
Dr. Peter Matuschek

Energy Issues, Energy Transition and the consequences What do citizens think?

1. Importance of energy issues to the German public



First of all:

How interested are Germans in energy issues and what are their sources of information?



Interest in energy issues (1)

- ➔ In general: little interest in energy issues:
„Low-interest-product“



- ➔ After Fukushima and the abrupt “U-turn” in energy policy:
high interest in energy issues
- ➔ **Today**: once more fading interest in energy issues

Interest in energy issues (2)

Respondents with strong interest for issues related to energy supply



Interest in energy issues (2)

Respondents with strong interest for issues related to energy supply



Interest in energy issues (2)

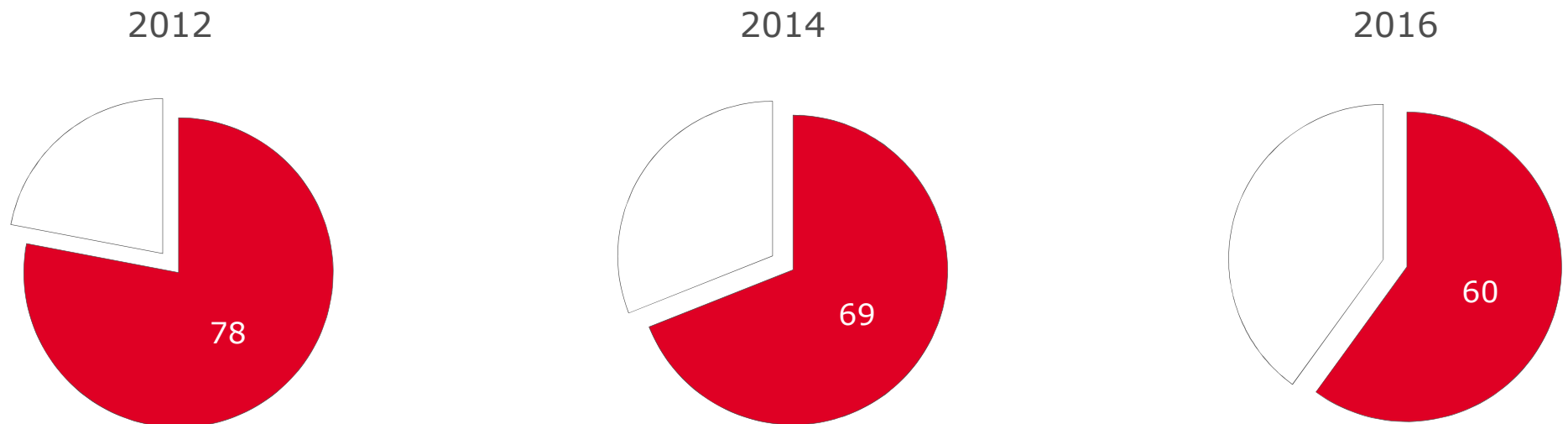
Respondents with strong interest for issues related to energy supply



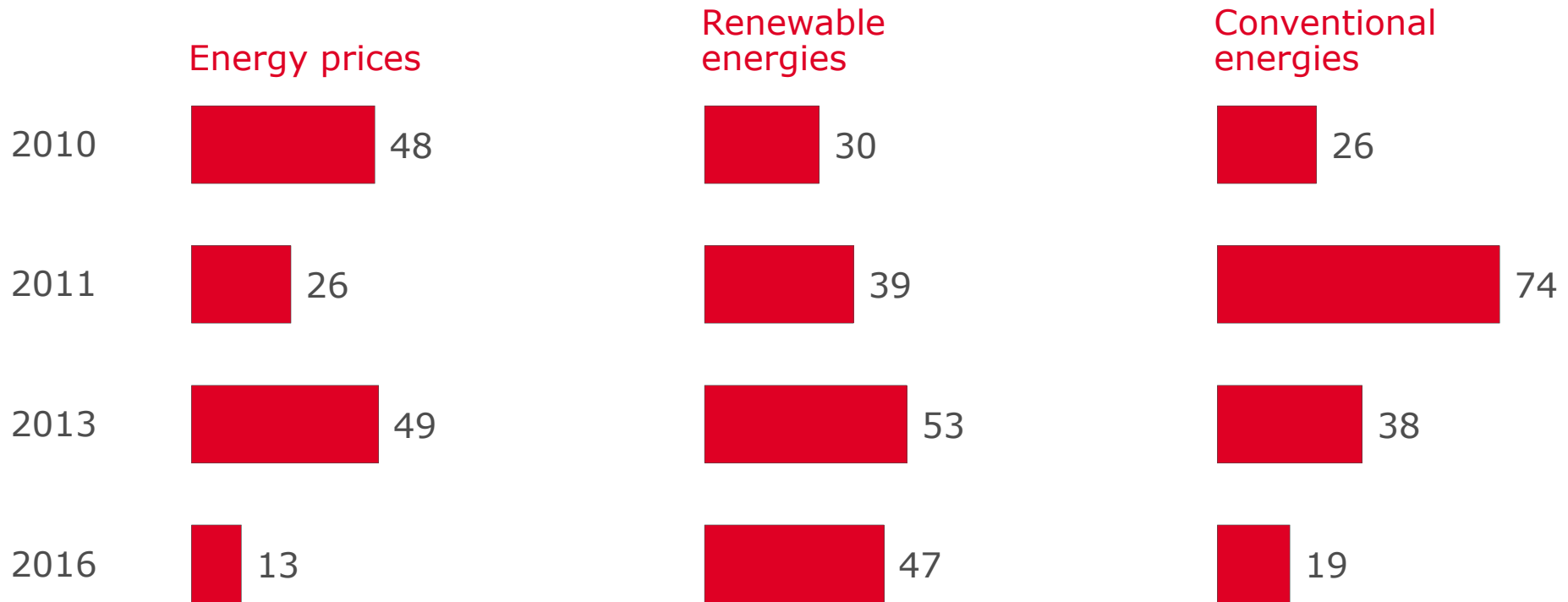
Perception of (media) coverage on energy issues

➔ Despite sagging interest in energy issues: Continued awareness of coverage on energy supply (albeit declining):

