

Consumer survey on the acceptance of carbon labels for biofuels in the UK

Report elaborated in the framework of the Carbon Labelling Project

Deliverable D17

Intelligent Energy – Europe (IEE)



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1. Introduction

As part of the EU Carbon Labelling Project, and in line with the UK government Renewable Transport Fuel Obligation (RTFO) and the EU Renewable Energy Directive (RED), the HGCA tasked The Oxford Partnership to conduct research into UK consumer behaviour and attitudes towards environmental issues and specifically their perception and knowledge of biofuels, their attitudes toward a CO₂ label, and their likely future actions in relation to biofuel.

The research was carried out in the UK during February and March 2008 (prior to the introduction of the RTFO on April 15th 2008).

2. Research objectives

The main objective was to assess the impact of CO₂/efficiency labels on increasing awareness and interest in the use of biodiesel and/or efficiency improvements for lubricants and fuels.

The specific tasks involved with delivering against these objectives were as follows:

- An informal customer survey (qualitative research) to determine the effect of CO₂ labels on purchasing decisions of fuel and lubricant products. The results from this survey to be used to define the scope, protocols and design for the quantitative phase
- This research will identify the information and government or industry endorsement needed to make consumers believe that the fuel products are both beneficial and safe for their vehicle
- The information delivered from this research will be used to assess the effectiveness of carbon labelling programmes and to define how the programmes can be modified to improve consumer interest

3. Methodology

The research methodology involved a two phase approach:

- Phase One: Focus groups to reveal the key issues and attitudes of consumers surrounding biofuels
- Phase Two: Quantitative research, in the form of an omnibus survey, to establish robust data on certain key issues surrounding biofuels

All research was conducted according to the codes of conduct laid down by the Market Research Society and the Association for Qualitative Research.

3.1. Phase One – Qualitative Research

Focus groups were conducted to reveal the key issues and attitudes of consumers on environmental issues in general and specifically on biofuels and efficiency labels.

Eight focus groups were held (4x2) in Newcastle, Birmingham, Watford and Bristol, with the group make up covering age – younger versus older, gender, and attitude to energy saving – early adopter versus laggard.

Overall Conclusions

- o There is an inherent scepticism regarding media reports about environmental issues and indeed the seriousness of the global position. Younger respondents in the main believing the problem will not become acute for several generations, if at all.
- o There was no evidence that the recent spate of negative publicity on biofuel has had any resonance with consumers. Perhaps it would have, had respondents realised how imminent the introduction of biofuels were at the pump (RTFO).
- o There is a tendency for some consumers to believe that the comparatively little they can achieve environmentally as individuals, is pointless when countries such as the USA will not commit to Kyoto.
- o Consumers want to help the environment but often feel that it is not made easy enough for them. They ideally want help both in terms of greater commitment from government and their local council, who many believe are just not serious enough about it. They also feel there should be financial incentives for being 'green'.
- o There is perhaps too much stick and not enough carrot. This is particularly felt to be true in London with the congestion and now emission charges.
- o There seems to be a pool of ignorance into which all environmental and ethical issues get sucked, all hard if not impossible to solve. This can foster the feeling it is 'someone else's problem'. Logically it should be government, as it is accountable and should be responsible, but it has little trust among respondents to be totally impartial.
- o Overall, encouraging people to be environmentally responsible is a matter of winning both hearts and minds – this research suggests there is still some way to go to achieve this goal.

Current behaviour

- o There is a hierarchy of consumers' environmental behaviour depending on their level of commitment to the environmental cause – their 'green mindset'
- o It starts with what they are coerced to do, such as recycling of household rubbish and the associated fines for misuse; goes on to things that will save them money such as low emission light bulbs and turning electrical appliances off and not to standby, and finishes with things that take personal sacrifice like walking not driving, carbon offsetting etc.

- o Although one would think the 'leaders' would be some way up this environmental ladder with the 'laggards' still on the first few rungs, from this research the distance between them is not substantial

Understanding the issues

- o When asked to define certain environmental terms such as sustainability, biodiversity, carbon footprint, renewable energy etc. the younger respondents had the most consistent understanding. Older male respondents were also knowledgeable but older women, even if they were committed environmentalists, had a fairly poor knowledge of the terms. There is only a thin veneer of knowledge
- o The carbon cycle is simply not understood by the majority. When it is understood it tends to be amongst older males
- o There is some superficial knowledge of greenhouse gases, but little knowledge of how they affect the planet

Awareness and knowledge of biofuels

- o There is a high awareness of the term biofuel but, apart from a knowledgeable few, the majority know little beyond this
- o There is little to no connection between biofuels and the carbon cycle. Indeed most were unaware of the carbon cycle
- o Only a few, usually male, respondents could claim any knowledge of the sources of biofuel or how it was made
- o Very little is known about the different feedstocks for biofuels and therefore respondents showed little perception of the deforestation or loss of wildlife issues
- o Not one respondent was aware of the Renewable Transport Fuel Obligation (RTFO) and only one that there would be a blend of biofuel in petrol and diesel from April 2008
- o When informed of the RTFO, initial reactions from respondents were concern as to what extent biofuel would affect their car, both in relation to performance and engine damage. There was also an inherent belief that biofuels would cost more than fossil fuel
- o Several groups queried why the government hadn't made more of the introduction of biofuels, seeing it as a good initiative
- o The food v fuel question causes confusion and there is no conclusion as to how this would or could be resolved – it is felt to be a government problem
- o When discussed, the general feeling was that the industry should use British crops where possible for biofuels. This would help British farmers and help to make Britain more self sufficient for transport fuel
- o The more ethically minded respondents also saw a role for developing countries in growing biofuel feedstock, providing it wasn't harming their own environment

Pricing and likely behaviour

- There were split feelings on cost, some believing that in general, biofuels should be cheaper to produce and therefore cheaper at the pump, others taking the cynical view that they would be more expensive
- There were quite strong views that the government takes too much in tax from fuel and that with the 5% blend there was an opportunity to take less and pass that saving on to the consumer
- Some of the more affluent consumers with greater environmental conviction, would be prepared to pay a 'few pence' more for biofuel if there was a choice, particularly if it was made from British crops
- However, crop provenance is irrelevant to what the majority are willing to pay

Spokespersons

- Respondents are very sceptical about organisations or individuals who might be the best spokesperson or body for biofuel, believing they all have an axe to grind and are consequently not objective.
- Government is considered appropriate because it is accountable, but is not trusted.
- Scientists are considered to be trustworthy but often derailed by conflicting research.
- NGO's have their hearts in the right place but are too evangelical and one sided.
- People's champions or media personalities are most believable and considered to be the most objective.

Efficiency labels

- All respondents were aware of efficiency labels on white goods with most using them as part of their decision making process after their prime driver of price. However the labels need to be both simple and universal to be successful.
- It was commonly agreed that having efficiency labels was better than not having them , but they have to cut through manufacturer's hype and expose the true benefits
- Once explained, the idea of an efficiency label for biofuel was seen as helpful so long as it explained the benefits over fossil fuels, in a clear, concise and simple to understand way. However, the label was only useful where there is a choice, if no choice exists then the need for a label disappears.

The CO2 Star logo (Figure 1):

- Majority of consumers were indifferent to the label design
- The drop reminded all groups of the British Gas flame logo, which did not have a positive association (comment would only be understood by UK consumers)
- Colours were perceived as OK

- o Putting 'CO₂' in the name was felt by some to be wrong, drawing attention to the wrong thing
- o The drop could possibly become a CO₂ friendly icon – like the kitemark symbol for quality and integrity
- o The possibility of 'add-ons' to the logo was raised, for example: % carbon reduction, sustainability criteria, quality aspects (ISO, DIN), % efficiency improvements, source / origin, web-site for further information. However, apart from specific items, the overwhelming request is for simple to understand, tangible comparisons.
- o The possibility of developing the logo into a general quality marque for CO₂ efficient products was also raised by respondents.
- o Efficiency labels on other, transport-related items was thought to be a good idea, provided they were items where choice was a key market factor, such as cars and tyres.
- o The information on the labels must be simple to understand and preferably with tangible comparisons
- o The response from consumers was to keep the message simple. Thus the most meaningful element of current efficiency labels was seen as the easy to read A to G ratings, the rest being too small to read or too technical to follow.



Figure 1: CO₂Star logo developed for the Carbon Labelling project

Discussions identified four requirements to make a successful label:

- o **Eye catching** – well designed and distinctive
- o **Simple** – lodging in peoples minds quickly
- o **Relevant** – improves the likelihood of changing behaviour
- o **Meaningful** – information I can remember and justify

3.2. Phase Two – Quantitative Research

- Quantitative research, in the form of an omnibus survey, was conducted to obtain robust data on key issues concerning biofuels
- 586 car drivers were questioned
- The sample profile of participants in terms of gender, age, social grade and geographical area is shown in Figure 2

Overall

- Protecting the environment is important to all groups (88% agreeing) but is more important to females, older age groups and those in the higher social grades
- The most important influencing factors when buying fuel for cars is that it is safe for the car, followed by its efficiency or mpg; the fact that it is environmentally friendly and finally the car's performance

Biofuels

- Overall awareness of biofuels is high at 84%, but decreases down through the social grades – 87% for AB's and 76% for DE's (see Figure 3)
- The most influential factors in buying biofuel are that it's safe for your car followed by the fact that it's better for the environment; it is sustainable; it's a secure fuel supply; it helps UK farmers; it improves your car's performance; it helps third world farmers and finally that it uses set-aside land (see Figure 4)
 - Of these factors, the one that has least discrepancy across the groupings is 'better for the environment', followed by 'safe for cars', and the one that splits opinion most is 'helps third world farmers', closely followed by 'uses set-aside land' and 'improves car performance'
 - The over 65's are the least likely age group to be influenced
 - The DE social group is the group least likely to be influenced
- 35% of respondents would only be willing to pay the same for biofuel as they pay now for petrol. 31% would only pay less and 21% more (see Figure 5). Within the age groups, the youngest age group are willing to pay the most, and within the social grades the ABC1's are more likely to pay the most
- The majority of people (72%) do not have any concerns with biofuel. Amongst those that do, more likely to be older, in the higher social groups and in the south, the main concern is that the feedstock for biofuels could take land otherwise used for growing crops for food (Figure 6)
- Older age groups and those in the higher social grades are more likely to have seen or heard something about biofuel in the media – 66% for the over 65's v 29% for 17 to 24 year olds. In the main the coverage is seen as positive (44%) or neutral (37%) with the youngest age group seeing it as particularly positive

- o The most trusted organisation or people to offer impartial advice on biofuel would be an independent consumer organisation (31%) followed by an environmental organisation (17%). The least trusted is the EU (2%), followed by fuel companies (7%) (Figure 7).
- o Overall, industry (38%) is seen as the most responsible sector for causing pollution, followed by road transport (29%), but for the youngest age group it is road transport (37%) that is seen as the worst polluting sector.
- o Among the statements shown, the strongest agreement was for biofuel sourced in this country thus helping British farmers (81% agreement).

