

DEPARTMENT FOR BUSINESS
ENTERPRISE & REGULATORY REFORM

RENEWABLE ENERGY
AWARENESS AND ATTITUDES
RESEARCH

Management Summary

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1 Introduction

1.1 Overview of findings

- Awareness and support for the use of renewable energy remains high (only 4% of GB were not aware of any type of renewable energy source, and 83% support its use)
- Since 2006, awareness of biomass energy has increased the most (up by 9% points), but solar power remains the most widely known renewable energy source (91% GB were aware of it)
- Increasingly aware, the youngest age group (ages 16 - 24) were still ambivalent about some issues surrounding renewable energy
- Women appear to be less informed than men and this may be the reason why they give less support toward renewable energy issues
- Those more likely to have direct experience of renewable energy, such as those living in the Highlands & Islands, were much more likely to support the use of renewable energy (91% in Highlands & Islands vs. 84% nationally)
- Coverage of renewable energy perceived to be favourable has increased across all types of media

1.2 Background and objectives of research

The Department for Business, Enterprise and Regulatory Reform (BERR)¹ commissioned, via COI, GfK NOP Social Research to conduct a second wave of research exploring awareness and attitudes to renewable energy amongst the general public in Great Britain. This report summarises the findings from this research and highlights key shifts in attitudes.

The research was first carried out in March 2006 in order to benchmark current awareness, attitudes and influences on opinions towards renewable energy amongst the general public of Great Britain. This research was repeated in March 2007 in order to track any changes in opinion. Additionally, in this wave BERR wished to further explore which websites people use to find out more information about renewable energy. The research findings will assist BERR in planning their communications strategy appropriately.

1.3 Methodology and sample overview

In order to ensure comparability between findings from 2006 and 2007, the research methodology was kept the same; two separate surveys were carried by telephone via CATI (Computer Aided Telephone Interviewing). The first, using the GfK NOP Telebus (a telephone omnibus survey), interviewed a representative sample of 1,870 GB adults aged 16+, over two consecutive weekends, 2 - 4 and 9 - 11 March 2007. The second, a boost survey conducted amongst 100 residents of the Highlands & Islands aged 16+, was conducted between 5 - 9 March 2007.

Both surveys were exactly the same but the boost survey was undertaken in order to provide a robust data set for the Highlands & Islands, to allow independent analysis of this region, as in 2006. The omnibus survey would not provide enough data for the Highland & Islands population to be analysed on its own. The data from the two surveys were combined and weighted to ensure they were nationally representative and so that the Highlands & Islands were in correct proportion to GB as a whole (this region accounts for 0.74% of the total British population aged 16+).

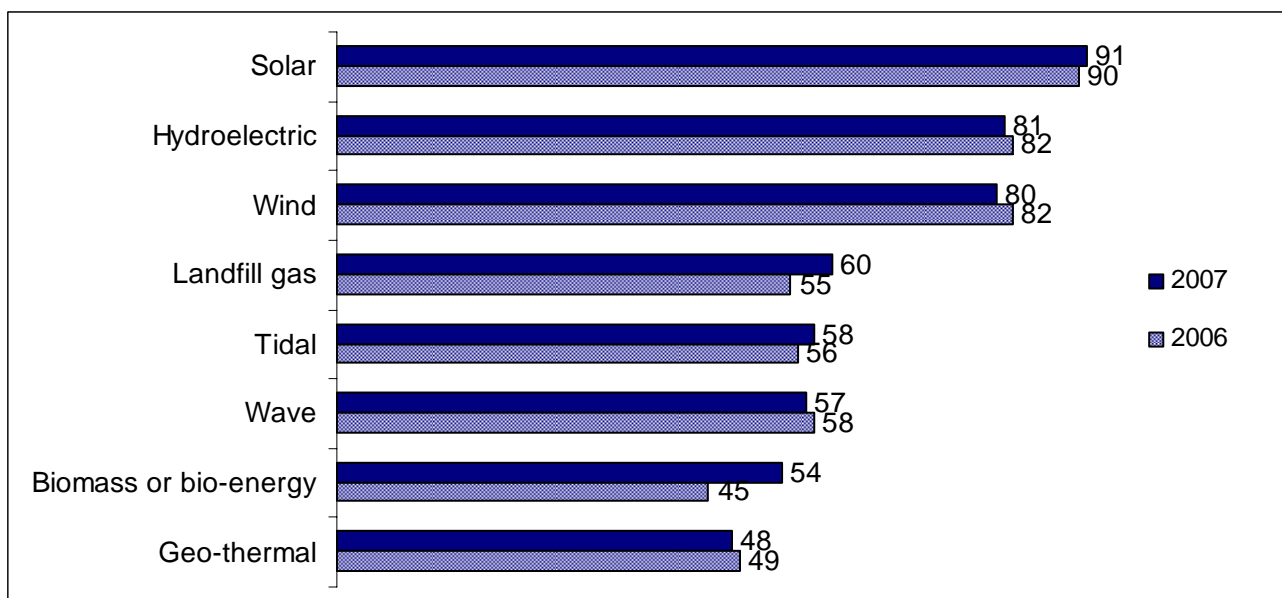
¹ BERR was formerly the Department of Trade & Industry (DTI)

2 Key Findings

2.1 Prompted awareness of renewable energy sources

- Respondents were prompted² with different types of renewable energy source. Figure 1 shows the awareness levels of different renewable energy sources, amongst the GB public in 2006 and 2007. There has been an increase in awareness of biomass / bio-energy (up by 9 percentage points to 54%) and landfill gas (up by 5 percentage points to 60% since 2006). Awareness levels of the other sources have more or less remained stable since 2006. Only a very small proportion of respondents could not identify any type mentioned (4%)

Figure 1: Which of the following sources of renewable energy have you heard of? By wave (%)



NB All respondents (base size for 2007 wave = 1970, for 2006 wave = 2032); None of these responses not shown

2.1.1 Prompted awareness by age and gender

- As was the case in 2006 the 45-54 age group were most aware of at least one of the types of renewable energy source shown in figure 1: 99% compared with 96% overall. However, the age groups with the highest awareness for *each* type of renewable energy mentioned were the 16 - 24 and 55 - 64 age groups. For the 16-24 age group, this represents the largest increase in awareness since 2006 compared to other age groups (e.g. landfill gas +19% points awareness between 2006 and 2007). Over 65s were significantly less likely than any other age group to have heard of any renewables

