

Energy Issues

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PRESENTATION

The energy sector has changed drastically over the last few years. We are using more and more energy and energy prices are perhaps more volatile and unpredictable than ever before. While global oil consumption has increased by 20% since 1994, oil and gas prices have nearly doubled in the EU over the past two years¹. At the same time, remaining fossil fuels are becoming more and more concentrated in some countries with sometimes unstable conditions, while the threat of climate change is pushing us towards reducing greenhouse gas emissions.

The EU represents 25 countries and 450 million energy consumers. Within the EU, energy demand continues to rise by 1-2% per year. Over 80% of our energy use is based on fossil fuels - gas, oil and coal. In ten years, we could be using 10% more energy and within a generation we could be importing almost all the oil we use and 80% of our gas².

The energy challenges are apparent. **Increasing demand**, and as its corollary, **growing consumption**, pose various challenges: ensuring **sufficient and secure energy supplies**, combating **increasing dependency** on energy imports, making **adequate investments** in new technologies and tackling **environmental effects**, especially the greenhouse effect.

It is possible to successfully meet these challenges: energy related problems are relatively recent, many technical options already exist or are under development and the stakeholders are willing to collaborate on solutions. On the other hand, over and above the costs involved in meeting up these challenges, it is necessary to change consumer habits and recognise the urgency of these problems.

In general, there are two main ways of tackling these challenges: **reducing energy demand by changing consumption habits** or **using energy in a "greener", more diverse and more efficient manner**.

In recent years, the European Commission has launched several actions in order to respond to these challenges. The latest, **the Green Paper on "A European Strategy for Sustainable, Competitive and Secure Energy"**³ sets out the Commission's vision for an energy strategy for Europe.

The Green Paper is based on three core objectives of energy policy: **competitiveness**, **sustainable development** and **the security of supply**. The first objective aims at the completion of the internal energy market, the second pursues the fight against climate change and other environmental hazards, while the aim of the last objective is to prevent any disruption of energy supplies due to insufficient sources or infrastructure problems. These three aims are complementary.

¹ Fuelling our future: the European Commission sets out its vision for an Energy Strategy for Europe, Press Release on 8 March 2006 in <http://europa.eu/rapid/pressReleasesAction.do?reference=IP/06/282&format=HTML&aged=0&language=EN&guiLanguage=en>

² Fuelling our future, Explanatory memo in http://ec.europa.eu/energy/green-paper-energy/doc/2006_03_08_gp_memo_en.pdf

³ The Green Paper "ENERGY" can be found in http://ec.europa.eu/energy/green-paper-energy/index_en.htm

Developing a European energy policy is **a long term challenge**. On the basis of replies and comments, the Commission will propose a series of concrete measures. It plans to publish an Energy Policy Communication in spring 2007.

In order to achieve the targets set in the area of energy, **general public opinion and consumer behaviour play a crucial role**. With this in mind, the European Commission is aware of the need to keep a track on citizens' opinions and attitudes towards energy issues and therefore launched this Eurobarometer survey. This study follows a similar survey five months ago⁴.

The study covers two main spheres: **the preferred decision-making levels and the willingness of people to change their energy consumption habits**, in terms of costs or behaviour.

This report illustrates the current results and then highlights changes during the five month period between the two surveys⁵. This latest survey was conducted between 27 March and 1 May 2006 in the 25 Member States, as well as in the candidate and acceding countries using a sample of 29 220 respondents. Further details of the survey methodology can be found in the technical note annexed to this report.

⁴ Special Eurobarometer 247 "Attitudes towards Energy" in http://ec.europa.eu/public_opinion/archives/ebs/ebs_247_en.pdf

⁵ In some cases, due to the rounding of figures, displayed sums can show a difference of one point with the sum of the individual cells.

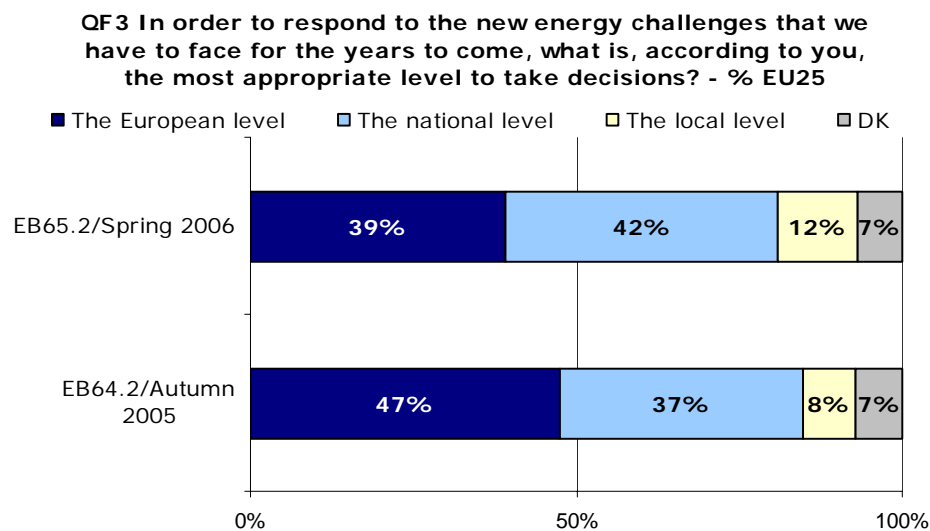
1. TAKING DECISIONS: THE ROLE OF PUBLIC INSTITUTIONS

This first chapter examines EU citizens' opinion on **the role of the public authorities in meeting the energy challenges and discusses the** most appropriate decision-making level and the measures recommended to help people to reduce their energy consumption.

1.1 The level of decision-making

Source questionnaire: QF3

- Contrary to the last survey less than six months earlier, a comparative majority of Europeans think that decisions should be taken at national level -



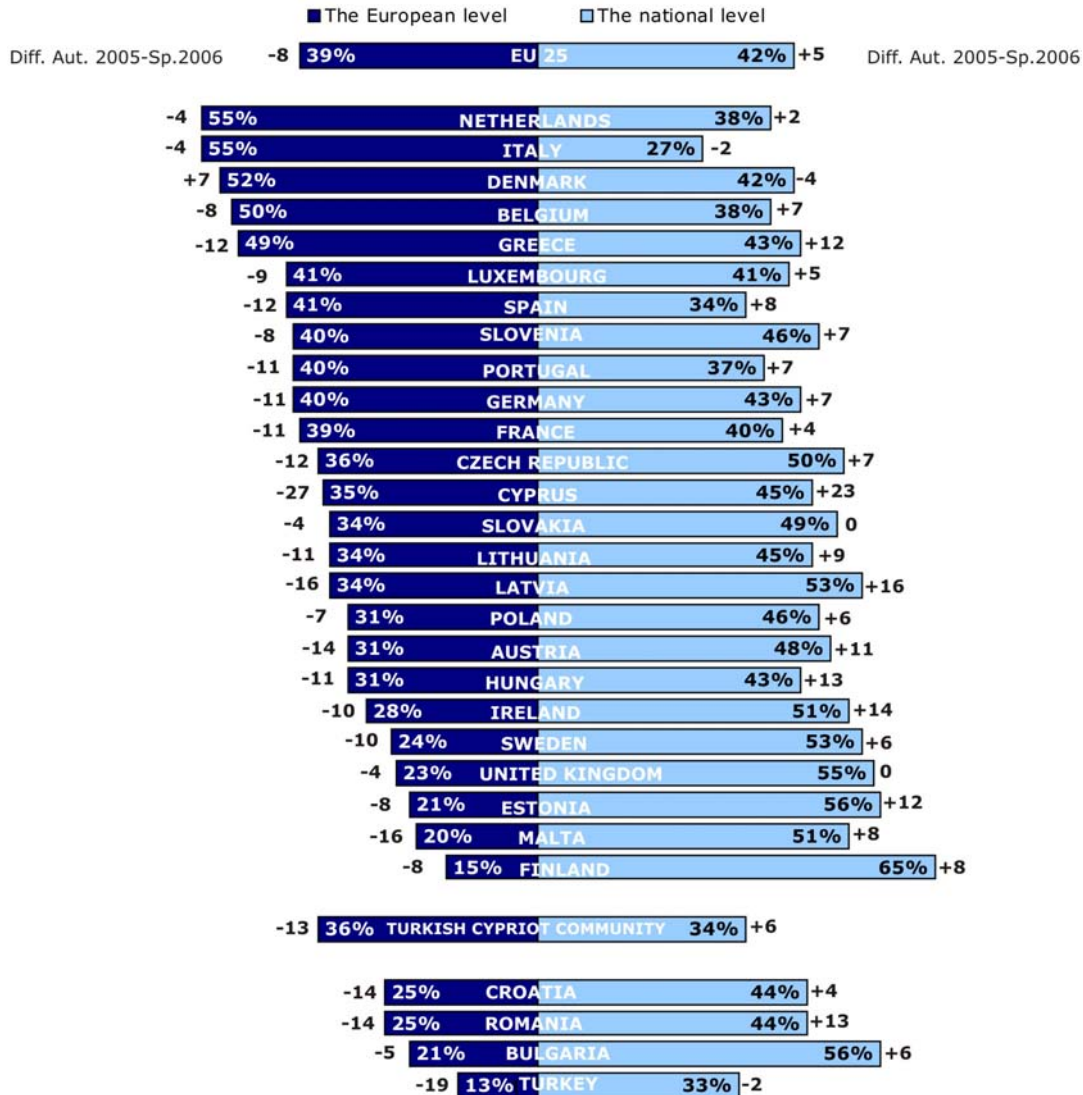
There seems to be **a slight shift from European level to national and local level** as the preferred level for energy decision-making.