Observations

- o The results show quite a split of opinion between groups. In general, males, the younger age groups and the lower social grades are the most indifferent to the issues and probably most disconnected, with their opposites - females, older groups and the higher social grades - the most concerned
- o This suggests that a different language and a different approach is needed when talking to different consumer groups

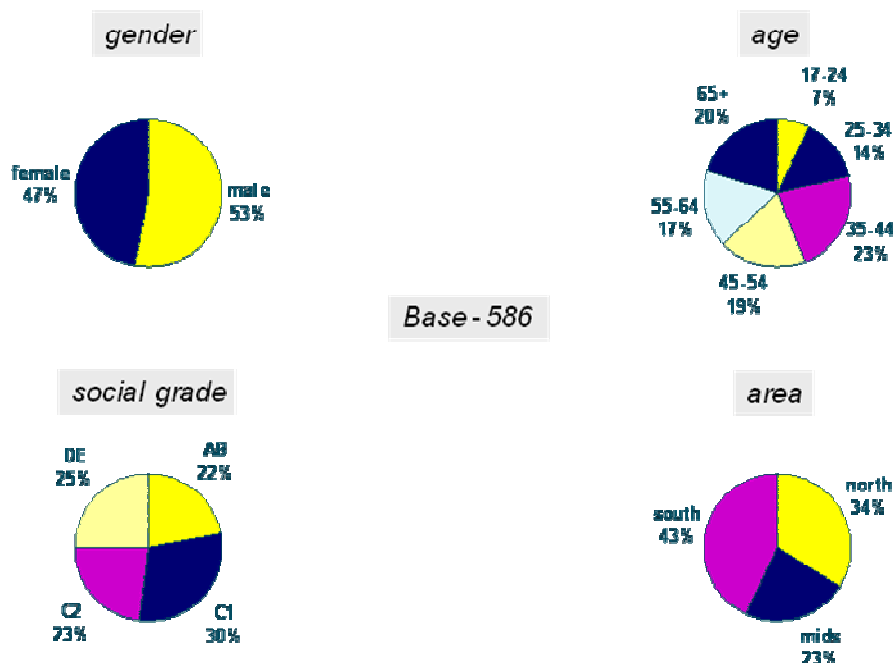


Figure 2: Sample profile – car owners

Q – Have you ever heard of biofuels?

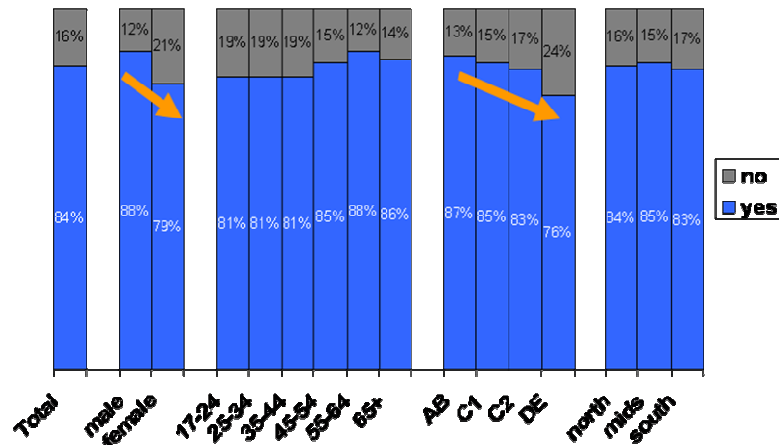


Figure 3: Awareness of biofuels

Q – How likely are these factors to influence your decision to buy biofuel for your car?

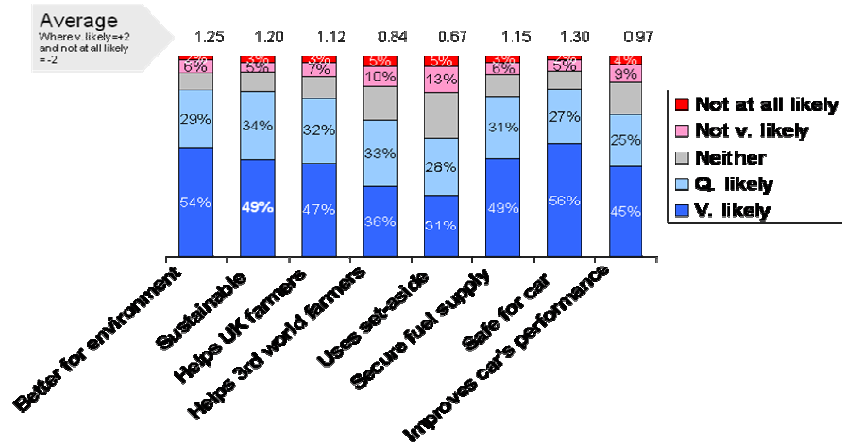


Figure 4: biofuel purchasing influences

Q – If a litre of unleaded petrol for your car cost £1.05, what would you be prepared to pay for a litre of biofuel?

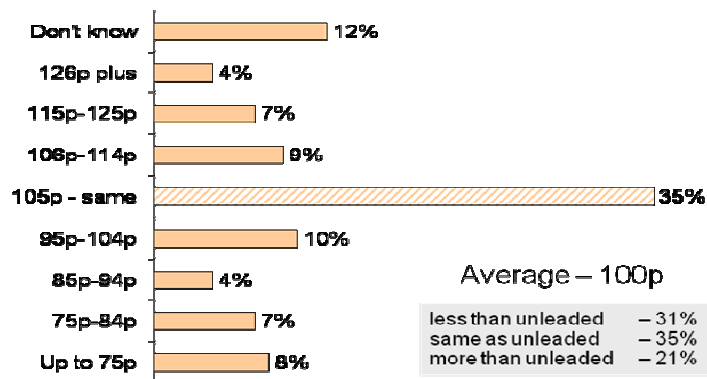


Figure 5: Amount prepared to pay for biofuel

Q – What concerns do you have? Base – Those with concerns

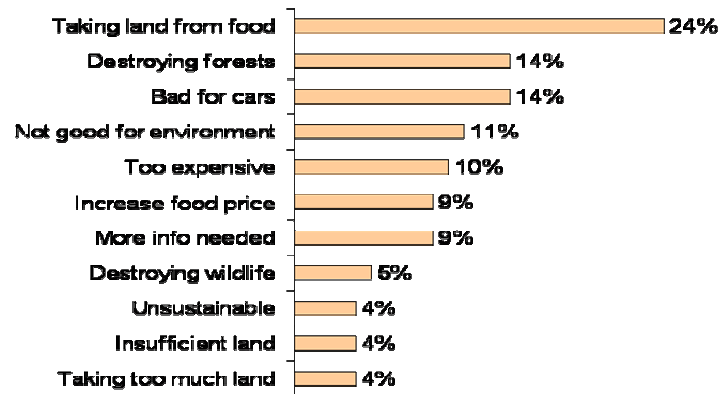


Figure 6: Concerns about biofuel

Q – Which of the following organisations would you trust the most to give you impartial advice on biofuel?

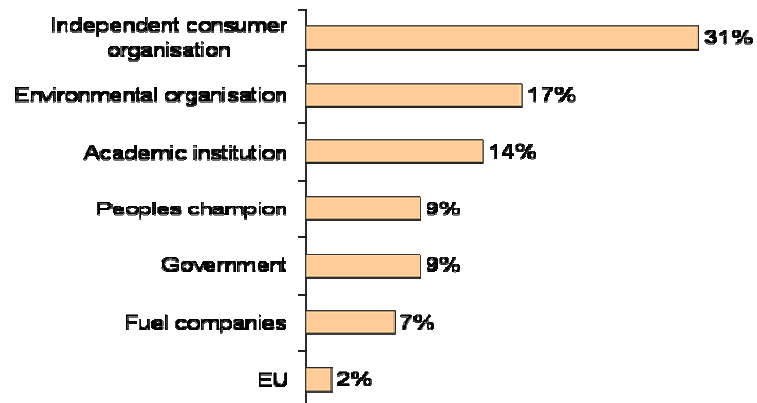


Figure 7: organisation or person most trusted

4. Conclusion

General Environmental Issues

Because in today's world it is possible to know and care about almost everything, consumers are caring less about almost anything that is beyond their household, friends and family, the so-called "my world". This attitude seems to be reinforced by the research results from this project and suggests that, even more than ever, it is the hearts and minds of individuals that must be won over, to marshal support and motivate changes in behaviour.

Environmental issues are complex and difficult to understand and a pool of ignorance develops leading to consumer feelings that the problems are hard, if not impossible to solve. This tends to result in the feeling that it is "someone else's problem". Logically it should be governments leading the debate but it has little trust amongst respondents. To achieve maximum impact the most believable information or advice should come from an independent consumer organisation or respected individual.

In terms of how environmental issues affect individual behaviour and lifestyle, people will only change their way of life so much, before they question the need, because mostly they are self-centred. Personal cost is a major consideration for most people. Those with strong convictions, although in the minority, are willing to pay more, whilst those with lesser convictions are not.

Consumers in general question how seriously people are taking environmental issues. Government, local government, workplace, media and peer pressure all put pressure on individual behaviour. However, there is a feeling that if the issues were that serious, then why aren't the US and China putting more effort into solving the problems. There is a general feeling that more pressure should be put on consumers and more legislation introduced to change behaviour. Consumers also want to know what the consequences of doing nothing are and whether they as individuals can make a difference or whether they are wasting their time and effort.

Biofuels

It is evident that biofuels is not top of the environmental worry list of consumers. Their main concerns lie elsewhere e.g. increasingly extreme weather conditions, recycling, energy conservation, and pollution. Overall there seems to be a disconnect between biofuels and environmental issues, caused to a large degree by a lack of understanding.

There was virtually a complete lack of awareness of the introduction of biofuels at the pumps in April 2008. This led to a feeling of suspicion among many consumers as to why they have not heard of biofuels and the introduction of the RTFO before. They also questioned why the blend of biofuel was not greater if they are so good. Probably more importantly was the negative uncertainty surrounding biofuels. Thus would it cause damage to the car or reduce engine performance coupled with an anticipated cost increase.

