and in glossing over these the narrative was viewed by some as being "too good to be true".

Distributional issues were at the heart of a number of concerns. Questions arose around who shares the benefits and who shoulders the burdens of such a vision, given its focus on expensive high-tech investment. The risk of 'gentrification' was identified as a potential concern. More widely, the narrative did not seem to carry clear meaning or resonance for "ordinary people" or renters, and its focus did not highlight clear pathways to action for groups who are typically excluded; a number of participants mentioned the lack of emphasis on communities and community action as a weakness in this regard.

The final set of possible obstacles related to broader societal scepticism around technology. Some participants questioned whether painting technology so unequivocally positively would work, while concerns about surveillance and the wider impacts of smart cities on people were also raised as possible sources of resistance. These critiques meant there was scepticism around the narrative's ability to resonate outside of the wealthy, urban upper middle class of Northern Europe. As one participant noted: "would this work in rural Bulgaria?"
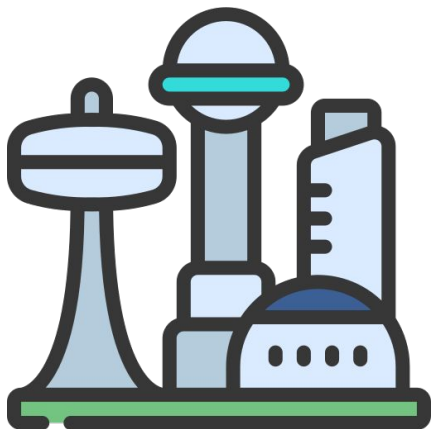
Expert Working Group: Futurist Narrative

Further considerations
The analysis above and the identified focus on elites as a target group - such as technological early adopters and those open to radical transformation - meant that many participants believed it would be fruitless trying to use this narrative for broad appeal. There were also questions around how to ensure that the justice component was adequately captured given this framing and target. A need was identified for tangible measures to ensure it delivers the wider societal outcomes we are actually aiming for, rather than inadvertently worsening other problems in the name of climate action.

The reliance on status and desirability surfaced a number of considerations which should be addressed in the name of practical applicability. While one participant questioned where the Tesla of the construction industry might be located, another noted that futuristic vehicles may make more desirable status goods than highly energy efficient buildings. Finally, one participant questioned how the narrative can be extended to support innovation in the renovation sector - which is dominated by decades old approaches - rather than inadvertently driving new build.

Finally, it was noted that perhaps the metaphor of the moon landing may be inappropriate for such a future focused narrative. In a world where wars are fought with satellites, perhaps a more compellingly futuristic image would be more compelling.

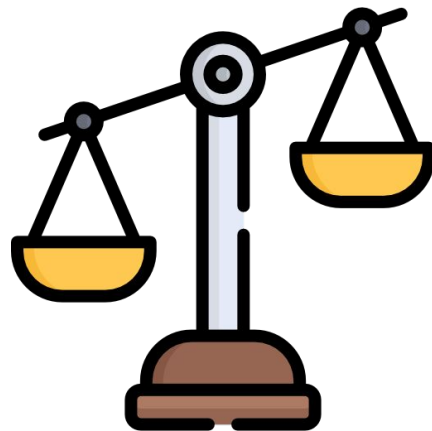# Expert Working Group: Insecurity Narrative

Appeal
The narrative was identified as having a high degree of mainstream appeal, given its focus on issues which are a real concern for many ordinary people. The link between energy, climate and housing crises was deemed particularly resonant. Specific groups who have felt particularly left out, such as women in their 30 and 40s or less well off over 60s, were raised as having the potential to be especially fruitful targets for the narrative. It was considered to be potentially as effective with civil society promoting a just transition, as with populist governments pushing to engage their citizens on new policy changes. In general, the narrative was felt to be particularly urgent and salient in the current moment, as a means of grounding climate action in everyday priorities, and countering populist backlash against climate action.

The promotion of agency was felt by a number of participants to be a strength in this narrative. Political action and democratic participation are viewed as particularly effective means for securing buy-in from European citizens. Plus, this would work well as a counterbalance to ongoing populist backlashes to environmental policies across the continent.

The narrative was identified as being likely to work best in the national press, given overall energy security in the EU is fairly prominent. As an extension of this logic, countries more exposed to energy insecurity due to their energy mix were expected to resonate particularly strongly.

Possible blockers and opponents
Pushing for greater democratic engagement was not seen as unequivocally positive, however. Questions were raised as to whether ordinary people actually want something more akin to a Swiss style model of participation, given this may feel like a time consuming and daunting hassle on top of other obligations. Similarly, the vast scale of the change involved in spatial redistribution - or the potential for rapid change with unclear implications - may simply feel too overwhelming for populations who have been through so much upheaval in recent years, further undermining support.
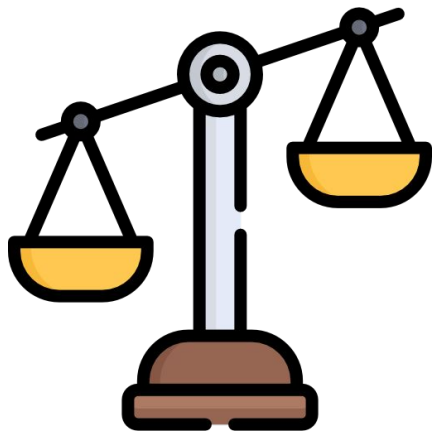
Expert Working Group: Insecurity Narrative

Some participants believed that the framing of a 'new deal' - akin to 30s America and modern day 'green new deal' - may be hard to understand a for ordinary people. Alternatively, it risked being linked to everyday disagreements that targets might have with neighbours and other acquaintances, further adding to the sense that the process of deal making would be a burdensome negotiation incapable of ensuring their interests would be reflected.

Possible blockers and opponents
The idea of a deal may also conjure a sense there will be winners and losers. Some participants flagged that under this framing there would be pushback from powerful interests who stand to lose out, many of whom have significant political sway.

Industry were identified as a stakeholder group who may resist the narrative on such grounds, and one participant identified that industry's predicted opposition to its more populist framing might indicate the potential for broader disagreement across the European population. Wealthier homeowners and landlords were raised as other possible sources of pushback, with concern that they would feel as if the fruits of their hard work were threatened by a focus on space saving. This threat was also identified in the narrative's reference to car travel, and a participant cautioned around it feeling too anti-car and instead advised a positive framing around greater accessibility more widely.

The real world implications of a deal producing winners and losers were also raised. Most obviously, targeting a deal requires careful consideration around who benefits and from whom to ensure that citizens are not bearing the burdens while other stakeholders reap huge rewards. In this vein, there was concern about how a deal could be translated into action within our current policy and economic environment. The type of for-profit affordable housing backed by private equity and high net worth individuals will still be highly extractive; these groups will still be winners and capitalise on costs for ordinary people unless there's a vast policy shift that goes beyond just the discussion of better homes.
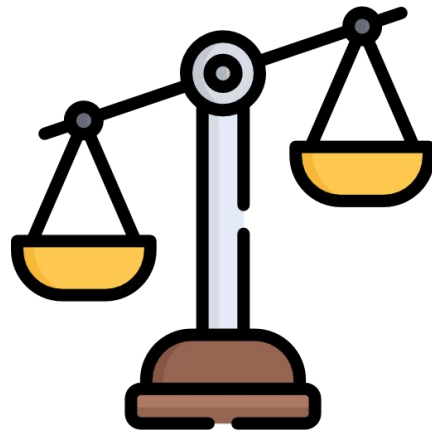
Narrative: Insecurity
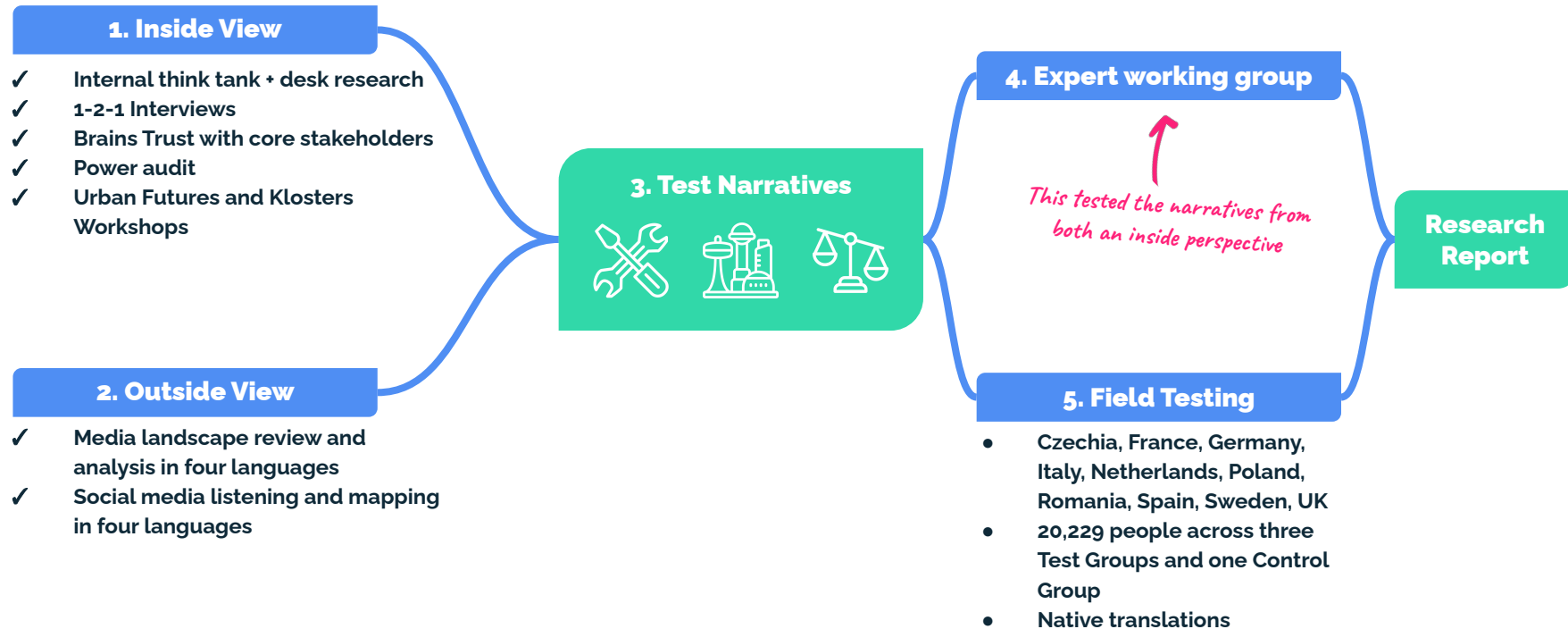
Further considerations

The Insecurity framing painted transition as a path to certainty; confidence in affordable energy bills and comfortable homes could be made a more concrete part of messaging, to bring the security component further forward. However, some participants expressed worry over the implications of rapid, large-scale, and uncertain change,

This focus on real world problems such as bills was echoed by a number of participants who suggested that the statistics be removed from the narrative. The 35% figure used was identified as perhaps being alienating or simply meaningless to people, and it was suggested that statistics be replaced with more descriptive components to increase their impactfulness. It should be noted that this opposition to the use of statistics was not unanimous with one participant arguing that they could be useful in grounding the narrative, but only if complemented by reference to more tangible references such as energy bill savings.

