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OPINIONS ON RENEWABLES – A LOOK AT POLLS IN INDUSTRIALISED COUNTRIES

STRONG SUPPORT FOR RENEWABLES IN MAJOR WESTERN ECONOMIES

The expansion of renewable energy (RE) is booming. Not only Germany and the European Union, but also dozens of other countries have set targets for the expansion of renewable energy sources (RES), albeit with different levels of ambition. These goals are not without reason and to a considerable extent due to political pressure by the public. At the same time, countries set different priorities for the expansion of renewable energy depending on their energy policy and natural conditions. But what is the public's opinion on renewables? Information is provided by surveys. This background paper examines selected surveys from major industrialised countries and compares their results to one another in the context of energy and socio-political issues.

AT A GLANCE

- In major industrialised countries of the Western World,renewables have, regardless of their expansion, a high degree of acceptance with approval ratings well above 80 percent in most cases.
- Expansion targets for renewable energies are also strongly supported. This applies to European Union member states, Japan and, depending on the costs, also to the US, Canada and Australia.

1 OBJECTIVES AND APPROACH

The acceptance of renewable energy is generally regarded as an important prerequisite for their further expansion. However, the meaning of "acceptance" is often left unspecified. Researchers generally draw a distinction between socio-political acceptance, market-related acceptance and project-related acceptance[1]. While the socio-political acceptance deals with the approval of renewable energy and its specific technologies, the market acceptance is about the market penetration of, for example, renewable power products or wood heating systems. The project-related acceptance refers to the approval of specific projects, e.g. the construction of renewable energy plants in a neighbourhood. The polls examined in this paper relate to those areas in varying degrees. For reasons of clarity, particular emphasis is put on socio-political acceptance. Due to the relatively low number of surveys which deal with market-related and project-related acceptance, these are only touched on[2].

For this analysis, some 15 surveys from 10 countries were evaluated. These include surveys which exclusively deal with renewable energies as well as polls that cover a broader range of topics within the field of environmental and economic issues. The selection of countries was made in consideration of their relevance as energy consumers or suppliers and their importance for energy policy debates in the German, European and global context. Japan, Canada, Australia, New Zealand and the USA were used as non-European examples. Within the EU, Germany, France, the United Kingdom, Poland, and a survey commissioned by the European Commission were chosen. In those countries as well as in Germany, the focus of the energy policy debate lies on the electricity sector. In this analysis, this is taken into account.

LEVELS OF ACCEPTANCE OF RENEWABLE ENERGY

	Object of acceptance	Subject of acceptance
Socio-political	renewable energy technologies, Renewable-Energy-Sources Act etc.	general population, political decision makers
Market-related	Renewable energy plants, eco-power	Investors, house owners, electricity consumers
Project-related	Plant project, line installation	residents, local politicians, conservationists etc.

The surveys examined are part of a socio-political and economical context. Some took place in the run-up to elections

and therefore strongly focus on current affairs. Others, such as surveys by the Renewable Energies Agency (AEE), but also those of the British Department of Energy & Climate Change (DECC) are conducted at regular intervals. The acceptance of regulatory measures - either existing or expected (e.g. quotas or support mechanisms such as feed-in tariffs) - is explored, as well as aspects of supply security and environmental protection. Wind and solar power are often picked out in the polls when people were asked about the acceptance of specific renewable energy technologies. In some cases, these two technologies are considered representative for the whole renewable energy industry. Some surveys (for example a survey conducted in Switzerland3,) are rather technology specific and could therefore not be included in the info graphic below, but are discussed in the text.