Sustainability or the food versus fuel debate had not been considered by the majority, but when it was discussed it was thought to be a complex area and one that government should resolve. Ultimately however consumers saw only one winner, namely food. The majority of consumers would prefer the biofuels to be sourced within the UK (providing it did not impact


on food production), to help UK farmers and to help secure the fuel supply. However the majority were not willing to pay a premium for biofuel no matter what the provenance.

Overall beneath a thin veneer of superficial understanding lies a high degree of ignorance of the key issues. In order to connect with the public there needs to be a widespread communications strategy, involving all of the marketing mix, with different messages targeted at different segments of society.

Efficiency Labels

In general, efficiency labels were considered to be a useful aid to the purchasing decision, but only where there is a choice. Where there is a choice such as white goods, houses and potentially other items specifically cars and tyres, then efficiency labels are considered to be a useful, unbiased purchasing aid. If there is no choice of products e.g. mandatory inclusion of biofuel in road transport fuel, then the need for a label is secondary and only serves to provide a warm feeling or self justification for purchase. Consumers identified four key factors necessary to make a successful logo: eye-catching, simple, relevant and meaningful. The CO₂Star logo did not perform well against these criteria.

Annex 1: HGCA - CO₂ efficiency labels – discussion guide



HGCA - CO₂ efficiency labels – discussion guide

Introduction

Aim and purpose of the group

Duration & Timings

Moderator's role

Their role – speak out – as honest and objective as possible – no disclosure of information

Using recorder

Only speak one at a time

Warm up – 5 mins

- We see, read and hear a lot about the state of our environment and the need to each do our bit for it, but just how bad do you think it is? How imminent is the problem?

Current household behaviour – 10 mins

- How energy conscious would you say your household is on a scale of 1 to 6?
- What do you think this figure will be in say 5 years time?
 - What will have changed?
- What do you do currently do, if at all, to help lessen your family's impact on the environment?
 - Recycling, composting, walking or cycling instead of the car, low emission car, low energy light bulbs, turning the central heating down, etc.

1

Understanding of the terminology – 10 mins**SHOWCARD 1 – List of terms**

- I am going to show you some words and want you to tell me your understanding of each of them?
 - Sustainability
 - Renewable energy
 - Biofuel
 - Carbon footprint
 - Carbon offset

White goods efficiency labels – 5 mins**SHOWCARD 2 – White goods label example**

- Have you seen these
 - What are they?
 - What are they showing?
 - Do you think they are useful?
 - Do you take notice and act on them?
 - How much do they drive purchase?

Awareness of biofuels -10 mins

- Initial thoughts on biofuels?
- What's good and what's bad?
- How would you think biofuels perform when compared with existing fuels?
- Do you think they are any better or worse for your car than existing fuels?

Establish who is aware of the governments Renewable Transport Fuel Obligation (RTFO)

Explain biofuels and explain the government's commitment to having 5% biofuels in petrol and diesel by 2010

**Knowledge of biofuels – 10 mins**

- How are biofuels produced?
- Do you think they are more or less green than conventional fuels?
- Do you think that certain biofuels are more or less green than others?
- How do fuels create CO₂?
- Do biofuels create CO₂?
 - More or less than conventional fuel?
- How would you find out about CO₂ currently?
- Do you care?

CO₂/efficiency label – 20 mins

- In much the same way that white goods have introduced an energy efficiency label on machines what do you think about having one for biofuels?
 - How useful would you find it?
 - Is it a 'must have' or a nice to have?
- What information would you like to see on such a label? *unprompted*
- Where should the labels be placed?
- Who do you think should be the organisation behind the labels – who should implement the CO₂ labels?
 - Government, fuel companies, academic institution, environmental organisation, independent organisation

SHOWCARD 3 - CO₂ star label

- Opinions?
 - Score out of six
 - Likes and dislikes?
- What if any further information would be useful to have on the label? *unprompted*

- Should conventional fuels have CO2 labels?

SHOWCARD 4 – List of possible add ons

- Looking at the list which if any of the following things would also be useful to show?
 - Why?

Likely behaviour – 10 mins

- Does it matter about the source of the biofuel – corn, oil seed rape, wheat, sugar beet, sugar cane, palm oil etc?
 - How would this affect buying behaviour?
- Does it matter which country the biofuel originates from?
 - How would this affect buying behaviour?
- Is it better or worse if it comes from the UK?
 - Why?

CO2/efficiency label on other transport – 5 mins

- How do you feel about the concept of having CO2/efficiency labelling on other transport products – for example:-
 - Tyres
 - Lubricants
 - Cars
 - Flights
 - Train journeys
 - Bus/coach trips
- Put list in priority order of importance
- Do you think they would have any impact on peoples behaviour?
 - How?

Thanks and close



SHOWCARD 1

Sustainability
Renewable energy
Biofuel
Carbon footprint
Carbon offset

SHOWCARD 2

Visual of a white goods efficiency label

SHOWCARD 3

Visual of CO2 star label

SHOWCARD 4

Possible add ons:-
% of carbon reduction
Sustainability aspects
Quality aspects – ISO, DIN
% efficiency improvements
Source/origin
Website for further information

Annex 2: Presentation “Biofuels research results: thoughts and observations from the two phases of research”



Chart 2

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Biofuels research – thoughts and observations – march 2008

Chart 3

Introduction and background

- The Oxford Partnership was commissioned by the HGCA to conduct research into consumer's perceptions and knowledge of biofuels, their attitudes toward a CO2 label, and their likely future actions in relation to biofuel
- The research methodology involved a two phase approach:
 - Focus groups to reveal the key issues and attitudes of consumers surrounding biofuels
 - Quantitative research, in the form of an omnibus survey, to establish robust data on certain key issues surrounding biofuels
- Eight focus groups were conducted (4x2) in Newcastle, Birmingham, Watford and Bristol, with the group make up covering age – younger v older, gender, and attitude to energy saving – early adopter v laggard
- The omnibus survey covered 586 adult car drivers
- All research was conducted according to the codes of conduct laid down by the Market Research Society and the Association for Qualitative Research
- This document provides some overall thoughts and conclusions drawn from the research as a whole

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Chart 4

What does it all mean – overall environmental issues

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biofuel research – thoughts and observations – march 2008


Chart 5

Me, me, me

From numerous research projects conducted over the last six months or so, including this one, we have noticed a recurring theme. We call it Me-Business

Its origin appears to be driven by the fact that because today it is possible to know and care about almost everything, people are caring less about almost anything that is beyond their household, friends and family – my world; me

This attitude seems to be reinforced by the research results from this project and suggests that, even more than ever, it is the hearts and minds of individuals that must be won over, to marshal support and motivate changes in behaviour

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Chart 6

Pool of ignorance needs a beacon of light!

Add to this self centred attitude the fact that the issues involved are complex and difficult to understand and a pool of ignorance is developed into which all environmental and ethical issues get sucked – all big issues, all big problems and all hard if not impossible to solve. This can lead to the feeling that it is someone else's problem and not mine. Logically it should be government leading the debate as it is accountable and should be responsible – but it has little trust among these respondents to be totally impartial

To achieve maximum impact the most believable information or advice should come from an independent consumer organisation or respected individual

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Chart 7

Five key issues

There are five key issues that people consider either consciously or subconsciously based around a self-centred interest:-

1. How strongly do I feel about it?
2. How will it affect me and my lifestyle?
3. Will it cost me anything?
4. How serious are people taking it?
5. What are the consequences of me doing nothing?

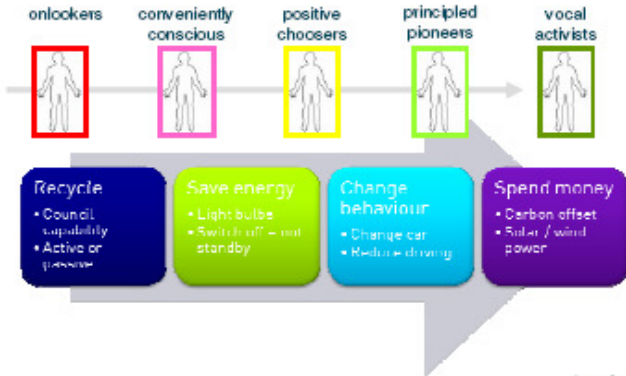
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Chart 8

1 – How strongly do I feel about it?

Likelihood of action is conditioned by position on the segmentation model – the aim is too move people to the right



onlookers	conveniently conscious	positive choosers	principled pioneers	vocal activists			
							
Recycle <ul style="list-style-type: none"> • Council capability • Active or passive 		Save energy <ul style="list-style-type: none"> • Light bulbs • Switch off – not standby 		Change behaviour <ul style="list-style-type: none"> • Change car • Reduce driving 		Spend money <ul style="list-style-type: none"> • Carbon offset • Solar / wind power 	

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Chart 9

2 – How will it affect me and my lifestyle?

People will only change their way of life so much, before they question the need – primarily, most people are self-centred

- What am I expected to do?
- Am I being asked or told to take action?
- How much time will it take?
- Will it curtail mine or my family's lifestyle?

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Chart 10

3 – Will it cost me anything?

Personal cost is a major consideration for people – those with strong convictions, although in the minority, are willing to pay more and those with lesser convictions are not willing to pay more

- Will it cost me money?
- How much?
- Is there any financial incentive for me changing my behaviour?
- Is there a financial penalty for non action?

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Chart 11

4 – How serious are people taking it?

Government, local government, workplace, media and peer pressure all put pressure on individual behaviour

- *What are my friends and neighbours doing?*
- *If the issue was that serious then why aren't China, the US and our government and councils putting much more effort into it!*
- *If it was crucial there would be more pressure on us and more legislation to change behaviour*

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Chart 12

5 – What are the consequences of me doing nothing?

Will what I do really have an effect on the issue or am I wasting my time?