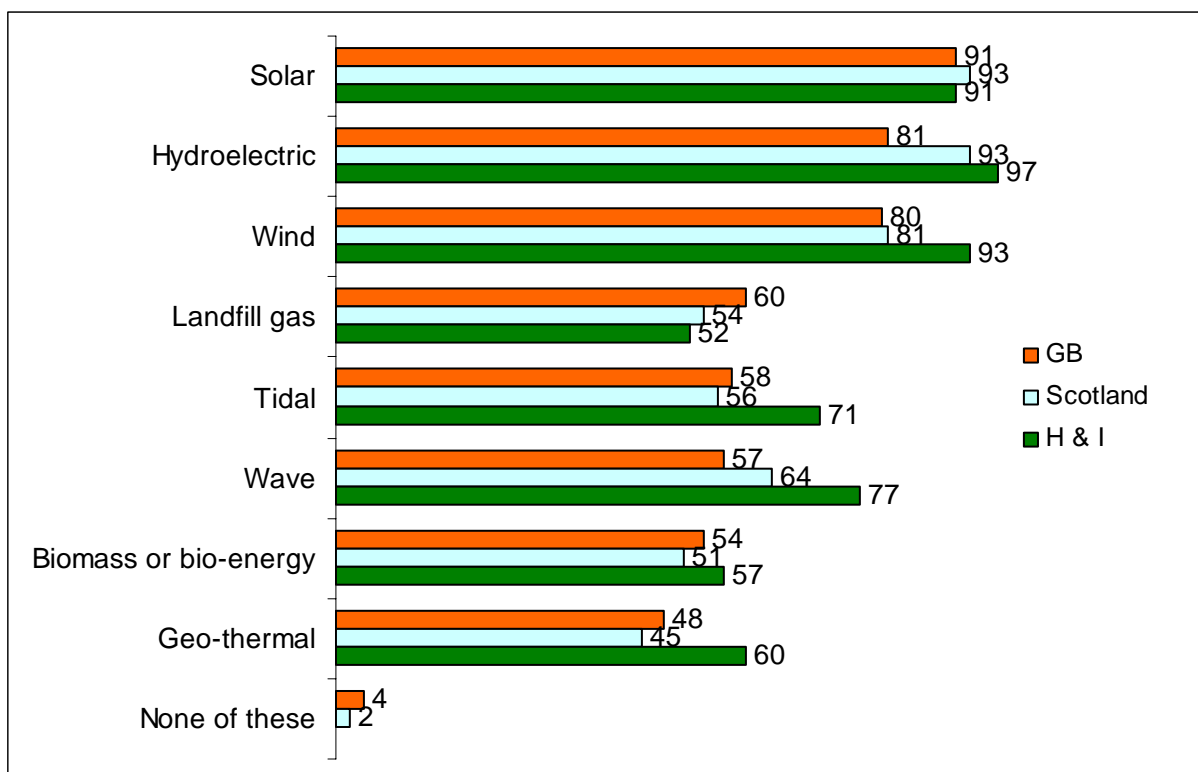
- Women were identified in 2006 as having lower awareness levels and there has been no change in 2007. They were found to be significantly less likely to recognise each energy source mentioned, compared to men

² Prompted means that respondents were read out a list of different types of renewable energy to which they had to say if they had heard of them

2.1.2 Prompted awareness by region

- As in 2006, awareness was generally higher in the Highlands & Islands (see figure 2) compared to everywhere else, and this was especially true of renewables located in (or might potentially be located in) that area, such as wind, tidal and wave power. For example, 77% were aware of wave energy in the Highland & Islands, compared to 57% in GB as whole
- Awareness in the Highlands & Islands since 2006 has remained broadly constant for all types of renewable energy. In terms of which sources these residents are most aware of, these include hydroelectric (97%) and wind (93%). The only real change since 2006 has been a 6% points decline in awareness of landfill gas energy
- Awareness in Scotland has remained at similar levels; the only notable change was a decline in awareness of wave energy (64% 2007 vs. 69% in 2006)

Figure 2: Which of the following sources of renewable energy have you heard of? By region (%)

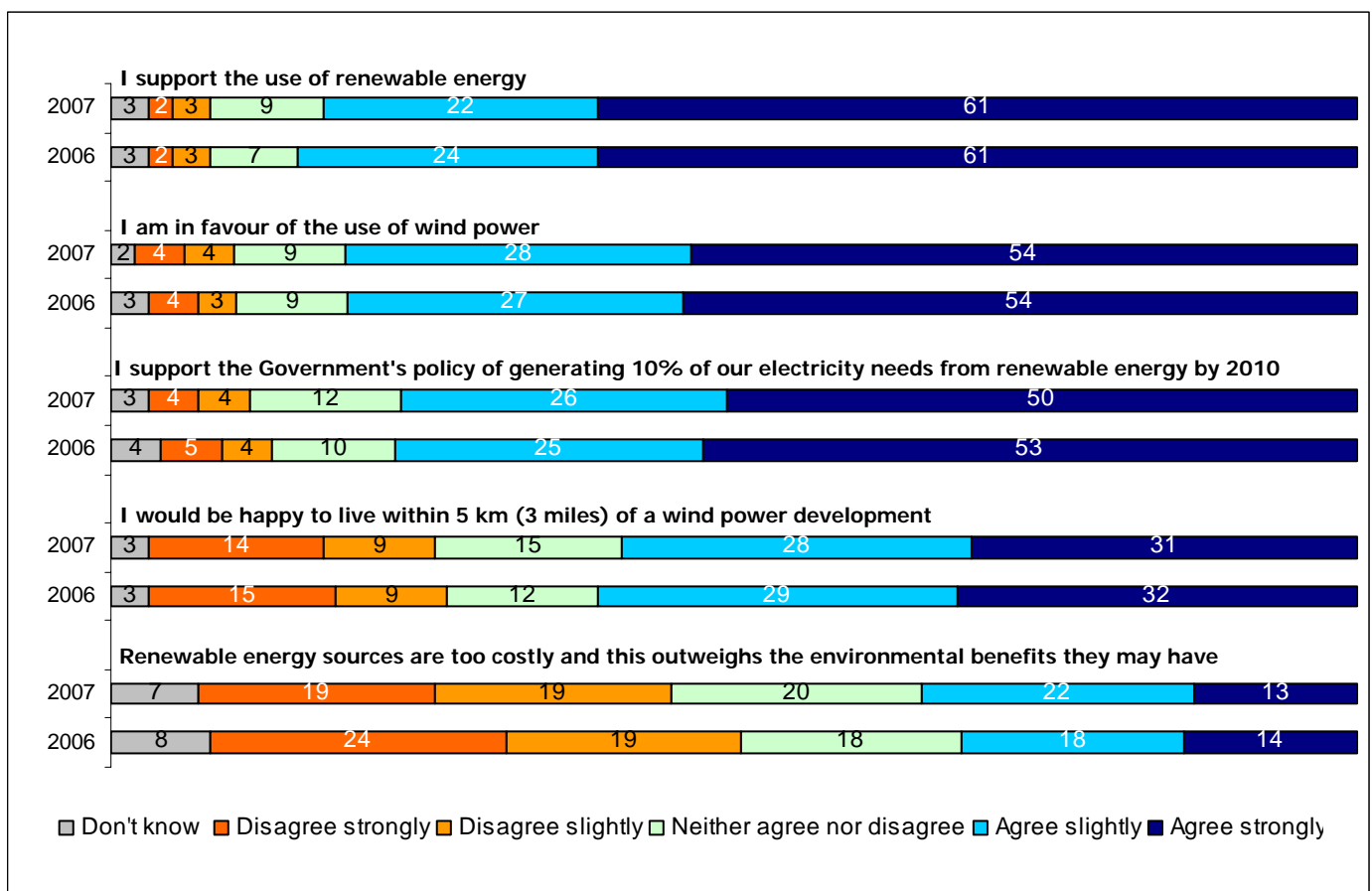


NB Base size for GB = 1970, Scotland = 168, Highlands & Islands = 100

2.2 Attitudes to renewable energy

- Five attitudinal statements about renewable energy were read out to respondents. Figure 3 shows agreement / disagreement levels for each statement for both 2007 and 2006. There has been little change in agreement since 2006 for most statements, with the highest level of agreement for supporting the use of renewable energy (83% all agree), and similar proportions in favour of wind power (82%). All those agreeing that "renewable energy sources are too costly and this outweighs the environmental benefits they may have" has risen slightly since 2006, from 32% to 35%.