Respondents who have recently perceived reports on energy supply



Perceived contents of coverage on energy issues



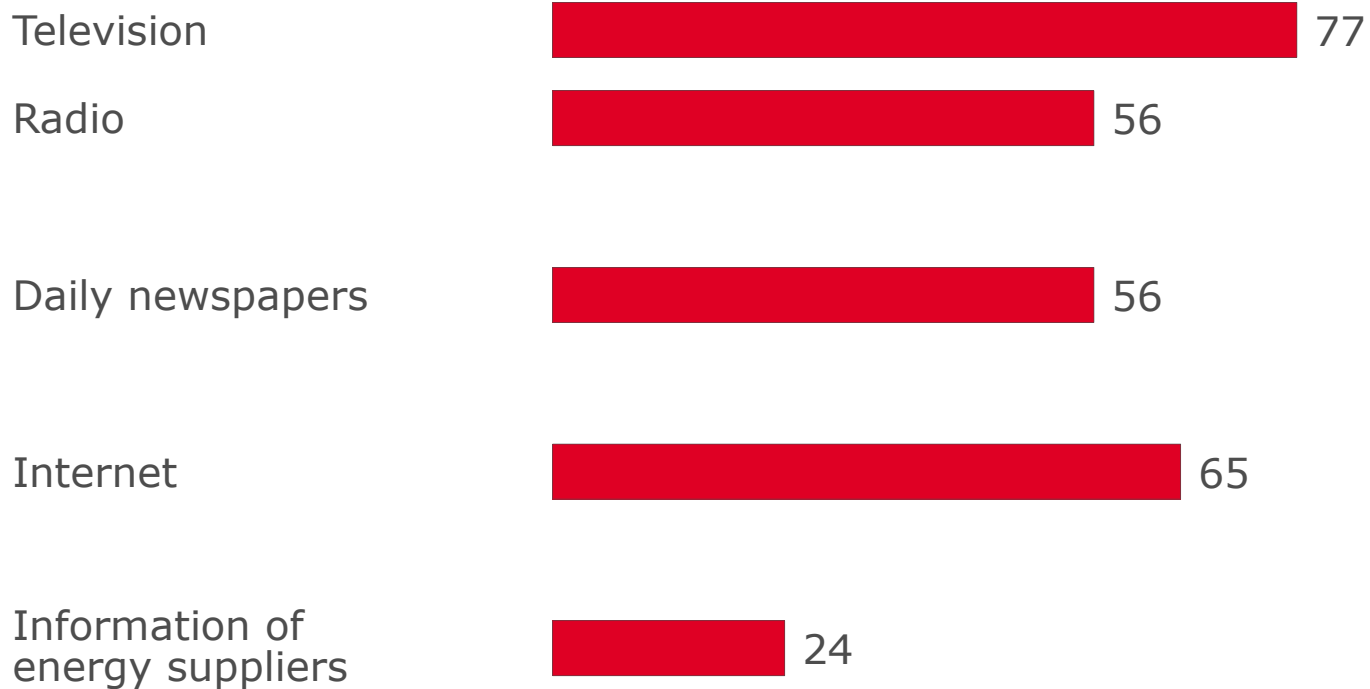
Sources of information on energy issues



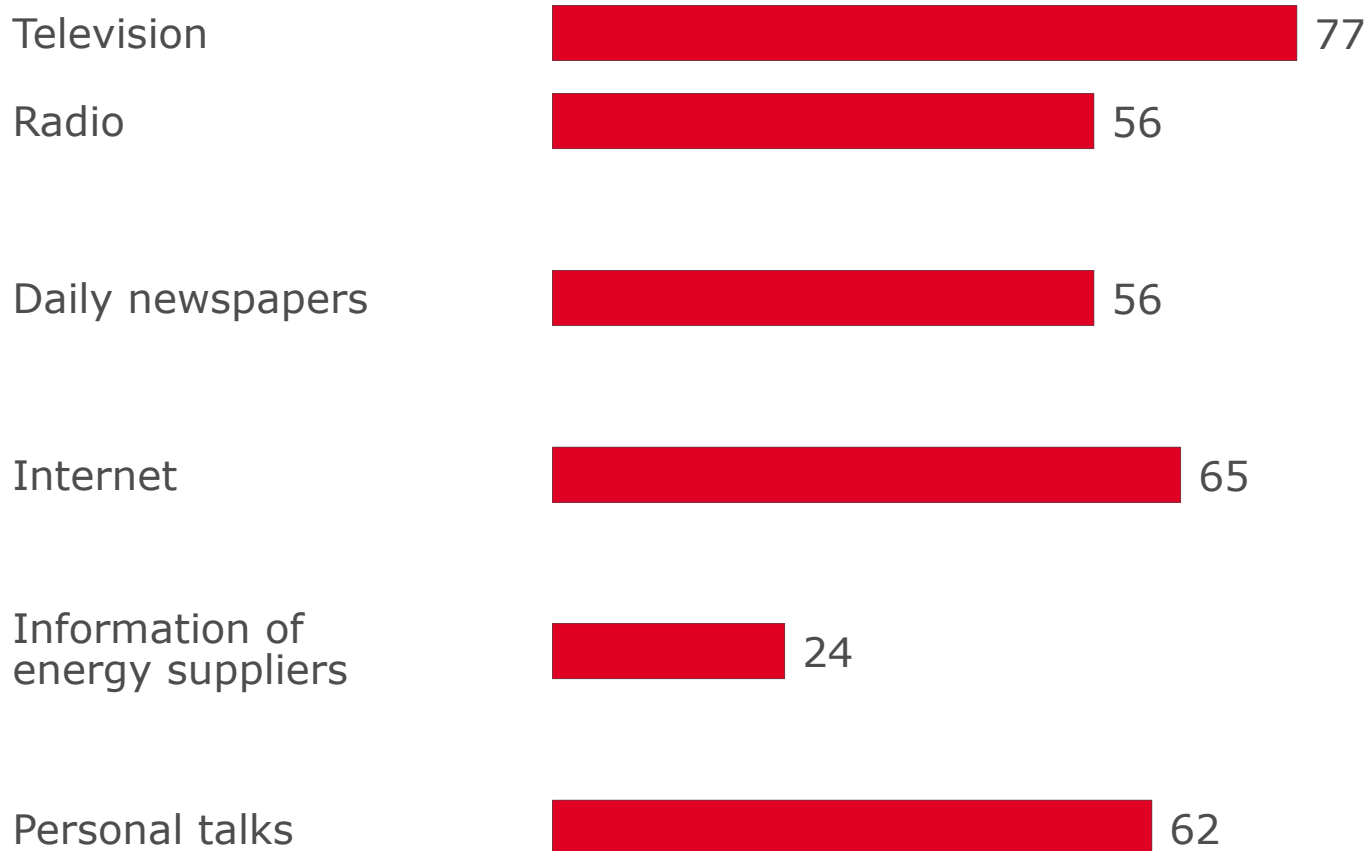
Sources of information on energy issues



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Sources of information on energy issues

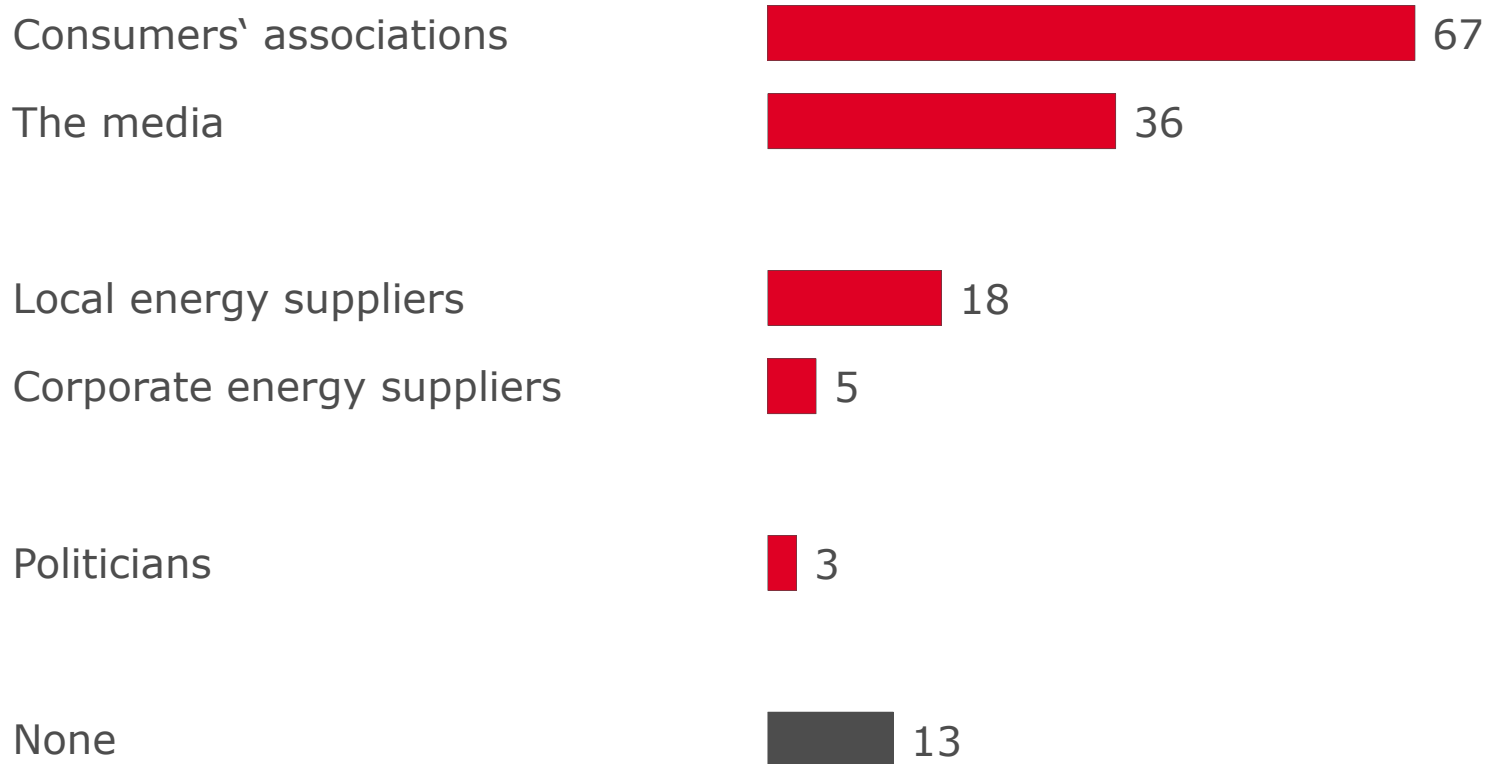


Whom do citizens trust on energy issues?

Consumers' associations

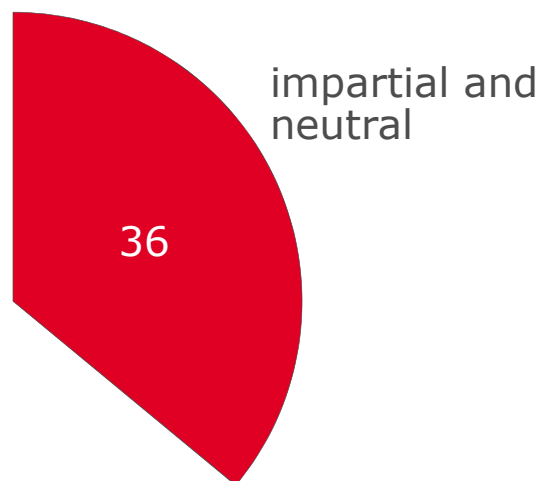


Whom do citizens trust on energy issues?