Two other noteworthy considerations were raised in the closing round: Incorporating the idea of the built environment as a service to evoke the sense that everyone is entitled to a certain quality of provision, building on work in other areas such as the push for healthy meals in schools. Addressing the disanalogies between the already built and not-yet-built built environment, and the differing approaches required in each case. It is unavoidable that justice likely means that at least some new building will be required, even if this carries environmental impacts. We must start by a strong understanding of needs to strategically build only where these needs cannot be met by other means, and this analysis will be crucial to the success of narratives targeting security and fairness.
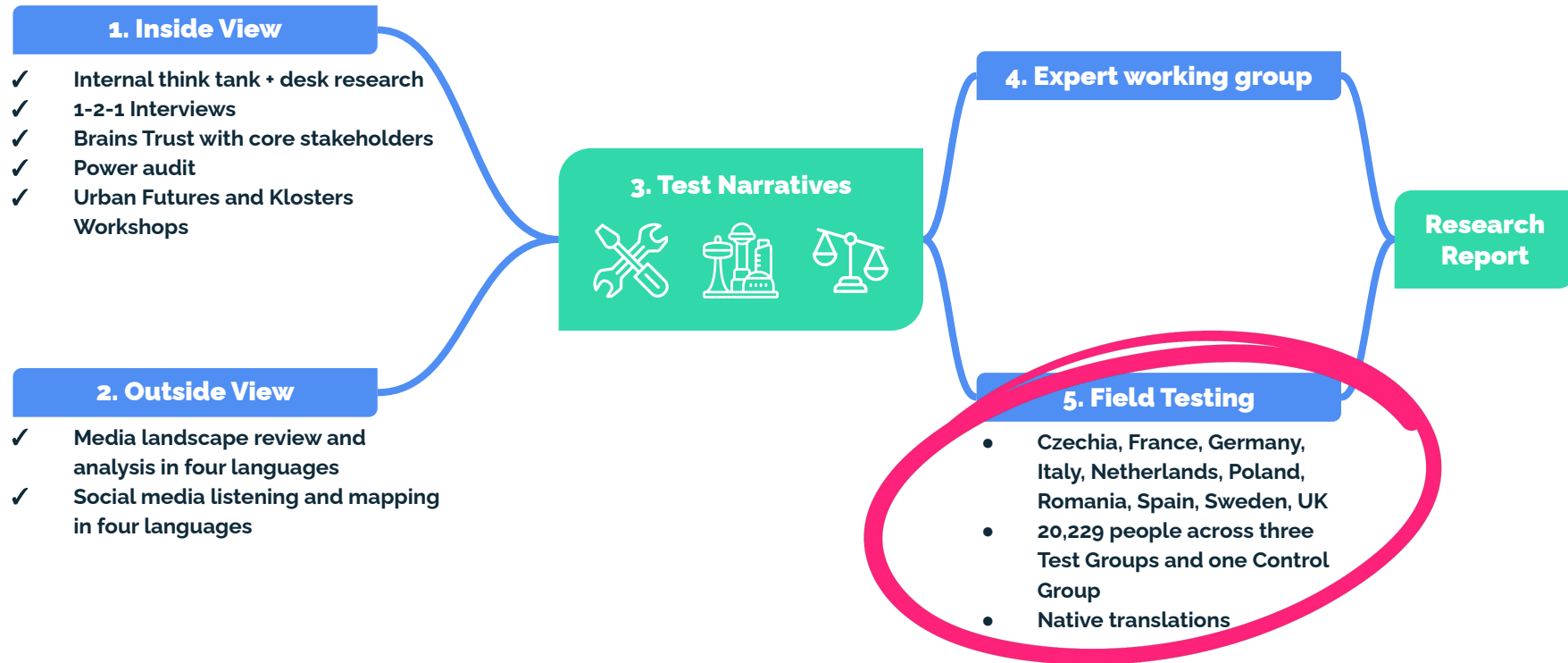
Polling Methodology

Phase 5: Field Testing

1. Inside View

- ✓ Internal think tank + desk research
- ✓ 1-2-1 Interviews
- ✓ Brains Trust with core stakeholders
- ✓ Power audit
- ✓ Urban Futures and Klosters Workshops

2. Outside View

- ✓ Media landscape review and analysis in four languages
- ✓ Social media listening and mapping in four languages

3. Test Narratives

4. Expert working group

5. Field Testing

- Czechia, France, Germany, Italy, Netherlands, Poland, Romania, Spain, Sweden, UK
- 20,229 people across three Test Groups and one Control Group
- Native translations

Research Report

Polling Groups

➢ Each respondent was placed into one of four equally demographically representative groups: the Control Group, or one of three Test Groups. Each Test Group would look demographically like the Control Group so we can truly measure impact.

➢ Imagine the Control Group as a baseline of what Europe thinks. The Control Group did not see a narrative. The Test Groups were shown a narrative and we used these groups to measure the impact of the narratives on the Test Group's answers in comparison to the Control Group.

➢ Every respondent received Questions 1-8. Whereas Questions 9-10 directly asked respondents about the narratives and were therefore not compared to the Control Group: their influence was measured differently.

Control Group	Test Group 1	Test Group 2	Test Group 3
Q.1-8 establishing world view	*Pragmatic Narrative* Q.1-8 establishing world view Q.9-10 perceptions of the narrative	*Futurist Narrative* Q.1-8 establishing world view Q.9-10 perceptions of the narrative	*Insecurity Narrative* Q.1-8 establishing world view Q.9-10 perceptions of the narrative

Polling Script

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Each narrative and script was _translated_ by native speakers ⭐

The Control Group established what Europe thinks, they did _not_ receive a narrative

Test groups received the narrative script _first_

Control Group	Test Group 1	Test Group 2	Test Group 3
	Pragmatic Narrative	_Futurist Narrative_	_Insecurity Narrative_
Q.1-8 establishing world view	Q.1-8 establishing world view	Q.1-8 establishing world view	Q.1-8 establishing world view
	Q.9-10 perceptions of the narrative	Q.9-10 perceptions of the narrative	Q.9-10 perceptions of the narrative

Q1-8 were the same for each group

Answers to Q.1-8 measured the impact each narrative had on the Test Group _once they read the narrative_. We were looking at how a Test Group's answers were different compared to the Control Group

Q.9-10 asked respondents to tell us what they thought of each narrative. The Control Group did _not_ receive these

We asked two types of questions in the polling, the results of which are measured in different ways

Q.1-8

World View

Measuring how the narrative has influenced a respondent in comparison to the control group

Q.9-10

Narrative Perceptions

Directly asking respondents of their perceptions of the narrative they received at the start of the survey

Questions measuring the influence of narratives

Q.1

Rank the following issues in order of importance to you:

Crime / Energy supply / Government debt / Health / Housing / Immigration / Pensions / Rising prices, inflation, or cost of living / Taxation / Terrorism / The economic situation / The education system / The environment and climate change / The international situation / Unemployment

Circle all the apply

Questions measuring the influence of narratives

Q.2

Have you decreased your usage of each of the following in the last 12 months?

Number of flights taken / Amount you've driven your car / Consumption of meat and dairy / Usage of single-use plastic / Amount of gas or electricity you use at home

Increased - Decreased - No change - Don't know - Not applicable

Questions measuring the <mark>influence</mark> of narratives

Q.3

And which of the following reasons, if any, explain why you made those changes?

To save money / Environmental reasons / Health reasons / Influence of family and friends / Other (please specify) / None of these / Don't know

Circle all the apply

Q.4

To what extent are the following responsible for tackling climate change?

Government / Businesses / Individuals

Select all on a scale of 1 not responsible to 7 very responsible

Q.5

To what extent do you support your national government investing more in and passing laws to achieve:

The building of more housing / More proactive urban planning for cities and towns to ensure they are climate friendly / Ensuring that gas boilers are replaced with heat pumps in homes /Increase the density of cities so it is easier to find everything you need from shops to offices within a short walk / Encouraging better building use so the amount of housing space each family has is more equal / Working to ensure there are more trees and parks in towns and cities / Making sure homes are fit for the next century with new insulation, solar panels and heat pumps / Efforts by politicians to improve air quality by making walking easier and reducing the gas we use

No Support - Some Support - Great Support - Don't know - Not applicable

Questions measuring the **influence** of narratives

Q.6

Buildings are responsible for nearly 40% of European greenhouse gas emissions which are causing our planet to heat up. To what extent do you agree with the following statements?

I would support more action on climate change if it meant my neighbours and community were more involved in decision-making
Climate change requires a complete rethink of how we use buildings / If there was financial support, I would support my local government making it compulsory to fix up buildings to make them use less energy / I would make a financial contribution to making my home more energy efficient, reducing its greenhouse gas emissions / I would support my local town or city government taking action so that empty buildings are brought into use for family homes / Governments should invest heavily in technological solutions to reduce the greenhouse gas emissions of buildings / In the future, I would move to a smaller home in order to reduce my greenhouse emissions and prevent climate change / Local government should work to make my town or city more healthy through better urban planning / Richer people should contribute more to fixing up their homes to stop climate change and the government should insulate the homes of poor people / Making our buildings more energy efficient is a good way to create new skilled jobs /The war in Ukraine has shown that we need to take urgent action on reducing our energy use

No Support - Some Support - Great Support - Don't know - Not applicable

Q.7

To what extent would you agree with the following ideas for towns and cities:

'The 15-minute city is an urban planning concept in which most daily necessities and services, such as work, shopping, education, healthcare, and leisure can be easily reached by a 15-minute walk or bike ride from any point in the city.' We should encourage 15 minute cities / 'Density is a measure of the number of homes per given area.' We should increase the density of towns and cities so that more people have the housing space they need / Governments should make new laws and provide funding to ensure we use new technologies in buildings to reach net zero, even if it means that people cannot choose to use old heating systems (for example: gas boilers) / We should force landlords and governments to refit buildings so they maximise the use of space, so more families can live in them, while also making sure they are better insulated and more energy efficient.

Select all on a scale of 1 strongly disagree to 7 strongly agree

Questions measuring the **influence** of narratives

Q.8

How much control do you have over:

The choice you had over the home you are currently living in / Whether your home is a comfortable temperature / Whether your home is at a high standard / Whether the town or city you live in is a good place to live

No control - Some control - A lot of control - Don't know - Not applicable

Questions measuring the **perceptions** of narratives:

Q.9

To what extent do you agree with the statement above?

Set on a scale of agree - disagree - don't know

Questions measuring the **perceptions** of narratives:

Q.10

What do you feel about the statement above?

It is practical / It is in line with my values and beliefs / It is bossy / We need change like this to make society better / It would restrict my personal freedom / It is what I believe should happen / It is expensive / I don't know if it is technologically possible to achieve / Politicians should get on and do this / Corporations and the rich will stop it happening

Circle all the apply

Methodology: measuring impact

Q.1-8

World View

Independent variable analysis to examine statistically significant differences amongst sample groups in comparison to the Control Group

Q.9-10

Narrative Perceptions

Without the need to compare results to the Control Group, this analysis was far simpler and the data could be represented through bar charts

This polling showed us that respondents' *perceptions* of the narratives were different to the *influence* that the narratives had on their responses in, comparison to the control group

