

BERR

Department for Business
Enterprise & Regulatory Reform

**RENEWABLE ENERGY
AWARENESS AND ATTITUDES
RESEARCH**

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Table of Contents

1	Summary of findings	1
2	Introduction	2
	2.1 Background and objectives of the research.....	2
	2.2 Methodology and sample overview	2
3	Key Findings	3
	3.1 Prompted awareness of renewable energy sources	3
3.1.1	Prompted awareness by age and gender	3
3.1.2	Prompted awareness by region	4
	3.2 Attitudes to renewable energy.....	5
	3.3 What has influenced views on renewable energy?	9
3.3.1	Which websites have influenced views on renewable energy?	11
	3.4 Media coverage of renewable energy	12
	3.5 Overall opinion of renewable energy	14
	3.6 Newspaper readership	15
4	Conclusions	17
	4.1 Overall	17
	4.2 Age and gender	17
	4.3 Social class	18
	4.4 Regions	18
5	Appendix	19
	5.1 Regions	19

1 Summary of findings

- Awareness and support for renewable energy remains high - eight in ten respondents supported its use
- Solar power continues to be the renewable that has the highest recall amongst the population (86% recognised it); awareness of biomass/bio-energy climbed again this year (59% now say they recognise it)
- The younger age group (16 - 24) tended to be unsure on many issues surrounding renewable energy such as being in favour of the use of wind power. The oldest (65+) were more likely to disagree with the use of renewables
- It appears that women felt less informed about the topic of renewable energy and therefore are less likely to give their support than men
- News reporting featured on television, newspapers and radio, was judged to be more favourable about renewables than it was 12 months ago. These types of media were still felt to be the strongest influence on views (despite a diminished effect this year) and national television had the most influence
- Highlands & Islands residents were more likely to support its use than any other region; they also considered news coverage of renewables in local newspapers and television more unfavourable compared to the general population

2 Introduction

2.1 Background and objectives of the research

The Department for Business, Enterprise and Regulatory Reform (BERR) wish to investigate awareness of and attitudes to renewable energy use in Great Britain. The findings will assist BERR in planning their communications strategy. Specific objectives of the research are as follows:

- To measure the level of awareness of renewable energy
- To monitor attitudes to renewable energy
- To investigate these opinions and which sources have influenced these views
- To monitor perceptions of recent news coverage on the subject of renewables

Through the Central Office of Information (COI), GfK NOP Social Research was commissioned to interview the general public, in spring 2008, regarding these issues. This was the third wave of an annual survey which began in 2006.

This reports sets out key findings from this wave of research and also comparative analysis with previous waves. Unless otherwise stated, differences are all statistically significant.

2.2 Methodology and sample overview

As in previous waves, the survey was carried out by telephone, using CATI (Computer Aided Telephone Interviewing). Maintaining this methodology ensured comparability across waves.

A sample of 1947 GB adults aged 16+ were interviewed using GfK NOP's Telebus (telephone omnibus survey) over two consecutive weekends: 28th - 30th March and 4th - 6th April. As only a very small proportion of these interviews were with Highland & Islands residents a survey to boost their numbers was also conducted. Between 25th - 30th March 100 people aged 16+ were interviewed in this region.

The data from both surveys was combined and weighted so that the Highlands & Islands sample was in proportion with GB as a whole. The region accounts for 0.74% of the total British population aged 16+.

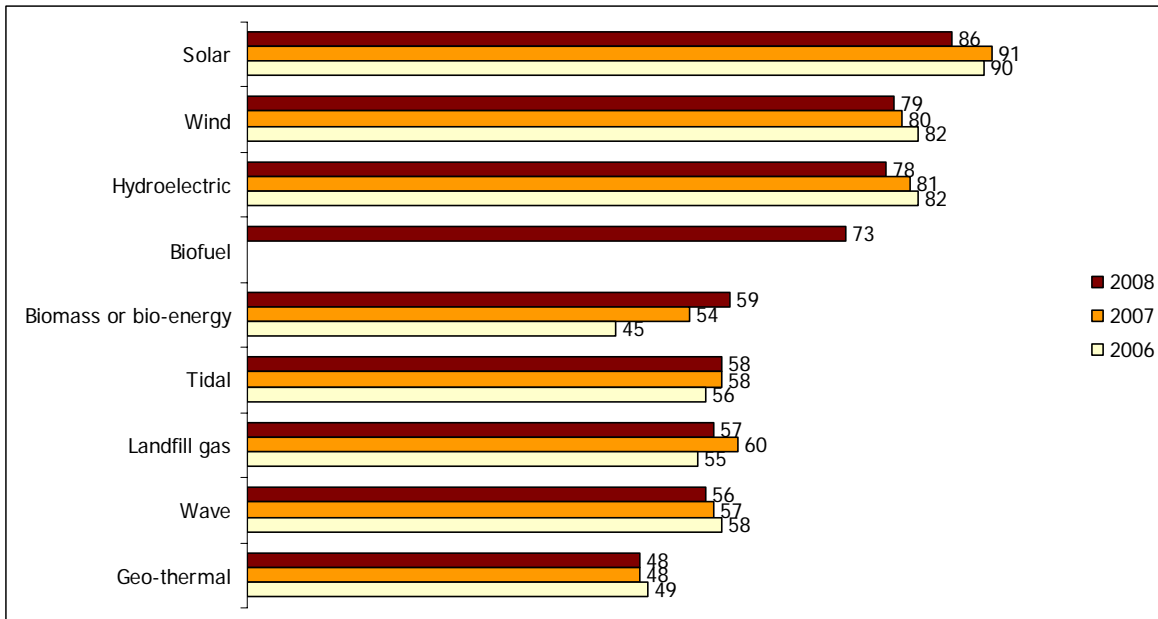
3 Key Findings

3.1 Prompted awareness of renewable energy sources

Respondents were asked whether or not they had heard of a number of sources of renewable energy. Figure 1 illustrates that in 2008 solar (86%), wind (79%) and hydroelectric (78%) remained the most recognised forms of renewable energy, despite a decrease since tracking began in 2006.

A new source was added to the list for this wave of research, biofuel. Over 7 in 10 respondents were aware of biofuel (73%). There has been a notable rise in awareness levels of biomass or bio-energy over the course of tracking, up from 45% in 2006 to 59% in 2008. Awareness levels of all the other energy sources have remained fairly constant.

