Department of Energy & Climate Change

DECC Public Attitudes Tracker – Wave 17

Summary of key findings

April 2016

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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. 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 in the annex.

This report presents summary headline findings from March 2016 (wave 17) and primarily makes comparisons with data from the previous quarter, December 2015 (wave 16), and that from the same period last year, March 2015 (wave 13).

The seventeenth wave of data was collected between 23 March 2016 and 27 March 2016 using face-to-face in-home interviews with a representative sample of 2,105 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 through cognitive testing. Full details of the methodology are provided in the technical note.

Wave 17 includes one new follow-up question on fracking. A complete list of changes to question set and frequency is included in the annex of this report.

This summary provides selected headlines and highlights statistically significant differences between wave 17 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
Wave 16	9-13 December 2015	2,121
Wave 17	23 March 2016 and 27 March 2016	2,105

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

Worries over paying for energy bills have remained relatively consistent over the last year of the tracker. At wave 17, 28% were either very or fairly worried about paying for their energy bills. The level of worry was at its highest amongst those with household incomes under £16,000 (41%), social renters (40%), 35-44 year olds (38%), private renters (38%), and those in social grade DE (36%).

Between wave 14 and wave 17, there has consistently been around a quarter of respondents saying they were either “very” or “fairly” worried about their energy bills. In earlier waves of the survey levels of worry were higher – for example, half (49%) were very or fairly worried two years ago, at wave 9.

Concern about energy bills in relation to other household bills has also remained fairly stable over the last four waves of the tracker. When energy bills are compared against other bills at Wave 17, 9% were more worried about energy bills than paying for food, transport, and housing costs. Those who were more worried about paying for their energy bills than other items were followed up with a question to ask their reasons for this. The majority felt that energy bills were generally more expensive than other items (55%), whilst just over a third (35%) felt that energy prices had increased more than other expenses on shopping or transport.

Energy suppliers and switching

Trust in energy suppliers has shown a slight but statistically significant reduction on four measures at wave 17 compared to wave 16. Overall, the two aspects that people are most likely to trust their energy supplier on have remained the same since the tracker begun. These are to provide a bill which accurately reflects energy use (69%), and to provide a breakdown of the components of your bill (67%). However, trust has fallen slightly at some measures compared with wave 16. This is particularly the case on giving customers a fair deal (drop from 58% to 54%), providing a bill which accurately reflects energy use (72% to 69%), informing you about the best tariff for you (54% to 50%), and providing impartial and accurate advice on energy efficiency measures (57% to 54%).

When asked about their history of switching gas or electricity supplier, 15% had switched in the last year. A further four in ten (39%) had switched longer than a year ago. The remainder (42%) had never switched their energy supplier. Levels of switching have shown little change since the tracker begun: the proportion that say they switched supplier in the last year as been either 15% or 16% in every annual wave.

The proportion of the public that plan to switch energy supplier in the next year has also remained stable over the course of the tracker. At wave 17, only 6% had firm plans to switch their supplier in the next year. At wave 17, around a third (34%) felt that they ‘may or may not switch supplier’ compared to 30% at wave 16. However, this is not out of line with previous annual waves, and this percentage was 33% at both waves 9 and 13. More than half (55%) stated that they would not be switching supplier. The most likely group to have plans to switch in the next year were those aged between 35-44 (11%), 25-34 (9%), those with a mortgage (9%),

and those in social grades AB (8%). In comparison, those aged over 65 (3%) or under 24 (4%) were least likely to have plans to switch.

Energy security

Concerns in relation to the UK's future energy security have seen some modest increases since wave 16. There was no change in levels of concern in relation to the UK becoming too dependent on energy from other countries (67%), but slight increases were seen on other measures. The proportion concerned that supplies of fossil fuels are not sufficient to meet UK demand (57% up to 60%), that the UK is not investing fast enough in alternative sources of energy (63% up to 66%), and that the UK is not developing technology to use existing sources of fossil fuels sufficiently (55% up to 58%) all showed a small but statistically significant increase at wave 17.

A follow up question was also asked of those who said they were concerned about the UK becoming too dependent on energy from other countries. The question asked respondents to identify any specific sources of energy which they were concerned about. Gas (48%) and oil (45%) were the most common sources of energy mentioned. A smaller proportion mentioned electricity (22%), whilst just over a quarter had no specific energy source in mind (27%).