2 SOCIO-POLITICAL ACCEPTANCE OF RENEWABLES

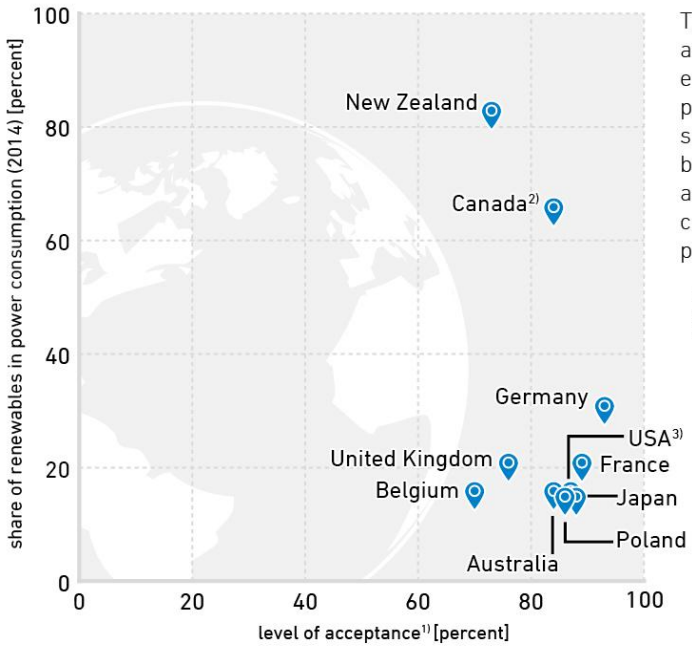
In major economies of the Western World, renewable energies enjoy very strong support among their populations. This is demonstrated by the info graphic below. Interestingly enough, the high level of acceptance seems not to be very much affected by energy policy and the expansion of renewable energies. Countries with a relatively low development of renewable energy, such as Japan, the USA and Australia, as well as countries with high development, for example Germany, Sweden and Denmark, all show high acceptance levels of renewable energy.

However, a correlation between high expansion rates of renewable energies (in the electricity sector) and a strong acceptance cannot be derived. New Zealand, with a share of 80 percent renewable power, is a leader when it comes to the electricity sector. The acceptance of renewables (73 percent) is relatively strong, however still at the bottom end when compared to other countries with lower renewable power shares. In Canada, the situation is a similar one. The highest degree of acceptance was shown in Germany with 93 percent. This number demonstrates the acceptance to further foster the expansion of renewable energies.

Germany is closely followed by France and Japan, with RE acceptance figures of 89 percent and 88 percent respectively. The French preferred renewables over any other energy technology: the question asked which energy sources should be promoted for heat and power production. Renewables are widely supported not only in France, but also in other European countries where nuclear power is strongly promoted. This is the case in the UK, for example.

These results, obtained from national surveys in EU Member States, were further confirmed by a Eurobarometer survey on behalf of the European Commission from March 2014[4]. This survey examined the significance of national renewable energy targets. Both in the UK and France, nearly 90 percent of respondents perceived renewable energy targets for national governments to be "important" or "very important". However, the proportion of those who stated that it was "very important" was significantly higher in the UK (54 percent) than in France (42 percent). A survey commissioned by

Acceptance of renewable energy in selected countries



The infographic shows acceptance of renewable energies (RE) in the general population. The poll questions sometimes differ significantly, but they all focus on sociopolitical aspects. Different political contexts in which the polls took place should also be kept in mind.

[1] different polls, mostly taken in 2014 and 2015
[2] Canada: share in electricity production
[3] USA: only homeowners asked

Sources: The following polls were used: USA: Zogby Analytics for Clean Edge Inc., Solar City; Australia: Reachtel for WWF; New Zealand: Colmar Brunton for WWF New Zealand; UK: DECC; Germany TNS Emid for AEE; France: OpinionWay for Qualit'ENR; Belgium: Ipsos for EDORA, ODE and BOP; Japan: CRIEPI; Poland: Szeczyn University for Polish Wind Energy Association