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



Q1. All respondents (base size: 2006 wave - 2032, 2007 wave - 1970, 2008 wave - 2047); 'none of these' response not shown

3.1.1 Prompted awareness by age and gender

As in 2007, only 4% of the sample did not recognise any of the sources read out to them. However, among the 65 and over age group this increased to 7%. Generally, this age group were least aware of the various renewable energy sources.

- In 2007 awareness of each source among the 16 - 24 age group increased, however at this wave, the figures dropped back to the levels seen in 2006, except in the case of biomass/bio-energy.

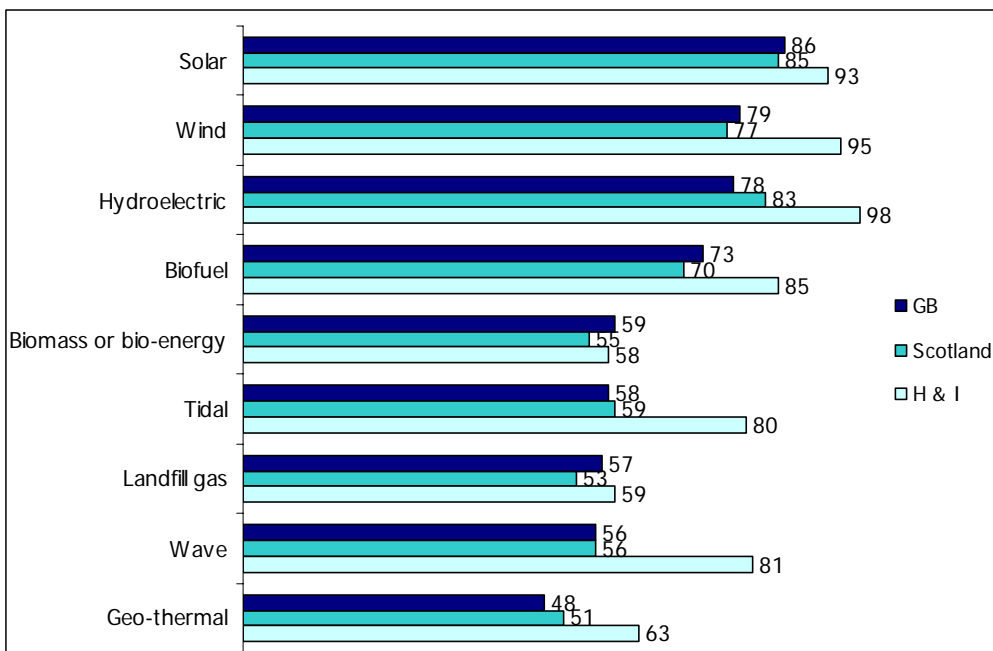
- Consistent with the last two waves, men were more likely than women to be aware of all the renewable energy sources.

3.1.2 Prompted awareness by region

- As has been found at previous waves, the Highlands & Islands region had a higher level of awareness of most renewable energy types compared with Great Britain as a whole, as figure 2 shows. The renewables most likely to be located in this region¹, hydroelectric and wind power, were recognised by virtually the entire Highlands & Islands sample, and awareness was much higher than in GB (98% of Highlands & Islanders had heard of hydroelectric vs. 78% of GB residents; similarly 95% in Highlands and Islands had heard of wind compared to 79% in GB as a whole).

- Whilst there has been little change in awareness levels amongst respondents in Great Britain as a whole since 2007, in Scotland there has been a drop in awareness for many of the renewable sources, most noticeably hydroelectric, which has fallen from 93% to 83% this year; and wave power, which has dropped from 64% to 56%.

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



Q1. All respondents (base size: GB - 2047, Scotland - 174, Highlands & Islands - 100); 'none of these' response not shown

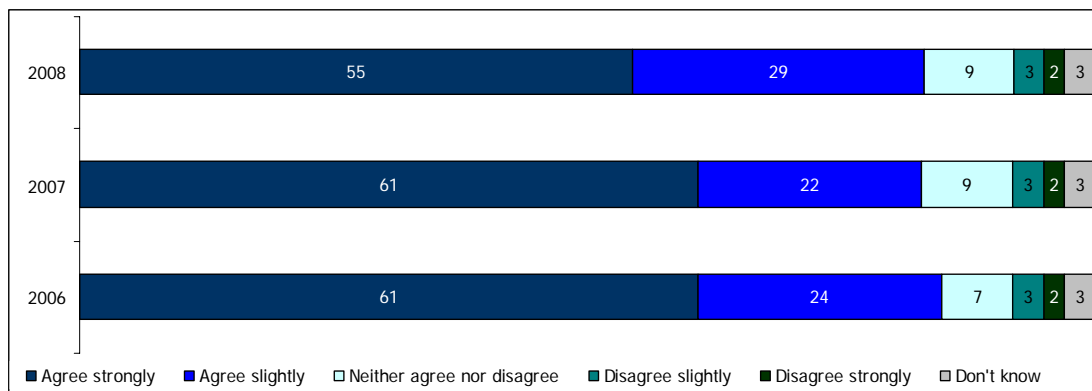
¹ Taken from <http://www.restats.org.uk/index.htm>.

3.2 Attitudes to renewable energy

Six statements relating to renewable energy were read out and respondents were asked how far they agreed or disagreed with each. Figures 3 - 8 show the agreement and disagreement levels for each statement. In general, attitudes to renewable energy have remained consistently positive over the three waves of research. At this wave around three quarters or more claimed to support renewable energy, to be in favour of the use of wind power, and to support the Government and EU targets for renewable energy. One notable difference is the rise in those feeling that renewable energy sources are too costly and outweigh environmental benefits - this year 4 in 10 felt that this is the case (42%, up from 35% in 2007).