A comparative majority of respondents, **42%**, indicate that **the national level is the best decision-making level for the new energy challenges**. This is 5 points higher than the results obtained five months earlier. In addition, the proportion of those who see the local level as the most appropriate decision-making level has increased by 4 points to 12%.

However, **a considerable number of Europeans (39%) still consider that the European level is the most appropriate decision-making level** for responding to the new energy challenges (-8 points).

This increase in the percentage of EU citizens (+9 percentage points) who believe that national and local authorities are the most appropriate decision-making level may reflect a growing recognition of **the importance of the subsidiarity principle** when promoting energy efficiency and renewable energies. In other words, citizens may think that when fast and effective decisions need to be taken, the authorities who are closest to citizens are usually the most efficient.

QF3 In order to respond to the new energy challenges that we have to face for the years to come, what is, according to you, the most appropriate level to take decisions? - % country



At country level, the trend away from decision-making at European level to national level is even more apparent. **In every country polled, except Denmark, the number of respondents who consider that European level is the most appropriate decision-making level has declined.** However, the majority of Dutch, Italian, Danish, Belgian, Greek, Spanish and Portuguese citizens still consider that European level is the most appropriate.

At the same time, **in 24 countries, the percentage of those who support the principle of decision-making at national level has increased** compared with five months earlier. This is especially the case in Cyprus (+23 points), Latvia (+16 points) and Ireland (+14 points).

When comparing the new Member States and the EU15, it is noteworthy that **respondents in the NMS are more likely to support decision-making at national level** (47% compared with 41% in the EU15) while more **citizens in the EU15 prefer European level** (40% compared with 32% in the NMS).

QF3 In order to respond to the new energy challenges that we have to face for the years to come, what is, according to you, the most appropriate level to take decisions?

	The European level	Diff. Aut.2005-Sp. 2006	The national level	Diff. Aut.2005-Sp. 2006	The local level	Diff. Aut.2005-Sp. 2006
EU25	39%	-8	42%	+5	12%	+4
Sex						
Male	43%	-8	41%	+5	11%	+3
Female	35%	-8	43%	+4	13%	+4
Age						
15-24	40%	-12	40%	+6	10%	+2
25-39	40%	-12	42%	+7	12%	+4
40-54	41%	-8	43%	+6	12%	+3
55 +	36%	-4	42%	+1	12%	+3
Education (End of)						
15	33%	-4	42%	+1	14%	+4
16-19	37%	-10	45%	+7	13%	+4
20+	47%	-8	40%	+6	10%	+3
Still Studying	44%	-10	37%	+4	9%	+3
Left-Right scale						
(1-4) Left	44%	-9	40%	+6	11%	+3
(5-6) Centre	38%	-9	45%	+6	11%	+2
(7-10) Right	39%	-7	45%	+4	12%	+4
Respondent occupation scale						
Self- employed	49%	-3	37%	+2	10%	+1
Managers	45%	-11	42%	+6	10%	+5
Other white collars	42%	-12	42%	+7	11%	+4
Manual workers	37%	-10	45%	+8	13%	+4
House persons	31%	-10	42%	+5	13%	+3
Unemployed	33%	-13	42%	+5	15%	+4
Retired	36%	-2	42%	0	13%	+3
Students	44%	-10	37%	+4	9%	+3
Trust in EU						
Tend to agree	49%	-1	37%	+8	9%	+2
Tend to disagree	30%	-8	48%	+2	14%	+4
Membership EU						
A good thing	49%	-11	37%	+8	9%	+2
A bad thing	21%	-4	54%	0	17%	+4
Neither good nor bad	30%	-10	48%	+4	14%	+5
Image of EU						
Positive	49%	-13	36%	+8	10%	+4
Neutral	32%	-9	46%	+4	13%	+4
Negative	24%	-4	54%	+2	16%	+3

A socio-demographic analysis reveals some clear differences. **Men** (43%) are more likely than women (35%) to support decision-making at European level. This is also the case for those who **studied at least until they were 20** (47%) and for self-employed people (49%) and managers (45%).

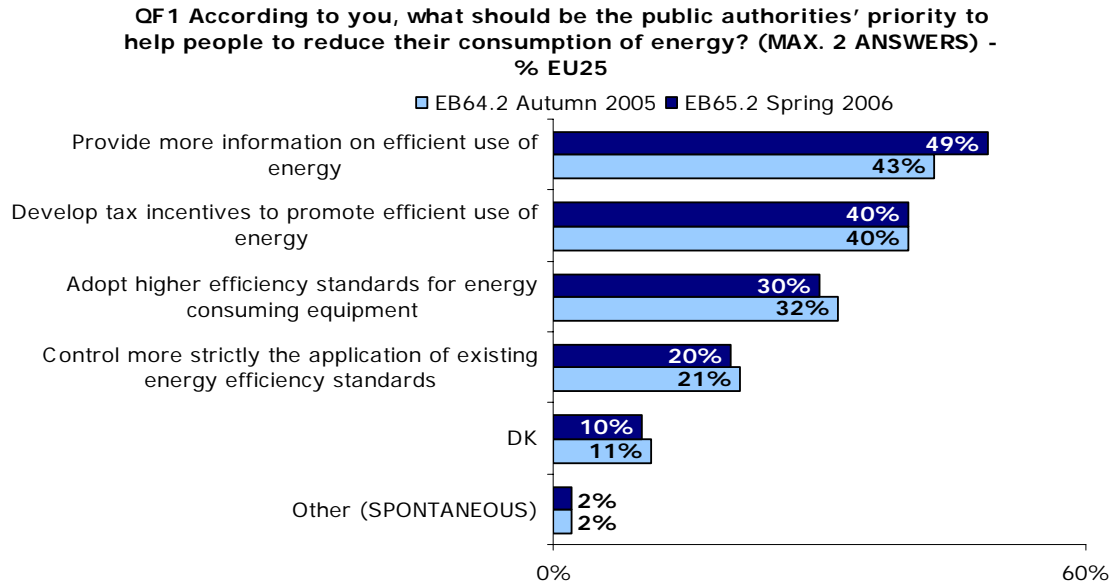
The most interesting changes compared with the previous survey are among the two youngest age groups: **the percentage of those aged 15-39 supporting the European level has decreased by 12 percentage points since the survey five months earlier**. In consequence, differences between the age groups that were perceived five months earlier (52% for those aged 15-39 vs. 40% for those aged 55+) diminish.

Not surprisingly, **support for a common European energy policy is higher among those who in general have a positive perception of the European Union**. This is particularly true for respondents who trust in the EU (49%), who consider that EU membership is a good thing for their country (49%), and those who believe that the European Union has a positive image (49%). However, it should be noted that support for decision-making at European level has also declined significantly in the two latter groups (-11 and -13 percentage points respectively).

1.2 Authorities' priorities to reduce energy consumption

Source Questionnaire: QF1

- More information is needed on efficient use of energy –



When asked what the public authorities should do to help them reduce their energy consumption, **most European citizens (49%) declared that they wanted more information on efficient use of energy**. Tax incentives (40%) are also considered to be an efficient means of changing consumption habits.

Higher energy efficiency standards and stricter controls over current standards are seen as slightly less effective (30% and 20% respectively).

In comparison with five months earlier, **distribution of information on energy efficiency is seen as an increasingly important way of promoting sustainable energy consumption habits** (+6 percentage points).

In most Member States (19 out of 25 countries), citizens consider that providing more information should be the highest priority of the public authorities. This is also the case in all the candidate and acceding countries. Citizens in 5 Member States believe that tax incentives are the best way to promote energy efficiency.

Respondents in **Denmark** (63%, +4 points), **Malta** (63%, +6 points) and **Portugal** (62%, +11 points) mentioned most frequently providing more information as the best means to promote energy efficient consumption habits while citizens of **Sweden** (65%, +3 points) and **Belgium** (60%, +6 points) are more in favour of the use of tax incentives.