Figure 3: I am now going to read out a list of statements about renewable energy, and I would like you to tell me how much you agree or disagree with each one. By wave (%)



NB All respondents (base size for 2007 wave = 1970, for 2006 wave = 2032)

2.2.1 "I support the use of renewable energy"

- Respondents were most likely to agree to this statement (83%), slightly less than in 2006 (85%)
- The difference in support for renewables between genders has increased further - 88% of men supported their use compared to only 79% of women in 2007; this has risen from 5 to 9% point difference in 2006. This difference can be attributed to significantly more women saying 'neither agree nor disagree' or 'don't know' and may be due to their lack of knowledge on the subject rather than actively wishing not to support renewables
- As in 2006, the 65+ age group were mostly likely to disagree with this statement (7%)
- The AB social classes were significantly more likely to support the use of renewables (93%) and DEs significantly less likely (72%)
- Regionally, the West Country (92%) and Highlands & Islands (91%) were most likely to agree to support their use, and this was also the case in 2006
- As was the case last year, support was significantly higher for renewable energy amongst those who cited living near a renewable energy development as an influence on their views - 89%, compared to 82% who did not cite this influence

2.2.2 "I am in favour of the use of wind power"

- Similar to 2006, DEs were significantly less likely to favour the use of wind power than other social classes (e.g. 46% of DEs strongly agreed to this statement, compared with 60% of AB social classes)
- Despite the 16-24 age group being increasingly aware of wind power, only 74% agreed with this statement. This was because of a high proportion saying they 'neither agreed nor disagreed' (18%) and suggests that younger people are more ambivalent to wind power
- In 2007, the Scottish region was most in favour of wind power with almost 9 in 10 (89%) agreeing, an increase of 7% points since last year. However opinion in the Highland & Islands region has shifted in the opposite direction, with a 6% points decline in agreement to this statement since last year (84% agreeing)
- Those influenced by living near a renewable energy development were significantly more likely to agree with this statement than those who were not influenced by proximity to such a development (87% vs. 81%)

2.2.3 "I support the Government's policy of generating 10 per cent of electricity needs from renewable energy by 2010"

- As in 2006, 16-24 year olds were least likely to agree (70%) and were by far the most unsure age group about this policy - 20% said 'neither agree nor disagree'
- Men and AB social classes were significantly more likely to support this policy (79% and 87% respectively agreed with this statement)
- Support was strongest in the Harlech ITV region (83% agreed) followed by the Highlands & Islands and Scotland as a whole (both 81%). In 2006 those living in the West Country were most supportive but this has fallen somewhat - from 92% to 80% in 2007
- As was the case in 2006, those who cited living near a renewable energy development as an influence were more likely to support Government policy (84%, compared with 75% who did not cite this)

2.2.4 "I would be happy to live within 5km (3 miles) of a wind power development"

- A significantly higher proportion of men were happy to live near a wind power development (62% compared to 55% women)
- Agreement to this statement amongst Highlands & Islands residents has reduced considerably since 2006, from 73% to 57% in 2007. (This is even though there has been no change in the proportions living in the Highlands & Islands for whom living near a renewable energy development has influenced their views: 47% in 2007 and 46% in 2006). The Harlech and Anglia ITV regions were most happy to live near this type of development (66% agreed)
- Those who cited living near a renewable energy development as an influence were much more likely to agree to this statement (73% compared to 55% who do not)

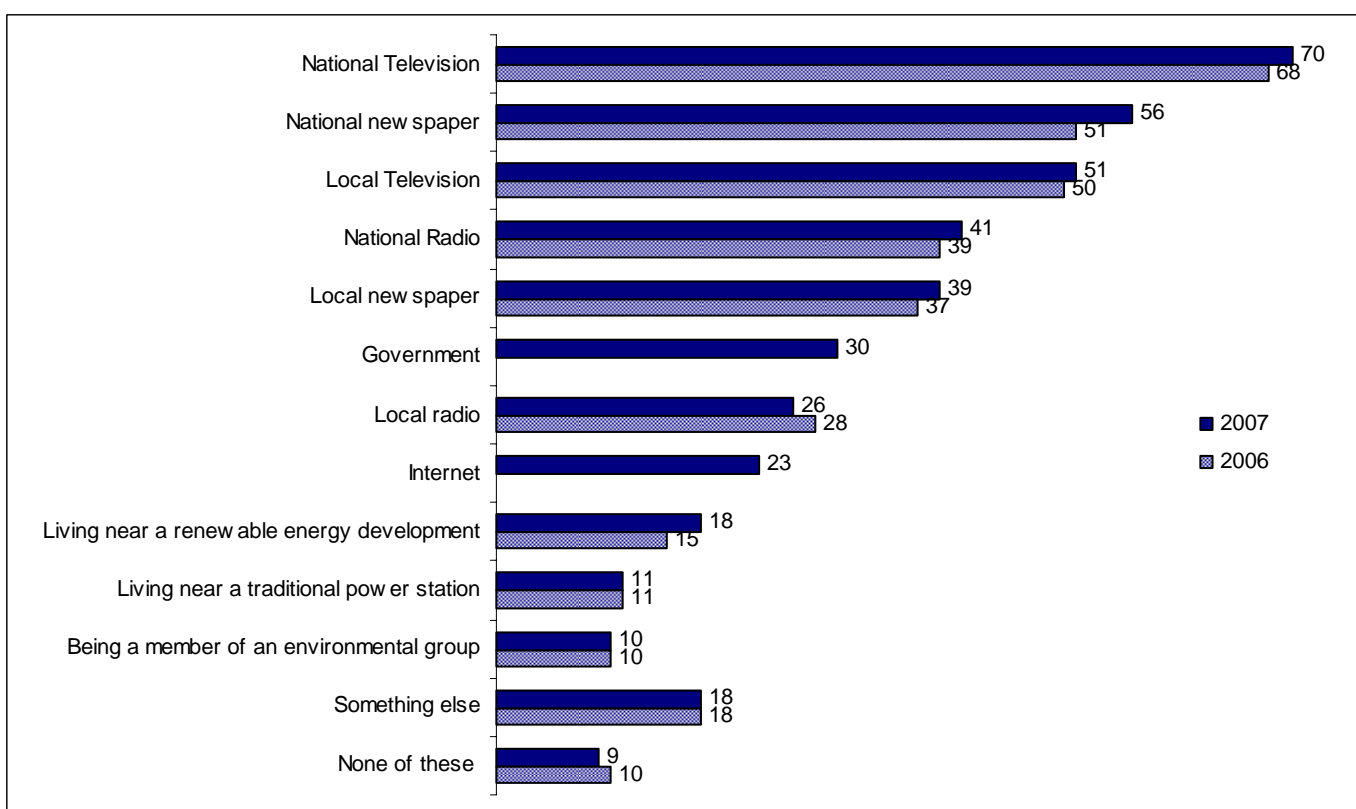
2.2.5 "Renewable energy sources are too costly and this outweighs the environmental benefits they may have"