We will look in more detail at each statement:

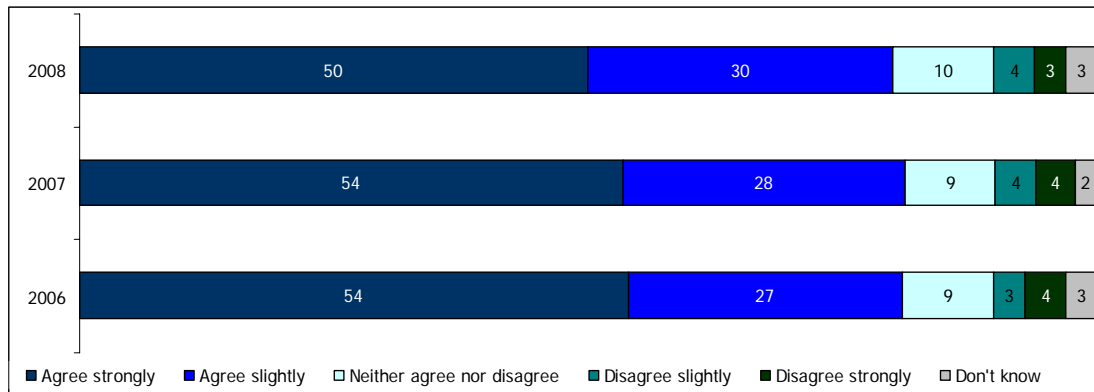
Figure 3: "I support the use of renewable energy". By wave (%)



Q2. All respondents (base size: 2006 wave - 2032, 2007 wave - 1970, 2008 wave - 2047)

- Support for the use of renewable energy has remained consistent over the three waves of research with around three quarters of respondents agreeing they support it
- Similar to previous waves, men were more likely to say they support the use of renewable energy than women (86% of men agreed, compared to 82% of women).
- Also consistent with previous waves, the 65 and over age group were most likely to disagree with this statement (10% disagree compared with 3% of those under 65).
- Those belonging to social classes AB were most likely to support the use of renewable energy compared to the other classes (91% agreed, compared with 81% for C1s, 86% C2s and 76% DEs).
- Regionally, the strongest support for renewables was in the Highlands & Islands (96%) as has been found at previous waves. Support amongst the other regions was broadly similar to last wave.

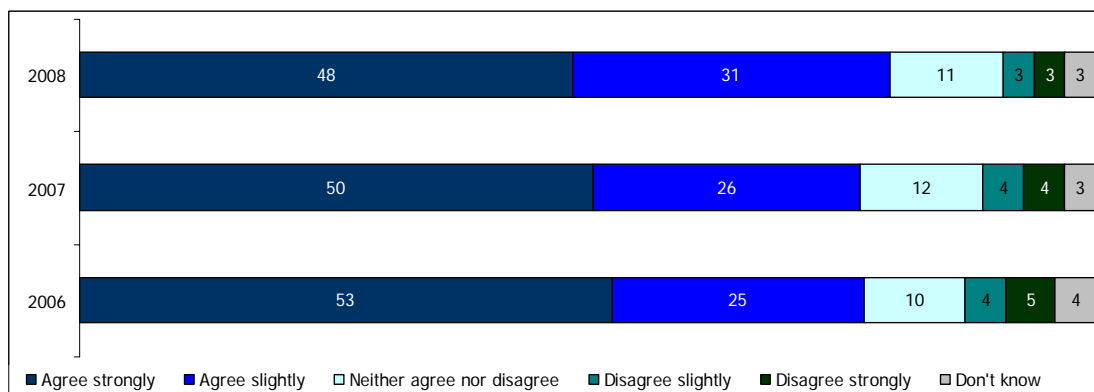
Figure 4: "I am in favour of the use of wind power". By wave (%)



Q2. All respondents (base size: 2006 wave - 2032, 2007 wave - 1970, 2008 wave - 2047)

- There was a high level of favourability towards the use of wind power again at this wave of research, with 8 in 10 respondents saying they were in favour.
- The youngest and oldest age groups were least likely to favour the use of wind power; 74% of 16 – 24s and 71% of 65+ agreed with this statement. The oldest were much more likely to actively disagree with wind power use (14% disagreed).
- Residents of the Highlands & Islands were most in favour of the use of wind power (88% agreed compared to 80% in GB overall).

Figure 5: "I support the Government's policy of generating 10% of our electricity needs from renewable energy by 2010". By wave (%)

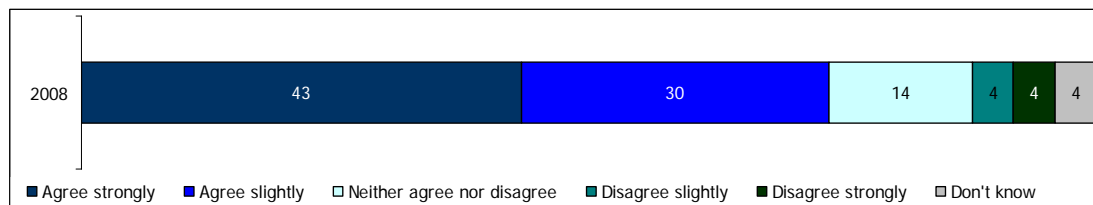


Q2. All respondents (base size: 2006 wave - 2032, 2007 wave - 1970, 2008 wave - 2047)

- Similarly to previous years, a high proportion of respondents agreed with the Government policy of generating 10% of electricity from renewable energy by 2010 (79%).
- As in 2007, those aged 16 to 34 were most unsure about this statement (17% said they neither agreed nor disagreed with this statement, whilst only 8% of those aged 45+ said the same thing). Those 65 and over were most likely to disagree with this statement (14%).

- Social classes D and E were most likely to disagree with this policy (11%) whilst those strongly agreeing to support the policy were more likely to be ABC1s (54%).
- Similar to 2007, the Harlech ITV region and Highlands & Islands were most likely to support this policy (83% agree) although statistically this proportion is not significant in comparison to most other regions.
- Consistent with the previous two years, those citing living near a renewable energy development as an influence on their views were more likely to support this policy (85% compared with 78% of those who did not).

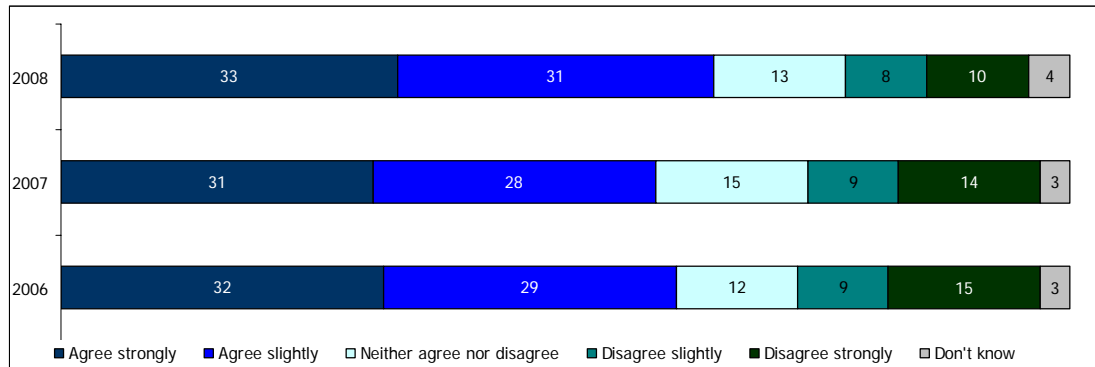
Figure 6: “I support the target for European Union countries to source 20% of the EU’s energy needs from renewable energy by 2020. This includes heat, transport and electricity”. 2008 only (%)