QF1 Against the background of high energy prices, some are proposing to take new measures that will help people to reduce their consumption of energy. According to you, what should be the public authorities' priority to help people to reduce their consumption of energy? (MAX. 2 ANSWERS)

	Provide more information on efficient use of energy	Diff. Aut.2005-Sp. 2006	Develop tax incentives to promote efficient use of energy	Diff. Aut.2005-Sp. 2006	Adopt higher efficiency standards for energy consuming equipment	Diff. Aut.2005-Sp. 2006	Control more strictly the application of existing energy efficiency standards	Diff. Aut.2005-Sp. 2006
EU25	49%	+6	40%	0	30%	-2	20%	-1
DK	63%	+4	44%	0	45%	-4	15%	-1
MT	63%	+6	21%	0	23%	-13	25%	0
PT	62%	+11	22%	-11	36%	-6	13%	-5
FI	60%	+9	45%	+4	40%	+8	14%	-5
LU	57%	+8	48%	+6	27%	+2	26%	-7
UK	57%	+11	34%	+1	37%	0	22%	-2
EE	56%	+12	40%	-5	25%	-1	22%	+2
CY	56%	-4	26%	-1	28%	-13	24%	-6
SE	56%	+4	65%	+3	20%	-6	18%	-4
SK	55%	+10	40%	-7	42%	+2	24%	-1
EL	54%	-1	35%	+8	41%	0	23%	-15
ES	54%	+3	24%	-1	15%	+2	18%	+8
IE	54%	+3	40%	0	32%	+2	28%	+1
BE	53%	+6	60%	+6	30%	+1	24%	-6
SI	50%	0	55%	+2	35%	-1	23%	-6
HU	49%	+13	41%	+1	17%	-1	16%	-4
DE	47%	+7	45%	-1	40%	-3	18%	-3
AT	47%	0	45%	-1	30%	+4	24%	0
NL	46%	0	56%	+2	42%	-3	13%	0
PL	46%	+11	42%	+1	19%	-1	13%	-5
FR	45%	+1	35%	+4	31%	-1	29%	-1
CZ	44%	+8	56%	-3	26%	-1	17%	-6
LV	43%	+3	31%	-3	29%	+1	26%	-2
IT	42%	+9	40%	-5	25%	-2	19%	+4
LT	36%	+3	29%	-1	24%	+3	29%	+3
HR	59%	+6	22%	-2	22%	-5	25%	-3
BG	39%	0	26%	-10	18%	-6	23%	-6
TR	38%	-6	19%	-2	13%	-12	25%	+7
RO	37%	-2	29%	-6	36%	+1	18%	-5
CY (tcc)	52%	+4	39%	+1	21%	+2	26%	+3

Finally, as can be observed from the table above, compared with five months earlier, significantly more Hungarian (+13 points), Estonian (+12 points), Portuguese, British and Polish citizens (+11 points each) think that the public authorities' priority should be to provide more information on efficient energy use.

QF1 Against the background of high energy prices, some are proposing to take new measures that will help people to reduce their consumption of energy. According to you, what should be the public authorities' priority to help people to reduce their consumption of energy? (MAX. 2 ANSWERS)

	Provide more information on efficient use of energy	Develop tax incentives to promote efficient use of energy	Adopt higher efficiency standards for energy consuming equipment	Control more strictly the application of existing energy efficiency standards
EU25	49%	40%	30%	20%
Sex				
Male	49%	43%	32%	19%
Female	49%	37%	29%	20%
Age				
15-24	53%	31%	30%	21%
25-39	49%	44%	30%	19%
40-54	50%	45%	32%	20%
55 +	47%	36%	29%	19%
Education (End of)				
15	47%	32%	27%	18%
16-19	49%	42%	30%	20%
20+	50%	49%	35%	19%
Still Studying	53%	33%	32%	20%
Left-Right scale				
(1-4) Left	50%	41%	33%	22%
(5-6) Centre	52%	40%	32%	20%
(7-10) Right	48%	49%	32%	19%
Respondent occupation scale				
Self- employed	50%	46%	33%	19%
Managers	50%	52%	36%	19%
Other white collars	47%	46%	34%	21%
Manual workers	51%	41%	30%	19%
House persons	47%	33%	26%	19%
Unemployed	51%	36%	28%	19%
Retired	46%	35%	28%	19%
Students	53%	33%	32%	20%

As was already apparent in the earlier survey, there are no real cleavages and there is a general consensus in all the socio-demographic categories on the need for further information.

However, some elements are noteworthy:

Young respondents who are still studying appear more likely to support the idea of providing **more information** on efficient energy use.

On the other hand, **respondents aged 25-54**, those who have **finished their education after the age of 20**, those **at the right of the political spectrum** and **managers**, on the other hand, think that the public authorities' first priority to help people to reduce their energy consumption should be **tax incentives** to promote energy efficiency.

2. MAKING A DIFFERENCE: THE ROLE OF CONSUMERS

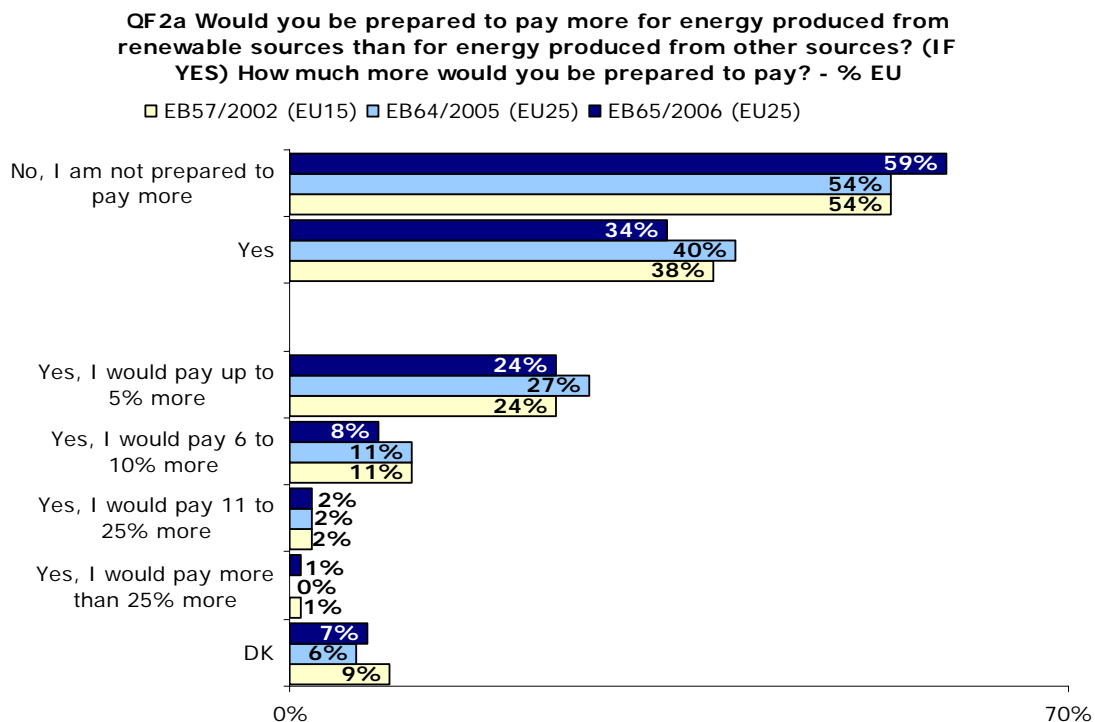
The second chapter deals with citizens' behaviour in terms of energy consumption as well as their willingness to change their energy consumption habits.

Two different questions were used to ascertain the respondents' attitudes towards energy challenges: half of the sample in each country was asked the trend question already posed in previous Eurobarometers⁶, while the rest answered a similar question but formulated differently⁷.

As was already observed five months earlier, **both questions prove that people are reluctant to pay more**. In comparison to the earlier survey this reluctance has increased significantly, which can most likely be explained by the rise in energy and petrol prices during the period when this survey was conducted⁸.

2.1 Readiness to pay more for renewable energy

Source questionnaire: QF2a



The overall percentage of respondents who **would not be prepared to pay higher prices for "green energy"** has increased by 5 points from 54% to 59%.

⁶ QF2a "Would you be prepared to pay more for energy produced from renewable sources than for energy produced from other sources? (IF YES) How much more would you be prepared to pay?"

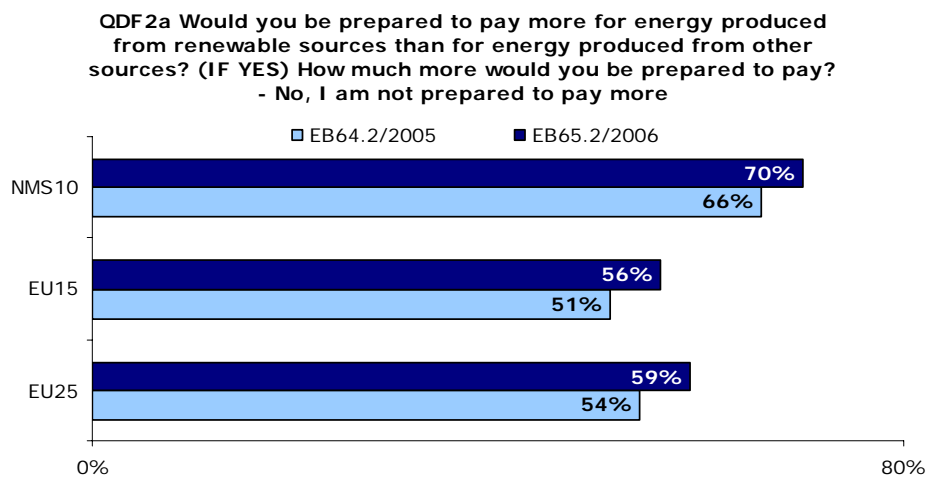
⁷ QF2b "As you may know, we are now facing new energy challenges (like high energy price, international obligations to reduce CO₂ emissions) that could imply efforts from citizens. With which of the following propositions do you agree the most?"

⁸ For more information, see for example: International Energy Agency in <http://www.iea.org/>

34% of respondents declared that they would be prepared to pay somewhat more for energy from renewable sources (-6 points compared with the earlier survey). However, 24% of respondents would still accept an increase of 5% (-3 points) and 11% (-2 points) a higher price rise. As was the case five months earlier, this change seems to confirm that **the price increase "ceiling" is 5%**.

Again, there are significant differences at country level as far as price related efforts are concerned.