- Men were significantly more likely to agree that renewables were too costly (38% vs 32% women)
- Compared to 2006, those living in the Highlands & Islands region have much stronger feelings about this statement. While the proportions of those disagreeing were similar (42% in 2007, and 45% in 2006) the proportion agreeing that renewable energy sources were too costly has leapt from 22% to 45%. This is largely due to a drop in the proportion answering "neither agree nor disagree" (from 14% in 2006 to 7% in 2007), or don't know (19% in 2006 down to 6% on 2007)
- As in 2006, those who cited living near a renewable energy development as an influence were significantly more likely to feel their benefits were outweighed by their cost, compared to those who did not cite this influence (41% vs. 34%)

2.3 What has influenced views on renewable energy?

Respondents were prompted with a list of different media and other factors which could have influenced their views towards renewable energy. A comparison between the two waves is shown in figure 4. The Government and Internet were new additions to the precoded list in 2007. Apart from local radio, all the factors measured were felt to have more, if not equal, influence on people's views than in 2006. National television continues to be the strongest influence with seven in ten citing it as an influence

Figure 4: Which of the following have influenced your views on renewable energy? By wave (%)



NB All respondents (base size for 2007 wave = 1970, for 2006 wave = 2032)

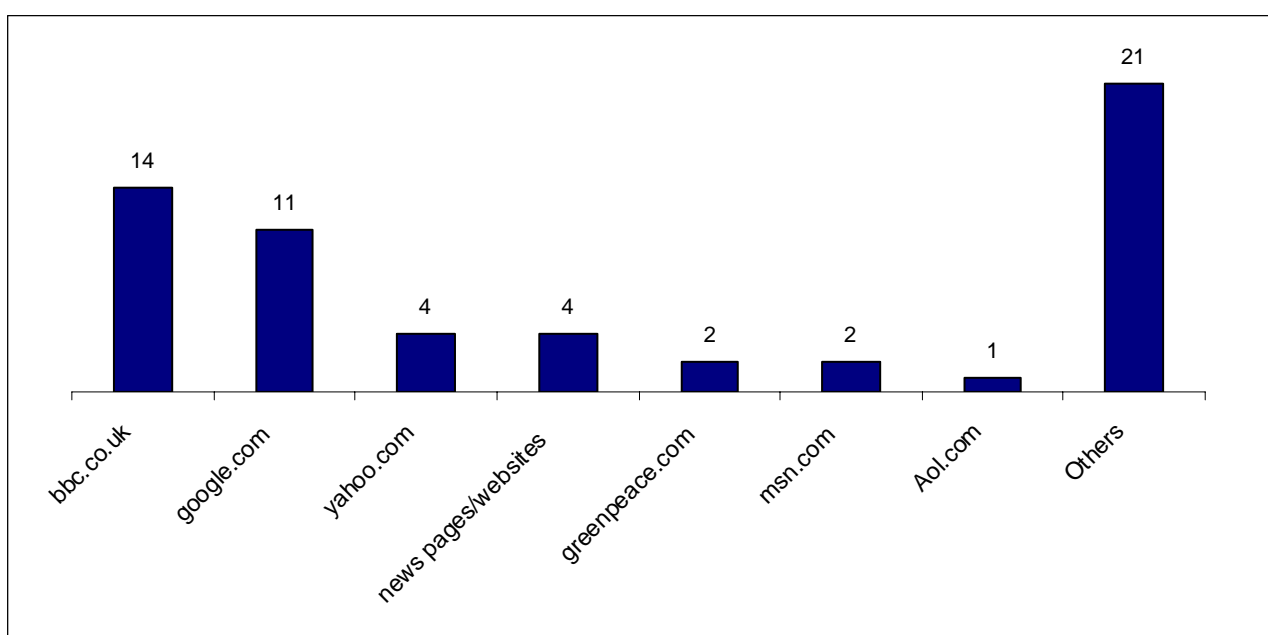
- Significantly more women than men claimed local television (55% vs. 47% men) and local newspapers (41% vs. 36% men) influenced their views
- Men were more likely to cite the Internet as an influence (26% vs. 20% women)
- The regions most likely to cite living near a renewable energy development as having influenced their views were Highlands & Islands (46%), Tyne Tees (31%) and Scotland as a whole (30%)

- As in 2006, those who cited living near a renewable energy development as an influence were significantly more likely to feel that all types of media (and the Government) influenced their views. This may reflect these respondents' need to engage more with media regarding matters that directly affect them
- National television was most influential amongst residents in Scotland, Granada and Meridian ITV regions where three quarters (75%) felt its influence
- Respondents in the Highlands & Islands and Tyne Tees were more likely than the rest of the country to be affected by local media, such as local newspapers (51% and 50% respectively) and local television (57% and 60%)
- Those citing the Internet as an influence were much more likely to be younger (35% aged 24 - 35 and 34% aged 16 - 24 versus 23% overall) and AB social classes (31% versus 14% C1s).

2.3.1 Which websites have influenced views on renewable energy?

- Respondents who said that the Internet had influenced their views were asked to cite specific websites. Figure 5 shows that *bbc.co.uk* was cited most by people as being an influence (14%), especially amongst men (19% versus 8% of women)

Figure 5: Please could you tell me which websites in particular have influenced your views on renewable energy? (%)