Q2. All respondents (base size: 2006 wave - 2032, 2007 wave - 1970, 2008 wave - 2047)

- This statement was new to the research in 2008. Around three quarters of respondents agreed with the EU target (74%). Men were much more likely to agree to the statement (78% of men agree compared to only 70% women).
- The age groups tending to agree the least with this statement were the youngest (16-24) and oldest (65+); 66% agreed compared with 78% of those aged between 25 and 64. The reasons for these low levels of agreement were: the older group were much more likely to say don't know (11%), whilst a high proportion of the younger group said neither agree nor disagree (23% - more than any other age band apart from 25 - 34 year olds).
- Those belonging to social classes AB were more likely to agree (82%) than the other social classes (72%).
- Support for this target was strongest in the Highlands & Islands region (85% agree - significantly more than overall GB support of 74%).
- Those influenced by living near a renewable energy development or a fossil fuel power station tended to agree to the statement more than those who did not; 81% of those living near a renewable energy development agreed compared to 73% of those who did not, similarly 83% of those influenced by living near a fossil fuel power station agreed compared to 73% who did not.

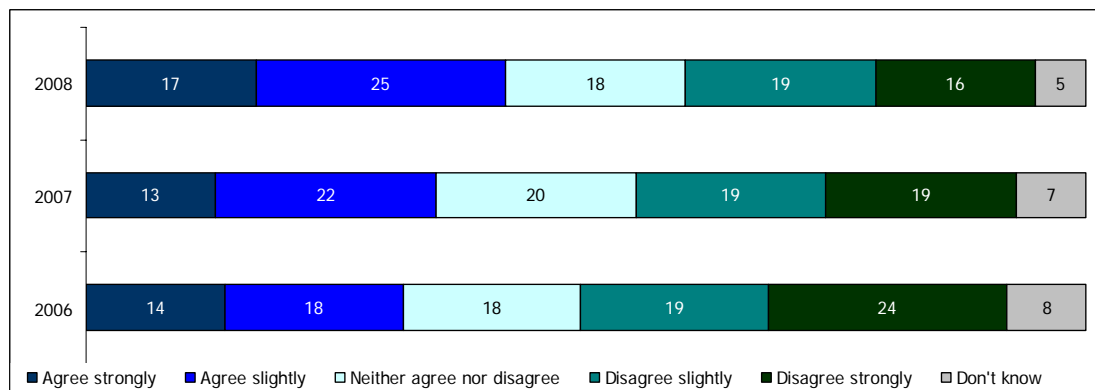
Figure 7: “I would be happy to live within 5km (3 miles) of a wind power development”. By wave (%)



Q2. All respondents (base size: 2006 wave - 2032, 2007 wave - 1970, 2008 wave - 2047)

- Just under two thirds said that they would be happy to live within 5km of a wind power development (65%)², an increase on the previous two years.
- As in previous years, men were happier to live near this type of development than women – 68% of men agreed with the statement compared to 61% of women.
- Regionally, residents in the West Country were most likely to agree with this statement (73% - although this is not statistically significant different to GB as a whole).

Figure 8: “Renewable energy sources are too costly and this outweighs the environmental benefits they may have”. By wave (%)



Q2. All respondents (base size: 2006 wave - 2032, 2007 wave - 1970, 2008 wave - 2047)

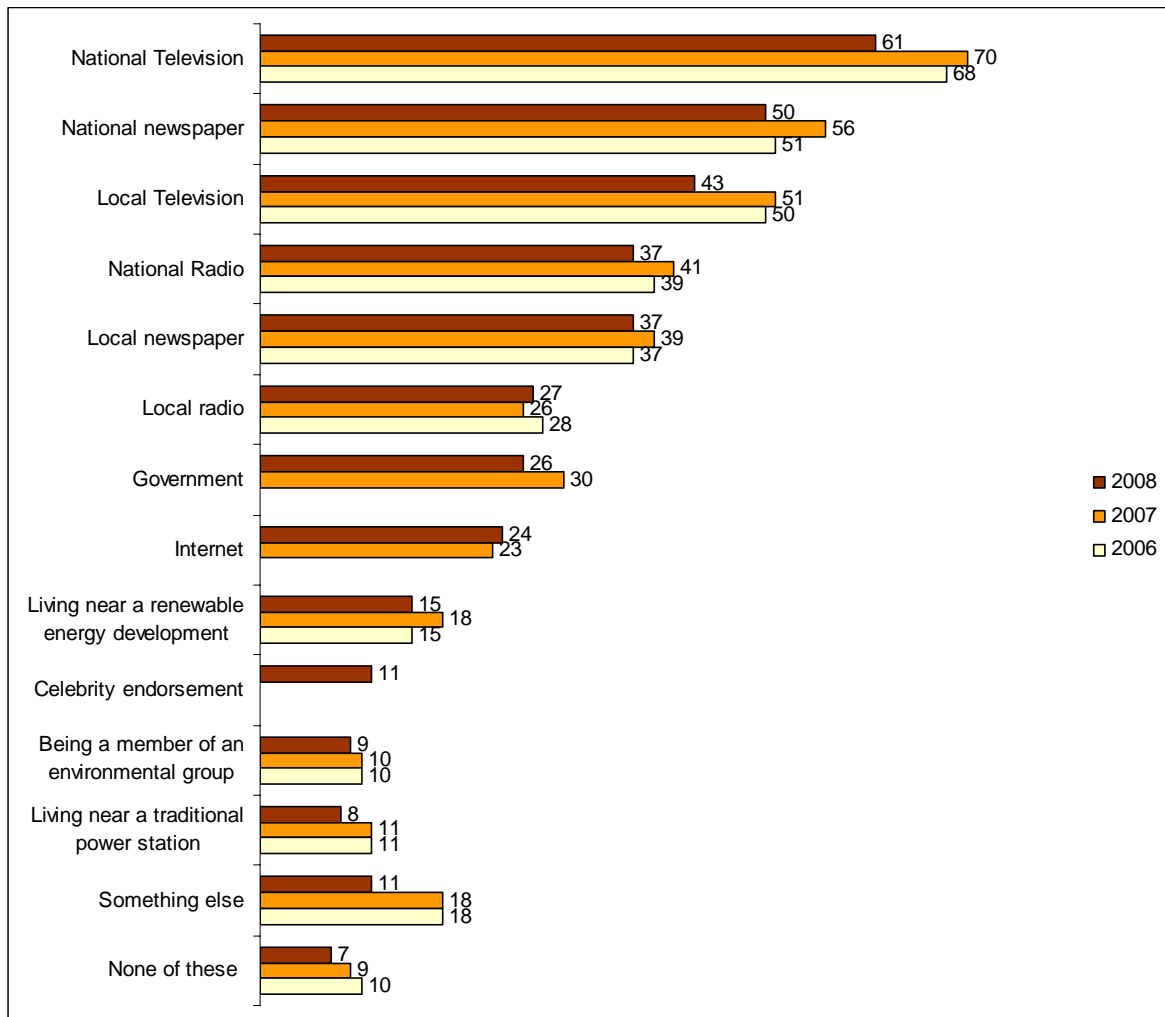
² Due to rounding, the sum total of the agree strongly and agree slightly score gives a percentage higher than the constituent parts added together