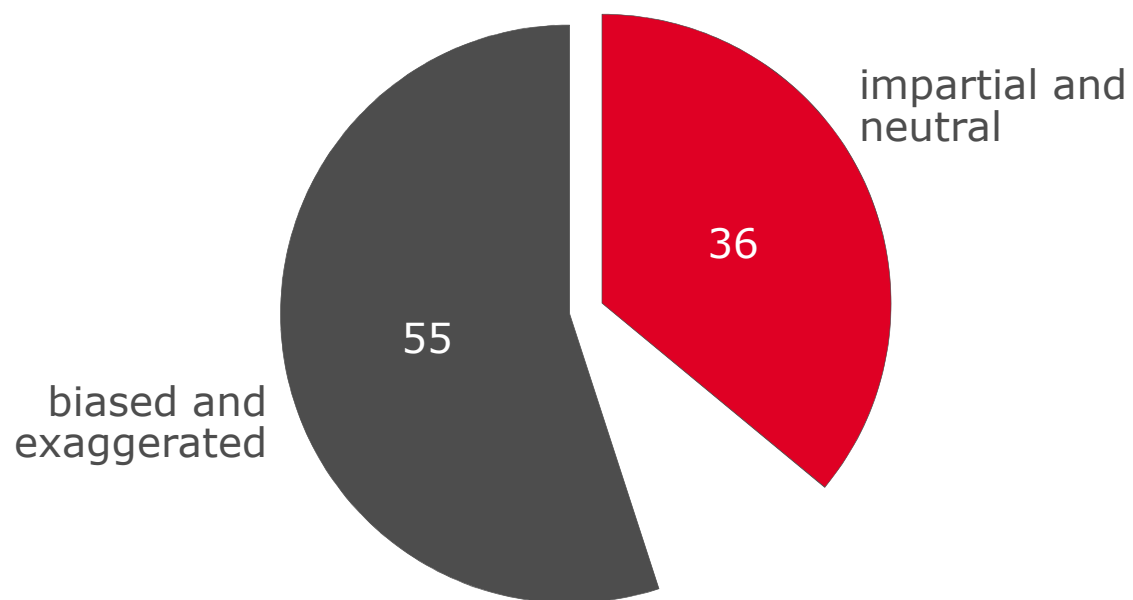
Evaluation of media coverage on energy issues

Media coverage on energy issues is



Evaluation of media coverage on energy issues

Media coverage on energy issues is



2. General attitudes towards the energy transition:

„Yes, but ...“



High acceptance of renewable energies ...



Popularity of solar and wind energy

➔ For almost 50 years, the most valued energy types among Germans have been:

Solar energy

and

Wind energy

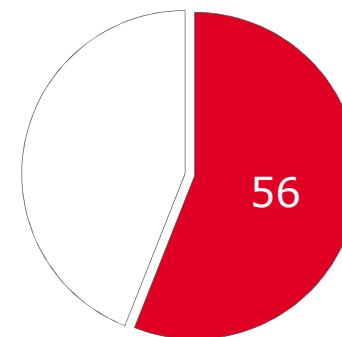
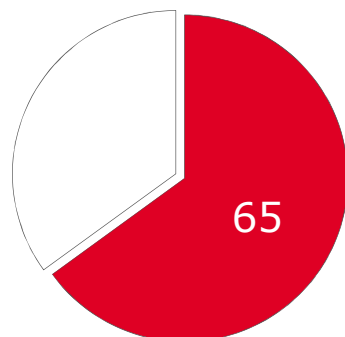


➔ as they are - according to most citizens still today -

secure

and

cheap



... but: despite unaltered high acceptance of renewable energies:

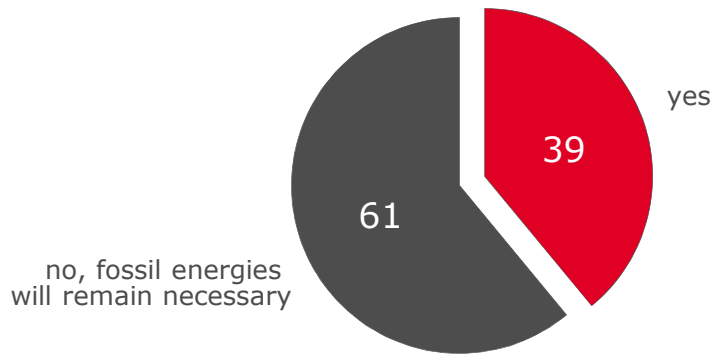
➔ Great doubts about their efficiency



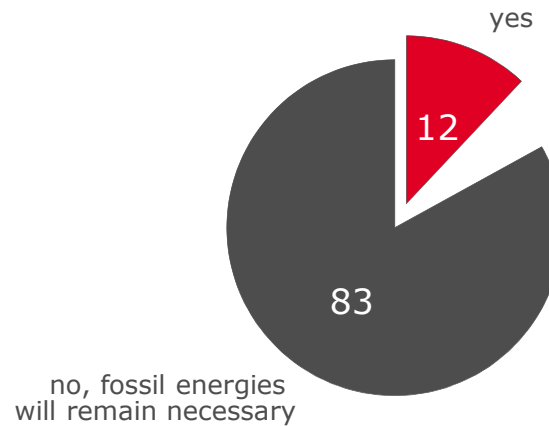
Evaluation of renewables' efficiency

Energy demand in Germany
can be covered by renewables alone
in the foreseeable future

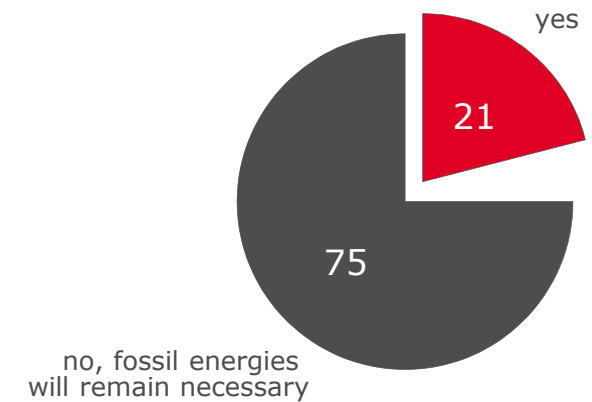
2011
(after Fukushima)



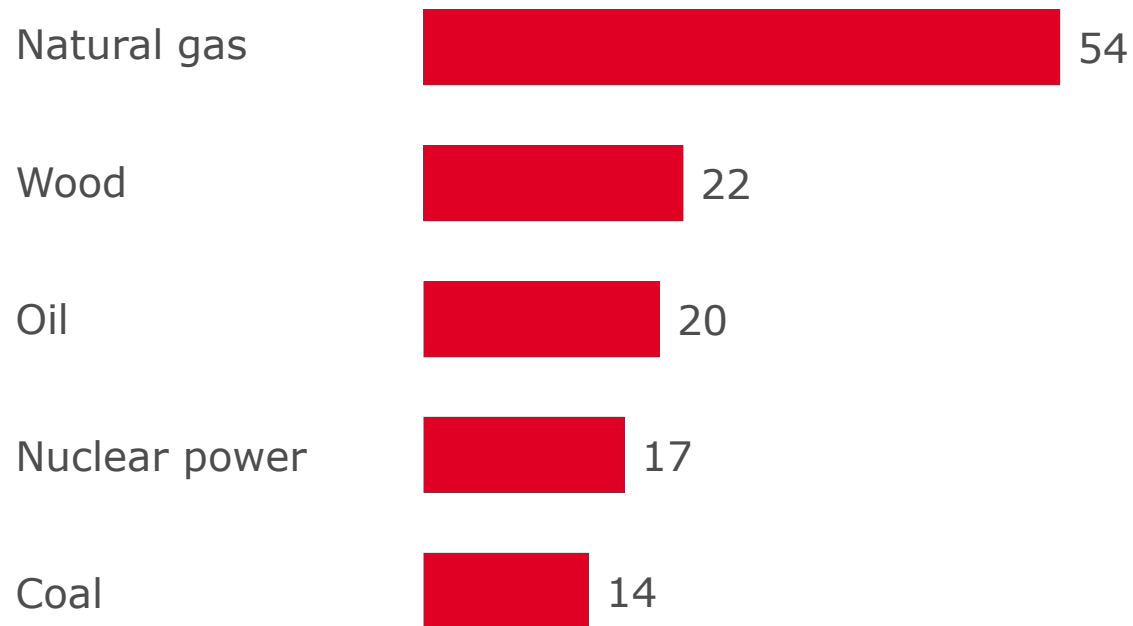
2013
(after the general election)