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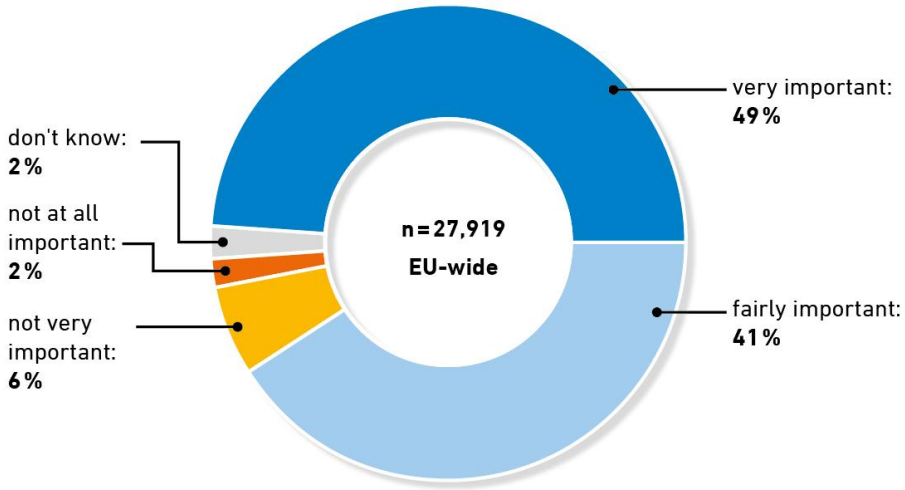
the French Wind Energy Association in March 2014 was revealing too[5], particularly in terms of what the elderly in France prioritized. 87 percent of all respondents were in favour of achieving a balance between different energy sources. Among pensioners the share reached 94 percent.

Renewable energy enjoys strong support in the United States too. A poll by Zogby Analytics showed that 87 percent of Americans considered renewables to be important for the future of energy. Half of the respondents considered solar energy to be of prime importance, for coal it was only 8 percent. However, this survey was limited to owners of residential property. It is therefore also relevant for the market-related acceptance of renewables. Key findings of the survey by Zogby Analytics are underpinned by a survey from Gallup. According to its results, the Americans attach very high importance to the expansion of wind and solar power usage.

Acceptance for Renewable Energy in the European Union

How inportant do you think it is that your national government sets targets to increase the amount of renewable energy used, such as wind or solar power, by 2030?



Source: European Commission
As of: 03/2014

3 STRONG APPROVAL FOR EXPANSION TARGETS IN EUROPE

Several surveys specifically asked about the acceptance and increase of expansion targets for renewables. In March 2014, the above-mentioned Eurobarometer inquired about the importance of national targets, in order "to increase the amount of renewables until 2030". On average, 90 percent of the population in the EU perceived an increase of renewables to be important, of which 49 percent voted for "very important" and 41 percent for "fairly important". The "Top 5" included countries such as Cyprus or the Netherlands (both with a very low proportion of renewables), as well as Sweden, a country considered as a pioneer when it comes to renewables. The two Baltic states Latvia and Estonia - both with high shares of renewable energy - as well as the Czech Republic and Poland, could be found at the lower end. Among countries with an approval rate below average, Eastern European member states outnumbered the others. But all in all, the approval of renewables was strong in Eastern Europe too. In Poland, a third of the population thought that renewable energy targets of their government are "very important" and another 55 percent thought that such targets were "quite important", according to the Eurobarometer poll. In a much earlier survey by Szczecin University, more than 80 percent of the participants agreed that RE influences technological progress in Poland positively. More than 90 percent thought RE has positive environmental effects, 72 percent said renewables were conducive to security of supply[6].

Despite the citizens' massive approval of national RE- targets of their governments, heads of state and government in Brussels decided differently. For the period after 2020, no binding EU targets have been set for the expansion of renewable energies in individual member states. Instead, the target of achieving a 27 percent share in final energy consumption by 2030 applies to the EU as a whole.