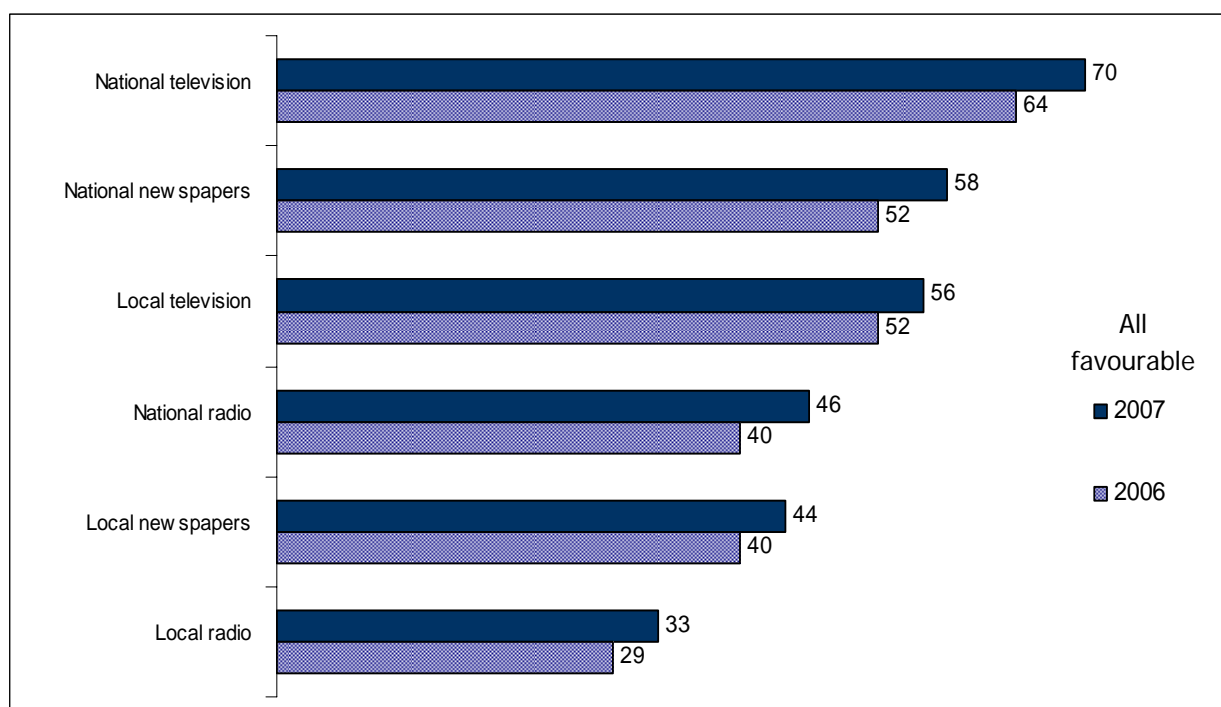


NB All those who felt the Internet influenced their views on renewable energy (base size = 144); none / don't know / no answer responses not shown

2.4 Media coverage of renewable energy

- Respondents were read out a list of various types of media and asked how favourable they felt each one to be in terms of its coverage of renewable energy over the past 6 months. On average, coverage perceived as favourable has grown by 5 percentage points since 2006. Figure 6 shows this is especially true of national media coverage.

Figure 6: I am now going to read out a list of different types of media, and I would like you to tell me how favourable you think their coverage of renewable energy has been over the last 6 months. All who said it was favourable by wave (%)



NB All respondents (base size for 2007 wave = 1970, for 2006 wave = 2032)

Other findings that can be drawn from this data include:

- As in 2006, the proportions who found media coverage favourable outweighed those who did not.
- Local newspaper coverage was felt to be most *unfavourable*, and this was also the case last year. The proportion saying it was unfavourable has fallen slightly (11% in 2007 compared to 15% in 2006)
- As was the case in 2006, there is a broad correlation between the amount of influence exerted by various types of media (figure 4) and how favourable they are deemed to be about renewables (figure 6). For example, as well as being seen as the most influential on the topic of renewable energy, national television is also deemed the most favourable
- Compared to GB as a whole, those living in the Highlands & Islands were on the whole more likely to feel that media coverage about renewable energy was favourable. This difference is not due to higher proportions in GB saying that media coverage is *unfavourable*, but rather more people answering 'don't know' about each type of media. Highland & Islanders, who are more likely to be directly affected

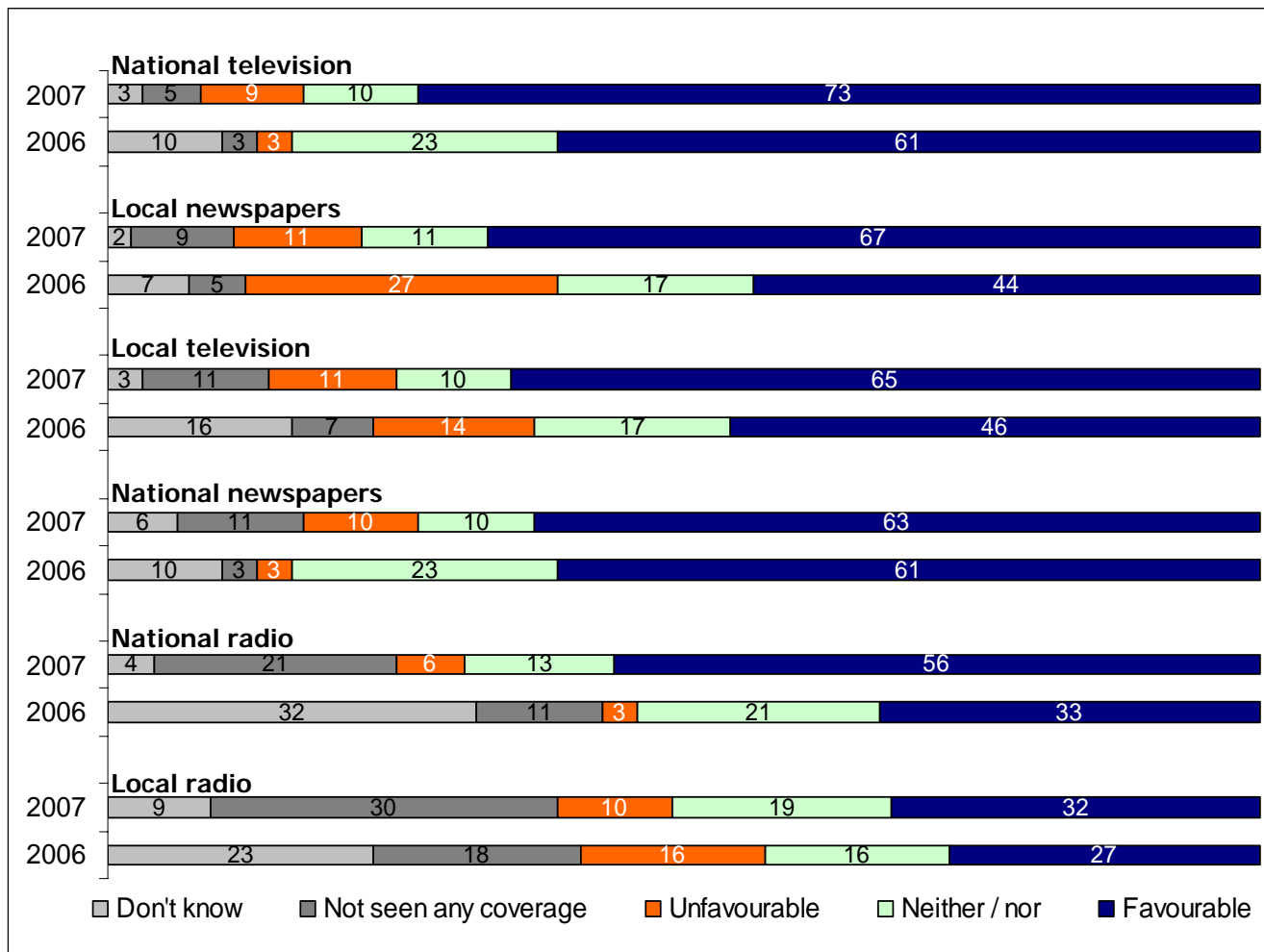
by renewables and therefore more engaged in this topic, perhaps feel qualified to give a positive response

- In 2006 coverage on all types of media was felt to be significantly more favourable for those who cited living near a renewable energy as an influence, compared to those who did not. This year, barring national television, this finding still holds true