2016

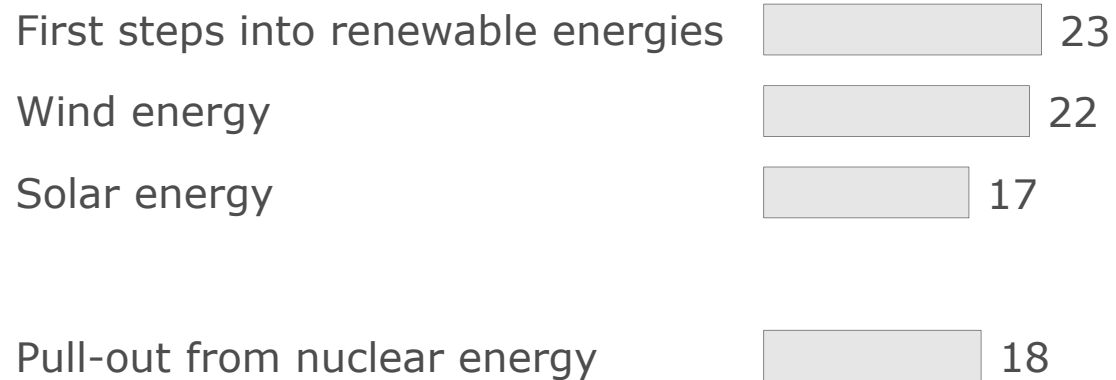


Preferred partner for renewables as part of the supply mix



Associations with the „energy transition“

Neutral associations:



negative associations:



positive associations:



Political effects of the abrupt turnaround in energy policy

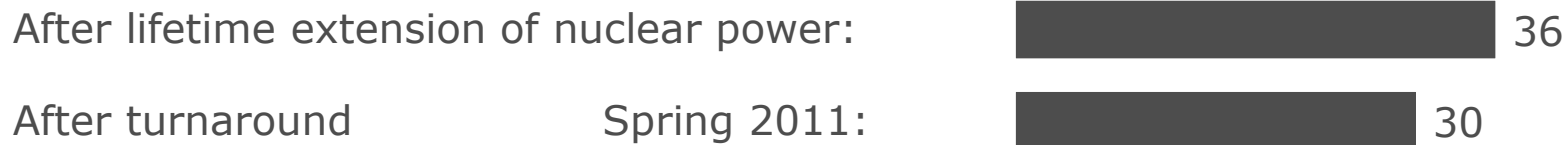
Voting preference for the CDU/CSU

After lifetime extension of nuclear power:



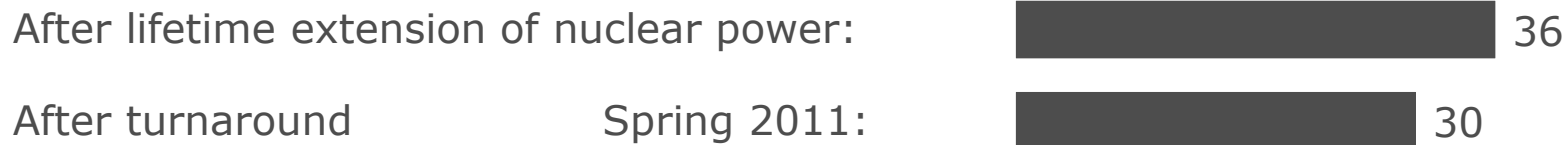
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Political effects of the abrupt turnaround in energy policy

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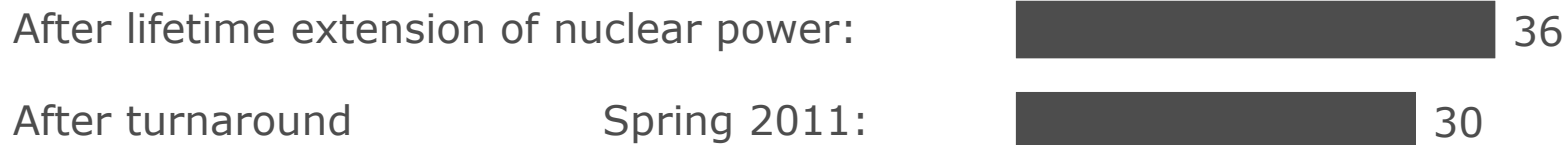


Voting preferences for Angela Merkel



Political effects of the abrupt turnaround in energy policy

Voting preference for the CDU/CSU

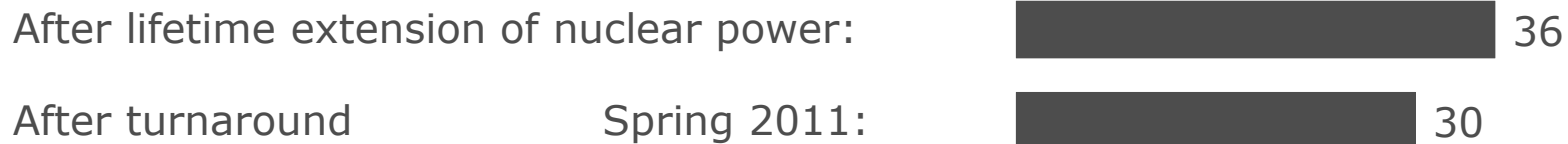


Voting preferences for Angela Merkel



Political effects of the abrupt turnaround in energy policy

Voting preference for the CDU/CSU

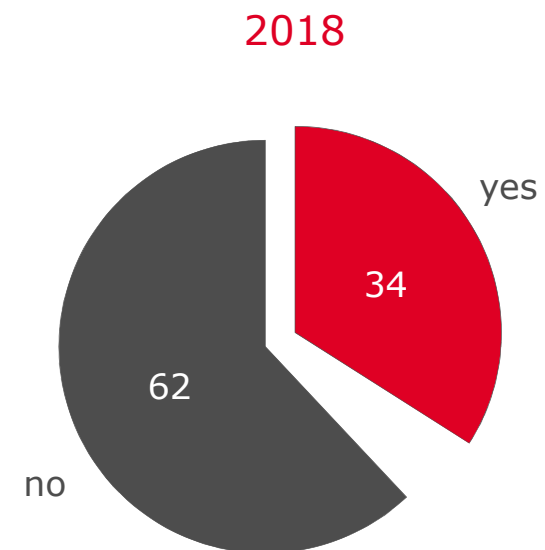
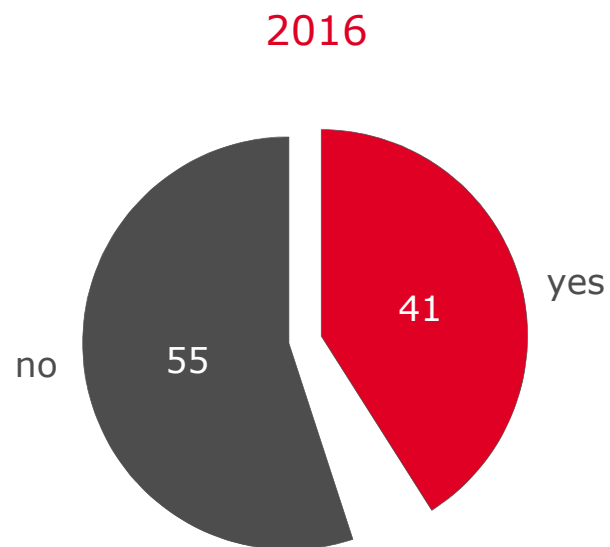


Voting preferences for Angela Merkel



Opinions about the energy transition (1) *)

The energy transition can be accomplished

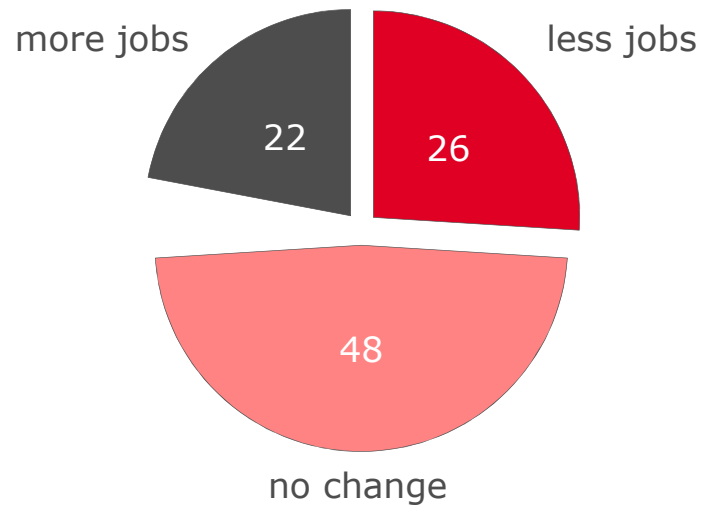


*) forsa-surveys for wintershall

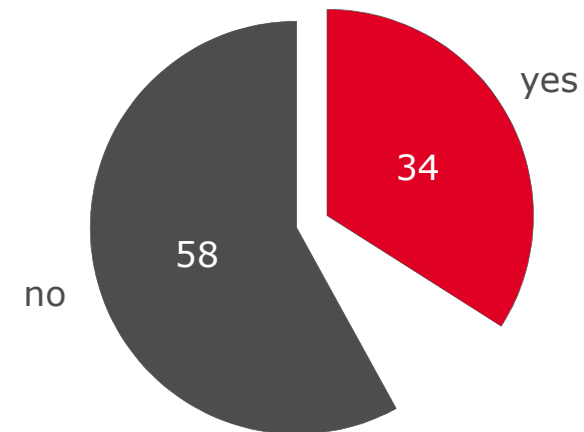


Opinions about the energy transition (2)