4 COST SENSITIVITY IN RELATION TO THE EXPANSION OF RENEWABLES

In North America, a different policy is in place. By means of so-called "Renewable Portfolio Standards" (RPSs), states in the US and provinces in Canada set their own targets for renewable energy. Almost 30 of the 50 states in America have already adopted an RPS. In Canada, the support for RE targets is strong (82 percent), as shown by a survey conducted in October 2013[7]. However, support for such targets diminished by 10 percentage points when accompanied by an annual increase in the electricity bill of $ 100. The same questions were asked in the same survey in the USA, where the sensitivity of the participants towards cost was much stronger. Generally, 79 percent approved of an RPS. With an increase of power costs by $100 per year, however, the support decreased to 45 percent. A

very similar result was obtained in a survey conducted by the National Survey on Energy and Environment in April 2015[8]. Nearly ¾ of the respondents were in favor of a target from their state government for renewables in the power mix. This support fell to only 45 percent when accompanied by additional electricity costs of only $ 50 per year per household.

In Japan, the situation in terms of cost sensitivity towards the expansion of renewables is a different one. According to a survey by the Ministry for the Environment in Tokyo[9], 37 percent of the respondents were not willing to accept a cost increase. This is a relatively high number. However, the Japanese attribute high importance to the environmental performance of the energy supply. For 42 percent, the security of supply is the top priority, as could be seen in a representative survey by public broadcaster NHK in 2011[10]. For 19 percent, minimizing environmental impact ranked highest. Only 6.5 percent of participants gave the highest importance to cheap electricity prices. At the same time, 75 percent wanted to see an expansion of renewables. Only 7.5 percent supported keeping the current energy mix.

In Germany, the surveys conducted by the AEE provide useful information on cost sensitivity of consumers regarding the Energiewende. The acceptance of the renewable energy surcharge is surveyed on a regular basis. In the autumn of 2015, nearly two thirds of those surveyed by the AEE, did not object to the surcharge: 57 percent found the surcharge reasonable, six percent said it was too low. Despite the increase in the EEG surcharge in recent years, the proportion of those who considered the surcharge to be too high decreased from almost 48 percent in 2012 to 31 percent in 2015. In 2011, this figure stood at 16 percent. Support for the expansion of renewable energy however remained constantly high, as the AEE surveys show.

5 DIGRESSION I: OPINION IN COUNTRIES WITH STRONG USE OF HYDRO POWER

New Zealand and Canada have a very high proportion of hydroelectric power. They therefore adopt a special position within this discussion. A survey in New Zealand has shown that the use of water power can conflict with other demands and that this is perceived among respondents[11]. A relatively high majority approved the further development of hydropower, while other interests such as species conservation and fisheries also loom large. In Canada, hydropower has a good image, and the population is well informed about its importance for the electricity mix[12]. Hydropower also has a very positive image in Switzerland, where the RE share in electricity consumption amounts to 56 percent, mainly due to hydropower. According to a survey conducted by the Risk Dialogue Foundation St. Gallen electricity from hydropower is supported by 85 percent of the Swiss population. Only solar power (88 percent) is more popular, while wind power scored an approval rating of 81 percent. Biomass (68 percent) and geothermal energy (66 percent) were outshone by the other technologies. At the same time, renewables left fossil fuels far behind.