Energy saving and waste

The proportion of people that claim to give a lot of thought to saving energy in the home remained stable at wave 17. Just over a quarter claimed to give a lot of thought to saving energy at home (28%), whilst half claimed to give it a fair amount of thought (51%). The findings at wave 17 were very similar to those at wave 13, which was conducted at the same point of the year.

Results in relation to energy saving and wasting behaviours showed little change over the last year. Three out of four people said they wash clothes at 30 degrees or lower (77%), and try to keep rooms they are not using at a cooler temperature (74%) at least occasionally. Two thirds at least occasionally boil the kettle with more water than they need (65%). Roughly half at least occasionally leave lights on when they are not in a room (51%), and leave the heating on when going out for a few hours (49%). Across all of the energy saving and wasting behaviours, the proportion that always do each of them has also stayed very consistent with the findings at wave 13.

Renewable energy

Support for renewable energy has been consistently high during the tracker at around 75-80%. This pattern has continued at wave 17, with 81% expressing support for the use of renewables. Opposition to renewables was very low at 4%, with only 2% strongly opposed.

Support for renewables was particularly high for people with incomes over £35,000 (91%), in social grade AB (86%), social grade C1 (86%), or aged 55-64 (86%). Support for renewables was lower amongst those aged 65+ (74%), in social grades DE (73%), and social renters (73%).

Wave 17 also featured an additional question which asked people's opinion on three statements about renewable energy. Nearly eight in ten agreed that renewable energy developments

should provide direct benefits to the communities in which they are located (77%), whilst seven in ten (70%) agreed that renewable industries and developments provide economic benefits to the UK. Just over half said they would be happy to have a large scale renewable development in their own area (56%)

Climate change

The level of concern over climate change has risen slightly at wave 17, increasing from 66% at wave 13 to 70% at the latest wave. Levels of concern over climate change were highest amongst 55-64 year olds (80%), those earning over £35,000 per year (77%), and social grades AB (76%) and C1 (76%). Concern was lowest amongst social renters (57%) and those in social grades DE (57%).

Respondents were more likely to see climate change as a result of human activity compared with natural processes. Four in ten (43%) believe it is caused mainly by human activity, compared to only one in ten (10%) that believe it is mainly down to natural processes. Four in ten think it is caused by a mixture of human activity and natural causes (41%).

Nuclear energy

Support for the use of nuclear energy has remained fairly stable over the life of the tracker. At wave 17 almost four in ten (38%) supported nuclear energy compared with 23% who were opposed. These findings show little change from last year (wave 13), when 39% supported and 23% opposed. Those with an income over £50,000 (53%), male (49%), in social grades AB (47%), and aged over 65 (44%) were the most likely to support the use of nuclear energy.

Four in ten (36%) selected the neutral option at this question, to indicate that they neither support nor oppose the use of nuclear energy.

Four additional statements on nuclear energy were presented to respondents at wave 17. These statements focused on whether nuclear energy is seen by the public as reliable, affordable, safe, and good for combatting climate change. Of the four statements, the public were most likely to agree that nuclear energy is a reliable source of energy; 49% agreed with this statement, compared with 14% that disagreed. Respondents were also more likely to agree than disagree with each of the other three statements: whether nuclear energy provides affordable energy for the UK (37% vs. 16%), whether it will help to tackle climate change (35% vs. 21%), and whether it is safe (34% vs. 29%).

Radioactive waste

At wave 17, 16% said they knew a lot or a fair amount about the way the UK manages radioactive waste, whilst 84% knew not very much or nothing at all. These results are consistent with previous waves.

More than four in ten (44%) claimed to have some knowledge of Geological Disposal Facilities (GDF). 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 20% knew a little about them. Only 3% said they knew a lot about GDF. Knowledge of GDF differs by gender and also social grade, with men (52%) more likely to claim knowledge than women (37%), and those in higher social grades AB (59%) much more likely to claim knowledge than those in social grades DE (32%).

Shale gas

Three quarters of the public were aware of fracking at wave 17 (74%). Awareness of fracking has remained very stable over the last two years of the tracker, following a significant increase between wave 2 (42%) and wave 8 (70%). However, despite many people being aware of fracking, only a small proportion claimed to have detailed knowledge. At wave 17, 12% claimed to know a lot about fracking, whilst 42% said they knew a little, and 20% were aware of it but didn't really know what it was. Awareness of fracking was higher for those in social grade AB (88%), aged over 45 (86%), with incomes over £25,000 (86%), and home owners (84%).