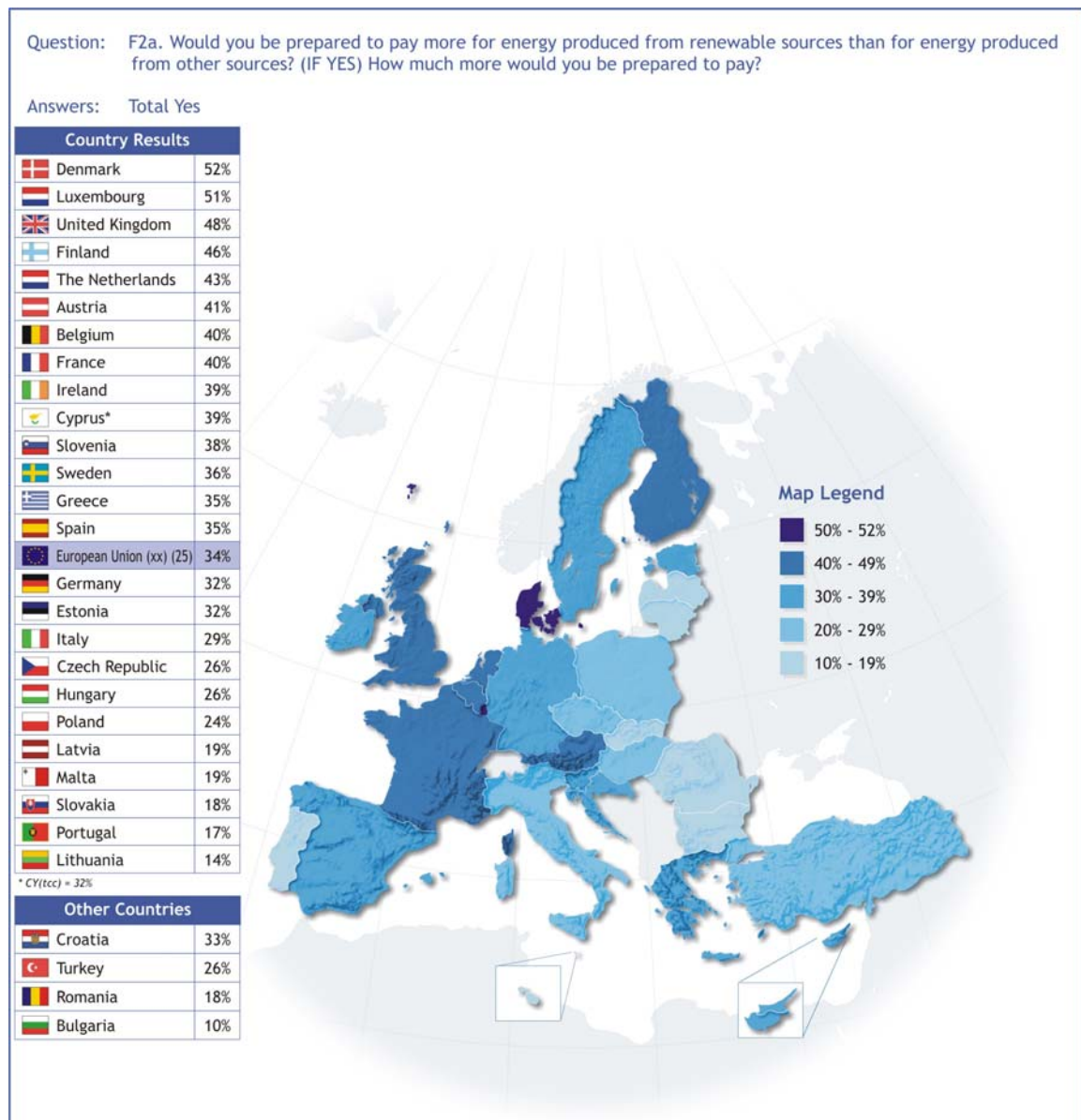
The gap amongst the old EU15 Member States and the ten new Member States, with the latter group being clearly more reluctant to pay higher prices for "green energy", is fairly stable compared with the previous survey. In both country groups, there is **a clear increase** in the number of respondents who are **not willing to pay more** for energy produced from renewable sources.



The existence of a market for "green energy" amongst consumers appears to be more evident in northern Europe, with countries such as Denmark (52%, -4 points), Luxembourg (51%, -9 points), the United Kingdom (48%, +3 points) and Finland (46%, -6 points) being more willing to take action even if this involves an extra financial effort by them in order to help the environment by consuming energy from renewable sources.

Among European Union Member States, citizens in **Portugal (78% saying no, +8 points), Latvia (78%, +8 points), Lithuania (75%, +2 points) and Slovakia (74%, -2 points) are the most reluctant to make energy consumption efforts if that demands financial sacrifices.**

The highest percentage of respondents who would not be prepared to pay more for energy produced from renewable sources is to be found in Bulgaria (80%, +4 points).



As was noted in the previous survey, there is **a relationship between citizens' attitudes and economic indicators, such as the economic situation or the unemployment rate of the respondent's country**. It should be noted that countries in which citizens are less prepared to pay more for energy from renewable sources have a GDP in Standard Purchasing Power (PPS)⁹ which is far lower than the European average, as well as a far higher unemployment rate¹⁰.

⁹ EUROSTAT: GDP per capita in Purchasing Power Standards (PPS) in http://epp.eurostat.ec.europa.eu/portal/page?_pageid=1996,39140985&_dad=portal&_schema=PORTAL&scene=detailref&language=en&product=STRIND_ECOBAC&root=STRIND_ECOBAC/ecobac/eb011

¹⁰ EUROSTAT: Euro-indicators – Euro area unemployment unchanged at 8.0% – Press release published on 1st of June 2006 in http://epp.eurostat.ec.europa.eu/pls/portal/docs/PAGE/PGP_PRD_CAT_PREREL/PGE_CAT_PREREL_YEAR_2006/PGE_CAT_PREREL_YEAR_2006_MONTH_06/3-01062006-EN-AP.PDF

As already seen in the previous question, among European Union Member States, citizens in **Portugal, Latvia, Lithuania, Slovakia and Poland** are somewhat reluctant to make efforts in energy consumption involving higher costs for them. The same situation can be found in Bulgaria, Romania and Turkey. It should be noted in this regard that these countries have a GDP in Standard Purchasing Power (PPS)¹¹ which is lower than the European average, and Poland and Slovakia in particular have a higher unemployment rate¹² (16,5 and 15.7% respectively versus a European Union average of 8.4%).

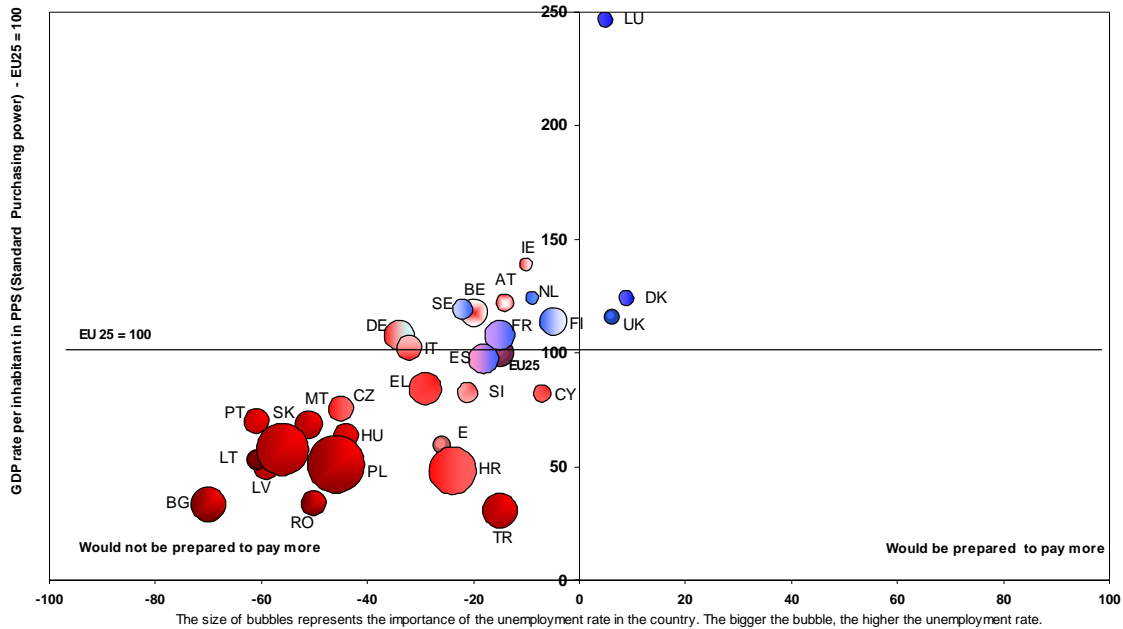
The position of Denmark, Luxembourg and the United Kingdom, on the upper-right quadrant of the chart, with **high GDP and low unemployment rates, exemplify their motivation as well as the existence of objective conditions** allowing citizens to afford such additional costs.

However, the relation between GDP-Unemployment Rate and the willingness to make a financial effort to change energy consumption habits does not explain situations such as that observed in Italy, Sweden, Belgium and Austria: in spite of having GDPs equal or higher than the EU25 average and unemployment rates below the European level, there is still significant reluctance among citizens.

These results might suggest **a lack of environmental or energy related awareness**, which could hamper, in these countries, a positive change towards renewable energy in spite of a favourable economical context.

QF2a. Would you be prepared to pay more for energy produced from renewable sources than for energy produced from other sources? (IF YES) How much more would you pay?