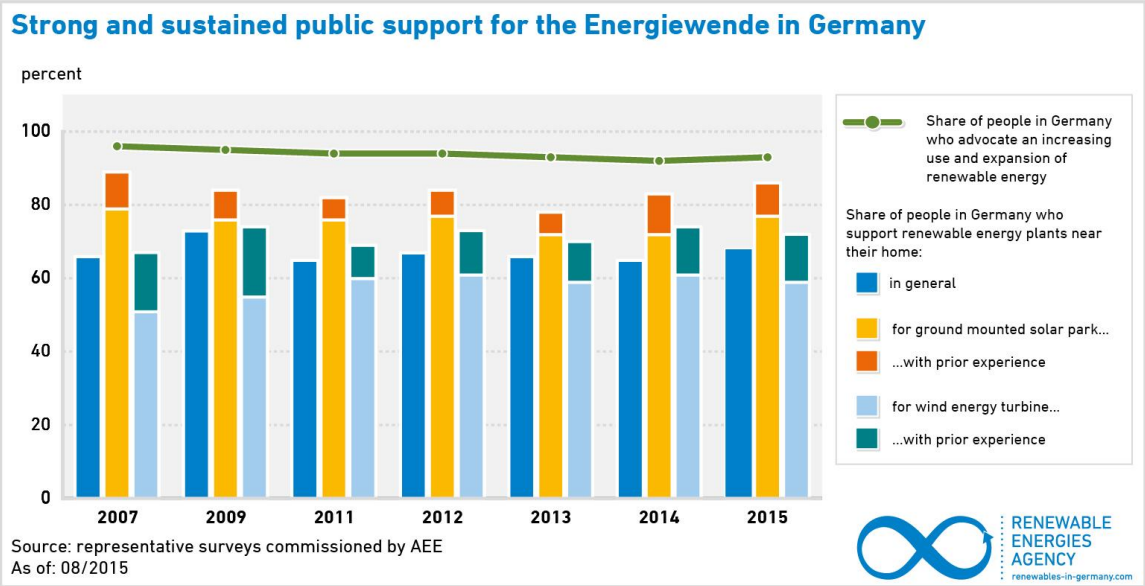
In countries with a strong use of hydropower, fluctuating renewables so far only play a subordinate role, unlike, for example, in Germany or Denmark. Germany, where wind power and photovoltaic characterize the mix of renewables, with a share of around two thirds, has completely different prerequisites.

6 LONG-TERM DEVELOPMENTS

The polls are "snapshots" that reflect mood and opinion at different times. Only in a few cases, can time series be found, which represent the development of the acceptance of renewable energy over longer periods. Since 2007, the AEE has regularly commissioned acceptance surveys. These surveys show, despite slight variations, a constantly high level of acceptance. External events (such as the tsunami and nuclear disaster in Fukushima in Japan or the development of the EEG surcharge in Germany) only slightly affected approval ratings.

The DECC provides a time series which depicts the development of public opinion on renewable energy in the United Kingdom[13]. Renewables are constantly very popular and were approved by almost 80 percent of respondents in the years 2013 to 2015, according to those polls. Thus, the acceptance is somewhat lower than in other countries; however, the survey not only covers electricity, but also the heat and fuel sector.

The situation is different in France, as shown by the survey of OpinionWay from January 2015[14]. Acceptance with regard to perceived benefits of renewable energy has suffered significantly in some areas. In 2011, 81 percent of respondents felt that renewables could help them save costs. Four years later, this number dropped to 71 percent. Agreement to the claim that renewables increase your well being likewise decreased by 10 percentage points, but still stood at 80 percent. Some 82 percent of respondents saw greater security of supply through renewable energies- this equaled a decrease by five percentage points since 2012 when the issue had first been taken up.



Source: representative surveys commissioned by AEE
As of: 08/2015

Other trends can be observed in the US. Since 2013, the Gallup institute has conducted a time series [15] which includes attitudes towards renewable energy technologies: According to their poll, in 2015 nearly 80 percent of Americans were in favour of increasing the use of solar energy - 3 percentage points more than a year before. Wind energy could assert itself with an approval rating of 80 percent. Since taking office, President Barack Obama has repeatedly supported the expansion of renewable energies. In May 2014, he announced increased investment such as in the expansion of the solar industry. One key goal is to increase the number of young and skilled workers in the sector.

7 DIGRESSION II: OPINION IN STATES WITH INTENSIVE USE OF FOSSIL RESOURCES

Together with economic and political issues, the energy mix influences the design of surveys. In some of the countries examined in this paper, the exploitation and export of fossil fuels is an important economic factor, as for example in Australia and Canada, but also in the US. Here, the expansion of renewables and the continued or increased use of fossil fuels are often put in comparison. Due to the size of these countries, a regional differentiation is useful.