When asked whether they support or oppose extracting shale gas, half of the public neither supported nor opposed it (46% neither supported nor opposed it and 4% did not know). This is likely to partly reflect a lack of knowledge about fracking. Three additional questions were asked at wave 17 to identify the most common reasons why people support, oppose, or are neutral towards fracking. Of those who were neutral or did not know whether they support or oppose fracking, for the vast majority this was purely down to not knowing enough about it (67%). In addition, some had never heard of fracking (12%), or were still making up their mind about it (10%).

Of those who did offer an opinion, more people were opposed (31%) to fracking than supported it (19%). The proportion supporting it fell in Wave 17 compared to Wave 16.

Renewable heat

Between a third and half of respondents claimed to be aware of the three most common renewable heating systems: air source heat pumps (34%), ground source heat pumps (39%), and biomass boilers (51%). Whilst a reasonable proportion report awareness of these systems, only a very small percentage know a lot about them. Only 5% said they knew a lot about any of these renewable heating systems. However, respondents were four times as likely to be positive (44%) compared with negative (11%) about the idea of having a renewable heating system in their home. Four in ten were neither positive nor negative towards this.

When presented with a range of statements about renewable heating systems and asked whether they agree or disagree, the majority could not give a clear answer either way and selected either the neutral or don't know options. These percentages were high for all four statements, on whether renewable heating systems are expensive to install (56%), would heat your home better than the current system (74%), are cheap to run (65%), and are less reliable than conventional heating systems (71%). This further illustrates the current lack of public knowledge and awareness in this area.

Four further questions were asked, on biomass boilers, air source heat pumps, and ground source heat pumps. These questions asked people how confident they were on a range of statements about each heating system, and were only asked of respondents that had earlier stated that they were aware of each one. For biomass boilers, the public were split on whether they would provide enough heat to keep your home at a reasonable temperature (43% confident vs. 39% not confident), whether they are reliable (41% vs. 40%), and whether they would be easy to use (40% vs. 42%). Respondents were much less likely to be confident that biomass boilers would be affordable; only 25% were confident about this compared with 56% that were not.

Results were less positive for air source heat pumps, with lower levels of confidence in relation to reliability (34% confident vs. 49% not confident), affordability (24% vs. 58%), ease of use

(37% vs. 46%), and its ability to heat your home to a reasonable temperature (32% vs. 50%). There was a similar lack of confidence in relation to ground source heat pumps, with only a minority feeling they would be affordable (23% vs. 61%), and would heat your home to a reasonable temperature (35% vs. 50%). However, opinion was more split on reliability (39% vs. 45%) and ease of use (40% vs. 44%).

Respondents were asked which sources they would trust the most for advice on which heating system to install. The most trusted sources were family and friends (20%), the Energy Saving Advice Service (18%), and a tradesperson (15%).

The majority of respondents claimed to pay a lot or a fair amount of attention to the amount of heat they use in their homes (74%), with the main reason for this being to minimise the amount of money spent on it (55%). Only 7% said this was due to wanting to minimise environmental impacts. A quarter (25%) said they did not pay very much, or any, attention to heat use at home; this was most commonly due to households using as much heat as is required to be comfortable (44%).

Two thirds of people would only replace their heating system if their current one had broken or begun to deteriorate (64%). Of those who would replace a working heating system (19%), the main reason for doing this would be to save money on current bills (48%). A smaller proportion cited getting a more environmentally friendly system (26%), and getting a more reliable system (25%) as the main reasons for doing this.

Perceptions of energy use

Questions were included at wave 17 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. These questions were first asked at wave 15.

Half of respondents (50%) believed that central heating uses the most energy in the home over the course of a year, compared with one in five who thought large appliances used the most (19%). 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 (69%), large appliances (46%), and hot water (39%).

Six in ten claimed to be aware of the Energy Performance Certificate (60%), but only 8% said they knew the exact rating of their property. Those with incomes over £35,000 (80%), aged 55-64 (75%), and in social grades AB (75%) had the highest levels of claimed awareness.

Smart meters

At wave 17, one in five respondents (20%) claimed to currently have a smart meter installed in their home at wave 17. Whilst this percentage was similar to the level recorded at wave 13, it has shown a consistent upwards movement over the four years of the tracker, from 6% at wave 1 to 12% at wave 5, 14% at wave 9 and 18% at wave 13, before now reaching 20%.

Of those who have a smart meter, two thirds (66%) reported having an in-home energy display or energy monitor installed in their home as well, whilst just over half (52%) stated that they refer to it at least occasionally. Three in ten (29%) stated that they were not offered an in-home display at the time of their smart meter being installed.