When prompted, Europeans are more likely to agree with the **Pragmatic** narrative...
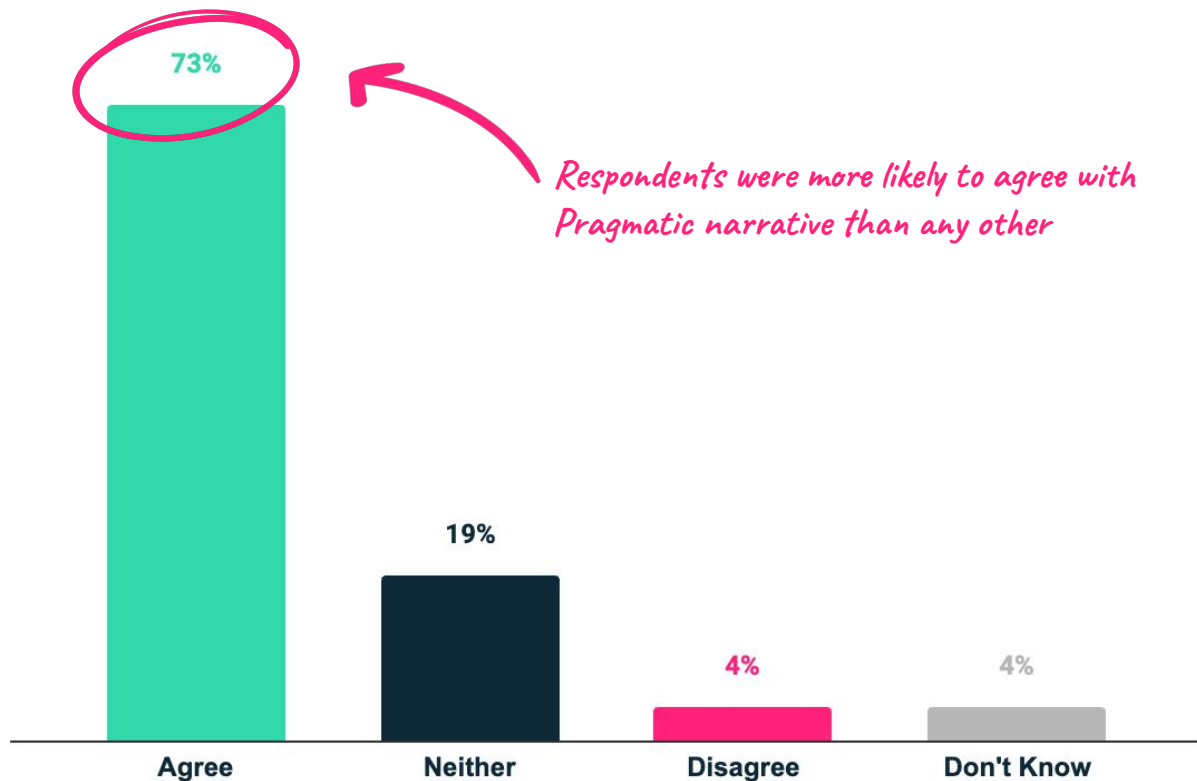
...but are more influenced by the **Insecurity** narrative
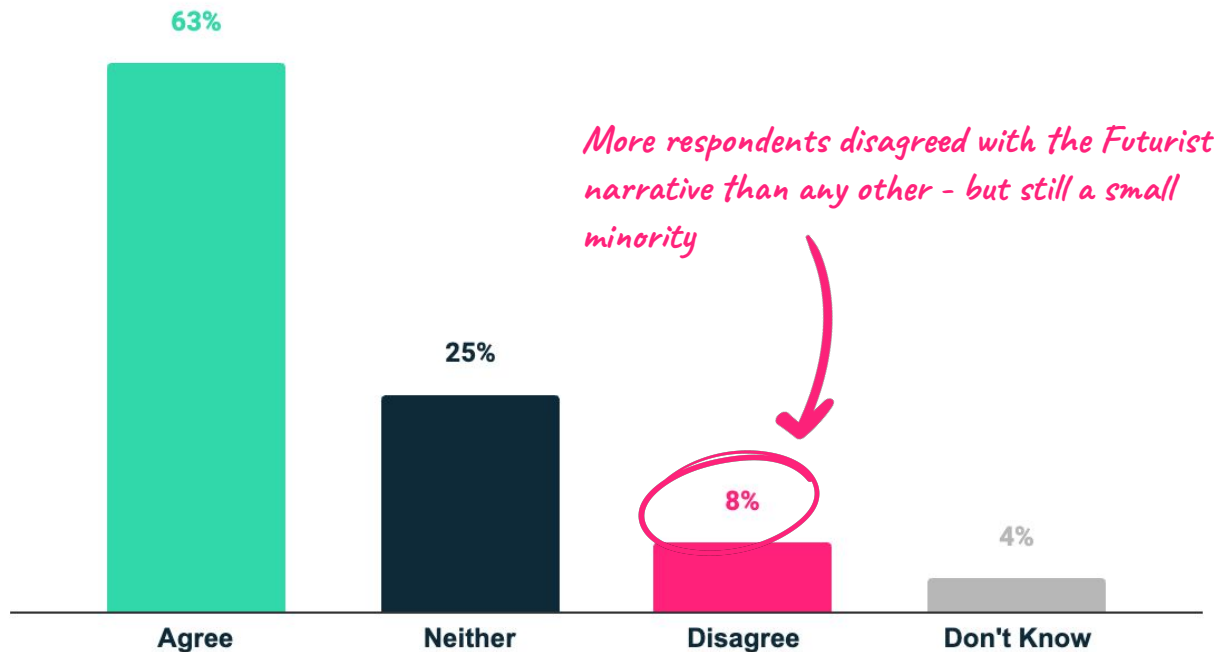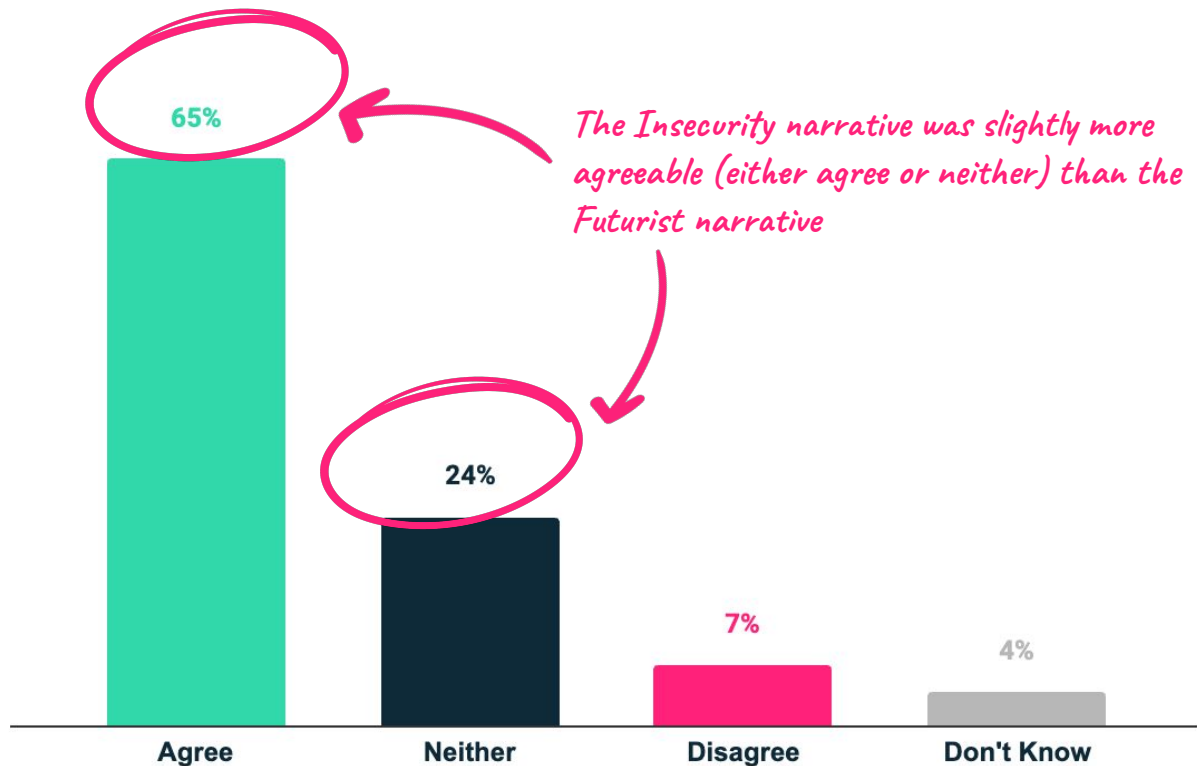
Results: Perceptions

Pragmatic Narrative: To what extent do you agree with the statement?

73%

19%

4%

4%

Respondents were more likely to agree with Pragmatic narrative than any other

Agree   Neither   Disagree   Don't Know

Futurist Narrative: To what extent do you agree with the statement?

63%

25%

8%

4%

More respondents disagreed with the Futurist narrative than any other - but still a small minority

Agree   Neither   Disagree   Don't Know

Pragmatic: To what extent do you agree with the statement?

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Legend: Don't know | Neither | Disagree | Agree

82% was the highest score of any country across the narratives

61% would still represent a slightly below average score for the other narratives

	ROM	FR	ES	UK	IT	PO	SW	CZ	NED	DEU
Agree	82%	81%	79%	77%	76%	73%	68%	67%	65%	61%

Futurist: To what extent do you agree with the statement?

Legend: Don't know | Neither | Disagree | Agree
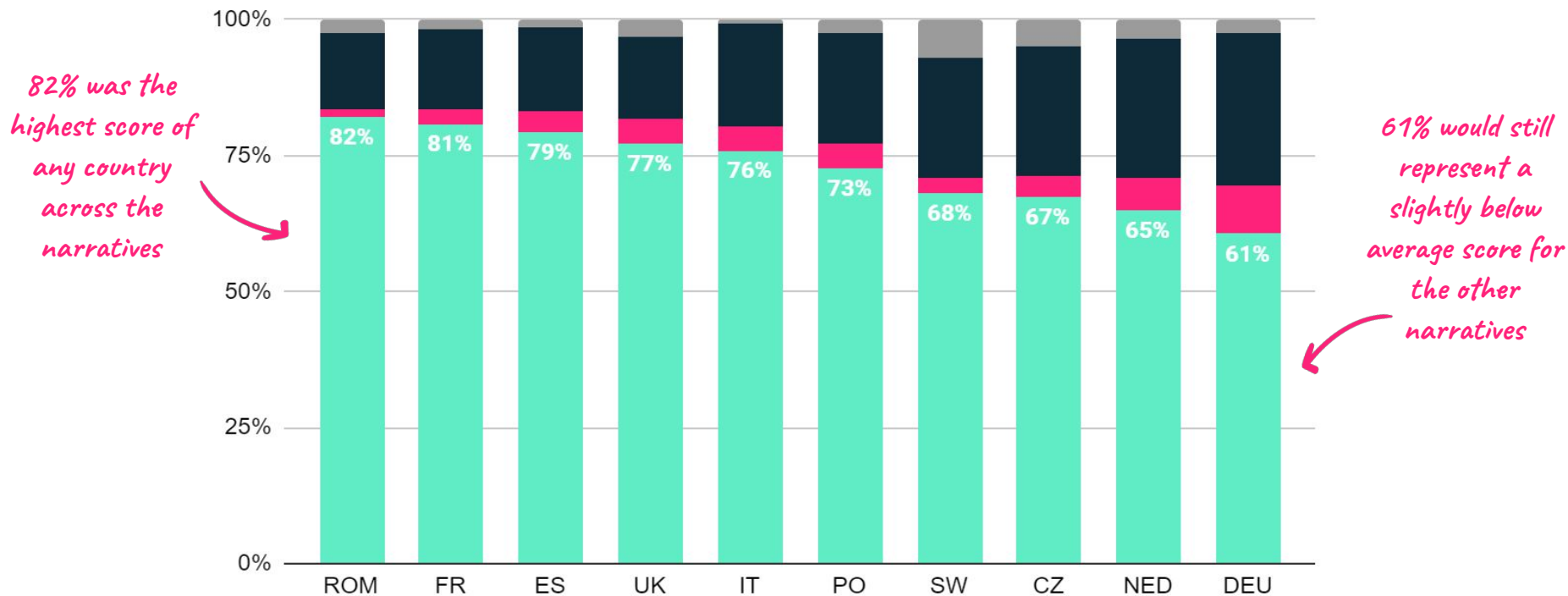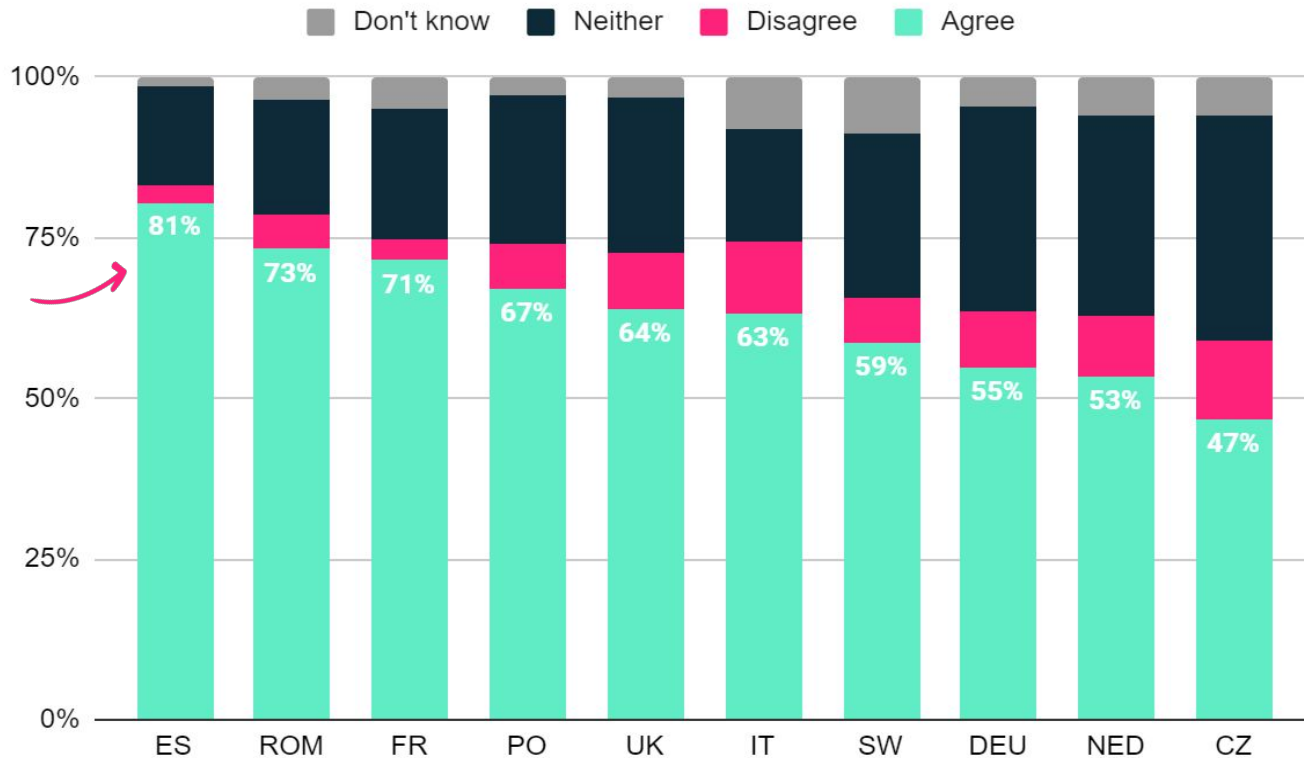
The Futurist narrative had the biggest disparity in score but it resonated most in Spain