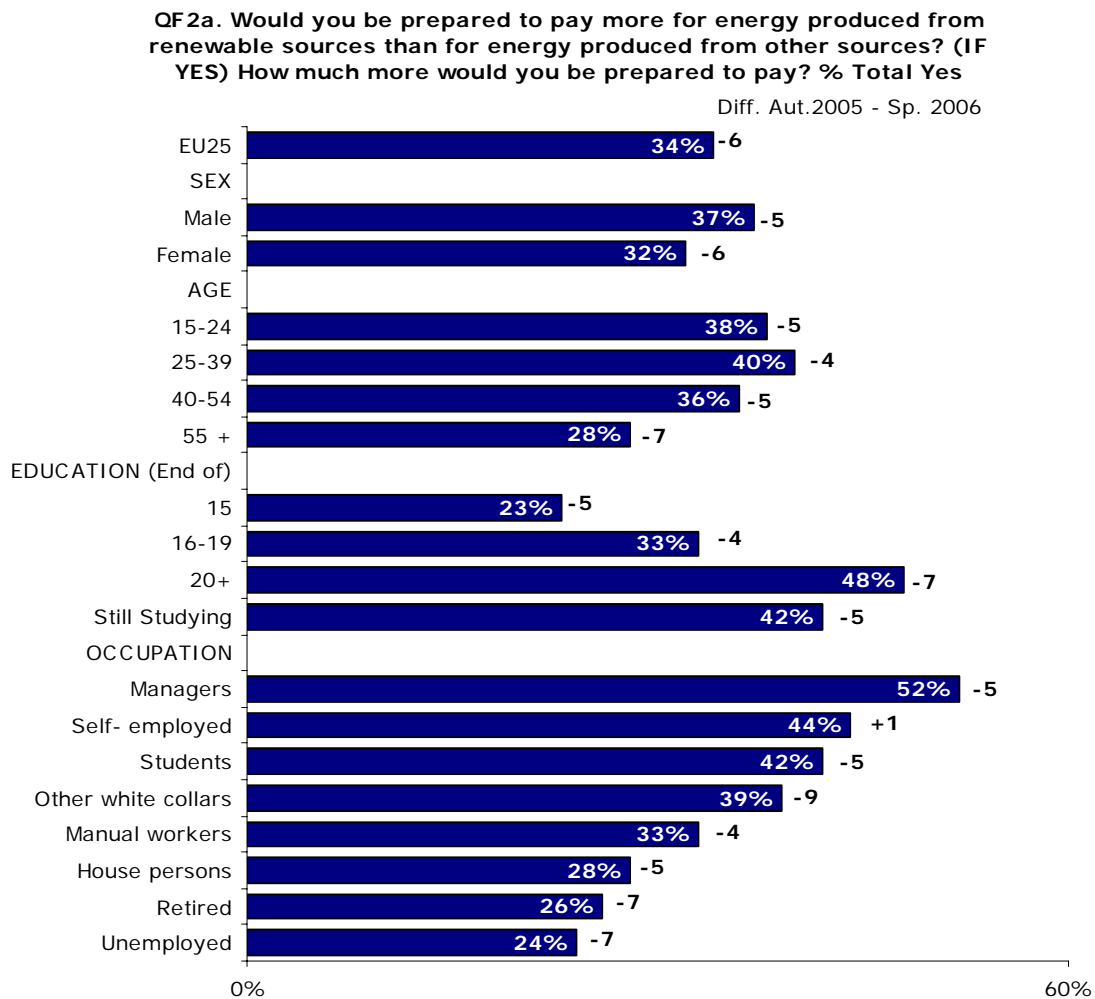
Willingness to pay more (difference "Total Yes" - "No")



Source : Eurobarometer 65 Sp. 2005

¹¹ EUROSTAT: GDP per capita in Purchasing Power Standards (PPS) in http://epp.eurostat.ec.europa.eu/portal/page?_pageid=1996,39140985&_dad=portal&_schema=PORTAL&sc reen=detailref&language=en&product=STRIND_ECOBAC&root=STRIND_ECOBAC/ecobac/eb011

¹² EUROSTAT Euro-indicators- [Euro area unemployment unchanged at 8.0%](http://epp.eurostat.ec.europa.eu/pls/portal/docs/PAGE/PGP_PRD_CAT_PREREL/PGE_CAT_PREREL_YEAR_2006/PGE_CAT_PREREL_YEAR_2006_MONTH_06/3-01062006-EN-AP.PDF)- Press release published on 1st of June 2006 in http://epp.eurostat.ec.europa.eu/pls/portal/docs/PAGE/PGP_PRD_CAT_PREREL/PGE_CAT_PREREL_YEAR_2006/PGE_CAT_PREREL_YEAR_2006_MONTH_06/3-01062006-EN-AP.PDF



Education indeed seems essential in order for citizens to recognize and face the new energy related challenges.

There is a difference of 25 points between respondents who continued their education for a longer time and those who had left school by the age of 15 when it comes to agreeing with the idea of paying more for "renewable" energy (48% compared to 23%). Apart from education, **men, those aged 15-39** as well as **managers** seem to be more open-minded with regard to the use of "green energy" when cost implications are involved.

It can be therefore said that it is very likely that there is a link between the standard of living and higher willingness to pay more for renewable energy.

Compared with the last survey, the self-employed appear to be the only group that is slightly more prepared to pay a higher price for energy produced from renewable sources than for energy produced from other sources, whereas other white collar workers are much less willing to pay more for "green" energy (-9 points).

2.2 Changing energy consumption habits vs. readiness to pay more

Source questionnaire: QF2b

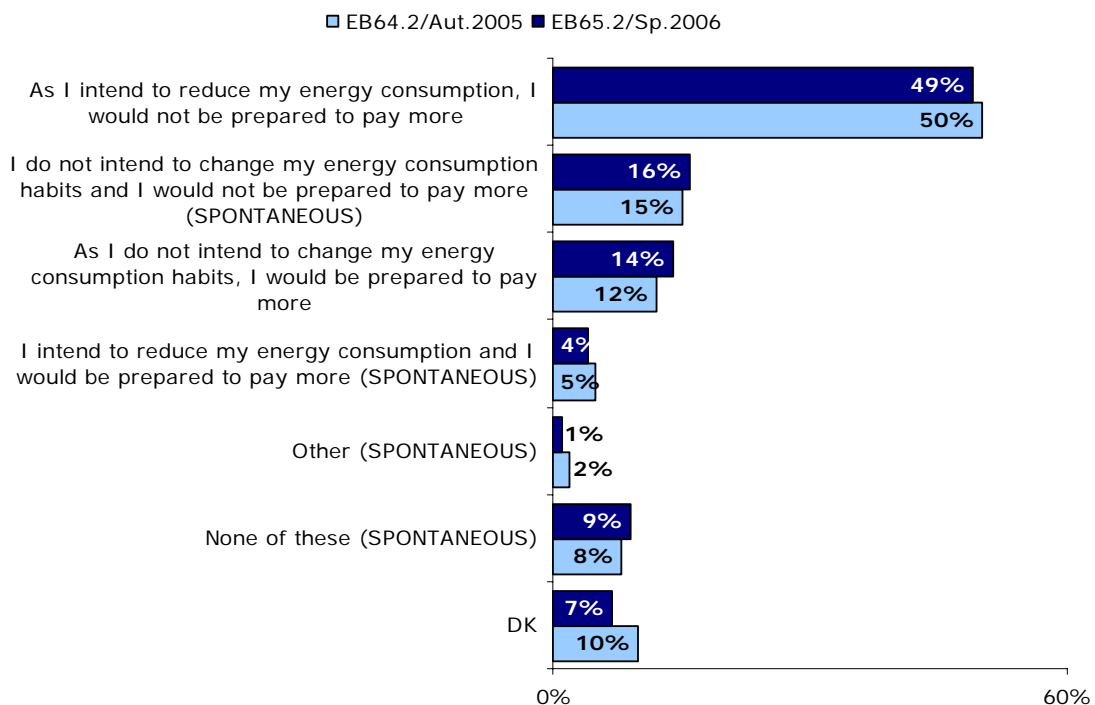
While changing energy usage increasingly generates a certain level of reluctance when it involves financial efforts, **reducing citizens' energy consumption seems to be a realistic goal on a short-term basis.**

- Citizens are more prepared to reduce their energy consumption than to pay more -

Nearly 5 out of 10 Europeans would appear to be willing to reduce their energy consumption and 4% would make this change even if it implies paying more.

However, **almost a third of respondents (30%, +3 points) would not reduce their energy consumption**, i.e. a slight increase. Amongst this group, 14% state they would be prepared to accept a potential price increase (+2 points compared with the former survey) but a higher proportion, 16%, would not accept either a change in their consumption habits or a price increase.

