



Media Release, December 1, 2022

12th Consumer Barometer of Renewable Energy: **The energy crisis electrifies Swiss consumers**

The Russian invasion of Ukraine has sparked a wave of awareness among Swiss consumers. The latest edition of the Consumer Barometer of Renewable Energy shows that interest in solar photovoltaics (PV) and heat pumps has reached unprecedented levels, and in combination with electric vehicles and battery storage, those technologies have emerged as a popular way to decrease Switzerland's dependence on energy imports. When it comes to policy measures to mitigate the energy crisis, recent decisions by the Swiss parliament to improve the conditions for hydro, wind, and solar power are supported by a majority of the population. The study was conducted by the University of St.Gallen in collaboration with Raiffeisen Switzerland, AMAG, and EnergieSchweiz.

Catchy headlines like “heat pumps are the new toilet paper” have been used to compare consumer reactions in light of the current energy crisis to the early days of the Covid-19 pandemic. As the 12th edition of the University of St.Gallen's annual Consumer Barometer of Renewable Energy shows, Switzerland is no exception in this regard.

“Early Electrifiers” on the rise

In 2021, the Barometer identified an emerging segment of “Early Electrifiers,” households interested in combining a range of clean energy technologies. This trend has been accentuated in light of the war in Ukraine and the subsequent energy crisis. The list of popular technologies is led by solar photovoltaics. 38% of homeowners say they want to invest in solar PV in the next three years, 16% of which wish to do so in the next 12 months. 17% of all respondents say they want to buy an electric car in the next three years. The main drivers to invest in solar PV, heat pumps, and electric cars are climate protection and a desire for independence. The latter has emerged as the most important driver for adoption of battery storage. 87% of “Early Electrifiers” state that most people in their social circles have a positive attitude towards these technologies, underscoring the importance of peer effects in adoption decisions.

Shift from plug-in hybrids to battery electric vehicles

When it comes to electric mobility, the Barometer observed a shift from plug-in hybrids to pure battery electric vehicles. 70% of respondents who have recently adopted an EV are driving a battery electric vehicle. Hydrogen cars have a marginal market share. Among those owning more than one car, three quarters of respondents stated that they use their electric car as the main vehicle. 74% of EV owners have their own charging station at home, underlining the high importance of home charging. Among tenants, barriers to installing a charging station for their electric car is still perceived to be a barrier to EV adoption.

Emotions: Solar enthusiasm and some EV anger

Emotions play a key role in the decision to acquire energy technologies at home. In the case of solar PV, positive emotions prevail. 45% of respondents feel curiosity when they think of solar power,

whereas 23% express joy. Similar patterns, although to a lesser extent, exist for heat pumps and electric vehicles. On the other hand, a small group of respondents expresses negative emotions about EVs, with 11% saying they perceive fear, and 12% being angry at electric cars.

Overcoming the energy crisis by accelerating the transition

Since 2015, respondents have been asked to assess the progress of the Swiss energy transition. This year, similar to pre-crisis conditions, a stable share of 63% of respondents would like to see an acceleration of the energy transition. On the other hand, the share of respondents who are unsure about the right way forward has increased, with 19% stating that they think the energy transition is moving too fast. When it comes to assessing the root causes of the current crisis, there is widespread agreement that the top three factors are Russia's war against Ukraine, Switzerland's dependence on energy imports, and a lack of progress in expanding domestic renewable power generation. Accordingly, the top three measures finding the highest levels of support to address the current challenges are accelerated planning procedures for hydro and wind power, additional financial support for deploying renewables, and higher tax incentives for improving the energy efficiency of buildings. In contrast, construction of new gas-fired power plants is the least preferred measure, supported by only 17% of respondents.

The detailed study results, illustrated infographics and further information can be downloaded at: <https://kuba.iwoe.unisg.ch>

Contact for further information:

Prof. Dr. Rolf Wüstenhagen, Chair of Management of Renewable Energies, Institute for Economy and the Environment (IWÖ-HSG), University of St.Gallen, Müller-Friedberg-Strasse 6/8, CH-9000 St.Gallen.

Mobile: +41 76 306 43 13, E-Mail: rolf.wuestenhagen@unisg.ch

Web: <https://iwoe.unisg.ch/research-rem/>

Contacts for queries to the survey partners:

Pius Schärli, Raiffeisen Switzerland, Market Communications, pius.schaerli@raiffeisen.ch

Raphael Zürcher, Swiss Federal Office of Energy, EnergieSchweiz, raphael.zuercher@bfe.admin.ch

Martin Everts, AMAG, Energy & Mobility, martin.everts@amag.ch

Consumer Barometer of Renewable Energy

Since 2011, the Consumer Barometer of Renewable Energy has established itself as one of the most comprehensive annual surveys of the Swiss population's preferences on energy and climate issues. The Chair of Management of Renewable Energies at the University of St.Gallen (HSG) is taking the scientific lead in the project. Raiffeisen Switzerland, EnergieSchweiz, and AMAG are financing the survey and supporting the development of the questionnaire. The data for the 12th Consumer Barometer of Renewable Energy was collected from 24.10. to 3.11.2022. The main sample (N=1'051) is representative of the population in terms of age, gender, region, level of education, and party preferences. For further investigation of the target group of "early electrifiers", we surveyed an additional group (N=275) of consumers who own an electric car and/or a solar PV system or have the intention to purchase these technologies within the next two years.

<https://kuba.iwoe.unisg.ch>