2.4.1 Media coverage of renewable energy in Highlands & Islands

- It is interesting to note a change in how favourable the media is seen amongst Highlands & Islands residents since last wave. Figure 7 compares their results in 2006 and 2007.
- Similar to GB as a whole, the trend of increasing favourable media coverage since 2006 prevails. However, local newspapers and television have come to prominence in 2007, becoming the second and third most favourable types of coverage in Highlands & Islands (up from 44% to 67% in 2007 and from 46% to 65% respectively). This is unlike the pattern for GB as a whole where local newspapers were only fifth most favourable in GB as a whole. For local television 65% felt it to be favourable, compared to 56% in GB as a whole
- Renewable energy has also been portrayed in a much more positive light in 2007 by national radio for Highlands & Islands residents: 56% said that they felt it was favourable compared to only 33% in 2006

Figure 7: I am now going to read out a list of different types of media, and I would like you to tell me how favourable you think their coverage of renewable energy has been over the last 6 months. By wave, Highlands and Islands only (%)

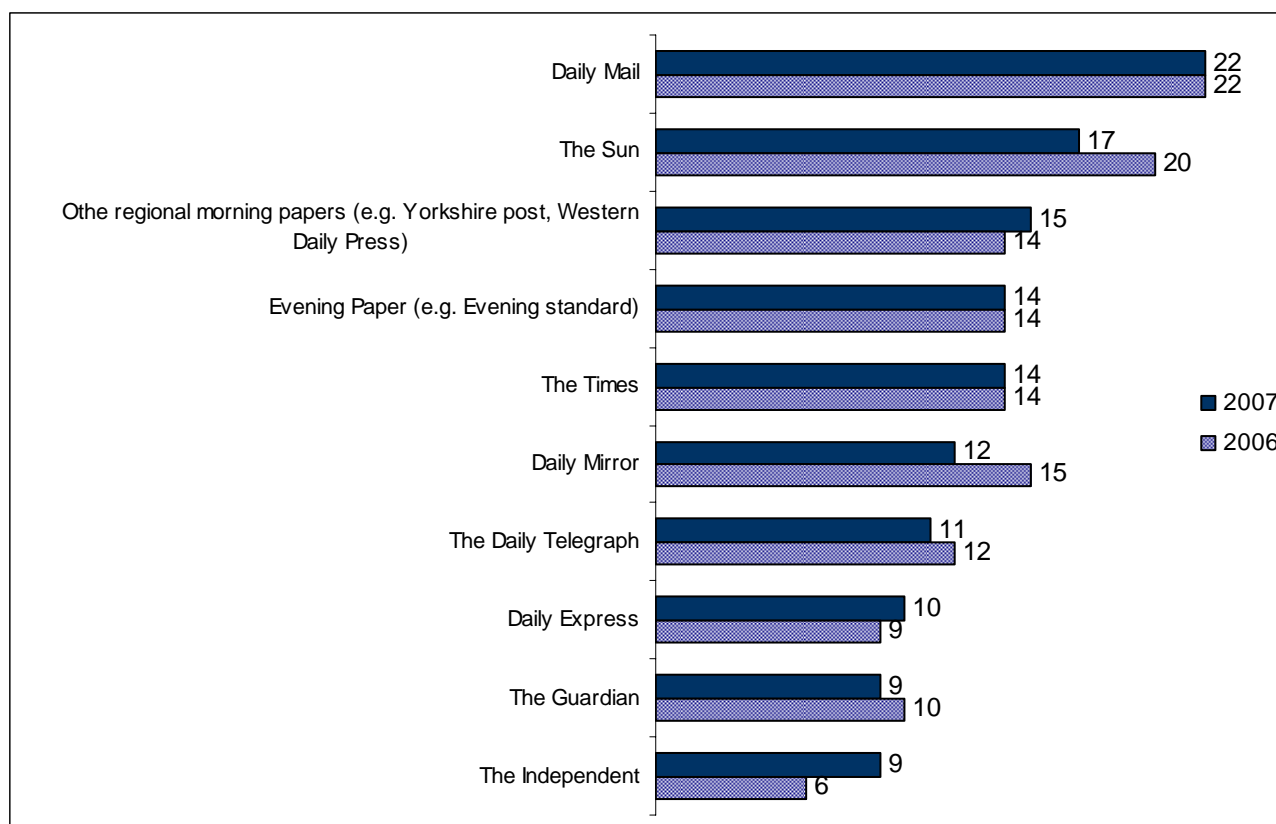


NB All respondents (base size for 2007 wave = 1970, for 2006 wave = 2032)

2.4.2. Newspaper readership

Figure 8 shows which newspapers were read regularly (at least twice a week) by respondents across the two waves. Over one in four respondents (27%) said that they did not read a paper regularly, slightly more than in 2006 (24%).

Figure 8: Which of the following newspapers do you read regularly, that is at least twice a week? Top ten most read newspapers in 2007 by wave (%)



NB All respondents (base size for 2007 wave = 1970, for 2006 wave = 2032); only mentions of 9% and above in 2007 are shown; none of these responses not shown

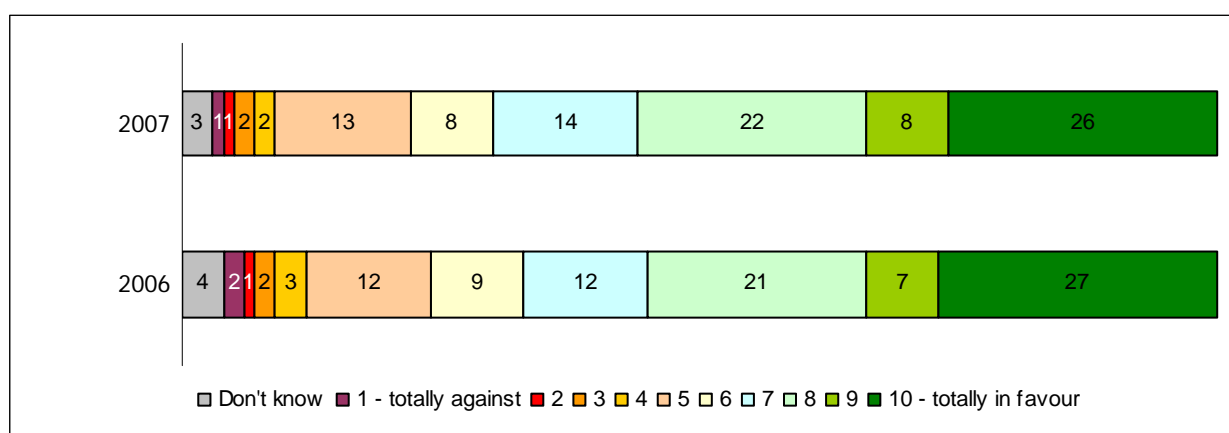
- The Daily Mail was the most popular newspaper (22%), as was also the case in 2006. Readership spread across the different newspapers has remained broadly similar apart from a slight reduction of tabloid press readers - The Sun is down from 20% to 17% in 2007 and Daily Mirror down from 15% to 12% in 2007
- The most read newspapers in the Highland & Islands were the Daily Mail (24%) and 'other regional morning papers' (23%). There has been a large increase of Daily Mail readers (+14% from 10% in 2006) and a decrease in the numbers reading 'other regional morning papers' (-18% from 2006) amongst these residents
- Those who were more favourable about renewable energy (on a scale said 9 or 10 totally in favour) were significantly more likely than those who were less favourable (on a scale said 1 or 2 or 3 totally against) to read the Times (17% vs. 7%) and the Guardian (14% vs. 4%)
- As in 2006 those reading The Sun were significantly more likely to rate renewable energy unfavourably (giving it only a rating of 1, 2 or 3) than those who rated it favourable (rating it 9 or 10). In 2006 a similar significant difference arose amongst Daily Mirror readers; however in 2007 there was no difference at all.

