

## OVERVIEW

The Future of Rural Energy in Europe (FREE) initiative was created in 2010 to bring attention to the energy needs of rural citizens, and to add new perspectives to the EU policy debates. The EU aims to be climate-neutral by 2050, an objective at the heart of the European Green Deal and in line with commitments under the Paris Agreement. The challenge is to make sure this works for the **130 million people living in rural areas across Europe**.

Over 40 million European households in rural areas are not connected to the gas grid. **These communities matter and need to be understood**. To deliver a just energy transition, policy should reflect conditions in rural areas. However, data is often difficult to find. In the context of the European Commission's Long-Term Vision for Rural Areas, this Rural Barometer survey aims to **give a voice to rural citizens and businesses**, analysing their expectations on EU policies affecting them.

## KEY FINDINGS

### RURAL PERCEPTIONS OF EU INITIATIVES



**30% of respondents have heard of The European Green Deal** and just under **1 in 5 (19%) have heard of The Renovation Wave**.

EU Green Deal actions supported by over three quarters of respondents are; investing in environmentally friendly technologies (78%), subsidising renovations (78%) and introducing cleaner forms of transport (77%).

Overall, **64% support the ambitions of the European Green Deal** and **three in five (59%) think The European Union are most responsible for addressing climate change**, closely followed by national government (58%) and companies (50%).

### RURAL SATISFACTION WITH HEATING OPTIONS



Three quarters of residents surveyed are satisfied with the performance of their home heating system as it meets their requirements (37%), is easy to use (20%) and is reliable (18%). 9% of residents are dissatisfied with the performance of their home heating system due to cost (41%), it not meeting requirements (23%) and it **not being sustainable (12%)**.

Of the business decision makers surveyed 78% are satisfied with the performance of the heating system in their place of work as it meets their requirements (28%), is reliable (24%) and is easy to use (20%). 7% are dissatisfied with the performance of their work heating system due to cost (27%), it not meeting their heating requirements (20%) and it being unreliable (19%). The most important factors for business heating systems are reliability (85%), cost (83%) and **sustainability (74%)**.



## INCENTIVES FOR CHANGE

The most important factors when choosing a new heating system are; cost of monthly bills (19%), cost of installation (15%) and **environmental friendliness (12%)**. Lower monthly bills (68%), government subsidies (63%) and knowing the new system will last a long time (62%) are the factors most likely to influence upgrading the heating system to be more environmentally friendly.

Potential energy savings (49%), the current heating system being too old to function (46%) and positive financial stimuli (46%) are the biggest motivators to change the current heating system. In terms of financial drivers, positive financial stimuli (56%) are more likely to influence changing the current heating system compared to negative financial consequences (25%).

On average, in terms of an up-front cost, residents would be willing to pay €3,480 to change their home heating system and business decision makers would be willing to pay €4,200 to change the heating system in their place of work.

Around 7 in 10 respondents agree that homeowners (76%) and businesses (70%) should be entitled to incentives to install more environmentally friendly heating solutions. **70% also agree that more focus should be put on helping rural regions to achieve their climate change ambitions.**

## LIVING IN RURAL AREAS



Over three in five respondents agree that businesses (64%) and people (61%) in rural areas should get more financial support. 61% also agree that those who live/work in rural areas are often the last to benefit from investments in infrastructure/facilities and **over half (53%) agree that as someone living/working in a rural area they feel that their views are often unrepresented by the local/national government/EU.**

Limited transport options (53%), fewer amenities (52%) and fewer professional opportunities (42%) are seen as the biggest challenges of living/working in a rural area. Being closer to nature (66%), less noise (64%) and less pollution (59%) are the main advantages. Natural gas boilers (28%), wood burners (18%) and oil boilers (18%) are the most commonly used heating systems in rural homes.

## METHODOLOGY

Savanta ComRes interviewed 8,000 residents and 700 business decision makers from the NUTS3 rural regions of Belgium, Denmark, France, Germany, Ireland, Italy, Poland, Spain and Sweden between 25<sup>th</sup> June and 6<sup>th</sup> July 2021. This research was conducted via online survey. If you are interested in finding more about the research the report can be found [HERE](#) and the data tables can be found [HERE](#).



The Future of Rural Energy in Europe (FREE) initiative was created by SHV Energy in 2010 to promote the use of sustainable energy within rural communities. FREE is supported by a variety of stakeholder groups, together giving a voice to all those who believe that rural energy needs are important and aiming to add new perspectives to the EU's energy and climate debate. Identifying untapped potential in Europe's rural areas to decarbonise and improve air quality in a cost-effective manner. Filling in rural energy data gaps. Engaging and supporting rural communities is essential if government energy, climate and environment policies are to be realised.



Savanta ComRes (formerly ComRes) is an established and trusted provider of opinion research, recognised for our specialism in research to inform communications, reputation and public policy. Savanta won the MRS Operational Excellence award for online data collection and was short-listed for the MRS award for Best Breakthrough agency.