Department of Energy & Climate Change

DECC Public Attitudes Tracker – Wave 15

Summary of key findings

November 2015

URN: 15D/507

Any enquiries regarding this publication should be sent to us at [insert contact for department].

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. In 2015 DECC launched a review of the tracker to ensure that the dataset would continue to offer valuable insight. A list of the changes made to date, covering both question content and frequency, is included at Annex A.

This report presents summary headline findings from September 2015 (wave 15) and primarily makes comparisons with data from the previous quarter, June 2015 (wave 14), and that from the same period last year, September 2014 (wave 10).

The fifteenth wave of data was collected between 23 September 2015 and 27 September 2015 using face-to-face in-home interviews with a representative sample of 2,121 households in the UK. Data was collected using 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 though cognitive testing. In comparison to the previous survey, wave 15 includes new questions on domestic heat, renewable heating systems, as well as questions that have previously featured on energy security, renewable technologies, and geological disposal facilities. Full details of the methodology are provided in the technical note.

This summary provides selected headlines and highlights statistically significant differences between wave 15 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.

Table 1. Fieldwork dates and sample sizes for each wave.

	Fieldwork dates	Sample size
Wave 1	21 - 25 March 2012	2,121
Wave 2	27 June - 1 July 2012	2,100
Wave 3	26 - 30 September 2012	2,118
Wave 4	12 December 2012 - 2 January 2013	2,107
Wave 5	27 - 31 March 2013	2,051
Wave 6	3 - 7 July 2013	2,124
Wave 7	25 - 29 September 2013	2,103
Wave 8	11 - 15 December 2013	2,110
Wave 9	26 - 30 March 2014	2,040
Wave 10	25 - 29 June 2014	2,087
Wave 11	24 - 28 September 2014	2,103
Wave 12	10 December 2014 - 8 January 2015	2,119
Wave 13	18 - 29 March 2015	1,981
Wave 14	24 - 28 June 2015	2,118
Wave 15	23 - 27 September 2015	2,121

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 Security

In September 2015, concerns in relation to the UK's future energy security had fallen to their lowest level since the tracker began, with the trend apparent across all six measures asked about in this area, compared to March 2015 when the full range of questions were last asked. Wave 15 findings reveal that:

- Nearly 7 in 10 (68%) report feeling concerned about steep energy rises in the future, down from 79% at March 2015, with the proportion not very or not at all concerned increasing from 20% to 31%.
- 42% report feeling concerned about power cuts becoming more frequent in the future, down from 52% at March 2015.
- 58% report feeling concerned about UK supplies of fossil fuels being sufficient to meet UK demand for them, down from 64% in March 2015.
- This downward trend in reported concern between March and September is also apparent in relation to the UK becoming too dependent on energy from other countries (72% down to 64%), the UK not investing fast enough in alternative sources of energy (69% down to 63%), and the UK not developing technology to use existing sources of fossil fuels sufficiently (62% down to 56%).

Energy bills, switching and suppliers

At wave 15, 24% were either very, or fairly worried about paying for their energy bills. These reported worries were relatively consistent with findings from June 2015. However, at this point last year (wave 11), this percentage was much higher at 34%.

In wave 15 worries about energy bills were at their highest amongst 35-44 year olds (31%), social grade DE (32%), private renters (31%), social renters (34%), and those with household incomes under £25,000 (33%). Concern about energy bills in relation to other household bills remained consistent with the previous wave, with only 7% more worried about energy bills than paying for food, transport, or housing costs.

In March 2015 trust in energy suppliers saw a significant increase across a range of areas, to a level which has remained relatively stable across the two subsequent waves. In September 2015, people were most likely to trust their energy supplier to provide a bill which accurately reflects energy use (68%), and to provide a breakdown of the components of your bill (66%), although the latter has decreased slightly since wave 14. Around half of the public trust that energy suppliers to give customers a fair deal (56%), and provide impartial and accurate advice on energy efficiency measures (56%).

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. This trend has continued in wave 15: only 6% had firm plans to switch their supplier in the next year and nearly six in ten (59%) reported that they would not be switching supplier. The most likely group to have plans to switch in the next year were those with an income of £35,000 to £49,999 (9%). People with an income above £50,000 were also amongst the most likely to have switching plans (8%), whilst those with an income below £35,000 were less likely than the average (5%).

At wave 15 a new set of questions was included to gain perceptions on what people think uses the most energy in their home, and also how familiar they are with the Energy Performance Certificate rating for their home.