- This is the first year in which more of the sample agreed than disagreed with this statement. Some 42% said that they agreed that renewable energy sources are too costly and that this outweighs the environmental benefits, compared with 35% in 2007.
- Those aged 35 - 44 were more likely to disagree (42%) than the youngest (30% 16- 24 year olds) and oldest (29% 65 years and over). The younger ages – those aged 16 to 34 – were more likely to sit on the fence and say 'neither agree nor disagree' than the older groups (22% of 16 - 34s compared with 15% of over 55s). A higher than average proportion of those 65 and over didn't feel informed enough - 14% said don't know.
- Those in the C2 (48%) and DE social classes (46%) were more likely to agree with this statement compared to those in the ABC1 groups (38%).
- Having seen a large increase in agreement between 2006 and 2007 (from 22% to 45%), the Highlands & Islands is now the region with the lowest level of agreement, with only a third agreeing (34%- although this is not significantly less than the national average).

3.3 What has influenced views on renewable energy?

A list of possible influences on peoples' views of renewable energy was read out to respondents. The list included various types of media and other factors; figure 9 shows, in descending order, what proportion felt each one to be an influence. Since 2007 many of the factors' influence on people's views have diminished, including all national media, local television and government. Figure 9 shows how exactly these and other factors have changed year on year. National television remains the biggest influence with six in ten people citing it as an influence (61%).

Figure 9: Which of the following have influenced your views on renewable energy? By wave (%)



Q3. All respondents (base size: 2006 wave - 2032, 2007 wave - 1970, 2008 wave - 2047)

- Whilst there was little difference between genders over what factors influenced their views, age was a differentiator. For example, those aged 55 - 64 were more likely than any other age group to cite national radio as an influence (48%).

- Interestingly, a third of those aged 16 - 34 perceived the Government to be an influence (32%), more so than the older age groups (although not statistically more than those aged 55 - 64).

- Perhaps unsurprisingly those under the age of 45 were more likely to say the internet was an influence (32% of under 45s compared with only 16% of those 45 and over). Also, those in the Carlton/LWT ITV region were more likely to mention this than most other regions, perhaps to be expected because of extensive internet access in the area.

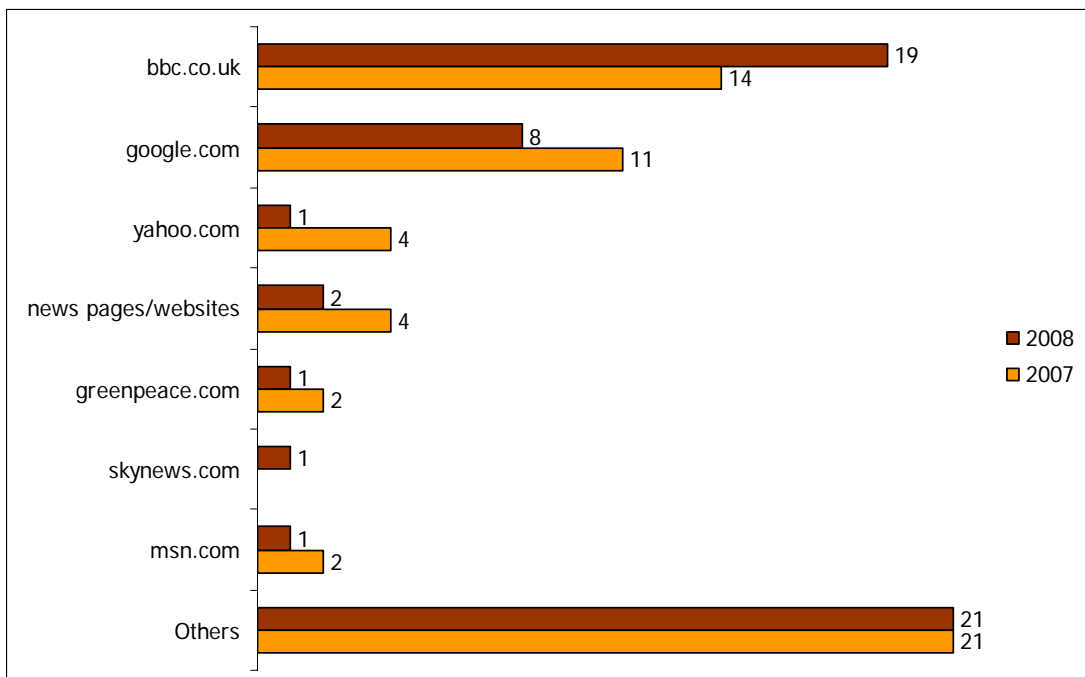
- Celebrity endorsement was added to the list of possible factors in 2008. One in ten people said celebrities influenced their views on renewable energy (11%). The youngest were more likely than the sample overall to cite this as an influence (19% of 16 - 24 year olds).

- For all the factors, except celebrity endorsement and being a member of an environmental group, Highland & Island residents were more likely than the overall GB sample to claim each was an influence. In particular, they were more likely to say that 'living near a renewable energy development' (50%, compared with 15% among the GB sample) and local newspapers (63%, compared with 37% in GB) were an influence on their views than those in Great Britain as a whole.