47% in Czechia was the lowest score of any country across all the narratives

Country	Agree
ES	81%
ROM	73%
FR	71%
PO	67%
UK	64%
IT	63%
SW	59%
DEU	55%
NED	53%
CZ	47%

Insecurity: To what extent do you agree with the statement?
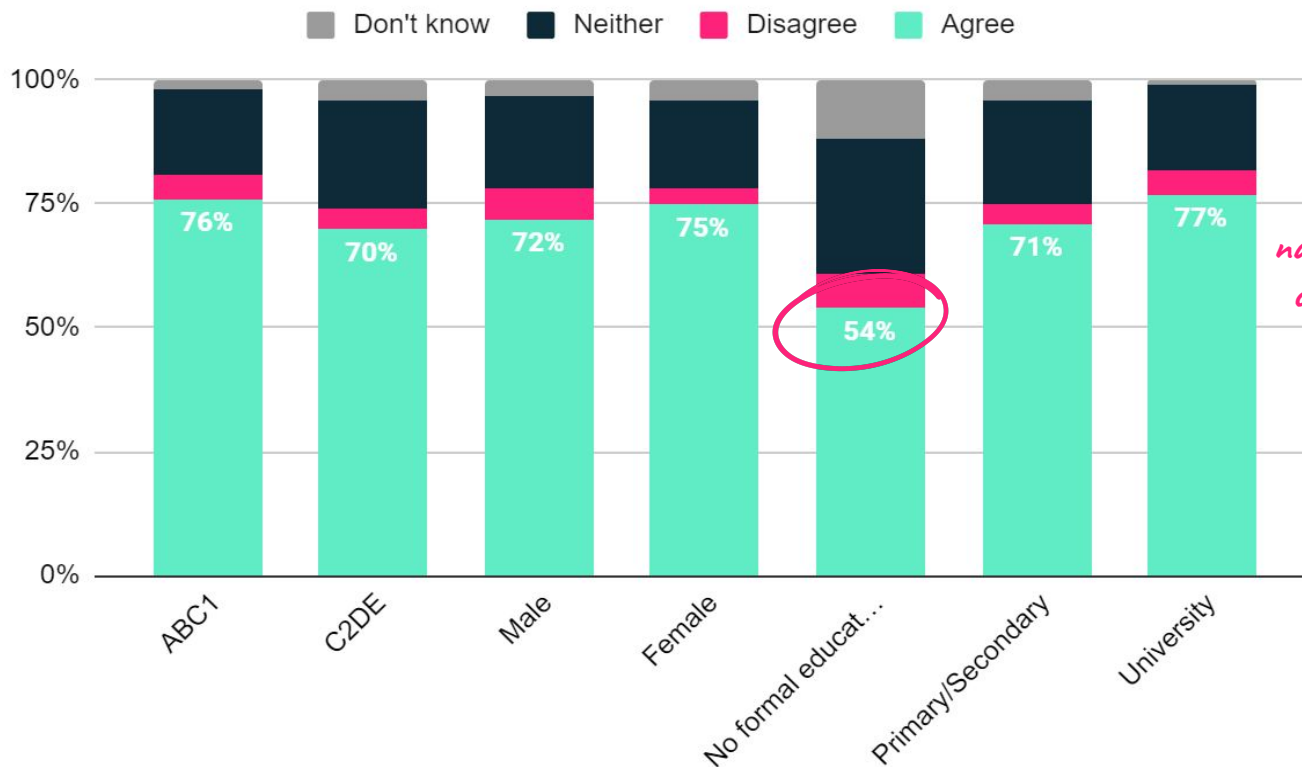

Legend: Don't know | Neither | Disagree | Agree
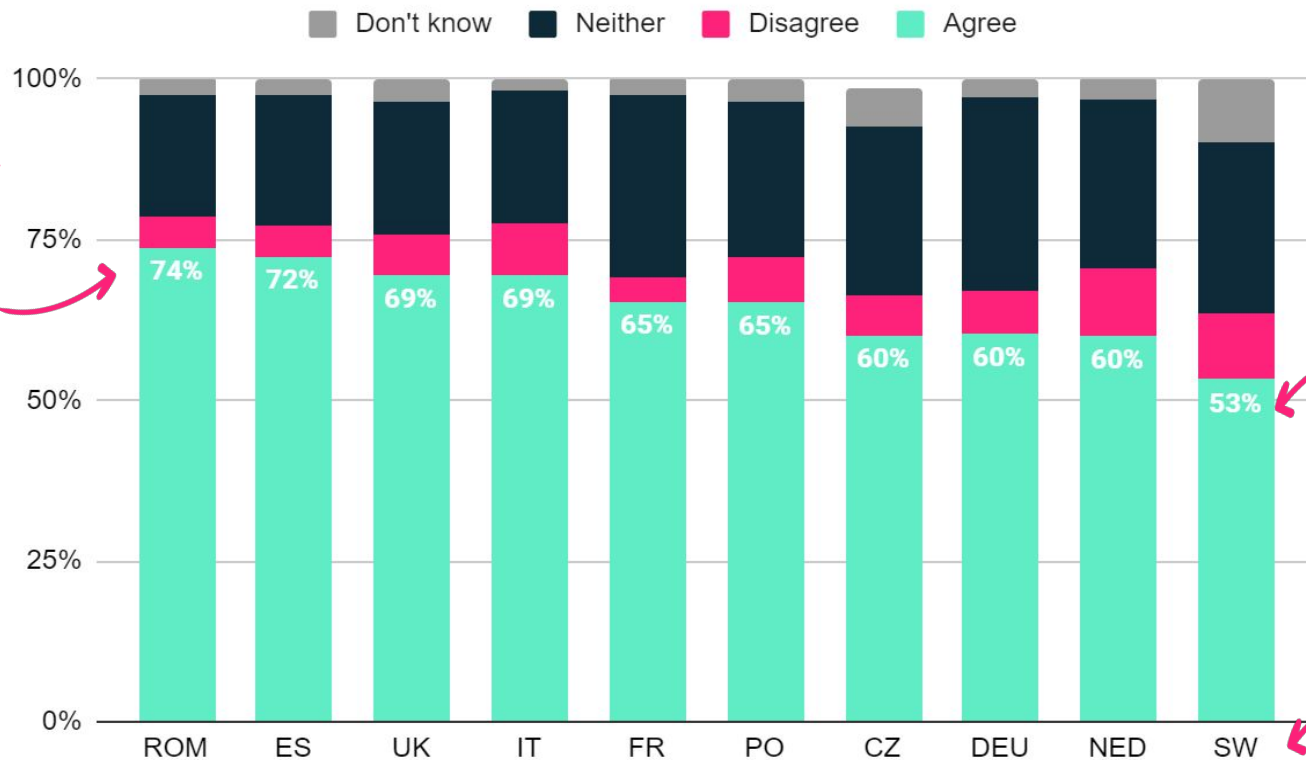
Respondents from Romania and Spain were the most likely to agree with each narrative, completing a top six with the UK, France, Poland, and Italy

Country	Agree
ROM	74%
ES	72%
UK	69%
IT	69%
FR	65%
PO	65%
CZ	60%
DEU	60%
NED	60%
SW	53%

Sweden's least popular narrative by far

Czechia, Holland, Sweden and Germany were generally the most sceptical of every narrative

Pragmatic: To what extent do you agree with the statement?

Legend: Don't know · Neither · Disagree · Agree

Category	Agree
ABC1	76%
C2DE	70%
Male	72%
Female	75%
No formal educat…	54%
Primary/Secondary	71%
University	77%

The pragmatic narrative scored best on all cross breaks apart from those without a formal education

Futurist: To what extent do you agree with the statement?

Legend: Don't know · Neither · Disagree · Agree
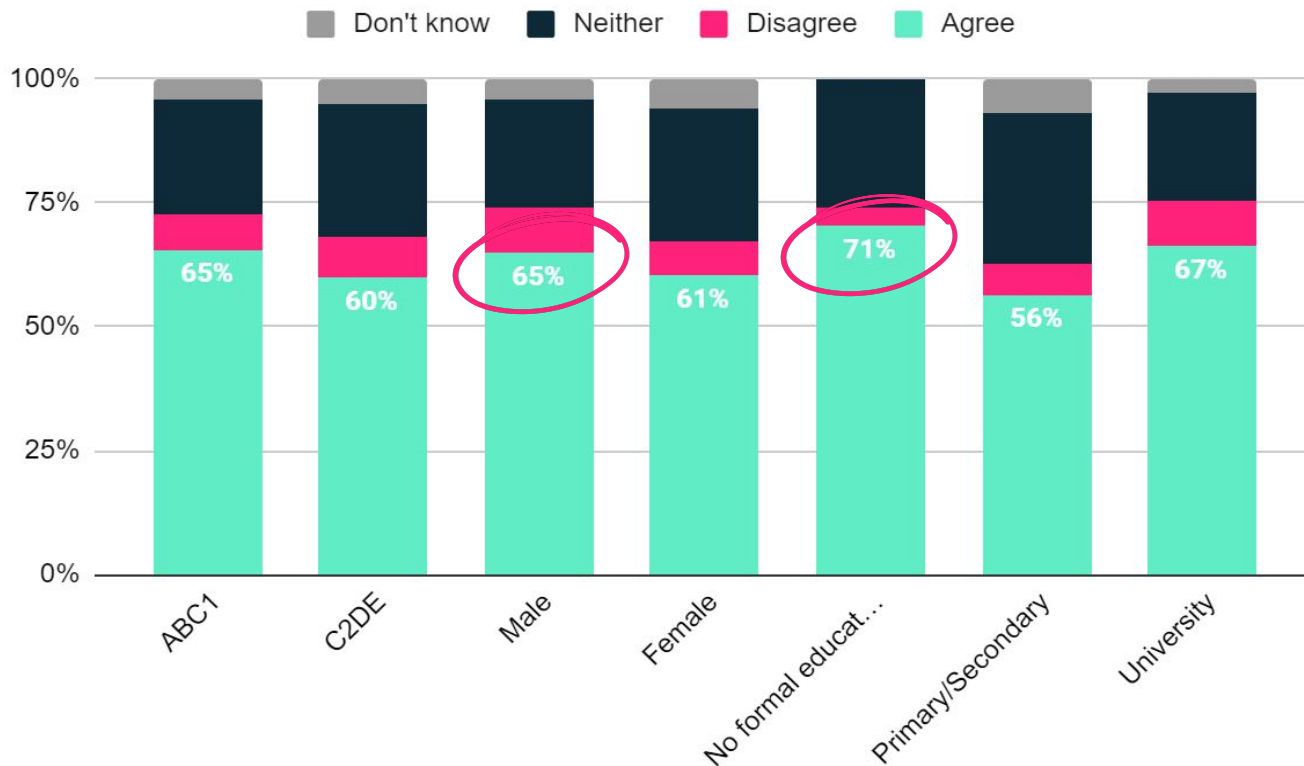
The Futurist narrative was the only narrative that resonated with <u>male</u> respondents more

This is by far the most popular narrative for those 'with no formal education'

Chart data (Agree %):
- ABC1: 65%
- C2DE: 60%
- Male: 65%
- Female: 61%
- No formal educat…: 71%
- Primary/Secondary: 56%
- University: 67%

