Department
of Energy &
Climate Change

DECC Public Attitudes Tracker – Wave 14

Summary of key findings

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Introduction

In March 2012 the Department of Energy and Climate Change (DECC) launched a tracking survey to understand and monitor public attitudes to the Department's main business priorities. The Public Attitudes Tracker consists of one annual survey every March and three shorter surveys, in June, September and December, which repeat a subset of questions where we think attitudes might shift with greater regularity or be influenced by seasonal factors. New questions are generally piloted in the shorter surveys.

This report presents summary headline findings from wave 14 and primarily makes comparisons with data from the previous quarter, March 2015 (Wave 13), and that from the same period last year, June 2014 (wave 10).

The fourteenth wave of data was collected between 24 and 28 June 2015 using face-to-face in-home interviews with a representative sample of 2,118 households in the UK. In comparison to the previous survey (the recent annual wave), wave 14 covers a reduced question set. Full details of the methodology are provided in the technical note.

This summary provides selected headlines and highlights statistically significant differences between wave 14 and previous waves. Please refer to the Excel summary tables for a full comparison of these findings: https://www.gov.uk/government/collections/public-attitudes-tracking-survey.

Summary of headline findings

This note provides selected headlines and is not an exhaustive overview of the findings. Please refer to the accompanying excel summary tables and excel dataset to see full responses to all survey questions.

Energy bills, switching and suppliers

Worries over paying for energy bills have fallen to the lowest level recorded since the survey began. In June 2015, only 25% were either very, or fairly worried about paying for their energy bills. At this point last year when wave 10 was conducted, this percentage was much higher at 35%. Worries about energy bills at wave 14 were at their highest amongst 35-44 year olds (38%), social grade DE (37%), private renters (33%), social renters (36%), and households with children (32%).

These findings sit in a context of a decline in concern over prices more widely - with worry about mortgages or rent payments at 14%, food and other household shopping at 19% and transport at 22%, the latter two down at least 10 percentage points on a year ago. Concern about energy bills in relation to other household bills has also fallen and there has been no increase in the proportion more worried about energy bills than other expenses. Only 8% are more worried about energy bills than they are about paying for food, transport, or housing costs.

Trust in energy suppliers saw a significant increase in March 2015 across a range of areas. This level of trust has remained stable at wave 14. Energy suppliers are trusted most to provide a bill which accurately reflects energy use (70%), and also to provide a breakdown of the components of your bill (69%). Trust is also high that energy suppliers will give customers a fair deal (56%), provide impartial and accurate advice on energy efficiency measures (56%), and inform you about the best tariff for you (54%).

The proportion of the public that plan to switch energy supplier in the next year has remained very stable over the course of the tracker. At wave 14 only 6% had firm plans to switch their supplier in the next year, whilst around a third (32%) felt uncertain as to whether they would switch supplier. More than half (57%) said that they would not be switching supplier. The most likely groups to have plans to switch in the next year were those in social grade AB (9%), 35-44 year olds (11%), and households with children (9%).

Renewable energy

Support for renewable energy has been consistently high during the tracker, fluctuating around 75-82%. This pattern has continued at wave 14 at which 75% expressed support for the use of renewables, although the proportion expressing strong support (24%) is lower than in any previous waves. Opposition to renewables was very low at 4%, with only 1% strongly opposed.

Support for renewables is particularly high for people in social grade AB (85%), with those that have incomes over £50,000 (88%), and those who give a lot or a fair amount of thought to saving energy in the home (81%). Opposition is slightly higher amongst over 65s (10%), social grade DE (6%), and those with an income lower than £16,000 (6%).

Shale gas

Three quarters of the public were aware of fracking at wave 14 (75%). Awareness of fracking has remained stable over the last 18 months, following a significant increase between wave 2 (42%) and wave 8 (70%). However, only 14% claimed to know a lot about it, compared to 42% saying they knew a little. Just under one in five (19%) were aware of it but didn't really know what it was. Awareness of fracking was higher for over 45s (upwards of 85%), social grade AB (90%), and people in rural areas (83%).

When asked whether they support or oppose extracting shale gas, almost half of the public neither supported nor opposed it (46%). Amongst those that did offer an opinion, slightly more opposed (28%) extraction of shale than supported it (21%). This is a reversal of the findings when these questions were first asked at wave 8, when 27% supported it against 21% that opposed. This shift towards more opposition has happened gradually over the last 18 months, with support currently at its lowest since the survey began.