I understand there are big environmental issues to resolve, and I will help, but:-

- *It can't be too painful personally*
- *It would help if I was incentivised*
- *Can I actually make a difference when the likes of China and the US aren't exactly rushing to do anything*

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Chart 1.3

What does it all mean – biofuel

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Chart 1.4

Biofuel is not top of peoples worry list

Peoples main environmental and ethical concerns lie elsewhere:-

<p style="text-align: center;"><i>Issues that directly affect them</i></p>	<ul style="list-style-type: none"> ○ <i>In the increasingly fluctuating weather and consequent issues – draught, flood etc</i> ○ <i>In recycling and energy conservation</i> ○ <i>In animal welfare</i>
<p style="text-align: center;"><i>Issues that indirectly affect them</i></p>	<ul style="list-style-type: none"> ○ <i>In the destruction of habitats</i> ○ <i>In the pollution of oceans</i> ○ <i>In the depletion of species</i> ○ <i>In the pollution caused by China and the US – and their reluctance to grapple with it</i>

There seems a disconnect between biofuels and the environmental issues, caused largely by a lack of a true understanding of the issues

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biobio's research – thoughts and observations – march 2008

Chart 13

Introduction of biofuels

There is virtually a complete lack of awareness of the introduction of blended fuel at the pumps from April. This fosters a feeling of suspicion amongst many


If biofuels were that good for the environment and that important then:-

1. *Why haven't they told us about the RTFO and the introduction of biofuel in April?*
2. *Why isn't the blend of biofuel greater?*

But more importantly:-

1. *Will it damage my car in any way?*
2. *How will it affect performance?*
3. *It's bound to cost me more!*

The 'me' dimension

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biofuel research – thoughts and observations – march 2008

Chart 14


The wider debate

Sustainability or the food v fuel issue has not been considered by the majority, but when thought through it is viewed as a complex debate for government to sort the way forward. However, there is ultimately only considered to be one winner - food

The majority would prefer biofuel :-

1. *To be sourced in this country where possible, providing it doesn't effect our ability to produce the food we need*
2. *To help British farmers in preference to those of other countries*
3. *To help secure the fuel supply*

However, the majority will not pay a premium for biofuel, no matter what the provenance

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Chart 17


The connection needs to be made

Beneath a thin veneer of superficial understanding lies a large scale ignorance of the key issues

To truly connect there needs to be:-

1. A widespread communications strategy
2. Involving all elements of the marketing mix
3. With different messages targeted at different segments of society

Hearts and minds need to be won to mobilise potential behaviour and maximise national effect

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biisla's research – thoughts and observations – march 2008

Chart 18

What does it all mean – efficiency labels

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biisla's research – thoughts and observations – march 2008

Chart 19

A useful purchasing aid

Overall, efficiency labels are considered to be a useful aid to the purchasing decision – BUT ONLY WHERE THERE IS A CHOICE

Where there is a choice such as white goods, houses and potentially other items specifically cars and tyres, then efficiency labels are considered to be a useful, unbiased purchasing aid

If there is no choice of products then the need for a label is secondary and only serves to provide a warm feeling or self justification for purchase

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blafala's research – thoughts and observations – march 2008

Chart 20

Keep it simple

The most useful element of current efficiency labels is the easy to see rating A to G, the rest tends to be too small or too technical

The four success factors are to make them:-

- 1. Eye catching – well designed and distinctive*
- 2. Simple – lodging in peoples minds quickly*
- 3. Relevant – improves the likelihood of changing behaviour*
- 4. Meaningful – information I can remember and justify*

The existing CO2 star label performs poorly against all of these criteria

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blafala's research – thoughts and observations – march 2008

Annex 3: Presentation “Biofuels research results: phase one – qualitative research”



Chart 2

Contents

○ Introduction and background	3
○ Executive summary	5
○ General environmental views	11
○ Current household behaviour	19
○ Understanding the issues	25
○ Understanding of biofuels	36
○ Efficiency labels	46
○ Appendix one – segmentation profile	59


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biofuels research results – march 2008

Chart 3

Introduction and background

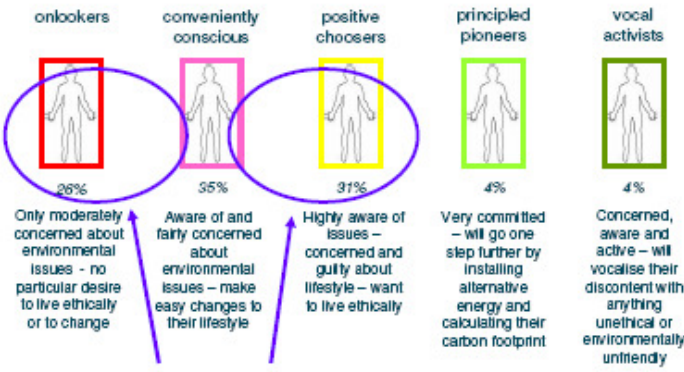
- The Oxford Partnership was commissioned by the HGCA to conduct research into consumer's perceptions and knowledge of biofuels, their attitudes toward a CO2 label, and their likely future actions in relation to biofuel
- The research methodology involved a two phase approach:
 - Focus groups to reveal the key issues and attitudes of consumers surrounding biofuels
 - Quantitative research, in the form of an omnibus survey, to establish robust data on certain key issues surrounding biofuels
- Eight focus groups were conducted (4x2) in Newcastle, Birmingham, Watford and Bristol, with the group make up covering age – younger v older, gender, and attitude to energy saving – early adopter v laggard (see next page)
- The omnibus survey covered 586 adult car drivers
- All research was conducted according to the codes of conduct laid down by the Market Research Society and the Association for Qualitative Research
- This document provides the full findings from phase one, the qualitative research

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Biofuels research results – march 2008

Chart 4


Ethical consumers – a segmentation (see appendix one for more segmentation detail)



Segment	Percentage	Description
onlookers	26%	Only moderately concerned about environmental issues - no particular desire to live ethically or to change
conveniently conscious	35%	Aware of and fairly concerned about environmental issues – make easy changes to their lifestyle
positive choosers	31%	Highly aware of issues – concerned and guilty about lifestyle – want to live ethically
principled pioneers	4%	Very committed – will go one step further by installing alternative energy and calculating their carbon footprint
vocal activists	4%	Concerned, aware and active – will vocalise their discontent with anything unethical or environmentally unfriendly

Groups taken from these two areas – the extremes of mainstream opinion

source – headlight vision

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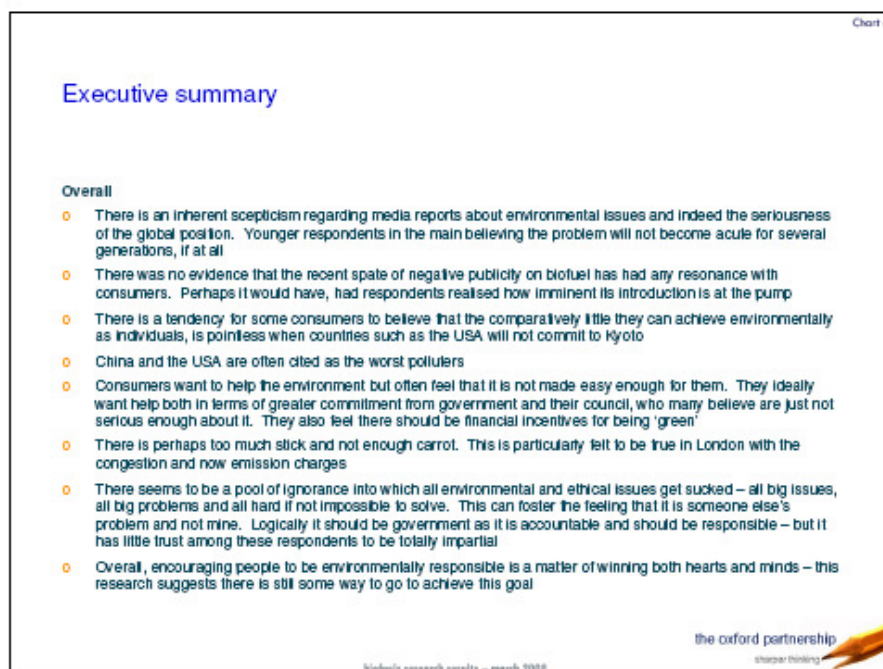


Chart 7

Executive summary continued

Current behaviour


- There is a hierarchy of consumers' environmental behaviour depending on their level of commitment to the environmental cause – their 'green mindset'
- It starts with what they are coerced or even forced to do, such as the recycling of household rubbish and the associated fines for misuse; goes on to the things that they will save money on such as low emission light bulbs and turning electrical appliances off and not to standby, and finishes with those things that take personal sacrifice like walking not driving, carbon offsetting schemes, etc
- Although one would think the 'leaders' would be some way up this environmental ladder with the 'laggards' still on the first few rungs, from this research the distance between them is not substantial

Understanding the Issues

- When asked to define certain environmental terms such as sustainability, biodiversity, carbon footprint, renewable energy etc. the younger respondents had the most consistent understanding. Older male respondents were also knowledgeable but older women, even if they were committed environmentalists, had a fairly poor knowledge of them. There is only a thin veneer of knowledge
- The carbon cycle is simply not understood by the majority. When it is understood it tends to be amongst older males

Awareness and knowledge of biofuels

- Respondents' knowledge of biofuels is scant, the most common reaction is that it is something to do with using chip fat to power your car!
- Only a few, usually male, respondents could claim any knowledge of the sources of biofuel or how it was made

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Chart 8

Executive summary continued

- Not one respondent was aware of the Renewable Transport Fuel Obligation (RTFO) and only one that there would be a blend of biofuel in petrol and diesel from April
- When hearing about the RTFO commitment one of the first reactions from respondents is how will it affect their cars – will it mess up their engine, will it affect performance etc. Also, will it cost more?
- Several groups queried why the government hadn't made more of the introduction, seeing it as a good initiative
- There is little to no connection with the biofuel cycle and the carbon cycle
- Very little is known about the different feedstocks for biofuels and therefore respondents showed little perception of the deforestation or loss of wildlife issues
- The food v fuel question causes confusion and there is no conclusion as to how this would or could be resolved – it is felt to be a government problem
- When discussed, the general feeling is that the industry should use British crops where possible for biofuels. This is born out of two beliefs –
 - It helps British farmers
 - It helps make Britain more self sufficient and less dependent on others – as with oil and gas
 But for many the question remains – Do we have the land?
- The more ethically minded respondents also saw a role for developing countries in growing biofuel feedstock, providing it wasn't harming their own environment

Pricing and likely behaviour

- There were split feelings on cost, some believing that in general, biofuels should be cheaper to produce and therefore cheaper at the pump, others taking the cynical view that it is bound to be more expensive

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Biofuels research results – march 2008


Chart 9

Executive summary continued

- There were quite strong views that the government takes too much in tax from fuel and that with the 5% blend there was an opportunity to take less and pass that saving on to the consumer
- Some of the more affluent with greater environmental conviction, would be prepared to pay a 'few pence' more for biofuel if there was a choice, particularly if it was made from British crops
- However, crop provenance seems to be irrelevant to what the majority of consumers are willing to pay