Shortly before the UN Climate Change Conference in Paris in November 2015, the Climate Action Network in Canada asked whether climate change was of greater importance than the construction of additional oil pipelines and the further development of oil sands[16]. 78 percent agreed to this statement, either strongly or at least to some extent. In the Prairie Provinces, where the mining sites are situated, agreement still reached 65 percent. 60 percent of respondents in the Prairie Provinces appreciated the government's plan of creating jobs in the renewable energies sector. The national average showed an approval rate of 84 percent for that plan.

In Australia, the world's largest coal exporter, renewables enjoy strong support. In a survey by ReachTEL commissioned by WWF [17] in November 2014, a large majority of 84 percent advocated for government investment in renewable energies. 56 percent were in favour of a more ambitious renewable energy target by 2020 (until then, 41,000 GWh or 24 percent of Australia's electricity should be provided by renewable sources).

In addition to this national target, there are also a number of regional expansion paths in Australia. Tasmania, with a target of 100 percent by 2020, and South Australia, with a target of 50 percent by 2025, are the most ambitious. In contrast, the coal producing regions in Queensland and New South Wales have not set any RE goal, but rather a CO2- reduction target. In Australia as well as in the US, coal mining is limited to certain states (Wyoming, West Virginia) that have their own energy policy focus.

USA: High priority for renewables

In the US, advocates of conventional energy sources such as the "Consumer Energy Alliance" position themselves in regard to the approaching presidential elections. Against the backdrop of the current primary elections, this is done by means of surveys in individual states like Iowa and Virginia which however cannot be considered as representative due to the relatively small number of only 500 participants.[18] The main topics of surveys by the "Consumer Energy Alliance" include pipeline projects for fossil fuels. In November 2015, President Obama had denied his support for the construction of the Keystone XL pipeline. The pipeline was supposed to bring fossil oil from tar sands in Canada via Nebraska to ports in the Gulf of Mexico. The Democratic presidential candidates have spoken out against this project too.

In view of the rapid decline in oil prices, energy policy has apparently lost significance for US citizens. According to the Gallup energy survey from early March 2015, only 28 percent of

Americans worried about the availability and prices of energy (37 percent in 2014 and 48 percent in 2012). It cannot be inferred from the survey whether this is due to a greater supply of fossil fuels, or the greater availability of renewable energy. However, the Gallup survey clearly shows: Since the beginning of the century, environmental issues were of greater importance to Americans than the exploitation of fossil energy sources. In March 2015, 49 percent of the Gallup respondents said they would prioritize the environment over the "development of U.S. energy supplies - such as oil, gas and coal". In contrast, 39 percent wanted to prioritize the development of U.S. energy supplies. Ten years earlier, in March 2005, these numbers were similar: 52 percent prioritized the environment, and only 39 percent fossil fuels.

8 MARKET-RELATED ACCEPTANCE

The acceptance of various renewable energy technologies may differ with regard to socio-political aspects on the one hand and market-related aspects on the other. In most surveys that are concerned with the socio-political acceptance of renewable energy technologies, bioenergy figures are mostly below average - as shown in the surveys conducted by the AEE, DECC, Foundation Risiko-Dialog St. Gallen and the home owners Survey by Zogby Analytics. However, bioenergy has a relatively high market-related acceptance. In Germany, it is the single most important source of renewable heat. In the UK, biomass boilers are among the front runners, as the DECC survey shows; in France however, wood stoves, followed by heat pump and wood boiler rank highest when it comes to the issue of trust in certain renewable technologies. This is demonstrated in the survey conducted by OpinionWay. Solar technology, which ranks top when it comes to the socio-political acceptance, looks less strong in this particular survey. For virtually all renewable technologies, the curve for the market related acceptance bents down in that poll from France. This may be due to the sharp drop in oil prices and the competition with fossil fuels.

On a global scale, investment in renewable energies reached record levels in 2015, according to figures from Bloomberg New Energy Finance (BNEF)[19] Investment increased to some $329 bn, an on-year increase of 4 percent. However, in Europe investment in renewables decreased to $58.5bn; on the other hand, in the United States investment in renewables increased by 8 percent to $56 bn. According to BNEF solid growth in new solar and wind projects supported the development in the US.