QF2b As you may know, we are now facing new energy challenges (like high energy prices, international obligations to reduce CO2 emissions) that could imply efforts from citizens. With which of the following propositions do you agree the most? - % EU25

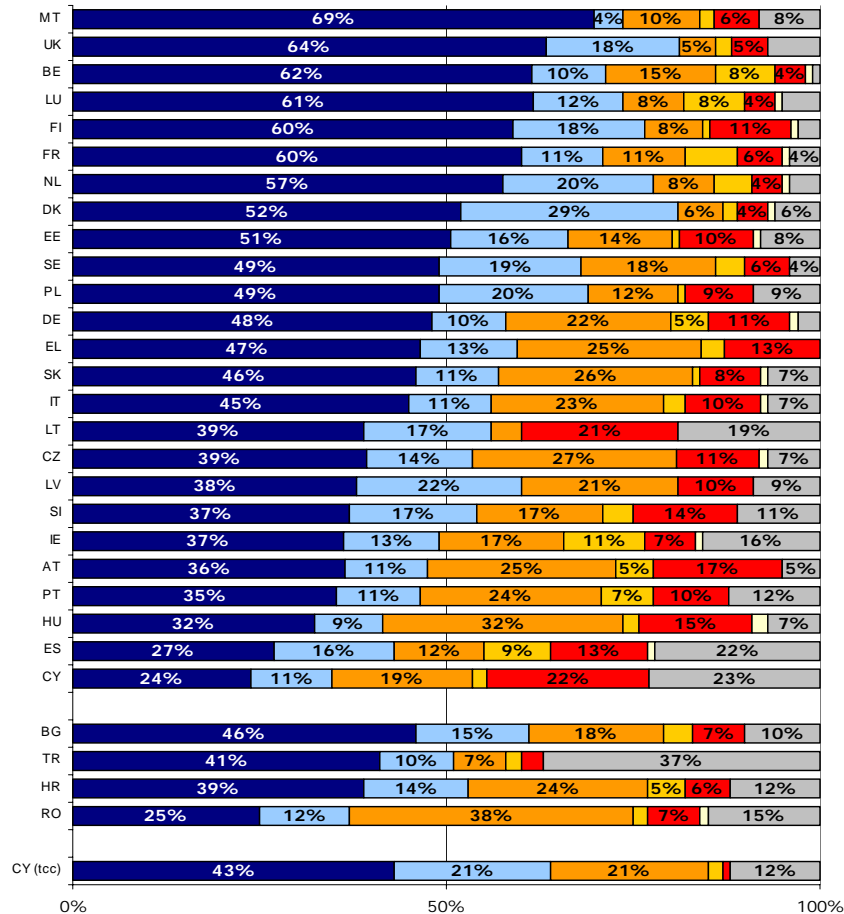


The **Maltese** (69%, +3 points), citizens of **the UK** (64%, +16 points), **Belgians** (62%, no change) and citizens of **Luxemburg** (61%, -7 points) seem to be more prepared to change their habits in terms of energy use with more than 6 out of 10 citizens stating that they would reduce their energy consumption and, therefore, that they are not willing to pay more.

As in the previous survey, **the Danes** appear to be most prepared to accept a price increase (29%, no change) in order to maintain their habits. **Romanians** (38%, +8 points), **Hungarians** (32%, +7 points), citizens of **the Czech Republic** (27%, +8 points) and **Slovaks** (26%, +10 points) are the most unwilling to make any change, either in terms of use or cost. It should be borne in mind that citizens in these countries are also reluctant to make major changes in their energy consumption (the use of renewable energy) because of the cost implications.

QF2b As you may know, we are now facing new energy challenges (like high energy prices, international obligations to reduce CO2 emissions) that could imply efforts from citizens. With which of the following propositions do you agree the most? - % country

- As I intend to reduce my energy consumption, I would not be prepared to pay more
- As I do not intend to change my energy consumption habits, I would be prepared to pay more
- I do not intend to change my energy consumption habits and I would not be prepared to pay more (SPONTANEOUS)
- I intend to reduce my energy consumption and I would be prepared to pay more (SPONTANEOUS)
- None of these (SPONTANEOUS)
- Other (SPONTANEOUS)
- DK



The socio-demographic analysis reveals once again similar patterns: **those aged 25-54, those who have studied longer, other white collars, managers and the self-employed**, all active categories, seem to be more willing to assume commitments in terms of energy consumption habits while the elderly and those with a low level of education appear to be reluctant to change their habits either in terms of consumption habits or financial sacrifices.

	As I intend to reduce my energy consumption, I would not be prepared to pay more	As I do not intend to change my energy consumption habits, I would be prepared to pay more	I do not intend to change my energy consumption habits and I would not be prepared to pay more (SPONTANEOUS)	I intend to reduce my energy consumption and I would be prepared to pay more (SPONTANEOUS)	None of these (SPONTANEOUS)	Other (SPONTANEOUS)	DK
EU25	49%	14%	16%	4%	9%	1%	7%
Sex							
Male	48%	15%	16%	5%	9%	0%	7%
Female	49%	13%	16%	4%	9%	1%	8%
Age							
15-24	46%	14%	12%	4%	10%	0%	12%
25-39	52%	15%	14%	4%	10%	0%	5%
40-54	53%	14%	15%	5%	8%	0%	5%
55 +	43%	13%	20%	4%	9%	1%	8%
Education (End of)							
15	42%	13%	21%	4%	9%	1%	10%
16-19	52%	13%	17%	3%	9%	0%	6%
20+	54%	15%	11%	6%	9%	0%	5%
Still Studying	43%	17%	10%	6%	11%	0%	13%
Household composition							
1	46%	16%	17%	2%	9%	1%	9%
2	48%	14%	18%	4%	10%	1%	6%
3	52%	13%	15%	3%	8%	1%	9%
4+	49%	14%	15%	6%	9%	0%	8%
Left-Right scale							
(1-4) Left	51%	14%	13%	6%	10%	0%	5%
(5-6) Centre	53%	14%	15%	4%	7%	1%	6%
(7-10) Right	50%	14%	18%	4%	9%	0%	4%
Respondent occupation scale							
Self-employed	53%	13%	17%	5%	7%	0%	5%
Managers	53%	18%	9%	6%	9%	1%	4%
Other white collars	55%	12%	16%	4%	8%	1%	4%
Manual workers	50%	14%	17%	4%	10%	0%	5%
House persons	47%	12%	17%	5%	8%	1%	11%
Unemployed	54%	11%	17%	2%	8%	0%	8%
Retired	42%	14%	20%	3%	10%	1%	9%
Students	43%	17%	10%	6%	11%	0%	13%
Subjective urbanisation							
Rural village	47%	14%	17%	5%	9%	1%	7%
Small/mid size town	50%	14%	16%	4%	9%	0%	7%
Large town	49%	14%	15%	3%	9%	1%	8%

CONCLUSION

The following points can be outlined on the basis of the results of this survey:

- In general, **European citizens appear to be more reluctant either to change their consumption habits or make financial sacrifices** in order to save energy compared with the results obtained five months earlier. This could be explained by the continuous rise of energy and petrol prices during spring 2006.
- Results show that **there is a clear demand for action by the public authorities at all levels.**
- Contrary to the previous survey, **the national level is perceived to be the most appropriate decision-making level** for energy issues: 42% of interviewees support this view. This is especially the case in the new Member States.
- When asked what the public authorities should do in order to help citizens reduce their energy consumption, a relative majority thinks that **governments should promote the efficient use of energy more actively by distributing more information.** Tax incentives to promote energy efficiency are also recommended.
- As regards consumer habits, **the majority of Europeans (59%) are not prepared to pay more for energy produced from renewable sources.** This is 5 percentage points more than five months earlier. However, a quarter (24%) of respondents are still prepared to do so provided that the price increase is limited to 5%. There are significant differences between the EU15 and new Member States, with the latter group being clearly more reluctant to pay higher prices for "green energy".
- Finally, while there is still a certain reluctance to changing energy utilisation habits when a financial effort is involved, **reducing energy consumption seems to be a quite realistic goal on a short term basis:** 5 out of 10 Europeans would appear to be willing to reduce their energy consumption and 4% would make this change even if it implies paying more. However, there are still 16% of respondents who are not willing either to change their consumption habits or pay more.

ANNEXES

TECHNICAL SPECIFICATIONS

SPECIAL EUROBAROMETER N° 258

“Energy Issues”

TECHNICAL SPECIFICATIONS

Between the 27th of March and the 1st of May 2006, TNS Opinion & Social, a consortium created between Taylor Nelson Sofres and EOS Gallup Europe, carried out wave 65.2 of the EUROBAROMETER, on request of the EUROPEAN COMMISSION, Directorate-General Press and Communication, Opinion Polls.

The SPECIAL EUROBAROMETER “Energy issues” is part of wave 65.2 and covers the population of the respective nationalities of the European Union Member States, resident in each of the Member States and aged 15 years and over. The SPECIAL EUROBAROMETER “Energy issues” has also been conducted in the two acceding countries (Bulgaria and Romania) and in the two candidate countries (Croatia and Turkey) and in the Turkish Cypriot Community. In these countries, the survey covers the national population of citizens of the respective nationalities and the population of citizens of all the European Union Member States that are residents in those countries and have a sufficient command of one of the respective national language(s) to answer the questionnaire. The basic sample design applied in all states is a multi-stage, random (probability) one. In each country, a number of sampling points was drawn with probability proportional to population size (for a total coverage of the country) and to population density.

In order to do so, the sampling points were drawn systematically from each of the “administrative regional units”, after stratification by individual unit and type of area. They thus represent the whole territory of the countries surveyed according to the EUROSTAT NUTS II (or equivalent) and according to the distribution of the resident population of the respective nationalities in terms of metropolitan, urban and rural areas. In each of the selected sampling points, a starting address was drawn, at random. Further addresses (every Nth address) were selected by standard “random route” procedures, from the initial address. In each household, the respondent was drawn, at random (following the “closest birthday rule”). All interviews were conducted face-to-face in people's homes and in the appropriate national language. As far as the data capture is concerned, CAPI (*Computer Assisted Personal Interview*) was used in those countries where this technique was available.