2.5 Overall opinion of renewable energy

- Respondents were asked, based on everything they knew about renewable energy, to rate how in favour they were of its use as an alternative to fossil fuels. The scale used was from 1 to 10 where 10 means 'totally in favour' and 1 means 'totally against'.

- Figure 9 shows that ratings between 2006 and 2007 have remained stable. A quarter of respondents (26%) were totally in favour (i.e. rating of 10), similar to 2006. Only 19% awarded the bottom 5 ratings for renewables

Figure 9: Based on everything you know about renewable energy, on a scale of 1 to 10, where 10 is 'totally in favour', and 1 is 'totally against', how much are you in favour of renewable energy, as an alternative to fossil fuels such as coal and gas? By wave (%)



All respondents (base size for 2007 wave = 1970, for 2006 wave = 2032)

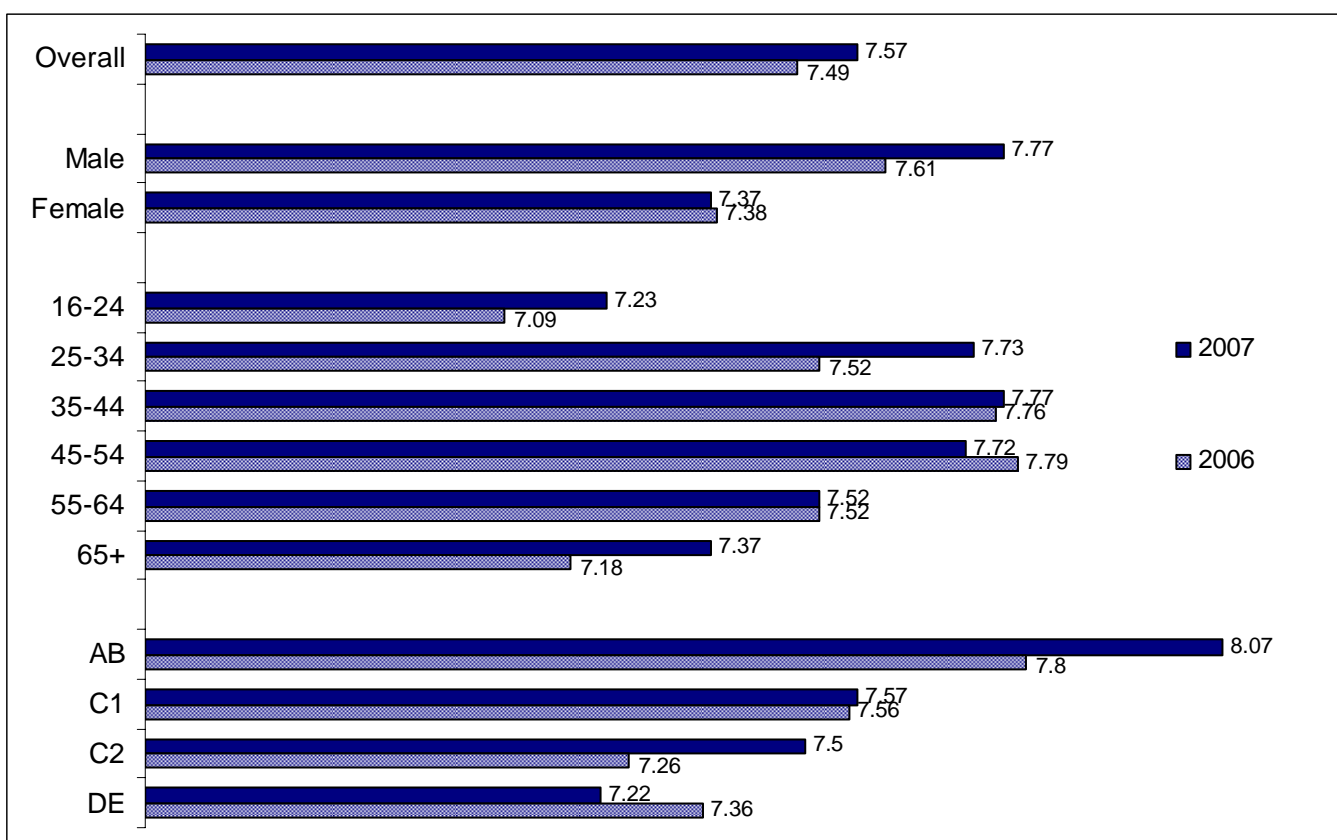
- Similar to 2006, more men favoured its use as an alternative. A significantly higher proportion of men gave a score of 10 (29% vs. 24% women), or 9 (10% vs. 6%)

- Figure 10 illustrates how the youngest and oldest age groups remain - on average - the least in favour of renewable energy as an alternative to fossil fuels, with the lowest mean scores (16-24s was 7.23 and 65+ 7.37). However both groups have seen an increase in their average scores since 2006

- AB social classes were most in favour of renewables as an alternative to fossil fuels. As in 2006, they gave a significantly higher mean score (8.07) than the other social classes and represents an increase on their own score since last wave (7.8 in 2006 for this group). The mean score for DEs has reduced slightly (to 7.22 from 7.36 in 2006) and further increases the gap in opinion between the highest and lowest social classes

- Last year 52% of those living in the West Country gave a rating of 9 or 10, but this figure has fallen to 32% in 2007, much closer to the overall figure for GB of 34%. Highlands & Islands was the only region to be much more favourable about renewable energy as an alternative in 2007 than 2006, 45% said 9 or 10 (compared with 43% in 2006). This region also got by far the highest mean score of 8.13 showing that more people in this region were in favour of its use an alternative

Figure 10: Based on everything you know about renewable energy, on a scale of 1 to 10, where 10 is 'totally in favour', and 1 is 'totally against', how much are you in favour of renewable energy, as an alternative to fossil fuels such as coal and gas? Mean score for key demographics



3 Conclusions

Overall

Overall awareness and support for the use of renewable energy remains similar to 2006. Whilst solar, wind and hydroelectric power are the most recognised forms of renewable energy, awareness of biomass/bio-energy has risen somewhat. Media coverage perceived to be favourable about renewable energy has grown since 2006; the amount of favourable coverage varied according to the type of media and how much influence each media exerted. National media, on the whole, had the most influence and was felt to be the most favourable on the subject.

Age

Along with 55 - 64s, the youngest age group (ages 16-24) were most likely to recall sources of renewable energy they were prompted with; awareness amongst this age group has increased the most since 2006 for most types of renewable energy. Despite this, they seem to be unsure about many issues related to renewable energy, such as giving support to Government policy or favouring the use of wind power. This seems to suggest that while raising awareness, current information on renewables might not be engaging young adults; ascertaining the exact cause(s) of ambivalence amongst this age group is beyond the scope of this study and other reasons may also be a factor. Given that younger adults were influenced significantly by the Internet, its use could play a role in readdressing this issue.