The energy transition
will lead to

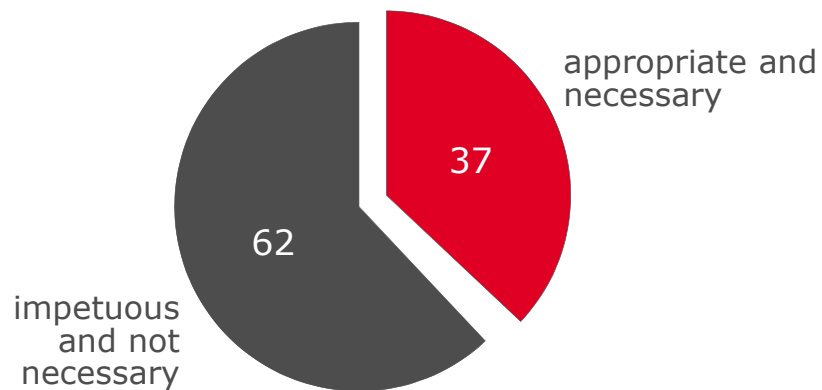


The energy transition leads to
new economic
stimuli in Germany

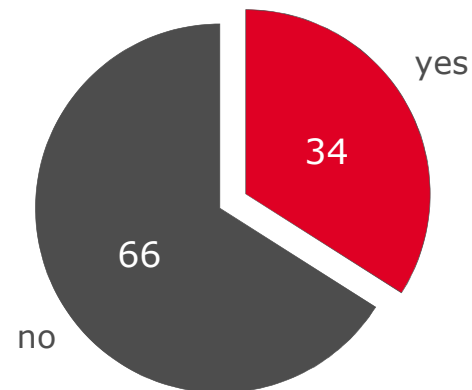


Opinions of German business on the energy transition

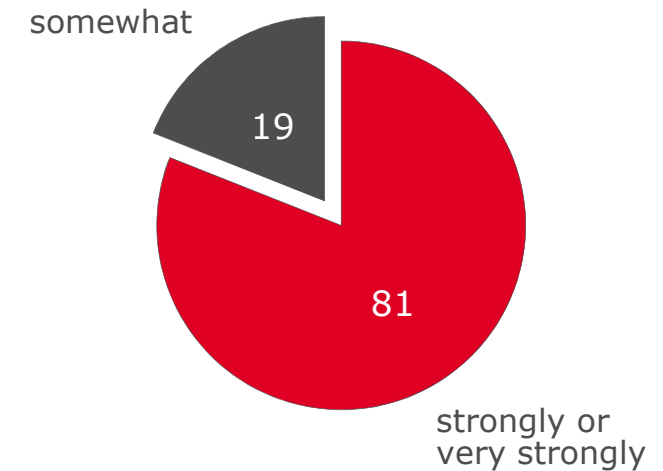
The turnaround in energy policy after Fukushima was



The changeover to renewable energies – as planned – is possible

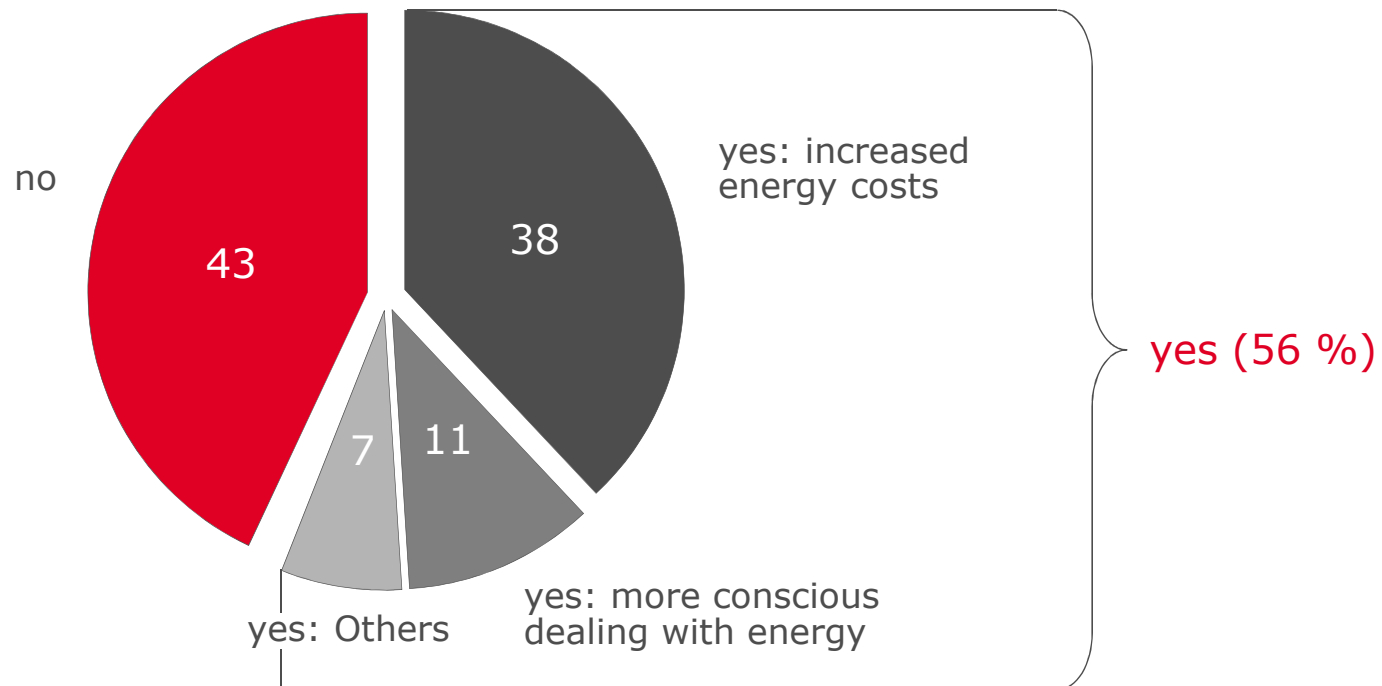


Energy costs for their own company will rise



Repercussions of the energy shift on citizens' life

The energy shift has repercussions on one's own life



Priorities with regard to energy supply

For the energy supply in the future
it is very important that ...

... climate targets are being
accomplished



... environmental friendliness



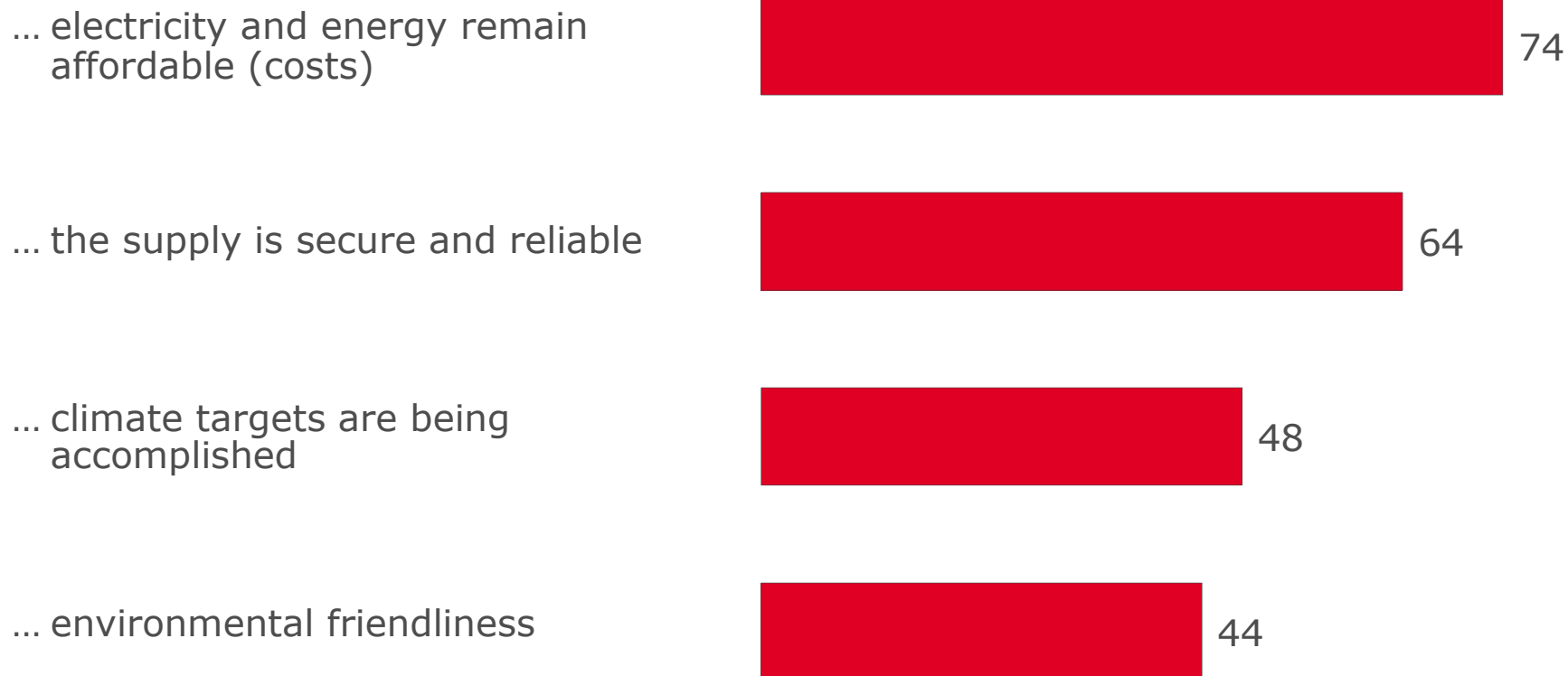
Priorities with regard to energy supply

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it is very important that ...