ABBREVIATIONS	COUNTRIES	INSTITUTES	N° INTERVIEWS	FIELDWORKDATES		POPULATION 15+
BE	Belgium	TNS Dimarso	1.020	28/03/2006	26/04/2006	8.598.982
CZ	Czech Rep.	TNS Aisa	1.068	29/03/2006	14/04/2006	8.571.710
DK	Denmark	TNS Gallup DK	1.008	29/03/2006	01/05/2006	4.380.063
DE	Germany	TNS Infratest	1.526	28/03/2006	23/04/2006	64.174.295
EE	Estonia	Emor	1.002	31/03/2006	24/04/2006	887.094
EL	Greece	TNS ICAP	1.000	28/03/2006	24/04/2006	8.674.230
ES	Spain	TNS Demoscopia	1.005	28/03/2006	24/04/2006	35.882.820
FR	France	TNS Sofres	1.020	30/03/2006	24/04/2006	44.010.619
IE	Ireland	TNS MRBI	1.003	30/03/2006	30/04/2006	3.089.775
IT	Italy	TNS Abacus	1.000	30/03/2006	01/05/2006	49.208.000
CY	Rep. of Cyprus	Synovate	507	31/03/2006	24/04/2006	552.213
CY(tcc)	Turkish Cypriot Comm.	KADEM	500	29/03/2006	15/04/2006	157.101
LV	Latvia	TNS Latvia	1.018	28/03/2006	23/04/2006	1.394.351
LT	Lithuania	TNS Gallup Lithuania	1.019	31/03/2006	23/04/2006	2.803.661
LU	Luxembourg	TNS ILReS	503	27/03/2006	24/04/2006	367.199
HU	Hungary	TNS Hungary	1.020	04/04/2006	25/04/2006	8.503.379
MT	Malta	MISCO	500	28/03/2006	21/04/2006	322.917
NL	Netherlands	TNS NIPO	1.009	04/04/2006	25/04/2006	13.242.328
AT	Austria	Österreichisches Gallup-Institute	1.017	31/03/2006	20/04/2006	6.679.444
PL	Poland	TNS OBOP	1.000	30/03/2006	26/04/2006	31.610.437
PT	Portugal	TNS EUROTESTE	1.002	31/03/2006	24/04/2006	8.080.915
SI	Slovenia	RM PLUS	1.033	30/03/2006	26/04/2006	1.663.869
SK	Slovakia	TNS AISA SK	1.078	31/03/2006	19/04/2006	4.316.438
FI	Finland	TNS Gallup Oy	1.006	27/03/2006	26/04/2006	4.279.286
SE	Sweden	TNS GALLUP	1.017	28/03/2006	24/04/2006	7.376.680
UK	United Kingdom	TNS UK	1.312	27/03/2006	26/04/2006	47.685.578
BG	Bulgaria	TNS BBSS	1.015	27/03/2006	10/04/2006	6.695.512
RO	Romania	TNS CSOP	1.007	27/03/2006	27/04/2006	18.145.036
HR	Croatia	Puls	1.000	29/03/2006	25/04/2006	3.682.826
TR	Turkey	TNS PIAR	1.005	29/03/2006	26/04/2006	47.583.830
TOTAL			29.220	27/03/2006	01/05/2006	442.620.588

For each country a comparison between the sample and the universe was carried out. The Universe description was derived from Eurostat population data or from national statistics offices. For all countries surveyed, a national weighting procedure, using marginal and intercellular weighting, was carried out based on this Universe description. In all countries, gender, age, region and size of locality were introduced in the iteration procedure. For international weighting (i.e. EU averages), TNS Opinion & Social applies the official population figures as provided by EUROSTAT or national statistic offices. The total population figures for input in this post-weighting procedure are listed above.

Readers are reminded that survey results are estimations, the accuracy of which, everything being equal, rests upon the sample size and upon the observed percentage. With samples of about 1,000 interviews, the real percentages vary within the following confidence limits:

Observed percentages	10% or 90%	20% or 80%	30% or 70%	40% or 60%	50%
Confidence limits	± 1.9 points	± 2.5 points	± 2.7 points	± 3.0 points	± 3.1 points

QUESTIONNAIRE

Let's move on to another topic

Parlons maintenant d'un autre sujet

QF1 Against the background of high energy prices, some are proposing to take new measures that will help people to reduce their consumption of energy. According to you, what should be the public authorities' priority to help people to reduce their consumption of energy?

QF1 En réaction aux prix élevés de l'énergie, certains proposent d'appliquer de nouvelles mesures qui aideront les gens à réduire leur consommation d'énergie. Selon vous, quelle devrait être la priorité des autorités publiques pour aider les gens à réduire leur consommation d'énergie ?

(READ OUT – MAX. 2 ANSWERS)

(LIRE - MAX. 2 REPONSES)

	(635-640)
Provide more information on efficient use of energy	1,
Develop tax incentives to promote efficient use of energy	2,
Adopt higher efficiency standards for energy consuming equipment	3,
Control more strictly the application of existing energy efficiency standards	4,
Other (SPECIFY - SPONTANEOUS)	5,
DK	6,

	(635-640)
Fournir plus d'informations pour un usage efficace de l'énergie	1,
Développer des incitations fiscales pour promouvoir un usage efficace de l'énergie	2,
Adopter des normes d'efficacité plus élevés pour les équipements qui consomment de l'énergie	3,
Contrôler plus strictement l'application des normes d'efficacité en matière d'énergie	4,
Autre (SPECIFIER - SPONTANE)	5,
NSP	6,

EB64.2 QA64

EB64.2 QA64

ASK QF2a TO SPLIT A - OTHERS GO TO QF2b

POSER QF2a AU SPLIT A - LES AUTRES ALLER EN QF2b

QF2a Would you be prepared to pay more for energy produced from renewable sources than for energy produced from other sources? (IF YES) How much more would you be prepared to pay?

QF2a Seriez-vous prêt(e) à payer plus pour l'énergie produite par des sources d'énergie renouvelables que pour de l'énergie produite par d'autres sources ? (SI OUI) Combien seriez-vous prêt(e) à payer en plus ?

(SHOW CARD – READ OUT – ONE ANSWER ONLY)

(MONTRER CARTE - LIRE - UNE SEULE REPONSE)

	(641)
No, I am not prepared to pay more	1
Yes, I would pay up to 5% more	2
Yes, I would pay 6 to 10% more	3
Yes, I would pay 11 to 25% more	4
Yes, I would pay more than 25% more	5
DK	6

	(641)
Non, je ne suis pas prêt(e) à payer plus	1
Oui, je serais prêt(e) à payer jusqu'à 5% de plus	2
Oui, je serais prêt(e) à payer de 6 à 10% de plus	3
Oui, je serais prêt(e) à payer de 11 à 25% de plus	4
Oui, je serais prêt(e) à payer plus de 25% de plus	5
NSP	6

EB64.2 QA66a

EB64.2 QA66a

ASK QF2b TO SPLIT B - OTHERS GO TO QF3

POSER QF2b AU SPLIT B - LES AUTRES ALLER EN QF3

QF2b As you may know, we are now facing new energy challenges (like high energy prices, international obligations to reduce CO2 emissions) that could imply efforts from citizens. With which of the following propositions do you agree the most?

QF2b Comme vous le savez sans doute, nous devons relever de nouveaux défis en matière d'énergie (comme les prix élevés, l'obligation internationale de réduire les émissions de CO2) qui pourraient demander certains efforts aux citoyens. Avec laquelle des propositions suivantes êtes-vous le plus d'accord ?

(SHOW CARD – READ OUT – ONE ANSWER ONLY)

(MONTRER CARTE - LIRE - UNE SEULE REPONSE)

(642)	
As I do not intend to change my energy consumption habits, I would be prepared to pay more	1
As I intend to reduce my energy consumption, I would not be prepared to pay more	2
None of these (SPONTANEOUS)	3
I do not intend to change my energy consumption habits and I would not be prepared to pay more (SPONTANEOUS)	4
I intend to reduce my energy consumption and I would be prepared to pay more (SPONTANEOUS)	5
Other (SPECIFY - SPONTANEOUS)	6
DK	7

(642)	
Comme je n'ai pas l'intention de changer mes habitudes de consommation d'énergie, je serais prêt(e) à payer plus	1
Comme j'ai l'intention de réduire ma consommation d'énergie, je ne serais pas prêt(e) à payer plus	2
Aucune de celles-ci (SPONTANE)	3
Je n'ai pas l'intention de changer mes habitudes de consommation d'énergie et je ne suis pas prêt(e) à payer plus (SPONTANE)	4
J'ai l'intention de réduire ma consommation d'énergie et je serais prêt(e) à payer plus (SPONTANE)	5
Autre (SPECIFIER - SPONTANE)	6
NSP	7

EB64.2 QA66b

EB64.2 QA66b

ASK ALL

A TOUS

QF3 In order to respond to the new energy challenges that we have to face for the years to come, what is, according to you, the most appropriate level to take decisions?

QF3 Afin de répondre aux nouveaux défis en matière d'énergie que nous avons à relever dans les années à venir, d'après vous, quel est le meilleur niveau pour prendre les décisions ?