Insecurity To what extent do you agree with the statement?
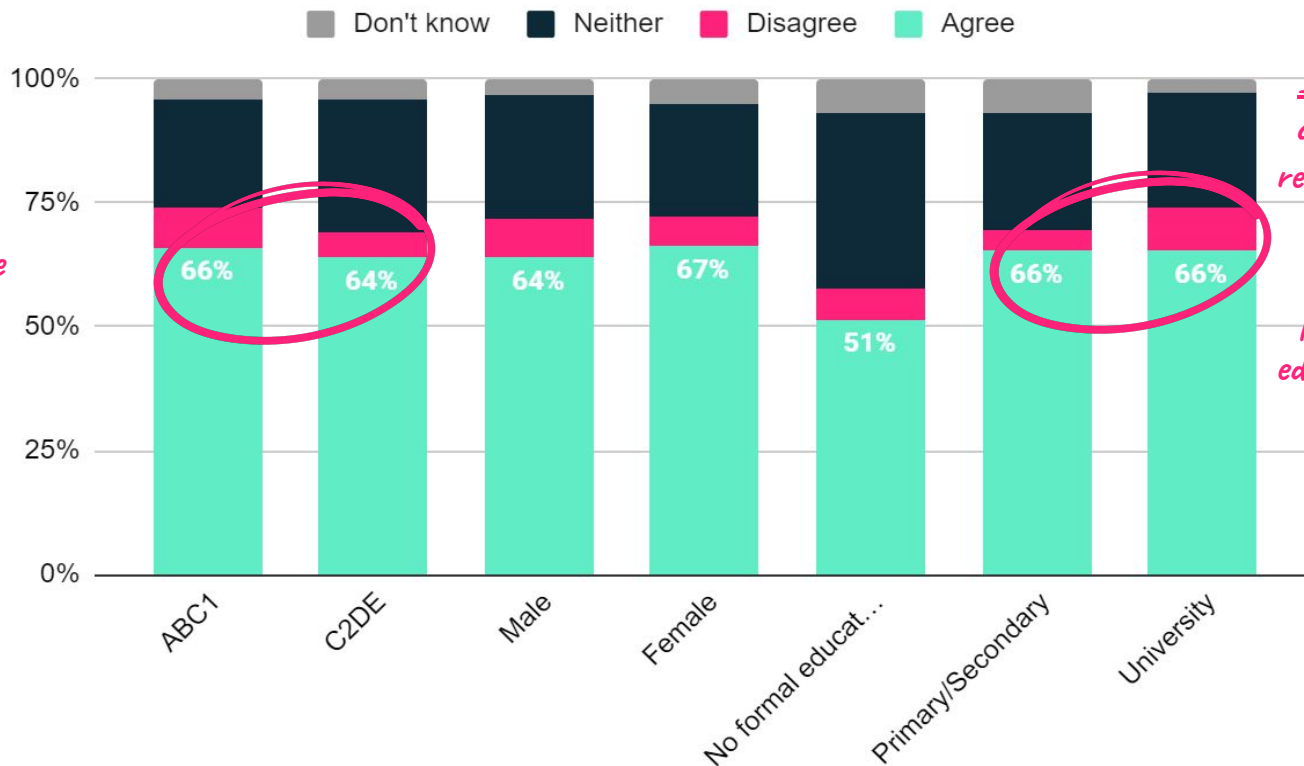
Insecurity had the most even spread across economic groups

Insecurity was the only narrative that resonated equally with those that have received a primary/secondary education and went to university

Results: Influence

How did the narratives **influence** respondents from different countries versus the control group?

Here, we did not ask participants to reflect on the narrative, but measured how their world view changed in comparison to the control group, after they read the narrative. We measured the extent to which the Test Groups provided a different answer to the Control Group, after seeing the narrative once at the start of the polling.

	Czechia	France	Germany	Holland	Italy	Poland	Romania	Spain	Sweden	UK	Average
Pragmatic	71%	7%	20%	22%	11%	18%	40%	18%	22%	36%	**26%**
Future	62%	7%	20%	22%	18%	9%	42%	38%	27%	36%	**28%**
Insecurity	53%	22%	22%	33%	33%	24%	42%	18%	27%	31%	**31%**

100% = High influence: every possible answer the Test Group gave was significantly-statistically different to the Control Group

0% = No influence: the Test Group were unmoved by the narrative and provided the same answers as the Control Group

How did the narratives **influence** respondents from different countries versus the control group?

The results show us that the **Insecurity narrative** was actually the most influential narrative across Europe overall, rather than the Pragmatic narrative which was perceived as the most effective.

	Czechia	France	Germany	Holland	Italy	Poland	Romania	Spain	Sweden	UK	Average
Pragmatic	71%	7%	20%	22%	11%	18%	40%	18%	22%	36%	**26%**
Future	62%	7%	20%	22%	18%	9%	42%	38%	27%	36%	**28%**
Insecurity	53%	22%	22%	33%	33%	24%	42%	18%	27%	31%	**31%**

However, the narrative that had the most single influence on any country was the **Pragmatic narrative** in **Czechia**.

The **Futurist narrative** was also clearly the most influential narrative in **Spain**, compared to the other narratives, but much less effective in France and Poland.

How did the narratives influence respondents from different demographics versus the control group?

Here, we did not asking participants to reflect on the narrative, but measured how their world view changed in comparison to the control group, after they read the narrative. We measured the extent to which the Test Groups provided different answers to the Control Group, after seeing the narrative once at the start of the polling.

	18-40	40+	Owner	Tenant	Left	Centre	Right
Pragmatic	29%	40%	47%	31%	47%	38%	31%
Future	31%	38%	38%	44%	53%	42%	29%
Insecurity	53%	31%	24%	71%	51%	49%	33%

100% = High influence: every possible answer the Test Group gave was significantly-statistically different to the Control Group

0% = No influence: the Test Group were unmoved by the narrative and provided the same answers as the Control Group

How did the narratives **influence** respondents from different demographics versus the control group?

The results show a **clear difference** between the narratives that are more likely to influence opposing demographic groups.

	18-40	40+	Owner	Tenant	Left	Centre	Right
Pragmatic	29%	40%	47%	31%	47%	38%	31%
Future	31%	38%	38%	44%	53%	42%	29%
Insecurity	53%	31%	24%	71%	51%	49%	33%

The **Pragmatic narrative** is more likely to influence older people age **40+ and homeowners**.
On the other hand the **Insecurity narrative** is more likely to influence younger people age **18-40** and **tenants**.
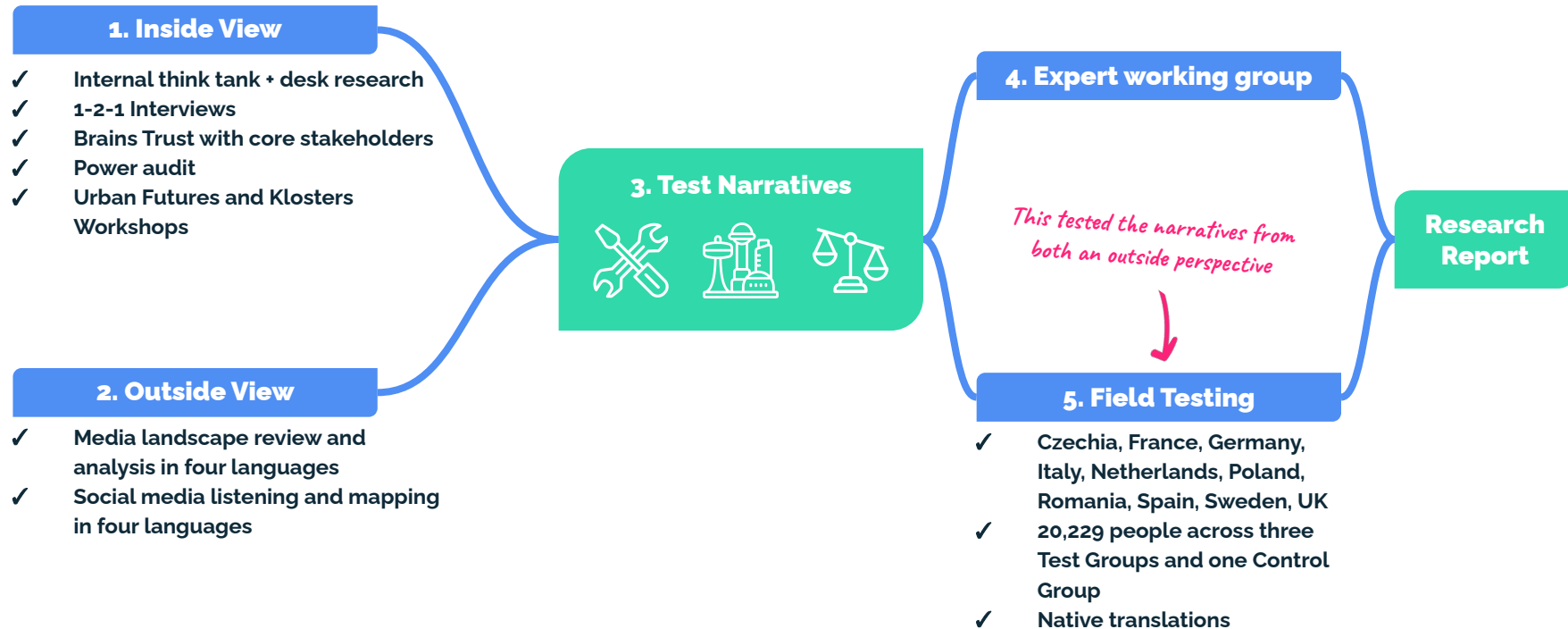
Overall among the political subgroups, the **left-leaning** participants were overall more likely to be influenced by the narratives.

What issues did each narrative particularly influence?

Each question in the poll aligned with a specific topic, theme, or issue. Below is an overview of the issues each narrative influenced participants to change their thinking on (in comparison to the Control Group).

Pragmatic	Futurist	Insecurity	

Pragmatic

Social Equity

- More likely to agree with improving building so there is equal housing space for families.
- More likely to agree with government action to turn empty buildings into family homes.
- More likely to agree that 'richer people should contribute more to fixing up their homes to stop climate change and the government should insulate the homes of poor people'.
- More likely to agree with national governments investing in Increasing the density of cities so it is easier to find everything you need within a short walk.

Futurist

Security

- Ranked terrorism, immigration, or the international situation in top three issues.
- Agreed with the statement 'the war in Ukraine has shown that we need to take urgent action on reducing our energy use'.

Jobs

- Ranked unemployment in top three issues.
- Ranked the education system in top three important issues.

Insecurity

Climate

- Ranked energy supply in top three issues.
- Agreed with moving to a smaller home to reduce greenhouse gas emissions.
- Agreed with governments investing in more trees and parks in cities.
- Agreed with proactive urban planning for cities and towns to ensure they are climate friendly.

Health

- Agreed that local governments should work to make towns or cities more healthy through better urban planning.

Economy

- Ranked government debt in top three issues.
- Ranked rising prices/inflation/cost of living in top three issues.
- Ranked taxation in top three issues.
- Ranked pensions in top three issues.

Housing

- Supported governments investing in building more housing.

Conclusion: Phase 5

1. Inside View

- ✓ Internal think tank + desk research
- ✓ 1-2-1 Interviews
- ✓ Brains Trust with core stakeholders
- ✓ Power audit
- ✓ Urban Futures and Klosters Workshops

2. Outside View

- ✓ Media landscape review and analysis in four languages
- ✓ Social media listening and mapping in four languages

3. Test Narratives

4. Expert working group

This tested the narratives from both an outside perspective

5. Field Testing

- ✓ Czechia, France, Germany, Italy, Netherlands, Poland, Romania, Spain, Sweden, UK
- ✓ 20,229 people across three Test Groups and one Control Group
- ✓ Native translations

Research Report

Communications Manual

Country Profiles

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Perceptions

This section details the key results from Questions 9 and 10 of the polling. I.e., what were respondents' perceptions of the narratives when directly asked. These are not the same as how respondents were actually influenced in comparison to the control group.

Pragmatic (71%) Futurist (62%) Insecurity (53%)
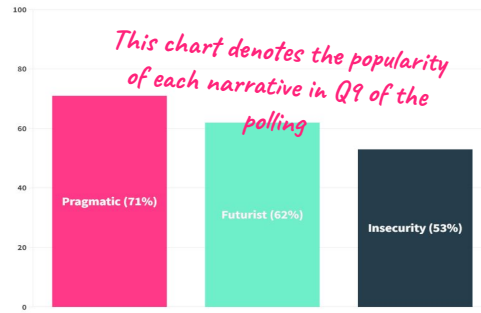
Demographics

This section details interesting results for each country broken down by demographic cross break.