Priorities with regard to energy supply

For the energy supply in the future
it is very important that ...



Ecological consciousness and behavior

A wide gulf between



the „superstructure“
(consciousness)

and

the „substructure“
(behavior)

↳ High acceptance of climate/
environment protection
and „sustainability“

↳ Low relevance of
ecological consciousness
for the actual behavior

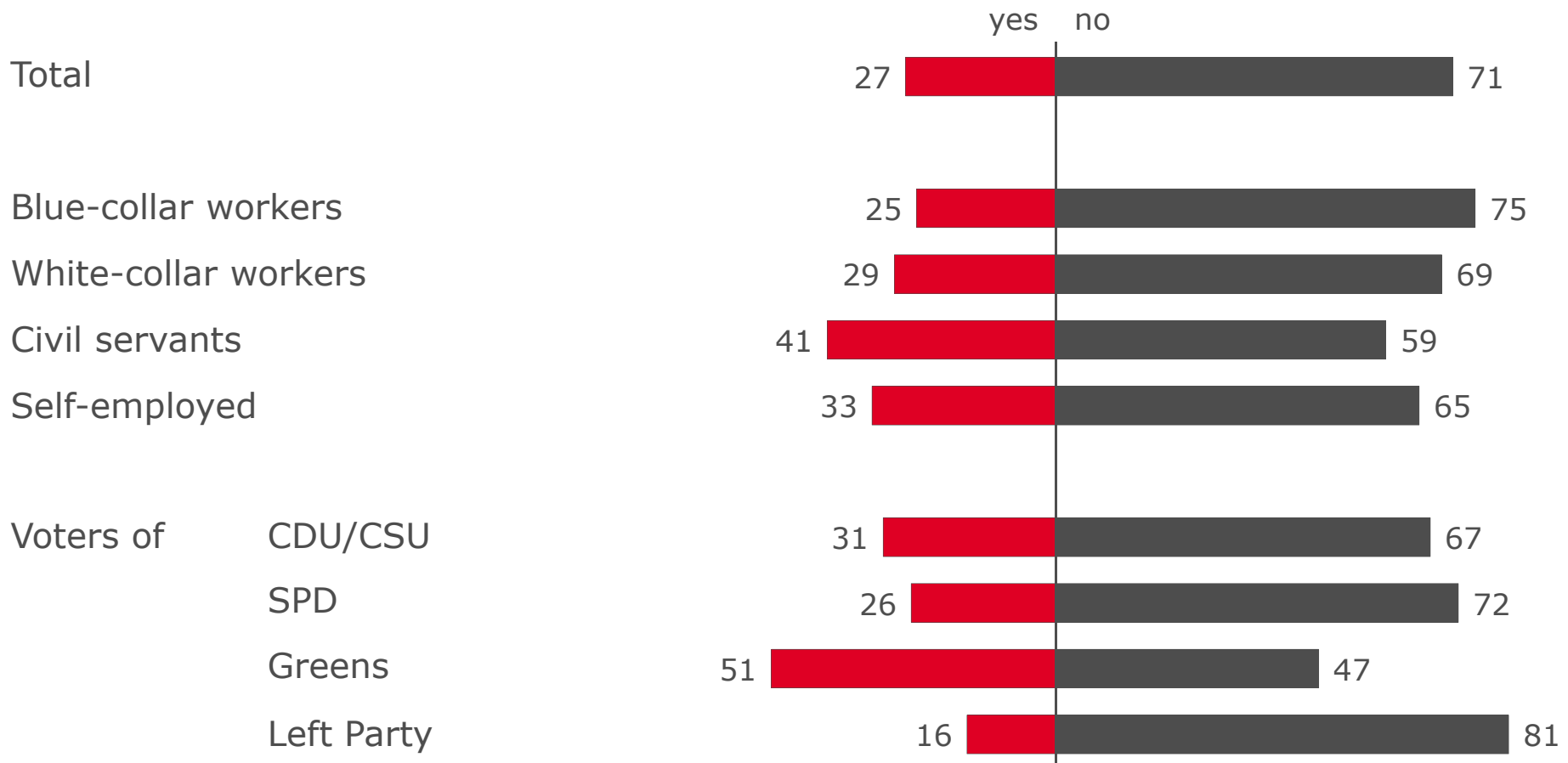


Acceptance of higher energy prices?

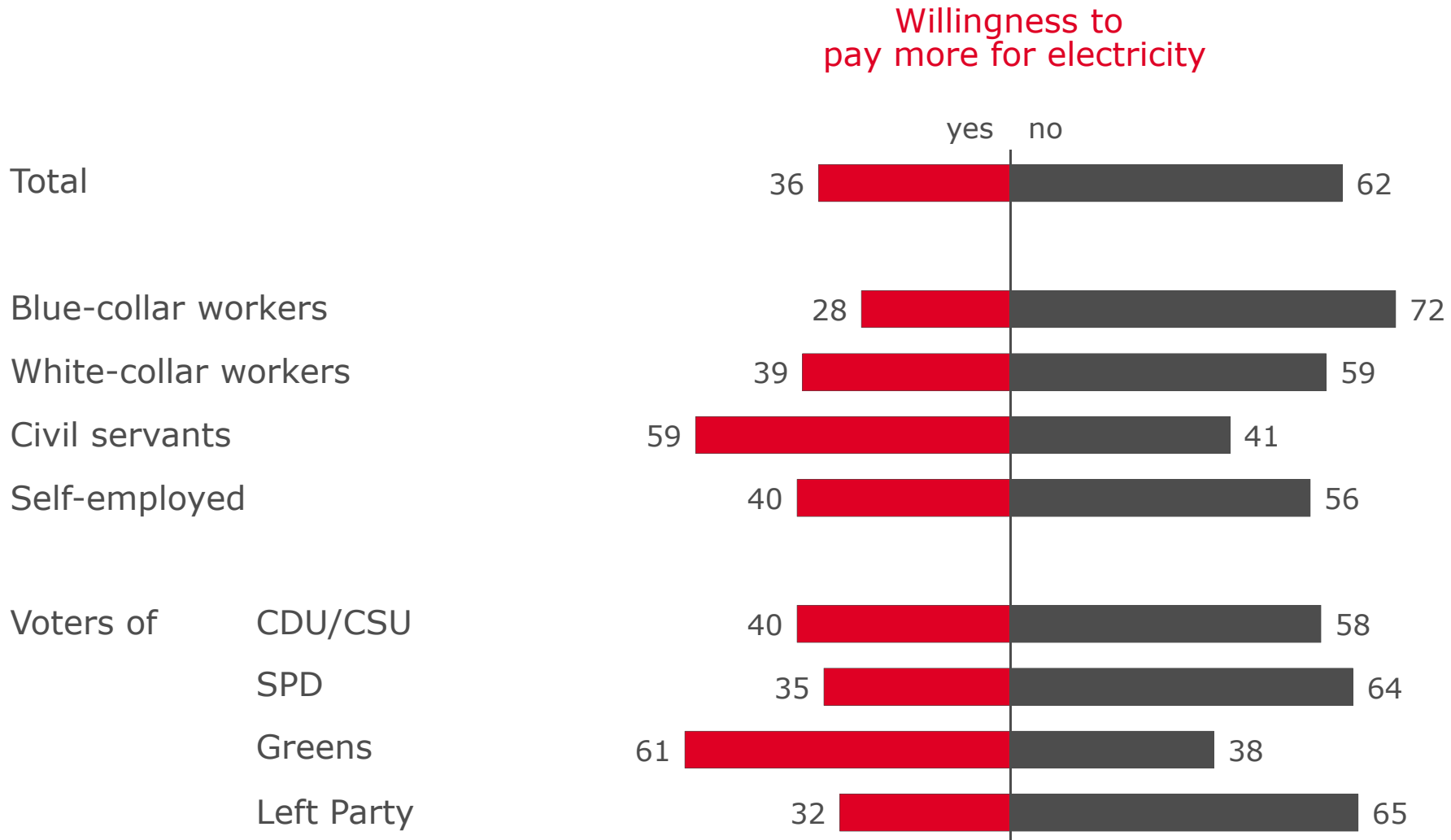


Citizens' opinions on higher electricity prices

Rising electricity prices due to the energy shift are acceptable



Acceptance of higher electricity prices



3. Further implications of the energy transition: Grid expansions and expansion of on-shore wind energy



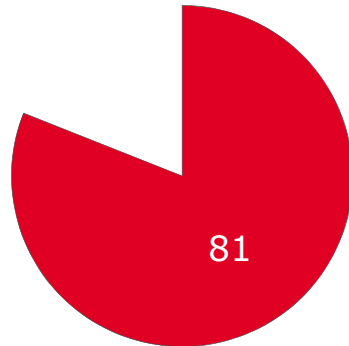
General acceptance of grid expansions



General acceptance of grid expansions *)