(READ OUT – ONE ANSWER ONLY)

(LIRE - UNE SEULE REPONSE)

(643)	
The European level	1
The national level	2
The local level	3
DK	4

(643)	
Le niveau européen	1
Le niveau national	2
Le niveau local	3
NSP	4

EB64.2 QA67

EB64.2 QA67

TABLES

OF1 Against the background of high energy prices, some are proposing to take new measures that will help people to reduce their consumption of energy. According to you, what should be the public authorities' priority to help people to reduce their consumption of energy? (MAX. 2 ANSWERS)

	TOTAL	Provide more information on efficient use of energy	Develop tax incentives to promote efficient use of energy	Adopt higher efficiency standards for energy consuming equipment	Control more strictly the application of existing energy efficiency standards	Other (SPONTANEOUS)	DK
EU25	24693	49%	40%	30%	20%	2%	10%
BE	1020	53%	60%	30%	24%	2%	2%
CZ	1068	44%	56%	26%	17%	2%	8%
DK	1008	63%	44%	45%	15%	1%	5%
D-W	1015	47%	46%	38%	16%	3%	8%
DE	1526	47%	45%	40%	18%	3%	7%
D-E	511	47%	39%	47%	23%	2%	5%
EE	1002	56%	40%	25%	22%	1%	11%
EL	1000	54%	35%	41%	23%	1%	2%
ES	1005	54%	24%	15%	18%	2%	19%
FR	1020	45%	35%	31%	29%	6%	8%
IE	1003	54%	40%	32%	28%	1%	10%
IT	1000	42%	40%	25%	19%	2%	9%
CY	507	56%	26%	28%	24%	3%	17%
CY (tcc)	500	52%	39%	21%	26%	-	12%
LV	1018	43%	31%	29%	26%	1%	12%
LT	1019	36%	29%	24%	29%	-	20%
LU	503	57%	48%	27%	26%	0%	6%
HU	1020	49%	41%	17%	16%	2%	15%
MT	500	63%	21%	23%	25%	2%	13%
NL	1009	46%	56%	42%	13%	2%	4%
AT	1017	47%	45%	30%	24%	1%	10%
PL	1000	46%	42%	19%	13%	1%	13%
PT	1002	62%	22%	36%	13%	-	14%
SI	1033	50%	55%	35%	23%	1%	10%
SK	1078	55%	40%	42%	24%	1%	6%
FI	1006	60%	45%	40%	14%	2%	2%
SE	1017	56%	65%	20%	18%	2%	7%
UK	1312	57%	34%	37%	22%	0%	9%
BG	1015	39%	26%	18%	23%	2%	26%
RO	957	37%	29%	36%	18%	1%	22%
HR	1000	59%	22%	22%	25%	1%	12%
TR	1005	38%	19%	13%	25%	0%	32%

QF2a Would you be prepared to pay more for energy produced from renewable sources than for energy produced from other sources? (IF YES) How much more would you be prepared to pay?

(IF 'SPLIT BALLOT A')

	TOTAL	No, I am not prepared to pay more	Yes, I would pay up to 5% more	Yes, I would pay 6 to 10% more	Yes, I would pay 11 to 25% more	Yes, I would pay more than 25% more	DK	Yes
EU25	12509	59%	24%	8%	2%	1%	7%	34%
BE	485	60%	25%	12%	2%	0%	1%	40%
CZ	514	71%	20%	6%	0%	-	3%	26%
DK	497	43%	24%	22%	5%	2%	4%	52%
D-W	507	63%	22%	9%	2%	1%	3%	33%
DE	767	66%	21%	8%	2%	1%	3%	32%
D-E	262	75%	17%	6%	1%	-	0%	24%
EE	514	58%	24%	6%	1%	0%	11%	32%
EL	497	64%	25%	8%	1%	1%	1%	35%
ES	515	53%	26%	6%	3%	0%	13%	35%
FR	516	55%	27%	10%	2%	1%	5%	40%
IE	495	49%	27%	9%	2%	1%	12%	39%
IT	505	61%	21%	5%	2%	1%	11%	29%
CY	255	46%	28%	10%	0%	1%	15%	39%
CY (tcc)	248	56%	23%	6%	3%	-	13%	32%
LV	511	78%	15%	3%	0%	0%	3%	19%
LT	510	75%	10%	2%	2%	-	12%	14%
LU	254	46%	31%	17%	3%	1%	3%	51%
HU	517	70%	19%	6%	1%	1%	4%	26%
MT	248	70%	15%	2%	2%	-	11%	19%
NL	508	52%	25%	15%	3%	1%	4%	43%
AT	470	55%	32%	7%	2%	-	4%	41%
PL	520	70%	18%	6%	0%	-	6%	24%
PT	533	78%	14%	2%	0%	0%	5%	17%
SI	501	59%	26%	10%	1%	1%	3%	38%
SK	568	74%	13%	4%	1%	0%	8%	18%
FI	523	51%	35%	10%	1%	1%	2%	46%
SE	517	58%	21%	12%	2%	1%	6%	36%
UK	677	42%	32%	13%	3%	1%	10%	48%
BG	511	80%	7%	2%	0%	-	10%	10%
RO	472	68%	12%	4%	1%	0%	14%	18%
HR	490	57%	21%	9%	1%	2%	10%	33%
TR	506	41%	7%	10%	5%	4%	33%	26%

QF2b As you may know, we are now facing new energy challenges (like high energy prices, international obligations to reduce CO2 emissions) that could imply efforts from citizens. With which of the following propositions do you agree the most?

(IF 'SPLIT BALLOT B')

	TOTAL	As I do not intend to change my energy consumption habits, I would be prepared to pay more	As I intend to reduce my energy consumption, I would not be prepared to pay more	None of these (SPONTANEOUS)	I do not intend to change my energy consumption habits and I would not be prepared to pay more (SPONTANEOUS)	I intend to reduce my energy consumption and I would be prepared to pay more (SPONTANEOUS)	Other (SPONTANEOUS)	DK
EU25	12184	14%	49%	9%	16%	4%	1%	7%
BE	535	10%	62%	4%	15%	8%	1%	1%
CZ	554	14%	39%	11%	27%	0%	1%	7%
DK	511	29%	52%	4%	6%	2%	1%	6%
D-W	508	11%	47%	11%	22%	5%	1%	3%
DE	759	10%	48%	11%	22%	5%	1%	3%
D-E	249	6%	54%	12%	22%	4%	-	2%
EE	488	16%	51%	10%	14%	1%	1%	8%
EL	503	13%	47%	13%	25%	3%	-	0%
ES	490	16%	27%	13%	12%	9%	1%	22%
FR	504	11%	60%	6%	11%	7%	1%	4%
IE	509	13%	37%	7%	17%	11%	1%	16%
IT	495	11%	45%	10%	23%	3%	1%	7%
CY	252	11%	24%	22%	19%	2%	-	23%
CY (tcc)	252	21%	43%	1%	21%	2%	-	12%
LV	507	22%	38%	10%	21%	0%	-	9%
LT	509	17%	39%	21%	4%	0%	-	19%
LU	249	12%	61%	4%	8%	8%	1%	5%
HU	503	9%	32%	15%	32%	2%	2%	7%
MT	252	4%	69%	6%	10%	2%	-	8%
NL	501	20%	57%	4%	8%	5%	1%	4%
AT	547	11%	36%	17%	25%	5%	0%	5%
PL	480	20%	49%	9%	12%	1%	0%	9%
PT	469	11%	35%	10%	24%	7%	0%	12%
SI	532	17%	37%	14%	17%	4%	-	11%
SK	510	11%	46%	8%	26%	1%	1%	7%
FI	483	18%	60%	11%	8%	1%	1%	3%
SE	500	19%	49%	6%	18%	4%	-	4%
UK	635	18%	64%	5%	5%	2%	0%	7%
BG	504	15%	46%	7%	18%	4%	0%	10%
RO	485	12%	25%	7%	38%	2%	1%	15%
HR	510	14%	39%	6%	24%	5%	0%	12%
TR	499	10%	41%	3%	7%	2%	-	37%

QF3 In order to respond to the new energy challenges that we have to face for the years to come, what is, according to you, the most appropriate level to take decisions?

	TOTAL	The European level	The national level	The local level	DK
EU25	24693	39%	42%	12%	7%
BE	1020	50%	38%	11%	1%
CZ	1068	36%	50%	8%	5%
DK	1008	52%	42%	3%	3%
D-W	1015	40%	44%	10%	6%
DE	1526	40%	43%	11%	6%
D-E	511	43%	42%	12%	4%
EE	1002	21%	56%	13%	10%
EL	1000	49%	43%	8%	1%
ES	1005	41%	34%	10%	15%
FR	1020	39%	40%	15%	5%
IE	1003	28%	51%	13%	8%
IT	1000	55%	27%	9%	8%
CY	507	35%	45%	11%	9%
CY (tcc)	500	36%	34%	19%	10%
LV	1018	34%	53%	8%	4%
LT	1019	34%	45%	9%	12%
LU	503	41%	41%	11%	6%
HU	1020	31%	43%	16%	10%
MT	500	20%	51%	26%	2%
NL	1009	55%	38%	5%	2%
AT	1017	31%	48%	13%	8%
PL	1000	31%	46%	16%	8%
PT	1002	40%	37%	7%	16%
SI	1033	40%	46%	8%	5%
SK	1078	34%	49%	11%	6%
FI	1006	15%	65%	18%	2%
SE	1017	24%	53%	17%	6%
UK	1312	23%	55%	16%	7%
BG	1015	21%	56%	7%	16%
RO	957	25%	44%	12%	18%
HR	1000	25%	44%	19%	12%
TR	1005	13%	33%	24%	30%