How to navigate this section

Context

This section tells you what was happening in the national discussion on the just transition and the built environment, as well as other significant national events, at the time of the polling.

Influence

This section tells you which narrative influenced respondents in this country the most based on Questions 1 - 8 of the polling. It tell you the level of influence the test narrative had in comparison to the control group, but how positively or negatively they interpreted each issue.

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Bar chart:
- Pragmatic (71%)
- Futurist (62%)
- Insecurity (53%)

Perceptions

Agreement with statement:
Czech respondents were more likely to agree with the Pragmatic narrative (73%).

Attitude toward the statement:
They were the least likely to agree with the Futurist narrative (47%) and were more sceptical about whether it is technologically possible to achieve (34%).

Influence

Most impactful narrative:
Czech respondents were very impacted by the Pragmatic narrative, with 78% of responses differing to the control group.

Most prominent issue:
Climate related issues - like energy efficiency, urban greening, energy use and climate friendly practices - had a much larger impact on Czech respondents.
Issues related to social equality - equal space, buildings for family use, better conditions, placing the burden on the rich - was next to influence respondents' views.

Least prominent issue:
Issues relating to health, security and the economic situation had very little to no impact on respondents' views.
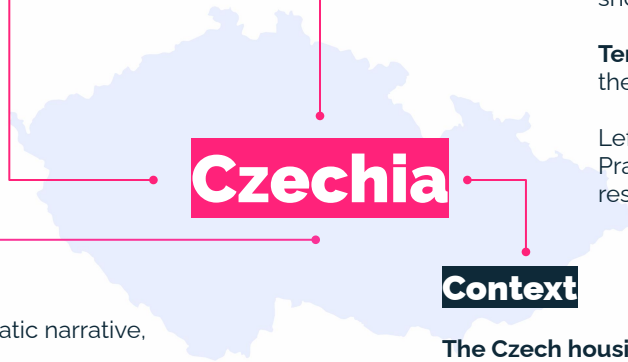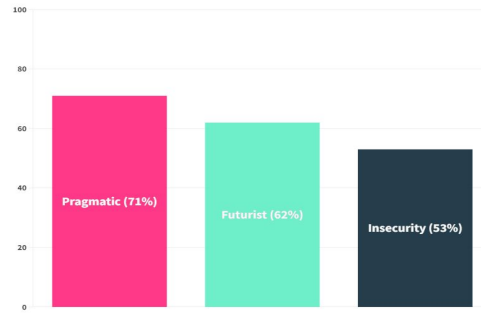
Demographics

People aged 40+ and homeowners were more impacted by the Pragmatic narrative.

They were more likely to care about energy efficiency and equal use of space in housing, as well as better urban planning.

They were also more likely to agree that governments should insulate the homes of poorer people.

Tenants were much more influenced by the Futurist and the Insecurity narratives.

Left-leaning respondents were more impacted by the Pragmatic narrative than otherwise politically inclined respondents.

Czechia

Context

The Czech housing market is one of the least affordable in the EU. Housing prices began increasing at an alarming rate from 2015 and rental prices have followed suit.

Construction demand is in decline. High mortgages, inflation, labor shortages, and rising construction costs are making construction more expensive.

On the other hand. demand for small and energy-efficient housing is on the rise, leading developers to introduce 'micro-apartments'.

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Perceptions

Agreement with statement:
French respondents were far more likely to agree with the Pragmatic narrative (81%), and less likely to agree with the Insecurity narrative (65%).

Attitude toward the statement:
They also agreed that the Pragmatic narrative is needed 'to make society better'. However, they thought it was the least 'practical' of all the narratives and they were more concerned about the cost of it (29% thought it was expensive).

Context

The French Government has been taking measures to support and invest in retrofitting, since the Climate and Resilience Act in 2020.

Social listening found that peaks in conversation were driven by political engagement around energy and heating renovation of buildings. On budget day, the top Tweets were questioning the practicality of Prime Minister Borne's move away from the government's commitment to 12 billion euro for Thermal Renovations.

France

Demographics

Respondents aged 40+ were more likely to be impacted by the Insecurity narrative.

These respondents were more likely to agree that governments and businesses are responsible for tackling climate change, and are more likely to find housing more important.

Tenants and respondents in the political centre who read the Insecurity narrative were more likely to agree with their national government investing more and passing laws to build more housing.

Influence

Most impactful narrative:
French respondents were far more influenced by the Insecurity narrative, with 22% of responses differing to the control group - compared to 7% for the Pragmatic and Futurist narratives.

Most prominent issue:
Climate related issues - like energy efficiency, urban greening, energy use and climate friendly practices - had more impact on French respondents overall.

Least prominent issue:
French respondents were only slightly or not at all influenced by issues around health, security, or jobs/unemployment.

Germany

Demographics

Young people were slightly more impacted by the narratives than people aged 40+, and tended to care more about health and the economy across all narrative groups.

People age 40+ were more likely to care about unemployment across all narrative groups.

German tenants were the demographic group most influenced by the narratives. Tenants were overall influenced to care more about unemployment, rising costs/inflation, and health.

Right-leaning German respondents were influenced less by the narratives. Left-leaning respondents and those in the centre were influenced to care more about unemployment by all narratives.

The Pragmatic and Insecurity narratives also made **left-leaning respondents** more likely to disagree that the war in Ukraine has shown that we need to take urgent action on reducing our energy use.

Perceptions

German respondents agreed with the Pragmatic narrative the most (61%) - although this was lower than all other countries.

German respondents were more likely to agree than other countries that the narratives would restrict their personal freedom (Pragmatic 11%, Futurist 15%, Insecurity 14%).

Respondents were more likely to consider the cost of implementing each narrative, agreeing they were expensive (Pragmatic 29%, Futurist 32%, Insecurity 27%).

Chart bars: Pragmatic (20%) | Futurist (20%) | Insecurity (22%)

Context

The German economy had been slower to recover from the coronavirus pandemic than the rest of the eurozone, causing high interest rates and persistently high prices. German unemployment rose more than expected at the time the poll was in the field.

The far-right Alternative party, which rose in the polls during debates around the controversial green heating law, fueled the "heizhammer" (the heating hammer) narrative of heat pumps being expensive. Social listening found that despite heat pumps being a contested subject online, positive research showed that switching to heat pumps not only benefits the climate but also the economy.
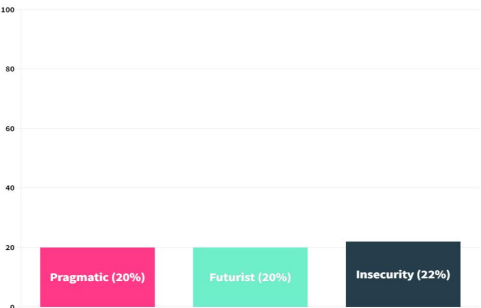
Influence

Most impactful narrative:
German respondents were slightly more impacted by the Insecurity narrative, where almost a quarter of responses (22%) differed to the control group.

Most prominent issue:
German respondents were particularly influenced to care more about issues on jobs, unemployment and the education system. Issues relating to climate change and energy efficiency had very little impact on German respondents.

Least prominent issue:
Issues relating to climate change and energy efficiency had very little impact on German respondents.

Italy

Perceptions

Agreement with statement:
Italian respondents were more likely to agree with the Insecurity narrative (76%).

Attitude toward the statement:
They were also more likely to agree that it is what is needed to 'make society better'.

However, Italian respondents agreed that the Pragmatic narrative aligns most with their values and beliefs.

Context

The **2022 Italian general elections put a centre-right coalition in power,** led by the radical right party, Brothers of Italy.

Since then, Italy has demanded that the EU water down green legislation such as improving the energy efficiency of buildings, phasing out combustion engine cars, and reducing industrial emissions.

Pressure on Prime Minister Meloni was growing around tackling immigration, as the interior Minister announced in August 2023 that more than 100,000 migrants arrived in Italy that year.

Demographics

Only the Insecurity narrative influenced **young people and respondents age 40+**.

Young people were more likely to agree with the idea of moving to a smaller home in order to reduce greenhouse emissions and prevent climate change.

People age 40+ were more likely to disagree that businesses are responsible for tackling climate change.

Left-leaning respondents were by far the most influenced demographic group.

The Insecurity and Futurist narrative influenced respondents to care more about energy supply, immigration, taxation and unemployment. The Insecurity narrative also made them less likely to believe that governments and businesses are responsible for tackling climate change.

Tenants were influenced to care more about energy supply. Particularly for the Insecurity and Futurist narrative groups.

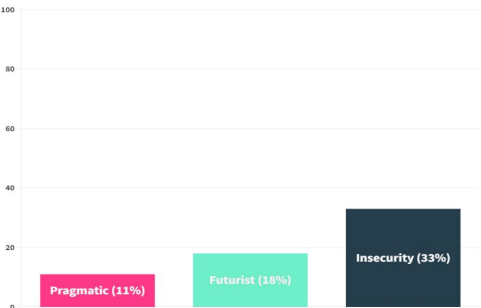## Influence

Most impactful narrative:
The Insecurity narrative was the most impactful on Italian respondents - 37% of responses differed from the control group.

Most prominent issue:
Climate related issues - like energy efficiency, urban greening, energy use and climate friendly practices - had a much larger impact on Italian respondents. The economic situation was also an issue that impacted Italians.

Least prominent issue:
Issues around housing, health, and social equality were not influenced at all.

Chart bars:
- Pragmatic (11%)
- Futurist (18%)
- Insecurity (33%)

Netherlands

Perceptions

Agreement with statement:
Dutch respondents were more likely to agree with the Pragmatic narrative (65%).

They were the second least likely country to agree with the Futurist narrative (53%).

Attitudes to statements:
Dutch respondents were one of the groups who most agreed that the Futurist narrative is 'expensive', and that the Pragmatic narrative is the change we need to make society better.

Influence

Most impactful narrative:
The Insecurity narrative was the most impactful on Dutch respondents - 33% of responses differed to the control group, compared to 22% and 24% for the Futurist and Pragmatic narratives.

Most prominent issue:
Climate change and jobs/unemployment were the most significant issues for Dutch respondents.

Least prominent issue:
The narratives had no impact on Dutch respondents' attitudes towards housing, and very little impact on issues around security, the economic situation, health, and social equality.
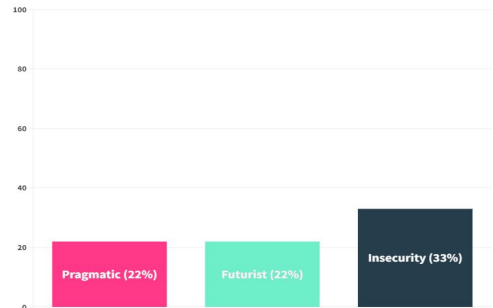
Context

In the summer, the Dutch cabinet collapsed from disagreements about measures to reduce immigration. Differences over asylum policy split former Prime Minister Mark Rutte's alliance of centre-right and liberal parties.

The Netherlands is one of the most vulnerable developed countries in terms of a housing crash because of the gap between incomes and house prices.

Nitrogen pollution has been causing delays to the building of new homes and roads.

Demographics

The Pragmatic narrative did not influence **respondents age 18-40** at all.

The Futurist and Insecurity narratives made them less likely to believe that individuals are responsible for tackling climate change, or that governments should make cities more healthy through urban planning.

The same narratives made **people age 40+** care more about the education system.

The Futurist and Insecurity narratives made **homeowners** care more about education and immigration.

The same narratives made **tenants** less likely to believe that governments or individuals should tackle climate change, or that urban planning should be used to make cities more healthy.

Left-leaning respondents were more likely to disagree with renovations for energy efficiency and making cities healthier through urban planning.

Right-leaning respondents were more likely to agree on issues around equal space in housing, and the education system. The Pragmatic narrative was the most impactful for them.

Chart bars:
- Pragmatic (22%)
- Futurist (22%)
- Insecurity (33%)

Y-axis: 0, 20, 40, 60, 80, 100

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Pragmatic (18%) Futurist (9%) Insecurity (24%)

Poland

Perceptions

Agreement with statement:
Polish respondents were more likely to agree with the Pragmatic narrative (73%).

Attitudes to statements:
Respondents who read the Pragmatic or Insecurity narratives were more likely to agree that 'politicians should get on and do this'.