Efficiency label

- When explained, an efficiency label was thought to be helpful if it explained the main benefits over fossil fuel in a simple to understand way – possibly numerically
- However, the label was felt to be redundant by many if there was no alternative choice at the pump
- The CO₂ star design did not receive a strong vote of confidence – rarely scoring well (ave.4/10). Main comments were:-
 - The drop reminded all groups of the British Gas flame logo/current advertising
 - This linkage did not have a positive association
 - Colours were perceived as OK
 - Putting 'CO₂' in the name was felt by some to be wrong, drawing attention to the wrong thing
 - The drop could possibly become a CO₂ friendly icon – like the kitemark symbol for quality and integrity
- The possibility of developing the logo into a general quality marque for CO₂ efficient products was also raised by respondents
- Efficiency labels on other products were thought to be good ideas –anywhere there is choice such as cars and tyres
- The information on the labels must be simple to understand and preferably with tangible comparisons

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Siobhán's research results – march 2008

Chart 10

Executive summary continued

Spokesperson

- Respondents are very sceptical about organisations or individuals who might be the best spokesperson or body for biofuel, believing they all have an axe to grind and are consequently not objective
- Government is considered appropriate because they are accountable, but are not trusted
- Scientists are considered to be trustworthy but often derailed by conflicting research
- NGO's have their hearts in the right place but are too evangelical and perhaps one sided
- Peoples champions or media personalities are most believable – considered to be the most objective e.g. Jeremy Clarkson, Jamie Oliver

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Siobhán's research results – march 2008

Chart 11

general environmental views

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biobasis research results – march 2008

Chart 12

Natural climatic cycle or manmade pollution

To the majority, the environmental problems facing the world are caused through manmade pollution and with a few it is already too far to reverse, but for a minority the issues are the result of a natural climatic cycle

'We've been messing the planet up for years – we've only ourselves to blame'

Older female

'The weather has been horrific for over five years but we don't really know what is causing it – could be a part of a normal cycle'

Younger male

'It's just one of those things – it's a cycle – we might contribute something but not all of it'


Older male

'You can't continue to do what we have been doing and not expect something to happen'

Older male

'The weather is just reported more now that's why we hear more about it'

Younger male

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biobasis research results – march 2008

Chart 13

D day - views depend on age

Generally, younger respondents have a more distant doomsday horizon than older ones, which in some fosters the belief that 'it's not my problem'

'The problem won't come for generations yet'
Younger female

'I think it will happen but not for a long time yet – I don't think it will happen in my grandchildren's lifetime'
Younger male

'The way its going I wouldn't be surprised if it happened within fifty years'
Older female

'I don't think we can stop it, only slow it down – so if we can do that well then I think you are looking at hundreds of years into the future '
Younger female

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Siobhán research results – march 2008

Chart 14

You go first – I will if you will!

A commonly held view is that the environmental problems we face are a global issue and so the responsibility of everyone. However, the fact that the likes of the USA and China are reluctant to wholeheartedly sign up to treaties, leads to a feeling that individual action is a waste of time


'Why should I do anything when the US isn't, Everybody has to be on board for it to work'
Younger female

'If the USA, China and India don't get their fingers out then I can see it all coming to a crunch within my children's lifetime'
Older male

'It's countries like China that are the worst offenders but the yoke of guilt is given to the likes of the UK'
Older male

'I read the other day that the pollution that China puts out counteracts the west's efforts anyway so what's the point'
Older female

'You look at these businessmen who go to say New York for a day's business trip when they could equally use video conferencing – makes my efforts in sorting out my tuna cans look silly'
Younger female

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Siobhán research results – march 2008

Chart 15

All for one and one for all!


Another general feeling is that the emphasis to change behaviour is too heavily pushed onto the individual, with not enough leadership coming from government or councils. The blame is always perceived to be with the individual

'They put the onus on the individual when they are not the worst offenders'
Older male

'If they were really worried they would have clamped down on flights already'
Younger male

'Government and the councils should lead by example but they don't'
Older female

'Everything is put down to us – it's wrong – all the blame comes back to us'
Older female

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Nickel's research results – march 2008

Chart 16

More carrot and less stick

There was a general feeling across the groups that at present the onus is on the individual and is enforced by punitive measures whereas the balance should change more toward incentives


'If they really want me to use these new light bulbs then they should make them cheaper or even give them away free'
Younger female

'I would like to do more but I don't think there are enough incentives for doing it – all they do is fine you'
Younger female

'You will only get the majority of people to do things by giving them an incentive to do it, not just by fining them – that really pisses people off'
Younger male

'My neighbour has just been fined £600 for putting a can in the wrong bin'
Younger male

'Environmentally friendly things should be cheaper – the government shouldn't tax them or at least tax them less'
Older male

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Nickel's research results – march 2008

Chart 17

Media manipulation

Most respondents are sceptical regarding media coverage of environmental issues, believing they are exaggerated to sell newspapers and fill television space. A small minority however, believe the opposite – that the truth is played down in the interests of big business


'You've got to remember that newspapers need to sell papers'
Older female

'It depends on what is happening elsewhere as to what they will cover – if it's a slow news day then the environment is fair game'
Younger female

'The big issue is that it is all hyped up - probably its reported as being 40% more 'severe than it really is – its scaremongering'
Older male

'It's hard to believe what you see and read'
Younger female

'The farming industry is massive with masses to hide – they don't tell us half the truth about it'
Younger female

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Statista's research results – march 2008

Chart 18


It will change in a generation

Schools are seen as playing a huge part in changing perceptions about the environment and recycling. While there would appear to be some way to go to convince teenagers, younger children appear to be much more environmentally concerned

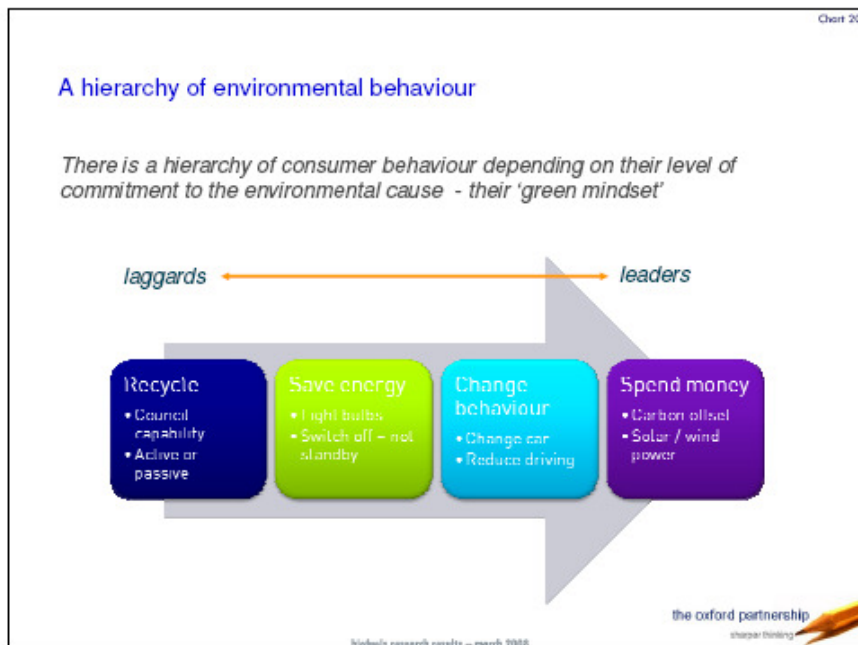
'We're pretty good in our house, but it's not me it's down to the kids they are dead keen. If you leave a light on you're in trouble. They get it from school. No standby's and they say I have to change my car. All their friends are the same'
Older male

'They should teach kids about these things and this way of thinking and then within a generation people will be on board'
Younger female

'My youngest is the driving force in our house always on at me to recycle and turn things off, she gets it from school'
Older female

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Statista's research results – march 2008



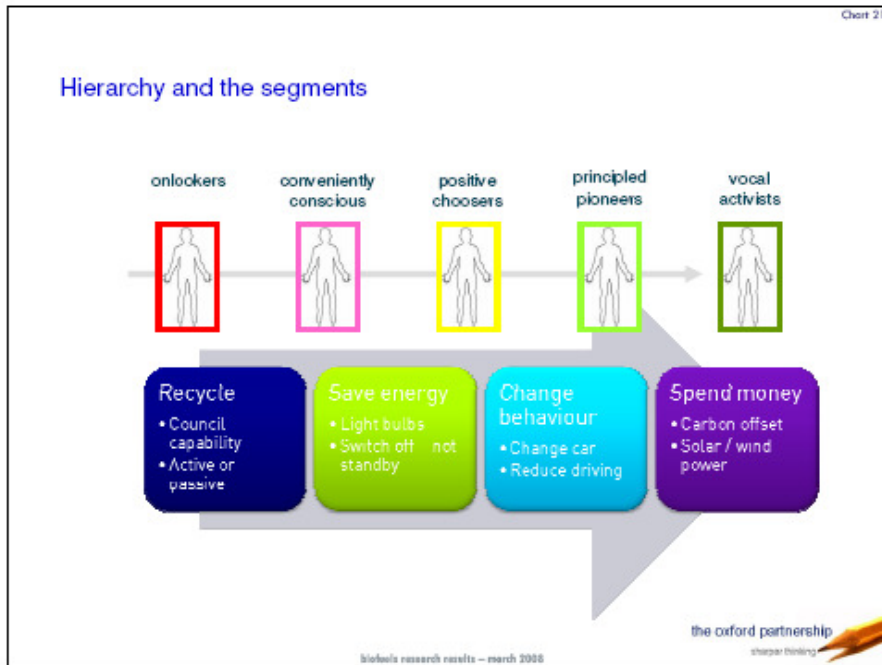


Chart 22

It starts with recycling

The first step is recycling because increasingly households are being forced to do so by their council with, in some cases, fines for not doing so correctly. Therefore even the laggards have to make this first step. However, recycling still has its issues and its detractors

'If the council was serious they would make the biggest bin for recycling not the smallest'
Younger male

'The bin men are too rigid it wouldn't hurt them to be more flexible'
Older male

'They don't even give us a lid for the paper recycling box here – so the paper blows all down the street'
Older female

'We have a small brown box for food waste, but it is only collected every two weeks – you can imagine what it's like in summer – so people don't use it'
Older female

'I know for a fact that our council don't recycle what they collect – it all goes into landfill'
Younger female

