DECC PUBLIC ATTITUDES TRACKER – WAVE 1

SUMMARY OF KEY ISSUES

9 July 2012

THE DECC PUBLIC ATTITUDES TRACKER

DECC has set up a tracking survey to understand and monitor public attitudes to the Department's main business priorities. This note presents headline findings from the first wave of the survey. The survey will run four times a year, with questions on issues where we think attitudes might shift quickly or be affected by seasonal changes repeated quarterly, and others asked annually.

The first wave of data was collected between 21st and 25th March 2012 using face-to-face in-home interviews with a representative sample of 2,121 households in the UK. The value of a tracking survey is in looking at how the attitudes change over time so the full value of the findings will only be apparent when we have a number of waves of data.

TOPLINE RESULTS FROM WAVE 1

This note is a summary of key issues. It provides selected headlines and is not an exhaustive overview of the findings. Please refer to the excel tables to see the responses to all the survey questions. http://www.decc.gov.uk/en/content/cms/statistics/public_att/public_att.aspx

CLIMATE CHANGE AND ENERGY SECURITY: These are not top of mind issues, but when asked directly, concern is high on all energy security measures vs concern about climate change

- Few see energy supply or climate change as the biggest challenges facing Britain today (3% saying energy supply and 2% climate change vs 43% unemployment).

- When asked directly, the proportions of people who were very concerned about various aspects of future energy security was as follows:
    - Steep rises in energy prices (51%).
    - The UK becoming more dependent on energy from other countries (40%).
    - The UK not investing fast enough in alternative sources of energy (29%).
    - UK supplies of fossil fuels not being sufficient to meet UK demand (25%).
    - The UK not developing technology to use existing sources of fossil fuels sufficiently (23%).
    - Power cuts becoming more frequent (21%).

- In comparison, 19% of people said that they were very concerned about current climate change. 38% of people thought climate change was mainly or entirely caused by human activity while 15% thought it was mainly or entirely caused by natural processes. 42% thought it was both. 3% said they did not think there was such a thing as climate change.

ENERGY EFFICIENCY AND HEAT: Whilst people said they think about saving energy in the home, many also said they were not taking some simple actions regularly

- More than eight in ten (82%) said that they gave a lot (27%) or a fair amount (54%) of thought to saving energy in the home. However, when asked about specific actions, it is clear that there is still potential to change behaviour[1]:
    - Two thirds (64%) of people said they boiled the kettle with more water than they are going to use at least occasionally
    - Half (52%) said they left the lights on when they were not in rooms at least occasionally
    - Just under half (47%) said they ever left the heating on when going out for a few hours
    - 27% said they always washed clothes at 30 degrees or lower
    - Three in ten (31%) said that they always tried to keep rooms they were not using at a cooler temperature than those they were using

- In terms of awareness and interest in installing low carbon heat measures, almost half of people (47%) said they had not heard of an air source heat pump and more than 2 in 5 (41%) said they had not heard of a ground source heat pump. Almost 1 in 5 (18% for an air source heat pump and 19% for a ground source heat pump) had not thought about installing one and a similar proportion said they did not want to. Similar patterns were reported regarding installing a biomass boiler or a micro-CHP unit.

- Sixteen per cent of people had previously heard of heat networks. A third (35%) said they would be very likely (9%) or fairly likely (26%) to join a heat network assuming it meant no increase to their heating bills.

- Six per cent of people said they had a smart meter. A further 41% had heard of them (but did not have one) while 53% had never heard of them. Of those with a smart meter, over six in ten (62%) said they had an in-home energy display/energy monitor. Only 15% said they referred to it every day though a further 31% referred to it occasionally.

ENERGY INFRASTRUCTURE: There are high levels of support for a mix of sources, with positive views on renewables, split views on the balance of benefits and risks for nuclear and low awareness/knowledge of CCS

- Overall, eight in ten (82%) agreed that 'The UK needs a mix of energy sources to ensure a reliable supply of electricity', with 46% strongly agreeing. Just 3% disagreed with the statement.

- Views in relation to renewable energy were generally positive. Eight in ten (79%) said they supported renewable energy for providing our electricity, fuel and heat, with 32% strongly supporting. Just 5% opposed renewable energy. Seven in ten (69%) agreed that renewable energy industries and developments provide economic benefits to the UK. Almost eight in ten (78%) agreed that renewable energy developments should provide direct benefit to the communities in which they are located. A little over half (55%) agreed that they would be

[1] Figures don't add up exactly because of rounding

happy to have a large scale renewable energy development in their area. Two in ten (19%) disagreed with this statement with one in ten (10%) strongly disagreeing.

- Perceptions of a range of renewable energy sources were mostly positive. Highest levels of support were found for solar (83%), off shore wind (76%) and wave and tidal (75%). On-shore wind had the highest level of opposition, though still only 12% opposed this, with 5% strongly opposing (compared with 66% supporting).

- The sample was split when asked to weigh up the benefits of nuclear energy against the risks. Three in ten (29%) felt that the benefits outweighed the risks while a similar proportion felt that the risks outweighed the benefits (30%). A further third (32%) felt that the benefits and risks were about the same, with one in ten (9%) saying they did not know.

- Opinions about nuclear energy were most positive for whether it provides a reliable source of affordable energy in the UK (43% of people agreed with this) and least positive for whether nuclear energy will help combat climate change in the UK (34% of people agreed).

- A third (36%) had previously heard of carbon capture and storage. Just 3% said they knew a lot about it with 16% saying they know a little. Seventeen per cent said they were aware of carbon capture and storage but did not really know what it was. Two thirds (64%) had never heard of carbon capture and storage.

ENERGY RETAIL MARKET: High level of concern about bills, but relatively small proportions of people switching in the past year or actively planning to switch

- Two in ten (19%) said they had been very worried about their energy bills over the last three months with a further 37% fairly worried.

- Eight per cent said they were more worried about their energy bills than both their transport costs and food and other household costs. The most common reasons for being more worried about energy bills compared with other outgoings were that they had increased more than other things (43%) and that they were more expensive than other items (42%).

- Fifteen per cent of people had switched their energy supplier in the last year while 39% had switched supplier more than a year ago. Five per cent said they planned to switch supplier in the next year with a further 27% saying they may or may not switch.

- Most people had some trust in their energy supplier but few trusted them a lot on any measure. Energy suppliers were more trusted to provide an accurate bill (68% of people trusted them a lot or a fair amount to do this) or provide a breakdown of the components of their bill (64%) than to improve homes to make them more efficient (48% compared to 43% who didn't trust them at all or very much) or inform customers about the best tariff for them (44% compared with 51%).

TECHNICAL NOTES

Results shown here are based on 2,121 UK face-to-face in-home interviews conducted with a representative sample of adults aged 16+. Fieldwork was conducted between 21st and 25th March 2012 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 though cognitive testing.

The representativeness of the data were 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.

The following adjustment has been made to the data as part of the quality assurance process.

- The data for the number of people reporting that they had installed or were in the process of installing solid wall insulation have been adjusted to remove people who already said they had cavity wall insulation or were in the process of installing this. (In order to make the adjustment the following assumptions have been made: that people don't have both solid wall and cavity wall insulation and that if people have reported having both they were more likely to have cavity wall insulation).

DECC will be reviewing the confidentiality of the data with a view to publishing anonymised datasets annually.

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