Gender

Women were less likely to support the use of renewables, to want to live close to wind power developments or to support government policy on renewables. However, it was not the case that women were actively opposed to these issues, rather many more were likely to answer 'don't know'. Women were also less likely to be aware of sources of renewable energy. This would suggest that, compared to men, women felt less informed and therefore less likely to give their support to renewable energy.

Living near a renewable energy development

Those who cited that living near a renewable energy development influenced their views, were wholly more supportive about renewable energy than those who did not cite this as an influence. Those people citing this influence supported the use of renewable energy (including wind), Government policy and perhaps most importantly were happier to live near a wind power energy development.

Region

The region with the highest awareness of renewables and most favourable about its use as an alternative to fossil fuels, was the Highlands & Islands. However, there has been a considerable drop since 2006 in those happy to live near a wind power development in this region. It seems these residents, whilst wishing to support an issue that so closely affects them, are becoming more cautious about living in close proximity to these developments.

Media coverage

Media coverage of renewable energy in the Highlands & Islands was felt to be more favourable than in GB as a whole, especially coverage in local newspapers and television. However, the proportions within Highlands & Islands and GB as a whole saying that the media is *unfavourable*, were broadly similar as GB residents are much more likely to answer 'don't know'. This suggests it is much easier to elicit a favourable viewpoint of media coverage from those with personal experience on the subject (such as Highlands & Islands residents), than those who are less likely to have direct experience of renewable energy. Perception of the media therefore seems connected to direct experience of renewable energy.

In general, those who have more awareness and experience of renewable energy tend to be more favourable about it, similar to the 2006 findings. Whilst not being able to practically provide experience of renewable energy to everyone, if the Government informs less-aware groups, this will be key to garnering support for renewables. Media coverage, in particular through local media which seems to be so effective in the Highlands & Islands, could perform this role nationwide.

4 Appendix

As the data has been weighted to provide a nationally representative sample, the demographics and regions (weighted) will be in line with Great Britain as a whole.

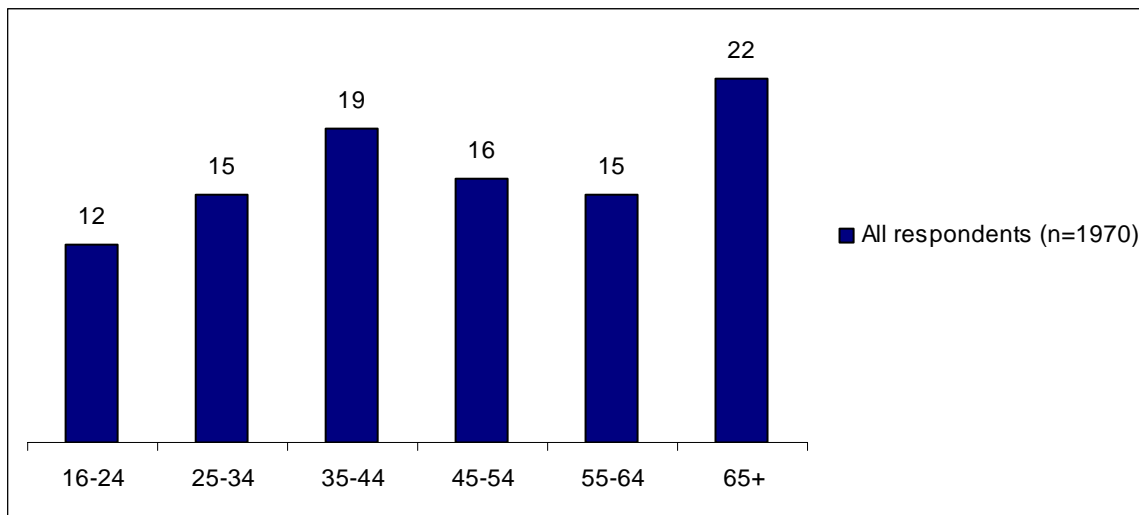
4.1 Demographics

4.1.1 Age

Figure 11 shows the age distribution for all respondents

- The average age of the respondents is 48 years
- The region with the youngest mean age is Carlton/LWT (44) and oldest mean age is in West Country (51). The mean age in the Highlands & Islands is 48 years

Figure 11: Age distribution (%)



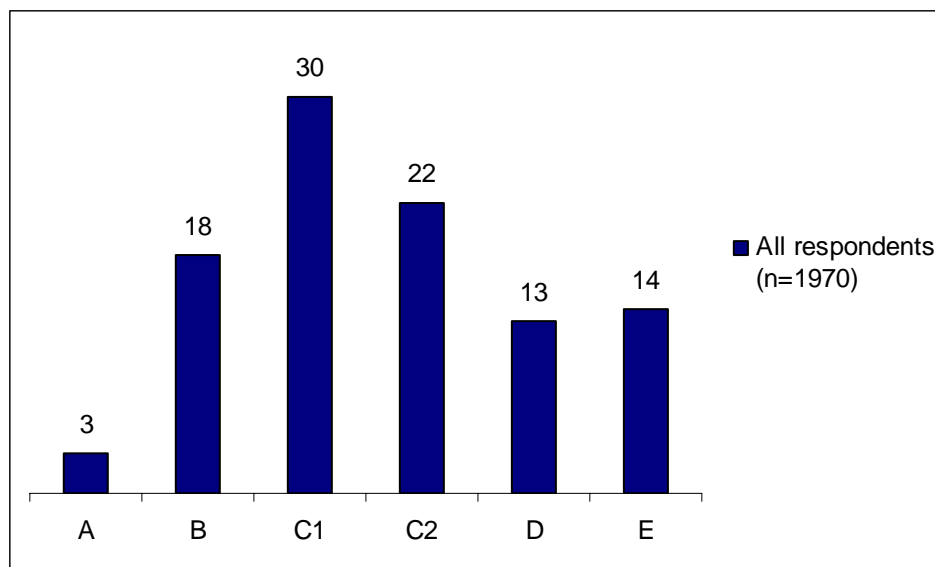
4.1.2 Gender

- 48% of respondents were male and 52% were women

4.1.3 Social class

Figure 12 shows the distribution of social class in the survey.

Figure 12: Social class (%)



4.2 Regions

The region referred to as Scotland in this report has been taken from Telebus data only. The data from the Highlands & Islands has not been merged into this Scottish sub-group because it is not possible to identify the Highland & Islands residents within the Telebus data and therefore it is not possible to weight Highlands & Islands to the true proportion of Scotland as a whole. Due to this, Highlands & Islands has been treated as a discrete region. However, both Scotland and Highlands & Islands are representative and can therefore be compared.

Figure 13: Number of interviews in each region

	Weighted	Unweighted
TOTAL	1895	1970
Scotland	168	166
Tyne Tees	99	101
Granada	216	222
Yorkshire	180	183
Central	281	270
Harlech	159	160
Anglia	148	153
Carlton / LWT	375	360
Meridian	192	190
West Country TV	63	65

Highlands & Islands (boost)	15	100
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