3.3.1 Which websites have influenced views on renewable energy?

Those who said their views on renewable energy had been affected by the internet were probed further to find out which websites in particular had been an influence. Once again bbc.co.uk had the greatest influence with 19% mentioning it; an increase of five percentage points since last year.

Figure 10: Please could you tell me which websites in particular have influenced your views on renewable energy? By wave (%)

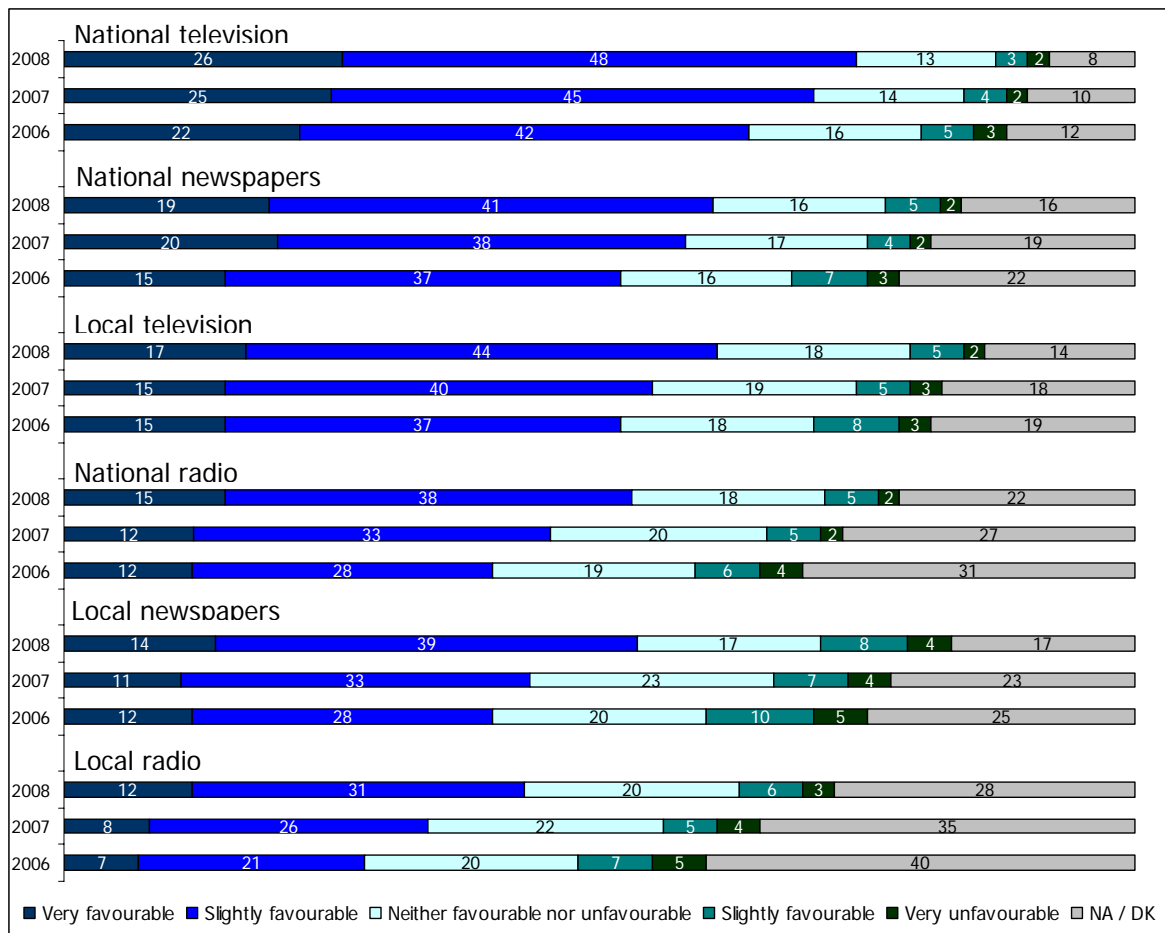


Q3b. All those who felt the Internet influenced their views on renewable energy (base size: 2007 wave - 444, 2008 wave - 488); none / don't know / no answer responses not shown

3.4 Media coverage of renewable energy

Respondents were asked how favourable they had found various forms of media coverage of renewable energy in the last 6 months. Figure 11 shows the proportion who thought these media channels were favourable. It can be observed that there has been an increase in the percentage of respondents who thought that coverage was favourable for all types of media types.

Figure 11: 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 (%)



Q4. All respondents (base size: 2006 wave - 2032, 2007 wave - 1970, 2008 wave - 2047)

- For each type of media, many said they were unsure by giving either a response of neither favourable nor unfavourable or don't know.
- National television was felt to be the most favourable, up 10% points since 2006 when only 64% said it was favourable.

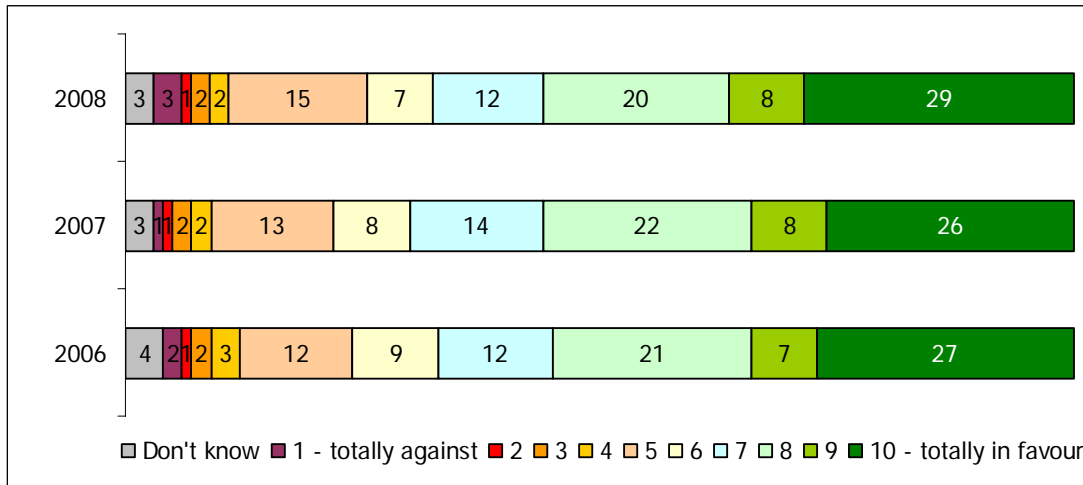
- Local newspapers and radio have seen a large increase in those deeming them favourable, with 53% saying newspapers were favourable and 42% claiming local radio coverage was favourable compared with last year when 44% and 33% said the same respectively.
- In spite of this, for the third year running, local newspapers were most frequently identified as unfavourable. One in ten said they were unfavourable (12%), about the same proportion as last year (11%).
- Those citing living near a renewable energy development as an influence on their views were significantly more likely to perceive each media type as favourable compared to those not influenced. This is consistent with previous results.
- Certain media local to the Highlands & Islands was thought to be particularly unfavourable: 23% said local newspapers were unfavourable versus 12% in GB; and 17% said local television was unfavourable, versus 7% in GB as a whole.