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biobasis research results – march 2008

Chart 23

Then moves on to saving energy


The next step up the environmental hierarchy is saving energy which is seen as a relatively easy step as you will be saving money by saving energy. However, not everyone has made the connection here between environmental action and saving money


'I'm on a pay as you go meter at home and I didn't half notice the savings when I started turning things off more often'
Younger female

'If people realised what they would save doing some of these things then I'm sure more would do it – why don't the government advertise it more'
Older male

'I have turned the heating down a little and I turn off the computer and I have noticed the difference in the electricity bill'
Older male

'My husband has got my son to turn things off now instead of just leaving them on standby and also to turn lights off when he isn't in the room – it's taken ages but it's worth it'
Older female



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birol's research results – march 2008

Chart 24

The higher rungs of the environmental ladder


The next step beyond energy saving (step two) is more difficult to accomplish and is only really achieved by the more dedicated environmentalists – who were deliberately excluded from this research

'It would take an awful lot to get me out of my car and on to public transport'
Younger female

'I try and walk the dogs now without the aid of the 4x4 – there is a perfectly good route from the house to the common'
Older female

'I think that people will go so far with these environmental things but after a certain point you need some incentive because it costs a lot'
Older male

'If they ever subsidise or give grants out for solar heating panels then I will be first in line, but I couldn't afford it now'
Older male

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birol's research results – march 2008

Chart 25

understanding the issues


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biobeta research results – march 2016

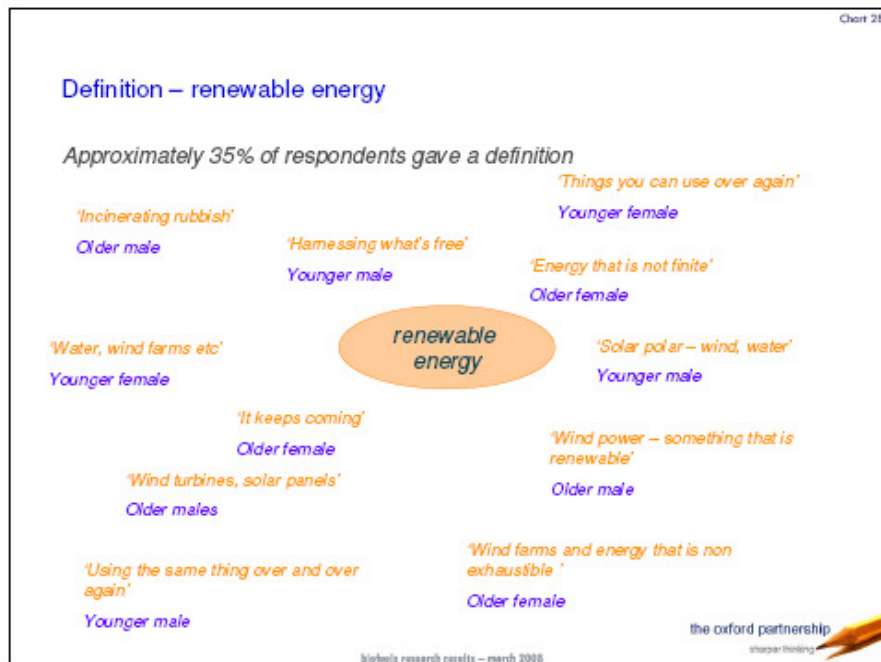
Chart 26

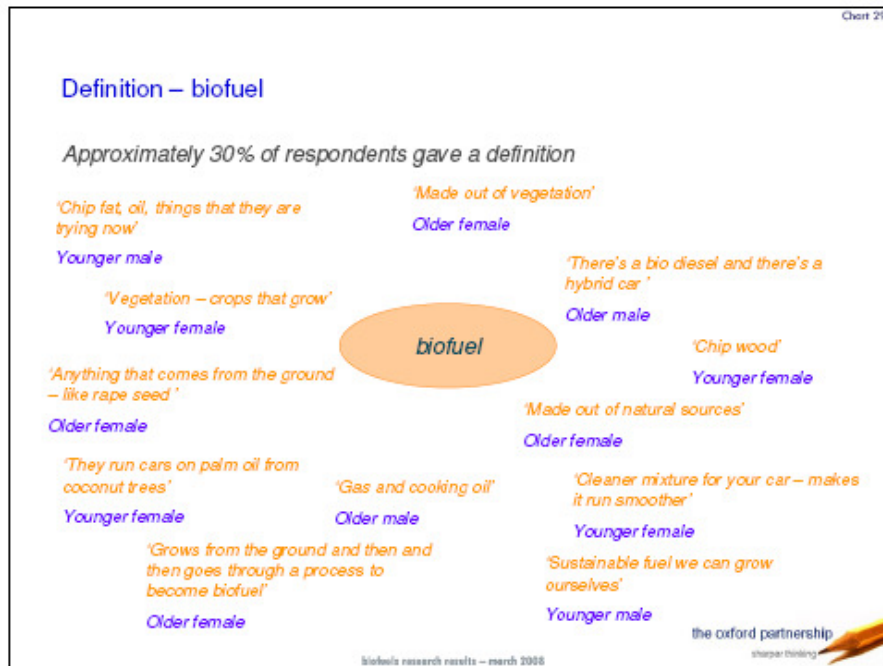
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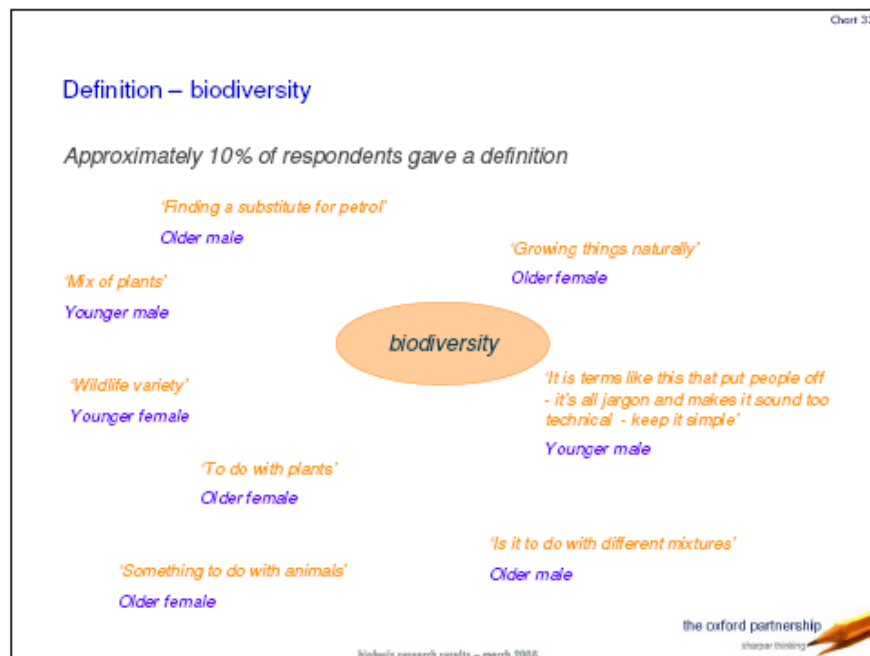
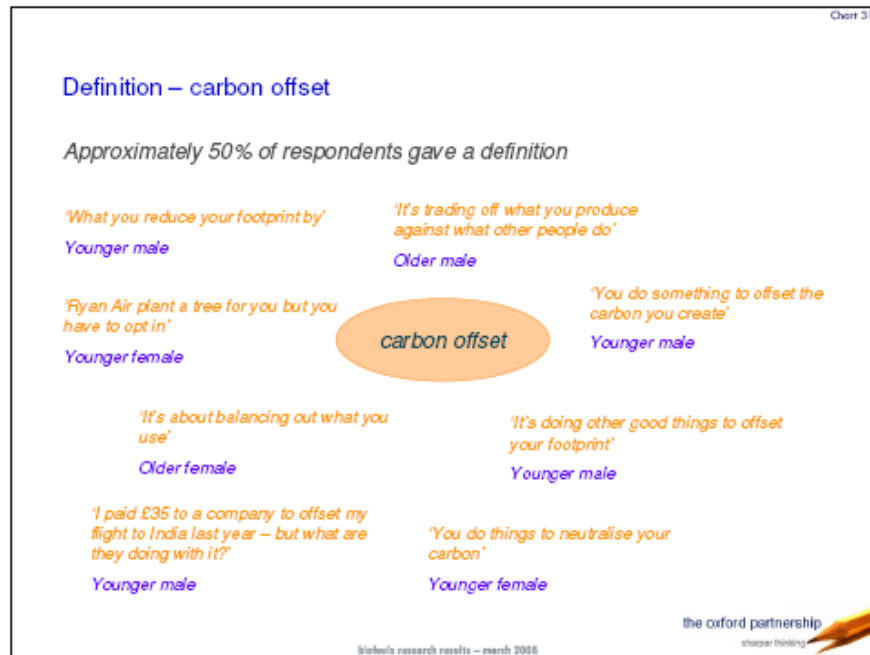
- *When asked to define certain environmental terms such as sustainability, biodiversity, carbon footprint, renewable energy etc. overall the understanding is quite low.*
- *The younger respondents had the most consistent understanding. Older male respondents were also fairly knowledgeable but older women, even if they were committed environmentalists, had a fairly poor knowledge of them.*
- *Spontaneous verbatims are shown on the following pages*
- *The carbon cycle is simply not understood by the majority. When it is understood it tends to be more so by older males*

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biobeta research results – march 2016