Over four in ten people believe central heating uses the most energy in the home over the course of a year (43%), with just over one in five thinking large appliances would use more (21%). Respondents were also asked what they think uses the second highest amount of energy in the home. From combining the two questions the most likely things to be cited in the top two highest energy users were central heating (64%), large appliances (49%), and hot water (42%).

Over half claimed to be aware of the Energy Performance Certificate (56%), but only 7% knew the exact rating of their property. Highest awareness of this was found in social grade AB (73%) and those with an income over £35,000 (77%).

Renewable energy

Support for renewable energy has been consistently high during the tracker at around 75-80%. This pattern has continued at wave 15, at which 76% expressed support for the use of renewables. Opposition to renewables was very low at 5%, with only 1% strongly opposed.

Support for renewables is particularly high for people in social grade AB (81%), social grade C1 (81%), those with incomes over £35,000 (86%), and those who give a lot or a fair amount of thought to saving energy in the home (82%). Support is lower amongst over 65s (69%), social grade DE (66%), and social renters (64%).

The level of support for specific renewable technologies reported in wave 15 are unchanged from March 2015, when the question previously featured: biomass (65%), on-shore wind (66%), off-shore wind (73%), wave and tidal (73%), and solar (80%).

Shale gas

Awareness of fracking has remained stable over the last 18 months. In September 2015 over half of respondents (56%) reported knowing a lot or a little (14% and 42% respectively) about shale. Just over one in five (21%) reported being aware of it but not really knowing what it was. Awareness of fracking was higher for over 45s (87%), social grade AB (88%), males (84%), and people in rural areas (81%).

When asked whether they support or oppose extracting shale gas, just over four in ten of the public neither supported nor opposed it (43%). Amongst those that did offer an opinion, slightly more opposed (30%) this approach than supported it (23%). This is similar to the findings at wave 14.

Support for fracking differs by gender, with men (30%) more likely than women (17%) to support it. Older people also tend to support fracking the most, with 30% of over 65s saying they support it. Opposition to fracking is highest amongst those aged 45-54 (38%) and 55-64 (40%), whilst people in rural areas are also slightly more likely to be opposed (33%).

Nuclear energy

In wave 15 support for the use of nuclear energy had increased slightly since June 2015, with 36% in favour (up from 33% at wave 14) and a quarter (25%) opposed. However, this is not as high as support has been in previous waves, where it peaked at 42% at waves 9 and 11. A relatively high proportion (37%) selected the neutral option at this question, to indicate that they neither support nor oppose the use of nuclear energy.

Those aged over 55 (43%), in social grade AB (48%), and male (46%) were the most likely to support the use of nuclear energy.

Energy saving and wasting

At wave 15 the proportion of people who report giving thought to saving energy in the home was equivalent to wave 14. The proportion claiming to give a lot of thought to saving energy at home remained at 23%, whilst the proportion giving it a fair amount of thought was 48% at both waves. Although this measure has remained steady since wave 14, this is lower than at wave 11 and wave 7, which were conducted at the same time of year.

Renewable heat

In wave 15 new questions were added to the PAT on domestic heating behaviours and renewable heat systems.

Between a third and half of the public report awareness of the three most common renewable heating systems; air source heat pumps (33%), ground source heat pumps (40%), and biomass boilers (49%). However, less than 5% of respondents felt that they knew a lot about any of these renewable heating systems.

The public are more than four times as likely to be positive (45%) about the idea of having a renewable energy system in their home than negative (10%). There is also a high proportion (41%) that are neither positive nor negative towards a renewable heating system.

The majority of people pay a lot or a fair amount of attention to the amount of heat they use in their homes (72%), with the main reason for this being to minimise the amount of money they spend on it (56%). Others in this category reporting that they want to control the amount of heat used (17%) and wanting to make sure that the household has enough heat to be comfortable (15%). The proportion who pay a lot or a fair amount of attention in order to minimise the environmental impact is much lower at only 8%.The main reason for not paying very much, or not paying any attention to heat use (27%) was due to households using as much heat as is required to be comfortable (47%).

Two thirds of people would only replace their heating system if their current one had broken or began to deteriorate (67%). Of those who would replace a working heating system (17%), the main reason for doing this would be to save money on current bills (49%). A smaller proportion cited getting a more reliable system (26%) or a more environmentally friendly system (24%), as the main reasons for doing this.

Awareness of the Domestic Renewable Heat Incentive is low, as just over one in ten people claimed to have heard of it (12%). Awareness was higher in the 55-64 age group (24%) and lowest for 16-24 year olds (5%). Awareness also varied based on tenure, as owner occupiers (15%) were more likely to be aware of it than private (9%) or social (8%) renters.