3.5 Overall opinion of renewable energy

To assess opinion of renewable energy as an alternative to fossil fuels respondents were asked to rate it on a scale where 1 was 'totally against' and 10 was 'totally in favour'.

Figure 12 illustrates the distribution of opinion for all three waves. There has been an increase in those saying they were 'totally in favour' of renewables (i.e. those who said 10) increasing from 26% in 2007 to 29% this year. Despite this, as figure 13 (overleaf) demonstrates, the average score has fallen only very slightly since last year.

Figure 12: 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 (%)



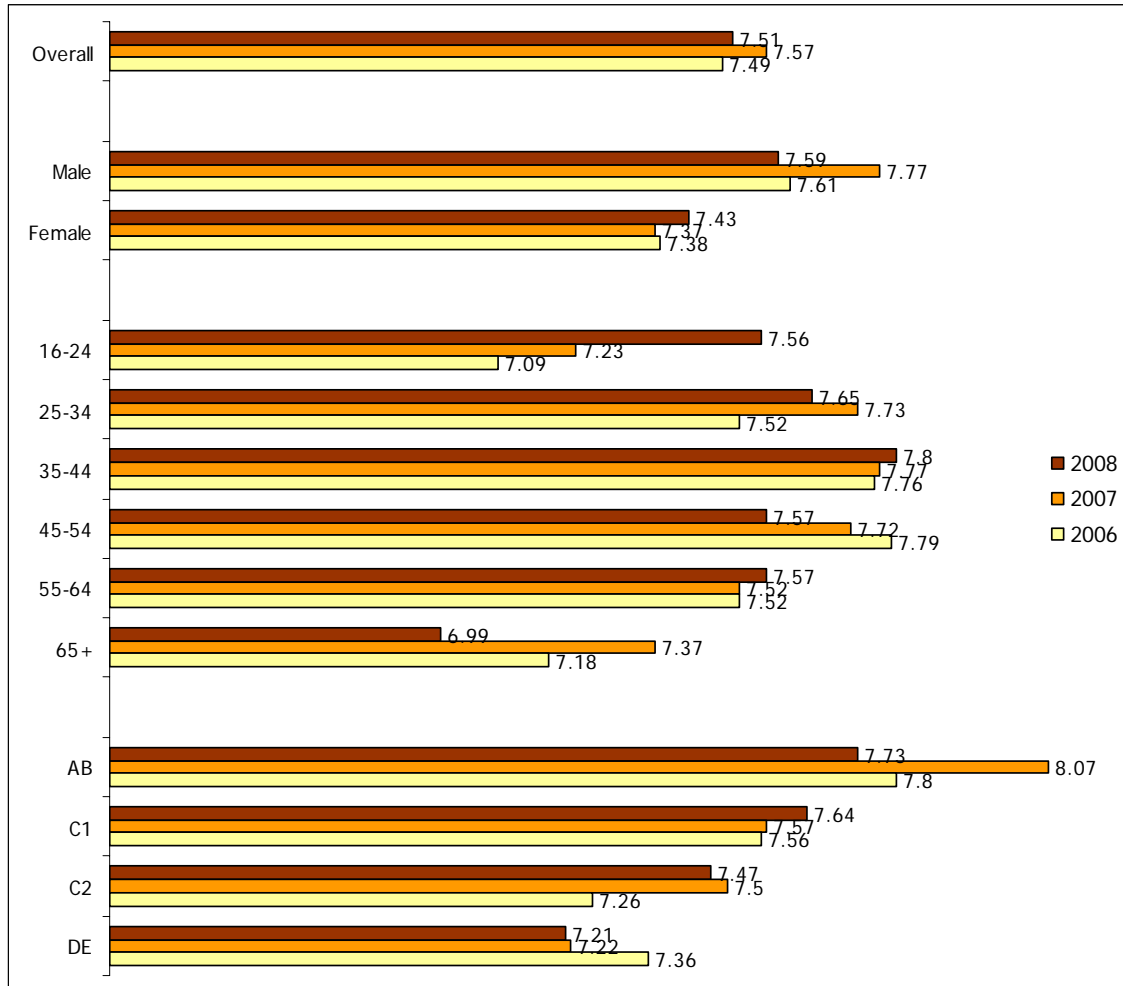
Q5 All respondents (base size: 2006 wave - 2032, 2007 wave - 1970, 2008 - 2047)

- Figure 13 shows the average score attributed to key demographics. Men still have a higher average score than women (although this difference is not statistically significant) despite their average dropping by nearly 0.2 points since 2007.

- The oldest, those 65 and over, were the least in favour age group (average 6.99 - the lowest recorded score throughout all three waves). In contrast, since 2006 favourability toward renewable energy has grown amongst the 16 -24 age group with a particularly big increase this year from 7.23 in 2007 to 7.56.

- As seen last year, a correlation can be seen between social class and favourability towards renewable energy, with ABs most in favour (average score of 7.73) and DEs the least (score 7.21). This is in spite of a fall in favourability amongst ABs from 8.07 in 2007.