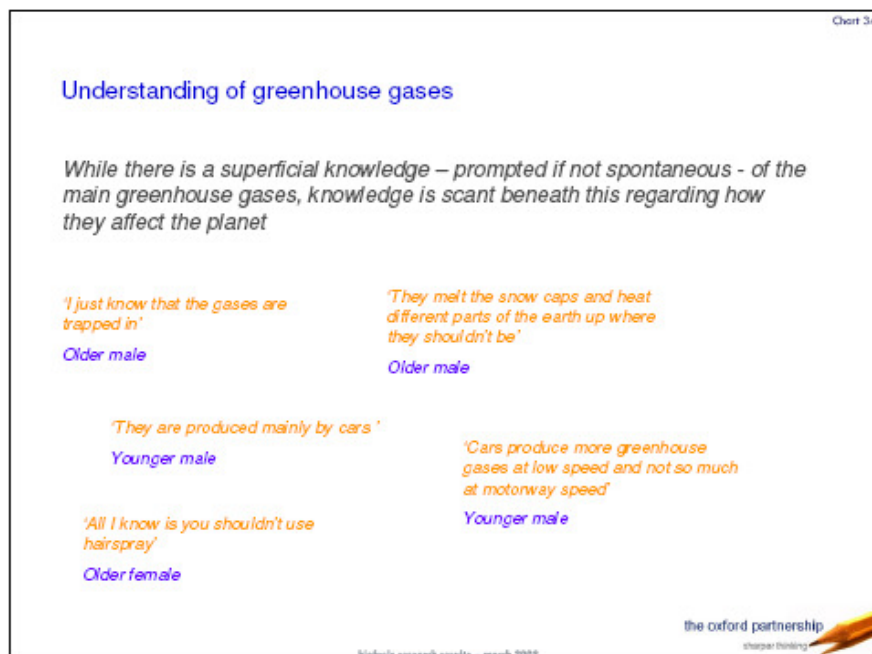
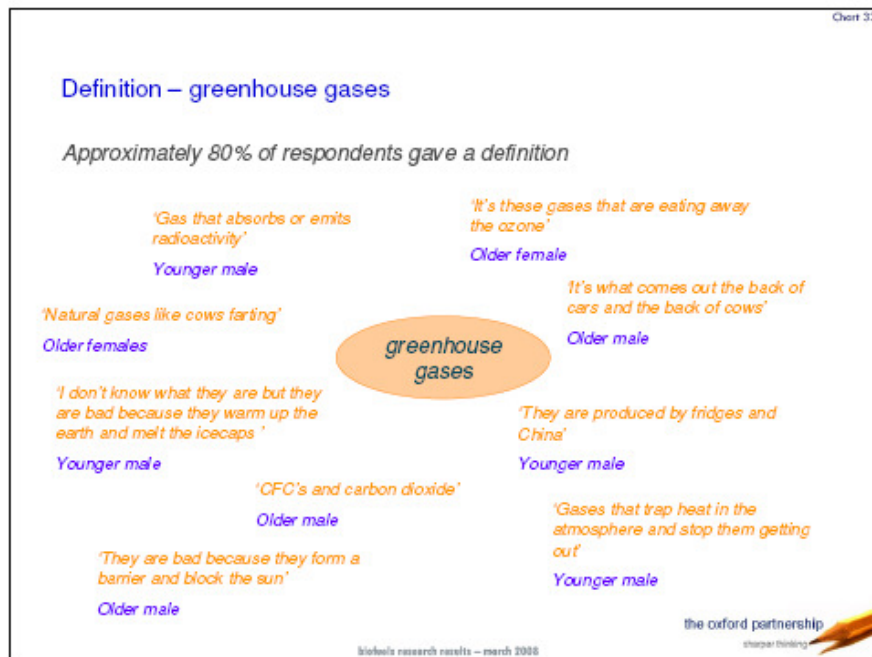



Chart 35

Impressions from the definitions

Respondents attempts at defining the terms shows there is a considerable depth of ignorance here

Several issues emerge

- The terms are mainly understood but at a superficial level only
- They get confused, misinterpreted and combined
- Falling under a general heading of 'a problem'
- That is probably too large to be dealt with by individuals!
- But needs something doing about it, by somebody and soon

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Chart 36

understanding of biofuels

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Chart 37

Poor knowledge of biofuels

There is high awareness of the term biofuel, but apart from a knowledgeable few, the majority know little beyond this

'It's a better way of driving your car – is it something that evaporates faster'
Older female

'It's about getting rid of petrol and using chip oil'
Older male


'I know it's eco-friendly and the Prius takes it'
Older male

'Aren't there emissions different – don't they produce water'
Older male

'I think you can get your car converted but I don't think biofuel is very economical at the moment'
Younger male

'I think it is made from waste products but I don't really know'
Younger female

'But how do they produce them, doesn't that harm the environment'
Younger female

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biofuels research results – march 2008

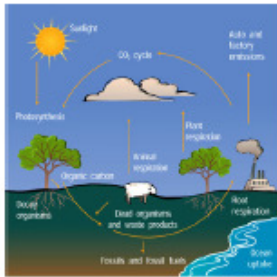
Chart 38

No connect to the carbon cycle


The majority of respondents do not make the connection between biofuel and cycle. Indeed most, evidenced by their various responses, are clearly unaware of the carbon cycle

'I know they say it's good for the environment but I don't know how'
Older female

'If the scientists say it's better then that's good enough for me – just make it cheap!'
Younger male



'I suppose it's better because the crops can be re grown while petrol or oil can't be, but beyond that I really don't know'
Younger female

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Chart 39

It's all a con!

There were one or two particularly cynical conspiracy theorists!

'If you remember the trouble a couple of years ago with dodgy petrol at Tesco's, well that was down to biofuel, I reckon they were trialling it and got caught out'
Younger male

'Farmers are always moaning, always bankrupt and always in fancy cars and big houses and this is just a way to get them more money'
Older male

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Chart 40

What affect on my car?

An instant concern among respondents is to what extent biofuel would affect their car, both in relation to performance and possibly engine damage


'I'm pretty sure my car can't take biofuel – I think it says so on the fuel cap'
Younger female

'When they put it in Formula One cars then I'll put it in mine'
Younger male

'They are going to slowly screw up our cars aren't they'
Younger male

'It might be better for the environment but I bet the engine wouldn't last as long and I bet performance is worse'
Older female

'I don't think they perform as well as normal cars would'
Younger female

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Chart 41

RTFO – why have we never heard of it?


Only one person in all the groups had a vague idea of what the Renewable Transport Fuel Obligation (RTFO) was, yet nobody was aware that from April all fuel would be blended with biofuel. To some respondents this represented a missed opportunity for the government to publicise something positive, to others the fact that they hadn't, raised suspicions

'I've never heard of it – is it something to do with some Stockholm agreement'
Younger male

'If it is so good why are they only putting in 5%'
Younger female

'The fact that they haven't told us anything about it is highly suspicious – they are usually the first to crow about how good they are'
Older female

'If it's a good thing, how come none of us know about it'
Older male

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Chart 42

It's bound to cost more!

There is a universal expectation that biofuel would cost more than fossil fuels, even though some thought it would be cheaper to produce


'If it was perfect for your car, perfect for the environment and half price then everybody would be happy – the chances of that – zero!'
Older male

'Things that are good for the environment should be cheaper, to make us use them'
Older male

'Its got to be cheaper to produce surely because they haven't got to drill for it – therefore it should be cheaper at the petrol station – but I bet it isn't!'
Younger female

'Most people will not pay more to be environmentally friendly – fact of life!'
Younger male

'The government should drop the tax on the biofuel bit to make it cheaper but you just know they won't!'
Older female

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Chart 43

Feedstock - source and provenance ????

Only a few respondents were aware of the various sources of feedstock for biofuel, therefore little was known about potential risks of deforestation, loss of wildlife etc. in other parts of the world. Given a choice, however, most would prefer it to be grown in this country for reasons of self sufficiency, transport economics and helping farmers – but not at a price premium


'I can see that the source of biofuel could affect price, but I don't think people really care where it comes from, it comes down to cost, people will buy the cheapest'
Older male

'If we can produce our own fuel then we don't have to bomb other countries do we'
Younger male

'If it helps our farmers then all well and good'
Older female

'Let's face it you go to the pump with the shortest queue – you're not going to bother with where it came from'
Younger female

'They will use whatever is cheapest won't they – it's down to economics'
Older male

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Biofuels research results – march 2008

Chart 44

Food v fuel – haven't really thought about it!


Given the general lack of knowledge of this whole area, it is perhaps not surprising that the majority of respondents have not thought through the consequences of the food v fuel issue

'Farmers aren't stupid, they will sell to the highest bidder whether it's for food or biofuel'
Younger male

'Perhaps we should let third world countries grow the biofuel crops and we just produce for food – if say India has the land and can grow it then why not'
Older female

'The answer is develop another source of energy like hydrogen – which is much better'
Younger male

'I really don't know what the answer is – I suppose the government would have to decide, but at the end of the day food has to prevail doesn't it?'
Older male

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Biofuels research results – march 2008

Chart 45

The perfect spokesperson for biofuel?

There is a definite hierarchy of the most objective type of person or organisation who should represent biofuel – although most see it as government's responsibility - they are simply not trusted by the majority!

Fuel companies	Academic organisations	Peoples Champion
Government	Environmental Organisation - NGO	Independent Organisation

'I'd trust the Archbishop of Canterbury'
Older male

'The trouble with scientists is that they can't agree things like MMR or mad cows disease'
Older female

'Jeremy Clarkson would be perfect, or someone like Jamie Oliver'
Younger male

'You simply cannot trust government anymore – every minister has an axe to grind'
Older female

'Lewis Hamilton, Gordon Ramsey, Richard Hammond'
Younger females

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biobuels research results – march 2008

Chart 46

efficiency labels

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biobuels research results – march 2008

Chart 47

Stimulus shown

The image displays four energy-related labels. On the left, two 'Energy' labels for 'Manufacturer Model' are shown. Label A has a rating of 325 and Label B has a rating of 175. Both use a color-coded scale from green (more efficient) to red (less efficient). On the right, two 'England & Wales' labels are shown. The 'Energy Efficiency Rating' label shows a scale from A (green) to G (red) with a specific rating point. The 'Environmental Impact Rating' label shows a scale from A (green) to G (red) with a specific rating point. Below these labels are explanatory text blocks: 'The energy efficiency rating is a measure of the overall efficiency of a home. The higher the rating the more energy efficient the home is and the lower the fuel bills will be.' and 'The environmental impact rating is a measure of a home's impact on the environment in terms of carbon dioxide (CO2) emissions. The higher the rating the less impact it has on the environment.'

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bielska's research results – march 2008

Chart 48

We're aware of efficiency labels.....