Radioactive waste

In September 2015 the results for the radioactive waste questions have remained very consistent with previous waves. 15% said they 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 (42%) claimed to have some knowledge of Geological Disposal Facilities. Most who were aware did not have a lot of knowledge; 21% said they were aware but did not really know what they are, and 17% knew a little about them. Only 4% said they knew a lot about Geological Disposal Facilities. Knowledge of Geological Disposal Facilities differs by gender, with males (50%) more likely to claim knowledge than females (35%).

Technical notes

The results shown here are based on 2,121 face-to-face in-home interviews conducted with a representative sample of UK adults aged 16+. Fieldwork was conducted between 23 September 2015 and 27 September 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.

Annex A: changes to question set and frequency

Question	Frequency
Q4) How often, if at all, do you personally do any of the following? • Leave the lights on when you are not in the room • Boil the kettle with more water than you are going to use • Wash clothes at 30 degrees or lower • Try to keep rooms that you are not using at a cooler temperature than those you are using • Leave the heating on when you go out for a few hours	Annual
Q7) Which answer best applies to you and your household at the moment with regards to the following measures to heat your home and/or provide hot water? • Installing a biomass boiler (this may involve burning wood logs, pellets or chips to provide central heating and/or hot water) • Installing an air source heat pump • Installing a ground source heat pump • Installing solar thermal panels (this means solar panels for hot water, not solar PV panels which generate electricity) • Replacing an older gas boiler with a more efficient condensing gas boiler • Installing a micro-CHP (combined heat and power) unit	Annual
Q7_1A. The next few questions are about renewable heating systems, by renewable heat we mean heating systems which use energy from biomass or the sun, or which use electricity to draw heat from the ground, water, or air to heat your home. This does not include solar panels which produce electricity. How much, if anything do you know about the following types of renewable heating system… (air source heat pumps, ground source heat pumps, biomass boiler)?	New question. Annual from March 2016.
Q7_2. Thinking about these types of renewable heating system, how positive or negative would you say you are towards the idea of having a renewable heating system in your home?	New question. Annual from March 2016.
Q7_7a) Which of the following would you trust to provide advice about which heating system to install in your home?	Annual
Q7_7b) And which one would you trust the most to provide advice about which heating system to install in your home?	Annual
Q7_8. How much attention do you pay to the amount of heat you use in your home?	New question. Annual from March 2016.
Q7_9, You said that you pay [a lot/ a fair amount] of attention to the amount of heat you use in your home. What is the main reason for this?	New question. Annual from March 2016.

Q7_10. You said that you pay [not very much/ no] attention to the amount of heat you use in your home. What is the main reason for this?	New question. Annual from March 2016.
Q7_11. Now thinking about your heating system. Which of the statements on this screen comes closest to your view?	New question. Annual from March 2016.
Q7_12. Which of these would be the more important consideration in changing your heating system?	New question. Annual from March 2016.
Q7_13. Have you heard of the Domestic Renewable Heat Incentive?	New question. Annual from March 2016.
Q13) Generally speaking, do you support or oppose the use of the following renewable energy developments: • On-shore wind • Biomass • Off-shore wind • Wave and tidal • Solar	Bi-annual
Q20A. Over the course of a year, which of these do you think uses the most energy in your home?	New question. Annual from March 2016.
Q20B. Over the course of a year, which of these do you think uses the second most energy in your home?	New question. Annual from March 2016.
Q23a) I'm now going to ask you how concerned you are about various things happening in the future. When I talk about 'the future' I mean the next 10-20 years. When answering please think about how concerned you would be if this happened, rather than how likely you think it is to happen. So, how concerned, if at all, are you about... • Steep rises in energy prices in the future • UK supplies of fossil fuels not being sufficient to meet the UK's demand for them	Bi-annual
Q23b) And still thinking about the next 10-20 years, how concerned, if at all, are you about... • Power cuts becoming more frequent in the future • The UK becoming too dependent on energy from other countries • The UK not investing fast enough in alternative sources of energy • The UK not developing technology to use existing sources of fossil fuels sufficiently	Bi-annual
Q24A. Do you know what the Energy performance certificate (EPC) rating for your property is?	New question. Annual from March 2016.
Q26a) How much, if anything, do you know about the way the UK currently manages radioactive waste?	Quarterly

Q26b) The next question is about Geological Disposal Facilities. These are deep underground facilities for the permanent disposal of radioactive waste. Before today, how much, if anything, did you know about the UK's plans to dispose of radioactive waste in Geological Disposal Facilities in the UK?	Quarterly

Department of Energy & Climate Change
3 Whitehall Place
London SW1A 2AW
www.gov.uk/decc
URN: 15D/507