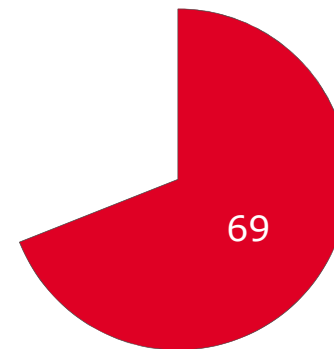
A fast grid expansion is necessary
for a successful energy shift

Germany

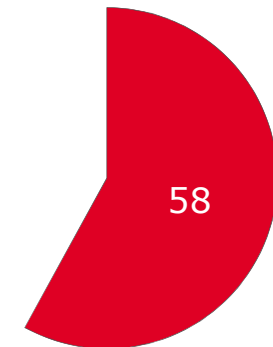


Acceptance of the construction
of high capacity power lines

Germany



Bavaria



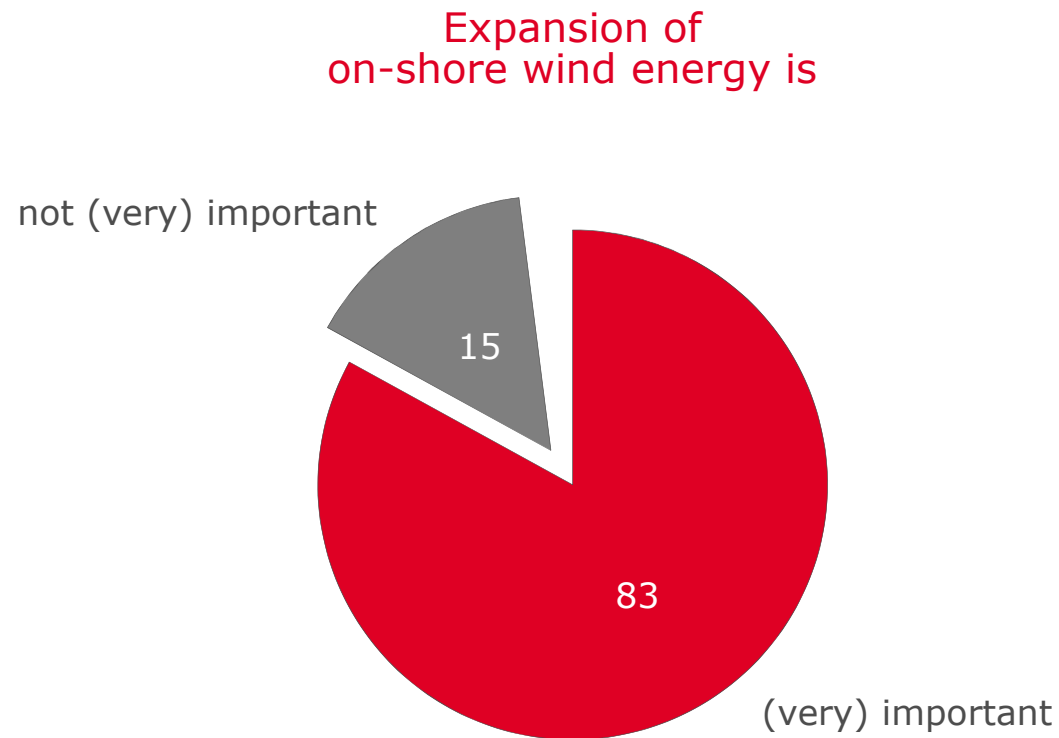
*) forsa-survey for TenneT, 2014



General acceptance of on-shore wind energy



General importance - wind energy expansion *)



*) forsa-survey for "Fachagentur Windenergie an Land", 2017



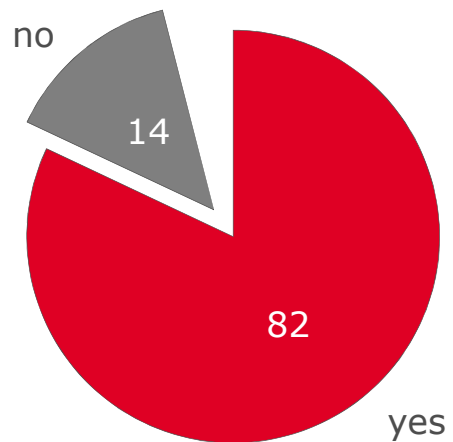
Acceptance of wind energy in residential environment *)

*) forsa-survey for "Fachagentur Windenergie an Land", 2017



Acceptance of wind energy in residential environment *)

Acceptance of wind turbines in their residential environment **)

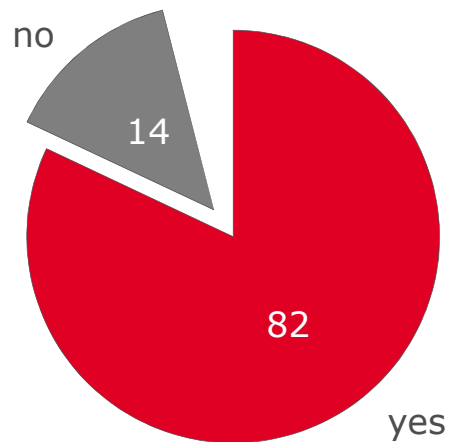


*) forsa-survey for "Fachagentur Windenergie an Land", 2017

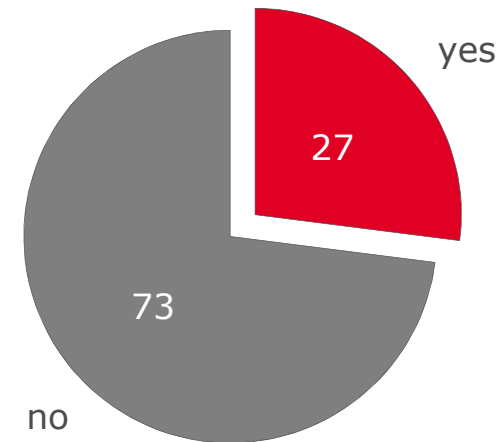
**) Base: People living in the proximity of wind turbines

Acceptance of wind energy in residential environment *)

Acceptance of wind turbines in their residential environment **)



Reservations against wind turbines in their residential environment ***)



*) forsa-survey for "Fachagentur Windenergie an Land", 2017

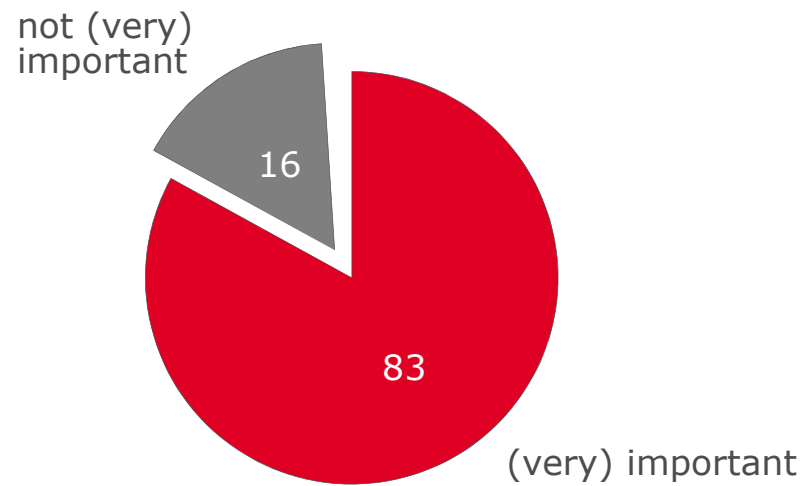
**) Base: People living in the proximity of wind turbines

***) Base: People not living in the proximity of wind turbines



Expansion of on-shore wind energy

Baden-Württemberg *)