Support for fracking appears to be linked to awareness. Amongst those that were only aware of fracking but did not really know what it was, and those that hadn't heard of it, over 60% selected the neutral option and therefore didn't give an opinion. There is more opposition than support amongst those who know a lot about it (54% vs. 32%), know a little about it (35% vs. 27%), and those who are aware of it but don't really know what it is (23% vs. 13%). The only group to be more supportive are those that haven't heard of fracking, of whom 12% support it and 7% oppose it.

Support for fracking differs by gender, with men (27%) more likely than women (16%) to support it. Older people also tend to support fracking the most, as 30% of over 65s are supportive.

Nuclear energy

Support for the use of nuclear energy has dropped to its lowest level so far during the tracker. At wave 14 one third (33%) supported this, whilst around a quarter (24%) were opposed. However, although support was higher at this point in previous years - 36% in June 2014, 37% in June 2013. Those aged over 55 (41-42%), in social grade AB (39%), and male (42%) were the most likely to support the use of nuclear energy.

A significant proportion (40%) selected the neutral option at this question, to indicate that they neither support nor oppose the use of nuclear energy. The proportion selecting this option increased at wave 14, having been at 36% at wave 13.

Energy saving and wasting

The proportion of people who claim to give thought to saving energy in the home dropped between wave 13 and wave 14. The proportion claiming to give a lot of thought to saving energy at home fell from 27% to 23%, whilst the proportion giving it a fair amount of thought reduced from 51% to 47%. A drop of this nature is similar to those recorded at wave 10 and wave 6. Wave 6, 10 and 14 were all conducted at the same time of year during the summer, thereby suggesting a seasonal effect is present at this question and explains the changes seen at wave 14.

Renewable heat

Awareness of and attitudes towards renewable heat have shown little change over the course of the tracker. At wave 14 73% were aware of renewable heat, a slight drop from 76% at wave 12. Depth of awareness however seems to be limited as the largest proportions report knowing a little about it (34%) or aware of it but did not really know what it was (33%), with a much smaller group reporting to know a lot about it (7%).

The public are more than four times as likely to be positive (44%) about the idea of having a renewable energy system in their home than negative (10%). There is also a significant proportion (41%) who are neither positive nor negative towards a renewable heating system.

When participants were asked more specific questions about the merits of renewable heating systems the limited understanding of the technology becomes clearer as the majority tend to select either the neutral option, ‘neither agree nor disagree’ or ’Don’t know’. The proportions selecting these two options were very high when asked if renewable heating systems are expensive to install (55%), would heat your home better than the current system (72%), are cheap to run (63%), and are less reliable than conventional heating systems (71%).

Whilst the numbers remain low, installation of renewable heating systems has been very consistent during the tracker. A small proportion at wave 14 had installed a biomass boiler (2%), an air source heat pump (1%), a ground source heat pump (0.5%), solar thermal panels (2%), or a micro-CHP unit (1%). A much larger proportion (44%) have replaced an old gas boiler with a more efficient condensing gas boiler.

Friends and family (34%) continue to be the most trusted for advice on which heating system to install in your home, consistent with previous waves. Trust in a tradesperson to provide advice fell slightly from 26% to 22% between waves 12 and 14.

Radioactive waste

The results from the radioactive waste questions have remained very consistent with previous waves. At wave 14, 14% knew a lot or a fair amount about the way the UK manages radioactive waste, whilst 85% knew not very much or nothing at all.

Four in ten (43%) claimed to have some knowledge of Geological Disposal Facilities. Most who were aware did not have a lot of knowledge; 22% said they were aware but did not really know what they are, and 18% knew a little about them. Only 3% knew a lot about Geological Disposal Facilities.

Technical notes

The results shown here are based on 2,118 face-to-face in-home interviews conducted with a representative sample of UK adults aged 16+. Fieldwork was conducted between 24 June 2015 and 28 June 2015 on the TNS UK Omnibus, which uses a random location quota sampling method.

The questionnaire was designed by DECC and TNS BMRB drawing on a number of questions from previous surveys. Questions were refined through cognitive testing. The representativeness of the data was controlled through sample design, fieldwork quotas and post-fieldwork weighting. Data were weighted for the following characteristics: sex, age, social grade, region and tenure. Results included here are based on weighted data.

Please refer to the full technical note at https://www.gov.uk/government/collections/public-attitudes-tracking-survey for further details.

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