Respondents were slightly more likely to agree that the Futurist narrative would restrict their personal freedom. .

Context

Inflation rose to one of the highest levels in the EU after Poland's recent PiS government was fined €436 million by the EU in 2021 for refusing to reverse some of its contested judiciary reforms, and its pandemic recovery fund was blocked.

Poland has experienced a revived left-wing opposition with Donald Tusk's Civic Platform forming a coalition with Third Way and the Left in October elections, defeating the PiS in both Parliament and the Senate.

In recent elections more young people cast their ballots than the over-60s. Polls show that 68.8% of voters aged under 29 turned out to vote, a major increase from 46.4% at the last parliamentary election in 2019.
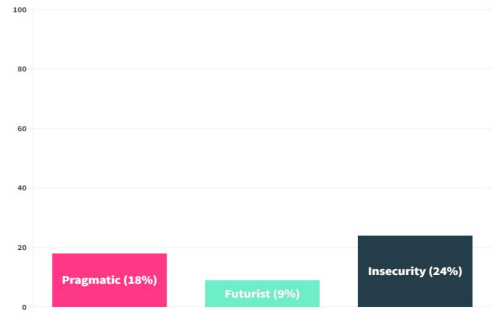
Demographics

Young people aged 18-40 were impacted by the narratives more than people aged 40+.

Young people were influenced to care more about the economic situation, like taxation and government debt, and also energy supply - especially by the Insecurity narrative.

Left-leaning respondents, and respondents on the political centre were impacted by the narratives the most, while right-leaning respondents were not impacted at all.

Left-leaning respondents were influenced to care more about building use to tackle climate change and make more equal space.

Both groups were influenced to care more about government debt.

Influence

Most impactful narrative:
Contrary to Polish respondents' perceptions of the narratives, the Insecurity narrative had more of an impact - where 32% of the responses differed to the control group.

Most prominent issue:
The economic situation - such as government debt - was the issue that moved Polish respondents the most, particularly those who read the Insecurity narrative.

Least prominent issue:
Views on issues around jobs, security, and health were not impacted at all.

Perceptions

Agreement with statement:
Romanian respondents were the most likely to agree with the Pragmatic and the Futurist narratives out of all the other countries (82% and 74% respectively).

Attitudes to statements:
Respondents who read the Pragmatic narrative were more likely to agree that it is needed 'to make society better'.

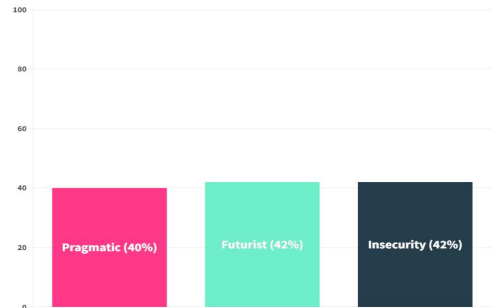On the other hands, more respondents who read the Insecurity narrative agreed that 'politicians should just get on and do it'.

Context

Romania is a country of homeowners. A "virtually absent rental market" has led to overcrowding as multiple generations or extended families live together.

Over 80,000 Ukrainian refugees have entered Romania since Russia's full scale invasion on Ukraine.

Ukraine and Romania signed an agreement in August to try and boost Kyiv's grain exports through Romania, after Russia withdrew from the Black Sea Grain Initiative, increasing concerns around national security.

Centre-right prime minister Nicolae Ciucă handed over his post to the Social Democrats in June 2023, as part of a power-sharing deal agreed in late 2021.

Pragmatic (40%) | Futurist (42%) | Insecurity (42%)

Romania

Demographics

All narratives influenced **people age 40+** more than young people.

All narratives influenced **people age 40+** to care more about housing and national security (particularly terrorism or immigration).

The Insecurity narrative influenced **young people** to care more about the climate and environment.

Respondents on the **political centre and left** were the most impacted overall by all the narratives.

Left-leaning respondents were much more likely to be influenced to disagree with statements about re-thinking building use for energy efficiency, climate change, and equal building use. In particular, by the Pragmatic and Futurist narrative.

Respondents on the **political centre** were more likely to be influenced to agree with statements about housing, health, the economic situation and security.

Influence

Most impactful narrative:
Romanian respondents were equally impacted by the Futurist and Insecurity narratives, with the Pragmatic narrative close behind - results differed to the control group by 42% and 40% respectively.

Most prominent issue:
Issues around climate change and security - like immigration, terrorism, and the international situation - were more impacted.

Least prominent issue:
Issues around health were the least impacted.

Spain

Pragmatic (18%)   Futurist (38%)   Insecurity (18%)

Perceptions

Agreement with statement:
Spanish respondents were more likely to agree with the Futurist narrative (81%), and less likely to agree with the Insecurity narrative (72%).

Attitudes to statements:
Respondents were more likely to agree that we need the Pragmatic, and Insecurity narratives to make society better (34%).
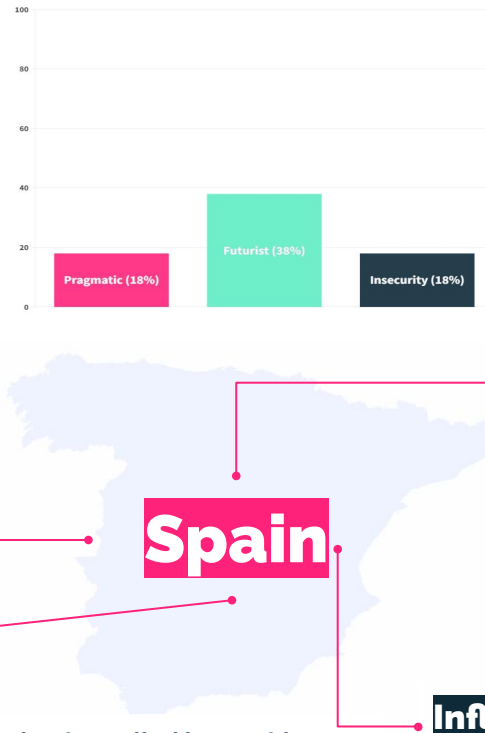
Respondents were also more likely to agree that politicians should get on and do' what the the Pragmatic, and Insecurity narratives suggest (36%).

Demographics

People age 40+ were the most influenced age group. The Futurist narrative influenced people aged 40+ to find issues around housing, pensions, the education system and unemployment more important.

They were also more likely to agree with the statement "We should force landlords and governments to refit buildings so they maximise the use of space, so more families can live in them, while also making sure they are better insulated and more energy efficient."

Right-leaning respondents were influenced by the narratives more than centrist and left-leaning people. While right-leaning respondents were more likely to care about rising costs/inflation, they were more likely to disagree with moving to a smaller home in order to reduce my greenhouse emissions and prevent climate change.

Context

At the time of the survey, Spain was going through a snap election called by President Sanchez, after his PSOE party suffered a significant loss in recent regional elections.

The narrative of sustainable cities has been particularly pushed by the Socialist Party (PSOE) and the left-wing media, and generally benefits from cross-societal support. However, right wing forces are playing up to the urban/rural divide to undermine the transition.

As the fourth largest economy in the EU, Spain has an ambition to become a clean economy superpower through massive deployment of renewable energy and green hydrogen.

Influence

Most impactful narrative:
The Futurist narrative had the most impact on Spanish respondents - 38% of responses were statistically and substantively different from the control group.

Most prominent issue:
Issues around housing and unemployment were the most influenced.

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Demographics

Across all three test narrative groups, **young Swedish respondents aged 18-40** was the most impacted demographic group.

Young Swedes were equally impacted by the Pragmatic and Insecurity narratives.
The Insecurity narrative influenced young respondents to care about climate change and energy efficiency slightly more than the Pragmatic narrative. Only the Futurist narrative influenced young people to care more about housing.

Tenants and respondents in the political center were more likely to be influenced to care more about housing by all the narratives.

Left and right-leaning respondents were not influenced at all.

Perceptions

Agreement with statement:
Swedish respondents agreed with the Pragmatic narrative the most (68%).

Sweden was the nation in our survey most likely to disagree with the Insecurity narrative (53%).

Attitudes to statements:
Respondents were overall cautious about whether the narratives were 'technologically possible to achieve', especially the Futurist narrative (27%).

Sweden

Context

At the time of polling, there was a sharp slowdown in residential construction in Sweden which threatens to worsen the housing shortage and consequently keep millions of young people at home with their parents.

Sweden raised its terror threat levels after facing outrage over permitting a number of far-right protests this year where the Koran was burned.

Influence

Most impactful narrative:
The Insecurity narrative was slightly more impactful than the other narratives - 33% of responses differed to the control group.

Most prominent issue:
The economic situation was the issue that most impacted Swedish respondents. This includes rising costs, inflation, government debt taxation and pensions.

Least prominent issue:
Issues regarding health had no statistically or substantively significant effect.

Pragmatic (22%) | Futurist (27%) | Insecurity (27%)

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Perceptions

Agreement with statement:
UK respondents were more likely to agree with the Pragmatic narrative (77%), and less likely to agree with the Futurist narrative (64%).

Attitudes to statements:
Respondents were more like to agree that the Pragmatic narrative is 'what should happen' and an equal number agreed that 'politicians should get on and do' what is suggested in the Pragmatic and Insecurity narratives.

Influence

Most impactful narrative:
The Pragmatic and Futurist narratives were equally impactful for UK respondents, and only slightly more than the Insecurity narrative.
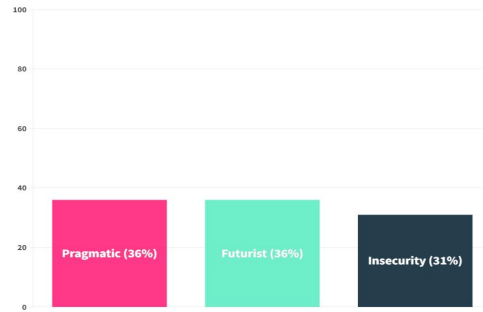
The responses in the former two narrative groups were 36% different to the control group, and the latter 31% different.

Most prominent issue:
Jobs and unemployment, the economic situation, and housing were the top issues where responses most differed to the control group.

Least prominent issue:
Responses around issues on security, social equality, and health were the least influenced.

Pragmatic (36%) | Futurist (36%) | Insecurity (31%)

UK

Demographics

People aged 40+ were more influenced by the narratives, especially the Pragmatic narrative. Respondents were more likely to care about housing, unemployment, and pensions.

Respondents were also more likely to agree with their national government passing laws to encourage better building use for more equal housing space for families.

Homeowners were far more likely to be influenced than tenants, particularly by the Pragmatic narrative.
They were more likely to care about the same issues as respondents age 40+, as well as climate friendly urban planning practices and the environment.

In the Pragmatic narrative group, **right-wing respondents** were more like to care about financial and housing issues.

In the Futurist group, they were also more likely to feel more control over whether their home is a comfortable temperature.

Context

High rents and cuts to housing benefits are pushing thousands of low-income private renters out of central areas and deepening economic disparity.

The cost of living crisis is fuelling a cost of retirement crisis. Food and energy bills, and rising inflation has made raising the state pension in line with the "triple lock" more expensive for the government to maintain

Audience Personas

distilled from the polling analysis, these are the groups that are most impacted by each narrative, and can be used moving forward

What are the audience personas that we found?

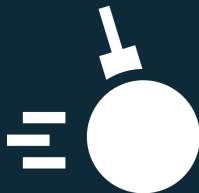## CIVIC HOMEOWNERS

Who are they?
Homeowners of all ages
Cross-political

Where are they?
Most prominent in northern and eastern Europe

What do they care about?
More equal housing space
More housing for families
Better conditions for the poorest in society
Greater burden for the richest in society

THE SOMETHING MUST BE DONES

Who are they?
Aged 18-40 and tenanted
Self-described as politically central

Where are they?
Present across all corners of Europe

What do they care about?
Government debt and taxation
Rising prices and inflation
Housing as a shortage and human right
The environment, and Impacts on health

OLDER PROGRESSIVES

Who are they?
Aged 40+
Left-leaning

Where are they?
Across Europe but strikingly present in Spain

What do they care about?
Unemployment, jobs,
and education
Security and foreign policy including
immigration and the war in Ukraine

Civic Homeowners

Homeownership creates cohesion amongst Europeans of all ages, socioeconomic status, and political identification. Homeowners, regardless of diverging demographic traits, were starkly more impacted by the Pragmatic narrative than any other (47% versus 38% for Futurist and 24% for Insecurity). It is perhaps unsurprising that homeowners would respond least strongly to a narrative around housing insecurity.