9 CONCLUSION

Together with an increasing importance of renewable energies for climate protection and the economy, public opinion of them has also grown. Although political and social contexts as well as the structures of the surveys differ from one country to the other, it can be concluded that renewables in major industrialized countries and economies of the Western World enjoy widespread support. This is due to the high standing which is attributed to the benefits of renewable energy in terms of climate and environmental protection. Given the high socio-political acceptance for renewables, the challenge for the future consists in translating this socio-political acceptance into an increasing market-related acceptance which manifests itself in higher sales and a more intensive market penetration. Within the heating sector this could be through selling RE heaters, within the transport sector through solutions which are based on RE or within the electricity market through genuine green power products.

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http://www.qualit-enr.org/presse-communiques/enquete-francais-enr-2015

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[16] Climate Action Network Canada: Canadian Perspective on climate change, energy and policy priorities for climate action and the Paris Climate Negotiations, November 2015 http://climateactionnetwork.ca/2015/11/23/canadian-perspectives-on-climate-change-energy-and-policy-priorities-for-climate-action-and-the-paris-climate-negotiations-survey-results/

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March 2016

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APPENDIX: OPINION POLLS REGARDING THE ACCEPTANCE FOR RENEWABLE ENERGY

Country	Support for renewable energy	Poller	Commissioner	Date of poll	No of participants	main question
USA[1]	87%	Zogby Analytics	Clean Edge Inc., Solar City	Jan 14	1,400	How important is RE to America's energy future? 1)
Canada[2]	84%	Oraclepoll Research	Climate Action Network	Nov 15	1,500	Question on priorities for the recently elected federal government.
Australia[3]	84%	ReachTEL	WWF	Nov 14	5,036	How important is it that the Federal government invests in renewable energy power?
New Zealand[4]	73%	Colmar Brunton	WWF-NZ	Apr 11	1,008	Participants had to choose between the alternatives: increased exploration and mining for fossil fuels or increased development of renewable energy such as wind and geothermal for electricity and wood waste to turn into fuel for cars and other vehicles to provide electricity and transport fuel in NZ.
United Kingdom[5]	76%	Department of Energy and Climate Change (DECC)	Department of Energy and Climate Change (DECC)	Dec14/Jan15	2,119	Do you support or oppose the use of renewable energy for providing our electricity, fuel and heat?
Germany[6]	93%	TNS Emnid	Renewable Energies Agency (AEE)	Aug 15	1,006	What importance do you attribute to the increased use and expansion of renewable energy?
Belgium[7]	70%	Ipsos	fédérations EDORA, ODE et BOP	Mar 14	more than 1,000	Which are your three preferred sources of energy beyond 2025?
France[8]	89%	OpinionWay	Qualit'ENR	Jan 15	1,015	Which energy sources should be promoted for the production of heat and electricity?
Japan[9]	88%		Central Research Institute of Electric Power Industry (CRIEPI),	Mar 14	2,313	What do you think is important for Japan's future energy policy?

1 http://www.solarcity.com/sites/default/files/reports/reports-2015-homeowner-survey-clean-energy.pdf

2 http://climateactionnetwork.ca/2015/11/23/canadian-perspectives-on-climate-change-energy-and-policy-priorities-for-climate-action-and-the-paris-climate-negotiations-survey-results/

3 http://awsassets.wwf.org.au/downloads/cl_climate_polling_25nov14.pdf

4 http://awsassets.wwfnz.panda.org/downloads/colmar_brunton_renewable_energy_poll_19_apr_2011.pdf

5 http://www.gov.uk/government/uploads/system/uploads/attachment_data/file/400404/Summary_of_Wave_12_findings_of_DECC_Public_Attitudes_Tracker.pdf

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8 http://www.qualit-enr.org/presse-communiques/enquete-francais-enr-2015

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