Figure 13: 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? Key demographics by wave (mean score)

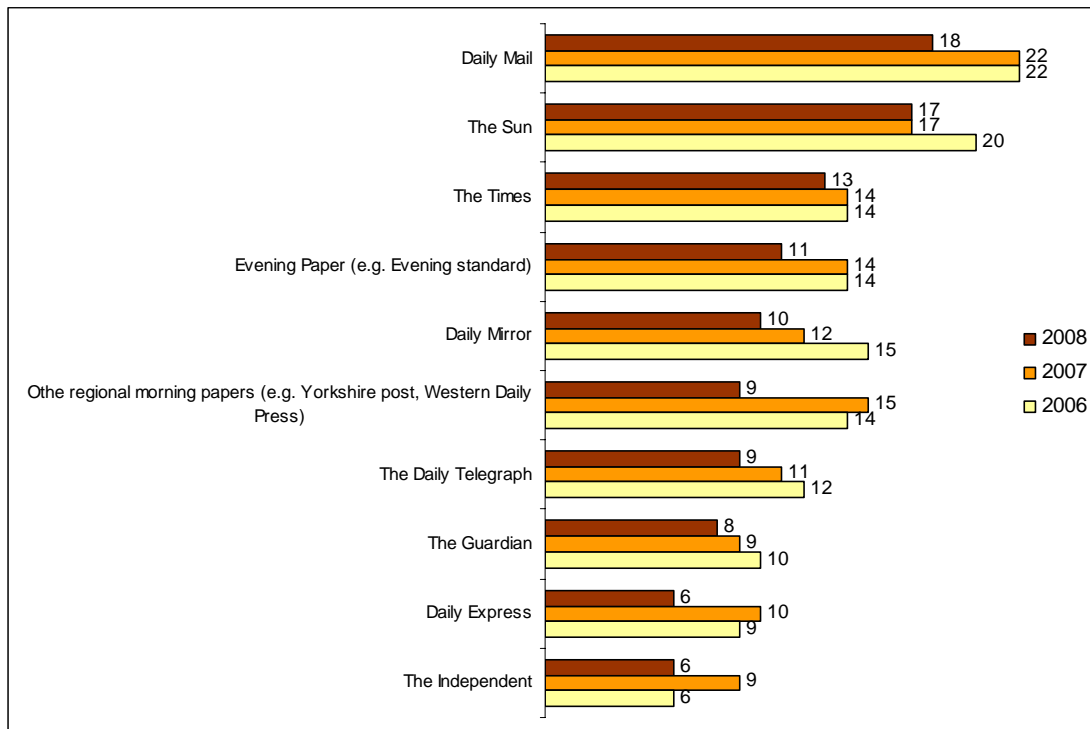


Q5 All respondents (base size: 2006 wave - 2032, 2007 wave - 1970, 2008 - 2047)

3.6 Newspaper readership

To ascertain how newspapers could influence views on renewable energy, readership was measured amongst the sample. Figure 14 shows which newspapers were read at least twice a week. A quarter said they did not read any of the papers that were listed regularly (24%), the same proportion as at the baseline survey in 2006 and slightly less than in 2007 (27%).

Figure 14: Which of the following newspapers do you read regularly, that is at least twice a week? Top ten most read newspapers by wave (%)



Q6. All respondents (base size: 2006 wave - 2032, 2007 wave - 1970, 2008 - 2047); only mentions of 6% and above in 2006 are shown. 'None of these' response not shown

- Readership amongst the sample has fallen since 2006 for all newspapers listed, as the number of papers people were mentioning fell. Most widely read was still the Daily Mail (18%) closely followed by The Sun (17%).
- Those influenced by being a member of an environmental group were more likely to read the Guardian (15%) than those who were not (7%).
- Last year it was found that Sun readers were significantly more likely to rate renewable energy unfavourable (i.e. giving it a rating of 1, 2 or 3) compared to those who rated it favourable. However, this finding was not repeated this year.

4 Conclusions

4.1 Overall

Awareness and support in Great Britain for renewable energy has remained at similar levels to those found in 2006 and 2007, with the majority still supporting its use (84%). Solar, wind and hydroelectric energy remained the most recognised sources. Biofuel was the fourth most recognised, perhaps unsurprisingly, given its current prevalence in the media.

News coverage about renewable energy on television, newspapers and radio (both national and local) was felt to be more favourable than in the last two years. Furthermore, these types of media continued to have the greatest influence, albeit slightly diminished this year, on views of renewable energy; national television had the most influence and was felt to give the most favourable coverage on the subject.

Whilst attitudes towards renewable energy generally stayed the same, those judging renewable energy sources as too costly, outweighing the environmental benefits, has increased this year (to 42%). This was the first year that more respondents agreed that this was the case than disagreed and it was those in the C2DE social classes who were most likely to agree. This may come as no surprise given the corresponding change in the economic climate and suggests that, whilst people are happy to support renewable energy in principle, it is conditional on cost.

4.2 Age and gender

The same differences were clear between gender and age that have been observed in previous waves. The indications are that women are less likely to support the use of renewables because they are often unsure and lack knowledge about renewables, rather than because they actively oppose their use. This is underlined by the fact that women were less likely than men to be aware of the various types of renewable energy, suggesting that they feel less informed than men. The younger age group (16 –24s) seemed to be unsure about many issues surrounding renewable energy, and they tended not to have an opinion about many issues, including being in favour of the use of wind power, supporting government and EU targets on renewable energy use and whether renewable energy sources are too costly outweighing environmental benefits. The oldest interviewed (those 65 and over) were much more negative towards renewable energy issues. They were more likely to actively oppose (i.e. disagree with) the use of renewable energy, wind power usage or government policy on generation targets.

4.3 Social class

Attitudinally those in the social classes AB tended to be more positive about renewable energy. This group were more in favour of using renewable energy as an alternative to fossil fuels, support renewable energy use and support government and EU policy on targets for renewable energy generation.

4.4 Regions

The Highlands & Islands was once again the region whose awareness and attitudes towards renewables generally varied from the rest of the country. As had been reported at previous waves, this region was most likely to favour the use of renewable energy and their attitudes towards it were generally more positive than other regions in Great Britain. For example, they were more favourable towards the use of wind power and supported government and EU targets on renewable energy use. Awareness of the various renewable sources was also highest here as was seen last year. Willingness to live near a wind power development also increased this year, and is now in line opinion in the Great Britain sample overall (after a drop last year).

Those living in the Highlands & Islands perceived media coverage about renewable energy to be slightly less favourable in general than the national average. This is in contrast with last year when this region tended to perceive it to be more favourable. Moreover, this region found its local media - newspapers, television and radio - to be more unfavourable on the whole, than elsewhere in Great Britain.

5 Appendix

5.1 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 15: Number of interviews in each region

	Weighted	Unweighted
	1960	2047
Scotland	174	174
Tyne Tees	96	102
Granada	241	236
Yorkshire	191	190
Central	275	274
Harlech	175	177
Anglia	150	149
Carlton / LWT	407	404
Meridian	186	182
West Country TV	53	59
Highlands & Islands (boost)	15	100