- **There was a particularly strong resonance between homeowners and the Pragmatic narrative:** only the political Left, 18-40 year olds (53%), Tenants (71%), and the Political Centre (49%) felt more influence (from the Insecurity narrative) than Homeowners (47%) did with the Pragmatic narrative against all cross breaks surveyed.
- The Pragmatic Narrative influenced younger people (29%), tenants (31%), the political left (47%) and the political Centre (38%) the least of all narratives, but still resulted in considerable impact across all demographics.
- It was the second (31%) most impactful narrative for the political Right, but the least impactful narrative for the Left. The Pragmatic narrative resonated best with respondents aged 40+ (40% v 38% Futurist and 31% Insecurity).
- Czechia (71%) saw the highest level of impact from any narrative in any country, only the UK (36%) were more likely to be influenced by a Pragmatic narrative than any other narrative. Romania (40%) saw a great deal of influence but this was the least impactful of the three in the country.

Therefore, it can be argued that the Empathetic Homeowner is cross-political, owing their views more to their financial position than their political affiliation.

This group is more likely to be swayed on issues of social equity including better space for families in housing regardless of income, better conditions for the poorest in society, and a greater burden for the richest in society to enact this change.
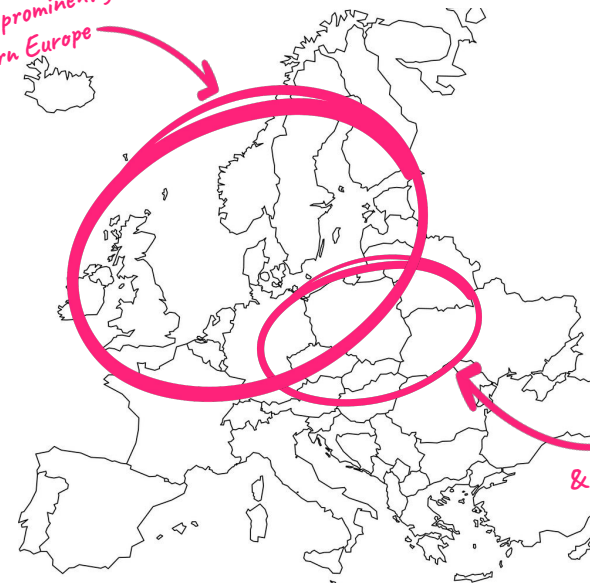
Cross-party politics
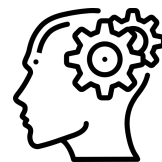
Better housing and social equity

Homeowners

Features most prominently in Northern Europe

& Eastern Europe

Something Must Be Dones

The Something Must Be Dones are statistically likely to be younger adults aged 18-40, born between the early 1980s and early 2000s, also known as Millennials and Gen Z. They are tenanted, entering adulthood and the job market after the 2008 financial crisis in a period of very slow housing growth.

- Those aged 18-40 were far more likely (53%) to be significantly influenced by a narrative that focuses on insecurity as opposed to the control group.
- **After reading the Insecurity narrative, European Tenants (71%) were the most impacted group of any cross break in the study. To put this into context, the second highest impacted demographic level was 53%.**
- Politically, Something Must Be Dones identify as 'centrist'. The political Centre are more influenced by the Insecurity narrative (49%) than any other narrative (42% Futurism, 38% Pragmatic).
- Geographically, the Something Must Be Dones are present across all corners of Europe: seven of the 10 countries surveyed were more influenced by the Insecurity narrative than any other: France, Germany, the Netherlands, Italy, Poland, Romania, and Sweden. Plus, Czechia (53%) and the UK (31%) were highly influenced by the narrative, but were more impacted by alternatives.

This group cares about a multitude of issues. More than any other grouping, the Something Must Be Dones are more likely to act on the following after reading the narratives: Climate (energy use, emissions, urban greening, climate friendly,), Economic situation (government debt, rising prices, inflation, cost of living, taxation, pensions) Health ('more healthy through urban planning') Housing (building more). Those aged 18-40 across Europe are twice as likely to answer that they have no control over the home they live in as those aged 55+.
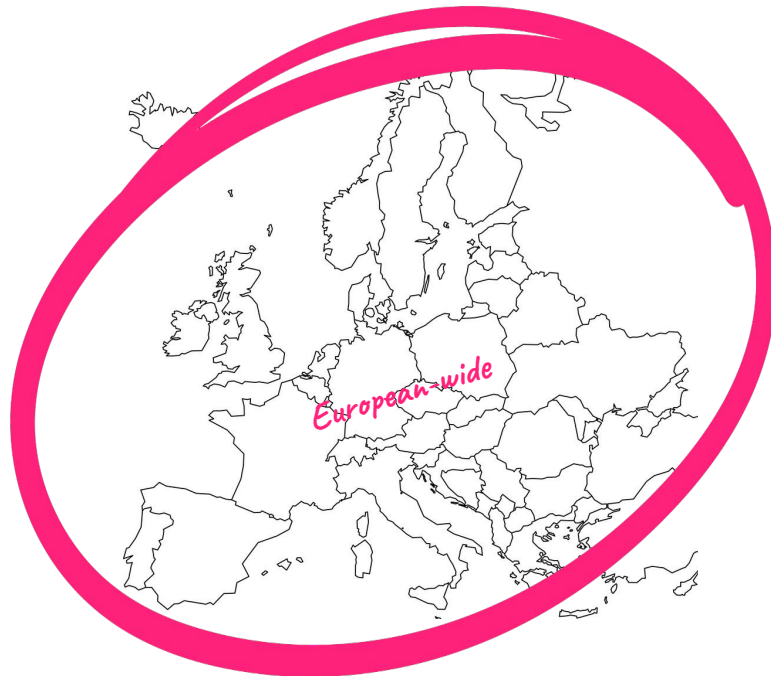

Politically 'centrist'
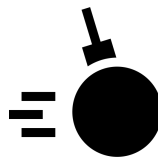
Systemic change tackling insecurity

Tenants

European-wide

Older Progressives

Those aged 40+ were more likely (38%) than their younger cohorts (31%) to respond to the Futurist narrative. Where Millennials and Gen Z responded to Insecurity, Gen X and Baby Boomers responded to Pragmatism. The Futurist narrative came in second for both groups.

- **Those that identify as the political Left were more impacted (53%) by the Futurist narrative than any other political grouping with any other narrative.**
- The Progressive Equitists - like the Empathetic Homeowner - exists across Europe but is strikingly more prevalent in Spain. The Spanish are more than twice as likely (38%) to respond to a Futurist narrative than any other narrative (18% and 18%). A starker contrast in country-level response only exists in French and Italian resonance with the Insecurity narrative.
- The Progressive Equitists - again like the Empathetic Homeowner - are prevalent in northern and eastern Europe: where Czechia (62%), Romania (42%), Sweden (27%), and the UK (36%), and displayed significant response to the Futurist narrative.
- Note that Czechia and Romania were the most impacted countries across all narratives but Spain had a stark resonance with the Futurist narrative. In contrast, France (7%) and Poland (9%) were comparatively unmoved.

The Progressive Equitists responds to the big picture, structural issues of the day. Once respondents had heard the Futurist narrative, they were significantly more likely to respond on issues detailing foreign policy, terrorism, immigration, the international situation, and the war in Ukraine.

In addition, the Futurist narrative greatly impacted answers covering employment jobs and education. This group imagines a better future with a shared aspiration, one that is joined-up culturally, economically, and internationally.

Left-wing

Shared cultural change

40

Aged 40+

Prominent in Spain

Moving Forward

2024 is a watershed moment for people, planet, and the built environment. A populist backlash to policies dubbed 'net zero' risks setting the just transition back decades. Meanwhile, the composition of the European Parliament could become less friendly to net zero policies with an anticipated move to the populist right in June's elections. In the UK and the US, there may be a change of government which could open up opportunities, or damage, the just transition.

From spotting controversy around 15-minute cities, to the backlash against efficient heating systems, and the effectiveness of highlighting insecurity: we have identified the challenges and opportunities faced by different audiences European-wide. We have little time, but our understanding of the challenges is growing, and we now have new narrative frameworks to help us inform and bring the public along with us.

This piece of research has helped us understand perceived tensions between those on the inside - industry - and those on the outside: citizens.

We need to communicate sensitively about the scale of the change required, but also confidently about the journey and the rewards both citizens and industry will face.

This resource contains the largest data-set of European perceptions of the just transition within the built environment. Digest it, request additional insights, consider its limitations, and deploy its lessons to inform your advocacy and media strategies during of a busy 2024.

Between us, we should build on these learnings with further insights to help us communicate a more sustainable future for planet and people, and continue to challenge ourselves on the strongest narratives to bring people together on this journey.

Appendices x Methodology

Methodology

Research

All research was conducted according to the ethical guidelines of the **Finnish Advisory Board on Research Integrity (TENK)** and existing legislation on research ethics and data management. Solutions for handling, storing and opening of workshop/panel observation and other co-production data, and their compliance with ethical guidelines, were discussed in every meeting. We ensured that all sensitive data was pseudonymised and stored in secure online environments.

For interviews and panels, practical and social barriers to participation to better facilitate the involvement of vulnerable groups as well as language barriers, choosing native speakers of the participants to conduct the sessions, were considered when possible. When applicable, interviews and panel facilitation were done digitally to reduce travel burden, cost and environmental impact.

Peer Review

The research methodology being composed of both desk research and various interactive formats of information acquisition (interviews, panels, etc.), peer reviewing will be held off to the final compiling of data (final report). This is to ensure that the process is as useful as possible for the project.

Literature & desk review

A review of existing literature on the perceptions, mindsets and discussions in Europe on climate change, just transition and the built environment was done to serve as a base for reflections. The most utilised references can be found in the bibliography section of this report.

Methodology

Research goal

Laudes Foundation looked to develop a new high-level narrative, set of key messages, proof points (research, data, solutions) and calls to action to be used by European partners, industry leaders and policymakers in relation to the built environment transition. The primary objective of this study was to investigate narrative perceptions of how the built environment relates to a just climate transition, and the extent to which messages can influence attitudes.

Survey Design and Participants

We conducted a survey involving four different samples drawn from a diverse set of 10 nations. Each sample was exposed to one of three different messages, with a control group receiving no message.

Demographic Analysis

Initially, we conducted an analysis to ensure that there were no statistically significant differences in terms of demographics (e.g., age, gender, education) between the samples across the national datasets. This step was crucial to control for potential confounding variables.

Methodology

Independent Variable Analysis

Next, we examined whether there were statistically significant differences in terms of the independent variables (the different messages and the control group) across the samples.

- For numerical values (e.g., attitude scores), we performed a **One-Way Analysis of Variance (ANOVA)** followed by post hoc t-tests with a **Bonferroni Correction Factor** to identify specific group differences.

- For categorical values (e.g., binary responses), we employed either the **chi-square test** or **Fisher's exact test**, as appropriate, and conducted post hoc tests using odds ratios to determine the significance of differences between groups.

Statistical Significance and Reporting

We considered a **p-value equal to or below 0.05** as the threshold for statistical significance.

Methodology

Effect Size Calculations

- For numerical values, we employed **Cohen's d**. If Cohen's d was **higher than 0.2,** the effect size was considered moderate and reported.

  - Small effect size: Cohen's d ~ 0.2
  - Moderate effect size: Cohen's d ~ 0.5
  - Large effect size: Cohen's d ~ 0.8

- For categorical values, we utilized **Cramer's V**.

  - Small effect size: Cramer's V 0.1 - 0.3
  - Moderate effect size: Cramer's V 0.4 - 0.5
  - Large effect size: Cramer's V > 0.5

Only findings that had a **p-value equal to or below 0.05** and a **moderate effect size** (Cohen's d > 0.2, Cramer's V > 0.3) were reported.

Methodology

By only including findings that had a **p-value equal to or below 0.05** and a **moderate effect size** (Cohen's d > 0.2, Cramer's V > 0.3), we make sure that the findings are **statistically and substantively significant**.

- **Statistically significant** refers to a result in a research study that suggests an observed effect or relationship is unlikely to have occurred due to random chance.

- **Substantively significant** relates to the practical or real-world importance of a finding. It focuses on whether the observed effect or relationship is meaningful and impactful in the context of the research or the problem being studied, regardless of statistical significance.

Thus, in the analysis of the data, we focused on results which are robust and meaningful.