All respondents were aware of efficiency labels on white goods with most using them as part of their decision making process after their prime driver of price. However they need to be both simple and universal to be successful

'I'm a plumber and people take a lot of notice of the efficiency level of the various machines'
Older male

'They are definitely useful, because within your price range, why wouldn't you want the most efficient'
Younger female

'The point is they offer choice and help to cut through the technical jargon and that has to be good news'
Older female

'They have got to be independently tested to be believable'
Younger male

'Price and colour come first for me – then I might look at efficiency'
Older female

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Chart 49

.....however there are some issues still with them


It was commonly agreed that having efficiency labels was better than not having them, but they have to be cut through manufacturer hype and expose the true benefits

'It should tell you what the different letters save you in terms of money, because for all I know it could be absolutely minimum'
Younger male

'I want to know if it's cheaper to run as much as I want to know it's environmentally friendly'
Older female

'They should tell you how much more each rating will cost you'
Younger male

'I've always assumed that while an 'A' rated machine might be more expensive to buy, it will be more economical in the long run – is that true?'
Older male

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Chart 50

An efficiency label for biofuel


Once explained, the idea of an efficiency label for biofuel was seen as helpful so long as it explained the benefits over fossil fuels – in a clear, concise and simple to understand way. However, the label was only thought useful where there is a choice, if no choice exists then the need for a label evaporates

'It has to say why it's better in simple language for us to understand – what mileage do you get compared with normal petrol for example'
Younger male

'I can see the information could be informative but you wouldn't have time to look at it at the pump. This sort of information should be in the advertising.'
Older male

'If there is no choice when you fill up then the only purpose of the label would be to make you feel good'
Older female

'It needs a big advertising campaign as well as just a label – people need to be aware of it'
Younger female

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Chart 51

Stimulus shown

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Chart 52

Spontaneous reactions

At best the majority were indifferent to the label design – average score 4/10

'It reminds me of British Gas – which isn't a good association, unless it is a British Gas company. - is it?'
Older male

'You can't really dislike it, but it is just average'
Younger female

'It should have the shape of the planet in there somewhere'
Older female

'Doesn't say what it is – biofuel!'
Younger male

'The line 'care for climate' is patronising – it's like you said to a class of 12 year olds now use alliteration'
Younger female

'What's the flame about?'
Younger female

'Why have CO2 on it you want to hide that association – its totally wrong, it looks like a pilot light'
Older male

'Too much like the British Gas flame'
Younger male

'It looks more like an award they have won'
Older male

'Colours are nice and clean but it has a BP feel to it'
Older female

'It should depict something that is growing'
Older male

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Chart 53

Stimulus shown

Possible add ons:-

- % of carbon reduction
- Sustainability aspects
- Quality aspects – ISO, DIN
- % efficiency improvements
- Source/origin
- Website for further information
- Others

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Chart 54

Just keep it simple!

Apart from specific items, the overwhelming request is for simple to understand, tangible comparisons

'10% carbon reduction, made from British wheat – something quick and easy'

Older female



Uses 70% less packaging
Uses 70% less water per wash
Helps take up to 14,000 tonnes off the road

'Most things on the list are nice to know as long as they would be understandable'

Younger male

'Lenor do it really well, with the lorry thing - it's simple to understand'

Older female

'Should say how you will make a difference by using it'


Younger male

'Comparative facts not just 20% better – by using this for a year you will be saving the world this'

Younger female

'Be good to say it was British if it was'

Older male

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Siobhán's research results – march 2008


Chart 55

Use it as a quality marquee

There were several mentions of the possibility of using the logo device as more of a 'CO2 friendly' icon – like the kitemark symbol - for quality and integrity

Why not use this logo on anything that reduces CO2 ?

Older male




'There are people who are not getting the 'green' message, so they could use this as some sort of overarching symbol

Younger female

'I could see the logo being used on anything that reduced CO2 by X%

Younger female

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Chart 56

Labels – key success factors

The discussions revealed four key success factors for any label

Eye catching – because it is well designed and distinctive
Simple – lodging itself in peoples' minds
Relevant – its presence improves the likelihood of changing behaviour
Meaningful – provides information I can remember and justify – to myself and others

The CO2 star label currently performs poorly against all four of these criteria

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Chart 57

Use of label on other things

Using the efficiency labels on other, transport related items was thought to be a good idea, provided they were items where choice was a key market factor – such as cars and tyres

'When you have your tyres changed you tend to go with what they recommend but you're never entirely sure whether they are recommending the ones they are making most profit on. If you could choose depending on the efficiency rating that might be a big help'

Older female



'I can't see how it would work on buses or trains'

Younger female

'It would be good for cars – it would mean the salesman couldn't fob you off'

Older male



'Got to be a good idea really – you've got them on food now so why not other things'

Older female

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Labels research results – march 2006

Chart 58

Good for cars

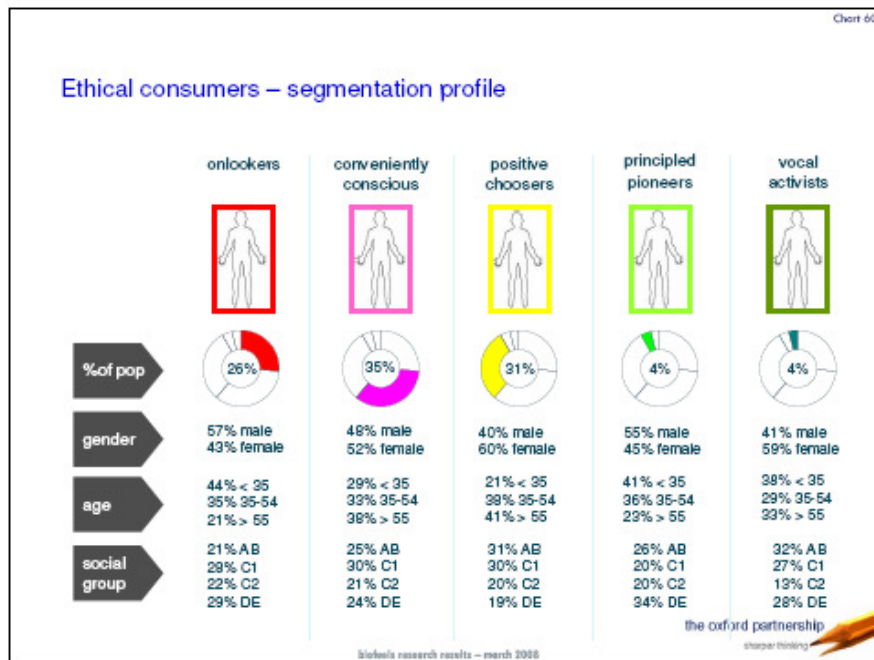
Using the efficiency labels on cars was felt to be useful in several ways:-

- To help cut through sales speak
- To give an unbiased rating
- To give a cost for that model

The graphic opposite – taken from a Budget report in the Guardian – gives a good example of what consumers want. An easy to understand rating system with costs clearly shown

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Labels research results – march 2006



Annex 4: Presentation “Biofuels research results: phase two – quantitative research”



Chart 2

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Chart 3

Introduction and background

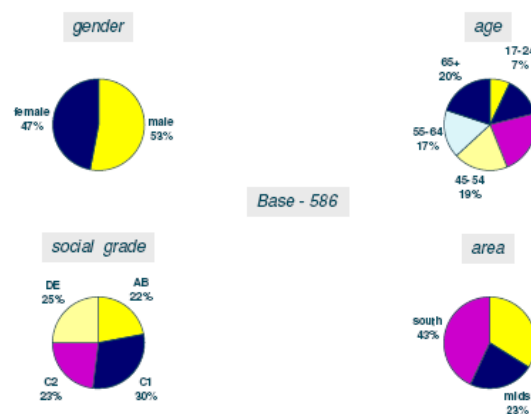
- The Oxford Partnership was commissioned by the HGCA to conduct research into consumer's perceptions and knowledge of biofuels, their attitudes toward a CO2 label, and their likely future actions in relation to biofuel
- The research methodology involved a two phase approach:-
 - Focus groups to reveal the key issues and attitudes of consumers surrounding biofuels
 - Quantitative research, in the form of an omnibus survey, to establish robust data on certain key issues surrounding biofuels
- Eight focus groups were conducted (4x2) in Newcastle, Birmingham, Watford and Bristol, with the group make up covering age – younger v older, gender, and attitude to energy saving – early adopter v laggard (see next page)
- The omnibus survey covered 586 adult car drivers
- All research was conducted according to the codes of conduct laid down by the Market Research Society and the Association for Qualitative Research
- This document provides the full findings from phase two, the quantitative research

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Chart 4

Sample profile – car owners



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Chart 6


Executive summary

Overall

- Protecting the environment is important to all groups (88% agreeing) but is more important to females, older age groups and those in the higher social grades
- The most important influencing factors when buying fuel for cars is that it is safe for the car, followed by its efficiency or mpg; the fact that it is environmentally friendly and finally the car's performance

Biofuel

- Overall awareness of biofuels is high at 84%, but decreases down through the social grades – 87% for AB's and 76% for DE's
- The most influential factors in buying biofuel are that it's safe for your car followed by the fact that it's better for the environment; it is sustainable; it's a secure fuel supply; it helps UK farmers; it improves your car's performance; it helps third world farmers and finally that it uses set-aside land
 - Of these factors, the one that has least discrepancy across the groupings is 'better for the environment', followed by 'safe for cars', and the one that splits opinion most is 'helps third world farmers', closely followed by 'uses set-aside land' and 'improves car performance'
 - The East of England and Wales are the regions least likely to be influenced by the factors
 - The over 65's are the least likely age group to be influenced
 - The DE social group is the group least likely to be influenced
- 35% of respondents would only be willing to pay the same for biofuel as they pay now for petrol. 31% would only pay less and 21% more. Within the age groups, the youngest age group are willing to pay the most, and within the social grades the ABC 1's are more likely to pay the most

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Chart 7

Executive summary - continued

- The majority of people (72%) do not have any concerns with biofuel. Amongst those that do – more likely to be older, in the higher social groups and in the south - the main concern is that the feedstock for biofuels could take land otherwise used for growing crops for food
- Older age groups and those in the higher social grades are more likely to have seen or heard something about biofuel in the media – 66% for the over 65's v 29% for 17 to 24 year olds. In the main the coverage is seen as positive (44%) or neutral (37%), with the youngest age group seeing it as particularly positive
- The most trusted organisation or people to offer impartial advice on biofuel would be an independent consumer organisation (31%) followed by an environmental organisation (17%). The least trusted is the EU (2%), followed by fuel companies (7%)
 - The youngest age group see academic organisations as the most trusted
- Overall, industry (38%) is seen as the most responsible sector for causing pollution, followed by road transport (29%), but for the youngest age group it is road transport (37%) that is seen as the worst polluting sector
- Among the statements shown, the strongest agreement was for biofuel sourced in this country thus helping British farmers (81% agreement)

Observations

- The results show quite a split of opinion between groups. In general, males, the younger age groups and the lower social grades are the most indifferent to the issues and probably most disconnected, with their opposites - females, older groups and the higher social grades - the most concerned
- This suggests that a different language and a different approach is needed when talking to different groups

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