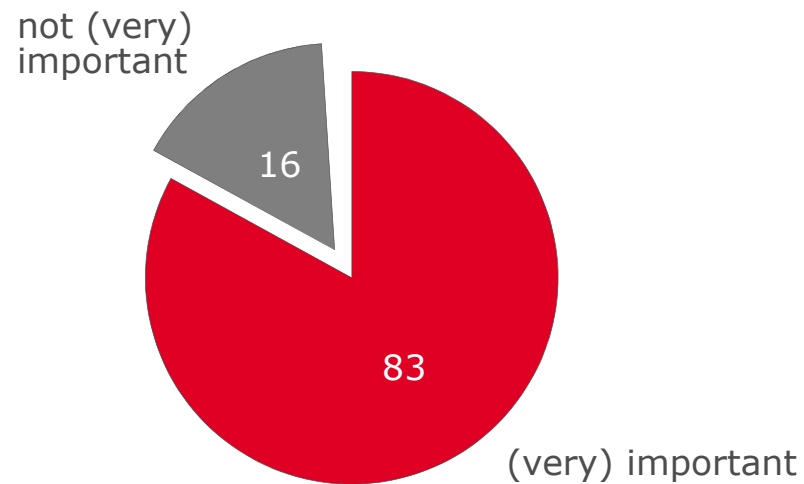


*) forsa-survey for EnBW, 2017

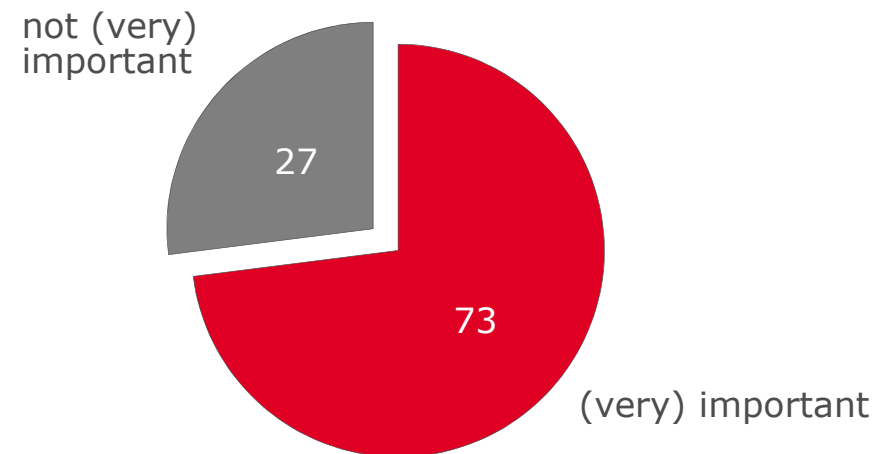


Expansion of on-shore wind energy

Baden-Württemberg *)



Thüringen **)

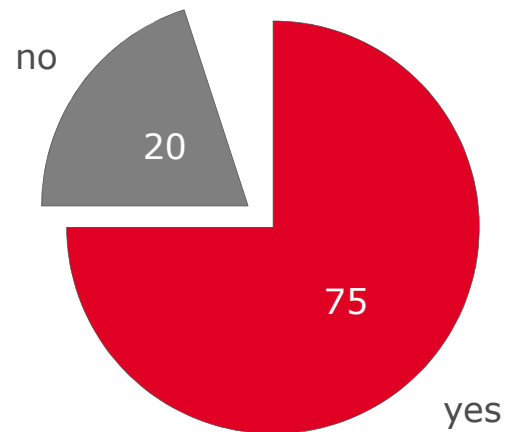


*) forsa-survey for EnBW, 2017

**) forsa-survey for EnBW, 2018

Acceptance of wind energy in residential environment

Baden-Württemberg *)



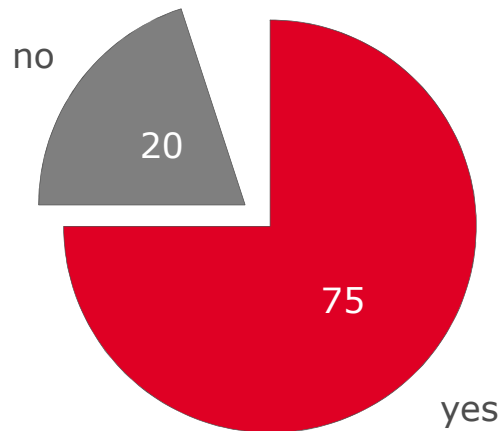
*) forsa-survey for EnBW, 2017

Base: People living in the proximity of wind turbines

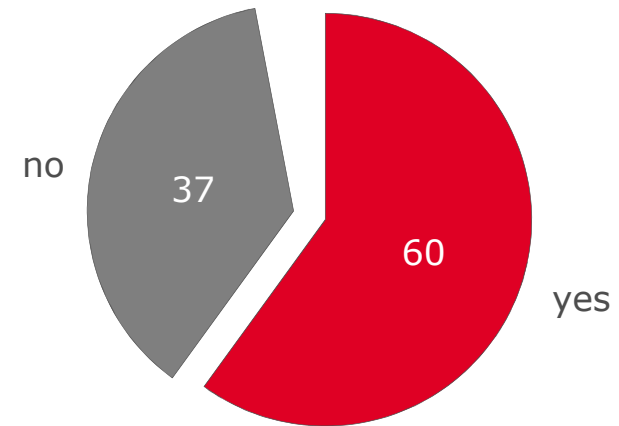


Acceptance of wind energy in residential environment

Baden-Württemberg *)



Thüringen **)



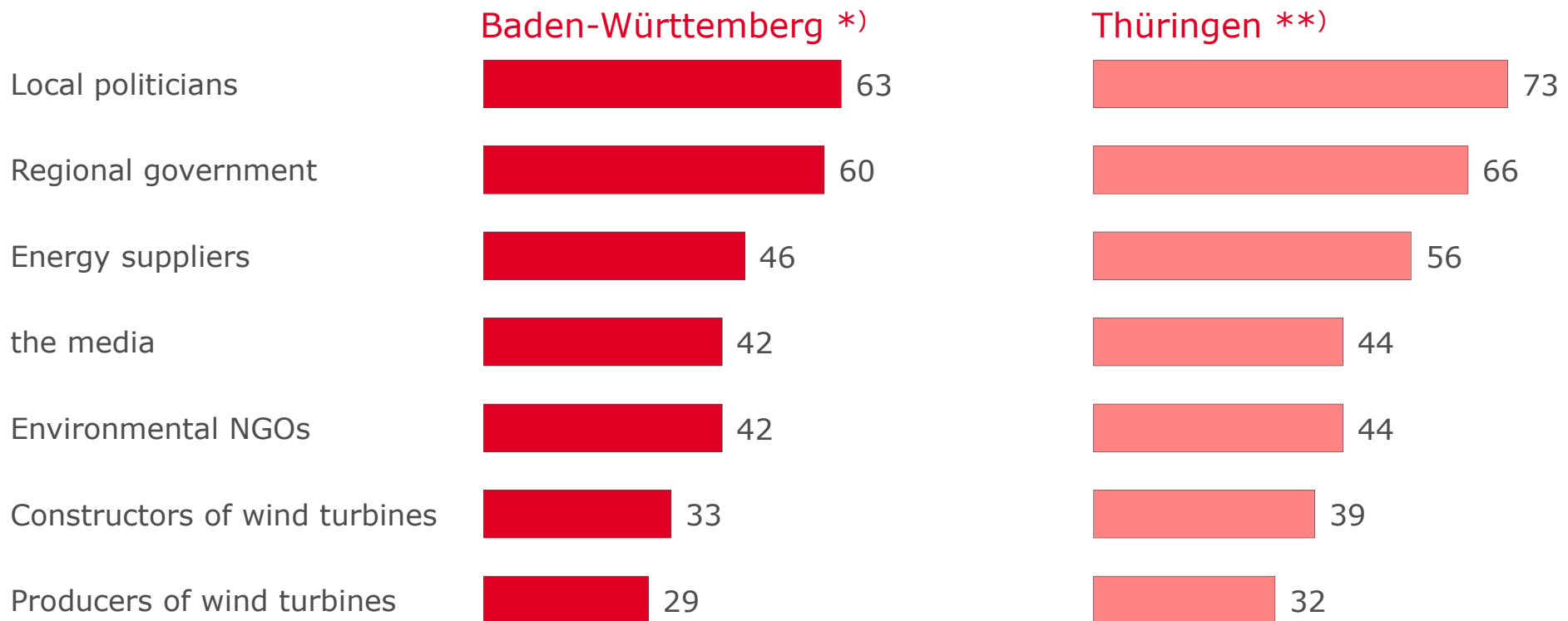
*) forsa-survey for EnBW, 2017

***) forsa-survey for EnBW, 2018

Base: People living in the proximity of wind turbines



Who is responsible for actively informing the citizens about regional expansion of wind energy?



*) forsa-survey for EnBW, 2017

**) forsa-survey for EnBW, 2018

Base: People living in the proximity of wind turbines



Concluding remarks

- Energy issues are not among the most important concerns of Germans today
- However: Steady awareness of coverage on energy supply
- Energy supply: Costs and security matter much more than environmental aspects
- Growing skepticism about the feasibility of the energy transition
- Low acceptance of higher energy prices
- General acceptance of grid expansions and on-shore wind energy



Thank you!

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