Insulation

The insulation measures most commonly installed were double glazing (76%), and loft or top-up loft insulation (63%). More than four in ten (44%) had installed cavity wall insulation, whereas much smaller proportions had installed under floor insulation (12%), and solid wall insulation (5%). Awareness of, and interest in under floor insulation and solid wall insulation was much lower than for the other insulation measures. For solid wall insulation, around one in five either had not heard of it (17%), had not thought about installing it (22%), or specifically did not want to install it (19%). For under floor insulation a lower proportion had not heard of it (11%), whilst one in five did not want to install it (21%), and a quarter had not thought about installing it (27%).

Overall half of respondents had installed at least one type of insulation (50%). Of those that had installed more than type, the vast majority were all installed at separate time (76%). A quarter had installed more than one type of insulation at the same time (23%).

Electric vehicles

A question was asked about ownership and perceptions of electric vehicles. The vast majority of responses suggested a lack of interest in owning an electric vehicle, as most people had either not thought about buying one (47%), or did not drive or need a car (25%). Almost one in four (23%) stated that they had thought about buying an electric vehicle, whilst just under 1% already owned one.

Technical notes

The results shown here are based on 2,105 face-to-face in-home interviews conducted with a representative sample of UK adults aged 16+. Fieldwork was conducted between 23 March 2016 and 27 March 2016 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: 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 in wave 15. 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 in wave 15. 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 in wave 15. 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 in wave 15. 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 in wave 15. 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 in wave 15. Annual from March 2016.
Q7_12. Which of these would be the more important consideration in changing your heating system?	New question in wave 15. Annual from March 2016.
Q7_13. Have you heard of the Domestic Renewable Heat Incentive?	Wave 15 (not asked in subsequent waves).
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

Q15c) You said that you support hydraulic fracturing for shale gas, otherwise known as fracking. Why is this? • Good for local jobs and investment • Reduces dependence from other countries for UK's energy supply • Reduces dependence on fossil fuels (coal, oil) • Need to use all available energy sources • Will have positive impact on climate change / meeting carbon reduction targets • May result in cheaper energy bills • Will have positive impact on UK economy • Won't affect me/my local area so no personal impact • Positive reports in the media • No specific reason (SINGLE CODE) • Other (specify) • Don't know	New question in wave 16. Quarterly from wave 17.
Q15d) You said that you oppose hydraulic fracturing for shale gas, otherwise known as fracking. Why is this? • Loss/destruction of natural environment • Increased traffic/noise/disruption • Local house prices will fall • Use of chemicals in the process • Should focus on developing renewable energy sources • Should focus on developing other energy sources • Risk of contamination to water supply • Risk of earthquakes • Negative impact on climate change / meeting carbon reduction targets • Not a safe process • Will not be regulated effectively • Negative reports in the media • Too much risk / uncertainty to support at present • No specific reason (SINGLE CODE) • Other (specify) • Don't know	New question in wave 16. Quarterly from wave 17.
Q15e.You said that you neither support nor oppose hydraulic fracturing for shale gas, otherwise known as fracking. Why is this? 1. Don't know enough about it 2. Not interested in it 3. I can see the positives and negatives 4. Haven't made up my mind yet 5. Will have no impact on me 6. There are many vocal campaigns and I don't know what to believe 7. Have never heard of it 8. Other (specify) 9. Don't know	New question in wave 17. Quarterly from wave 17.

Q20A. Over the course of a year, which of these do you think uses the most energy in your home?	New question in wave 15. Annual from wave 17.
Q20B. Over the course of a year, which of these do you think uses the second most energy in your home?	New question in wave 15. Annual from wave 17.
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
Q23c) You said that you are [very / fairly] concerned about the UK becoming too dependent on energy from other countries. When you gave this answer, were you thinking about specific energy types? • No specific sources • Oil • Gas • Electricity • Other source (specify) • Don't know	New question in wave 16. Bi-annual from the wave 17.
Q24A. Do you know what the Energy performance certificate (EPC) rating for your property is?	New question in wave 15. Annual from wave 17.

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
Q35) Which of these energy types do you think is most used by UK households overall? • Gas • Electricity (including renewable energy) • Petroleum • Bioenergy and waste • Solid fuels (wood, coal) • Other • Don't know	Piloted in wave 16. Reviewing as part of a planned approach.
Q36) And which energy type do you think is second most used by UK households overall? • Gas • Electricity (including renewable energy) • Petroleum • Bioenergy and waste • Solid fuels (wood, coal) • Other • Don't know	Piloted in wave 16. Reviewing as part of a planned approach.

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