Department of Energy & Climate Change

# DECC Public Attitudes Tracker – Wave 16

Summary of key findings

February 2016

**URN: 16D/017**



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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 December 2015 (wave 16) and primarily makes comparisons with data from the previous quarter, September 2015 (wave 15), and that from the same period last year, December 2014 (wave 12).

The sixteenth wave of data was collected between 9 December 2015 and 13 December 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 through cognitive testing. Full details of the methodology are provided in the technical note.

Wave 16 includes new questions on fracking, energy use and concerns about energy dependence. In comparison to the previous survey, questions on renewable energy development, renewable heat, energy awareness and Energy Performance Certificate (EPC) awareness were deliberately not asked. These questions will be asked again in the next annual survey (wave 17) as part of a planned approach. A complete list of changes to question set and frequency is included in the annex.

This summary provides selected headlines and highlights statistically significant differences between wave 16 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 |

# 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 remained relatively stable since wave 14. At wave 16, 25% were either very or fairly worried about paying for their energy bills. At this point last year when wave 12 was conducted, this percentage was higher at 31%. Similarly to wave 14 and 15, worries about energy bills at wave 16 were at their highest amongst 25-34 year olds (31%), social grade DE (35%), private renters (38%), social renters (33%), and those with household incomes under £16,000 (37%).

Concern about energy bills in relation to other household bills has increased at wave 16. When compared against other bills, 10% were more worried about energy bills than they were about paying for food, transport, and housing costs. Whilst this percentage has risen at wave 16, it is the same proportion found at wave 12 which was conducted at the same point in the year.

The level of trust in energy suppliers has remained relatively stable at wave 16. In December 2015, people were most likely to trust their energy supplier to provide a bill which accurately reflects energy use (72%) an increase from 68% at wave 15; and to provide a breakdown of the components of your bill (68%). Over half of the public trust that energy suppliers give customers a fair deal (58%), and provide impartial and accurate advice on energy efficiency measures (57%), both of which have remained stable.

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 16, only 7% had firm plans to switch their supplier in the next year, whilst three in ten (30%) felt that they ‘may or may not switch supplier’. Nearly six in ten (59%) said that they would not be switching supplier. The most likely groups to have plans to switch in the next year were those aged between 25-34, 35-44 and 45-54, as 9% within each age group have switching plans. In comparison, those aged under 24, or over 55 were less likely than the average (4%).

## Renewable energy

Support for renewable energy has been consistently high during the tracker at around 75-80%. This pattern has continued at wave 16, with 78% expressing support for the use of renewables. 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 (86%), social grade C1 (82%), those with incomes over £35,000 (86%), those aged between 35 -54 (83%) and those who give a lot or a fair amount of thought to saving energy in the home (83%). Support is lower amongst social grade DE (69%) and social renters (65%).

## Shale gas

Just under three quarters of the public were aware of fracking at wave 16 (74%). This compares with 77% at wave 15. Awareness of fracking has remained stable over the last 18 months, following a significant increase between wave 2 (42%) and wave 8 (70%). However, at wave 16 only 15% claimed to know a lot about it, compared to 43% saying they knew a little, and 16% saying they were aware of it but didn't really know what it was. Awareness of fracking was higher for over 45s (87%), social grade AB (92%), males (81%), incomes over £35,000 (87%), 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 (44%). This is most likely a reflection of the lack of knowledge people have about fracking. Amongst those that were only aware of fracking (but knew nothing about it), or that hadn't heard of it, over 60% selected the neutral option or 'don't know' when asked if they support or oppose its use.

Amongst those that did offer an opinion, slightly more opposed (29%) fracking than supported it (23%). This is similar to the findings seen since wave 14, but still 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 opposition has happened gradually over the last two years.

Support for fracking appears to be inversely linked to awareness, as those who know more about fracking tend to be more likely to oppose it. There is more opposition than support amongst those who know a lot about it (53% vs. 33%), and know a little about it (40% vs. 26%). For those who are aware of it but don't really know what it is, the stances are even (both 18%).

Support for fracking differs by gender, with men (28%) more likely than women (17%) to support it. Older people also tend to support fracking the most, with 32% of over 65s saying they support it. Opposition to fracking is highest amongst social grade AB (39%) those aged 45-54 (36%) and 55-64 (38%). People in rural areas are also slightly more likely to be opposed (33%).

Two additional questions were introduced at wave 16, asking people to identify reasons why they support or oppose fracking. Of the 496 people asked who supported fracking, the three most commonly cited reasons were: needing to use all available energy sources (35%), reducing dependence on conventional fossil fuels (34%) and reducing dependence from other countries for UK's energy supply (32%). Of the 596 people asked who opposed fracking, the most common reason by far was the loss/destruction of natural environment (61%). Beyond this, the next most common reasons cited were the risk of contamination to the water supply (32%), and fracking being too much of a risk/uncertainty to support at present (25%).

## Nuclear energy

Support for the use of nuclear energy has remained stable since wave 15. At wave 16, over a third (36%) supported nuclear energy compared to 21% who were opposed. This is not as high as support has been in previous waves, where it peaked at 42% at waves 9 and 11. Those with an income over £50,000 (47%), in social grade AB (44%), and male (46%) were the most likely to support the use of nuclear energy.

A significant proportion (41%) selected the neutral option at this question, to indicate that they neither support nor oppose the use of nuclear energy.

## Radioactive waste

The results for the radioactive waste questions have remained very consistent with previous waves. At wave 16, 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.

Nearly half (48%) 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 22% 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 men (55%) more likely to claim knowledge than women (40%).

## Energy saving and wasting

The proportion of people who claim to give thought to saving energy in the home remained stable between wave 15 and wave 16. The proportion claiming to give a lot of thought to saving energy at home remained at 24%, whilst half claimed to give it a fair amount of thought (50%).

## Energy Sources

New questions were added at wave 16 about which sources of energy are perceived to be used the most in UK households. Respondents were asked which energy type they thought was the most used, and then which was the second most used in UK households. Gas and electricity dominated the answers given here, as over 90% of respondents placed them both in the top two. Over half (57%) believed electricity was the main source of energy, with 38% believing it was gas. Very few respondents selected other options such as petroleum (2%), and solid fuels (1%).[1]

## Energy Security

Concerns in relation to the UK's future energy security have remained fairly stable at wave 16. Aside from a slight change in concern over power cuts becoming more frequent, all measures remained consistent. On power cuts becoming more frequent, concern increased slightly from 42% up to 45%. This follows a significant decrease from 52% down to 42% between wave 14 and 15. In contrast, concern over steep energy price rises in the future has remained stable at wave 16, at 68%.

There was stability over other aspects of future energy security as well. Concern over supplies of fossil fuels remained stable at 57%. There was also no change in levels of concern in relation to the UK becoming too dependent on energy from other countries (66%), the UK not investing fast enough in alternative sources of energy (63%), and the UK not developing technology to use existing sources of fossil fuels sufficiently (55%).

A follow up question was added at wave 16 for those who said they were concerned about the UK becoming too dependent on energy from other countries. The questions asked respondents

[1] Gas is the most used energy source in UK households. 23.9 Million Tonnes of Oil Equivalent (Mote) was consumed in the domestic sector in 2014 compared to 9.4 Mote of electricity. Figures sourced from: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/449134/ECUK_Chapter_3_-_Domestic_factsheet.pdf

to identify any specific sources of energy which they were concerned about. Of the 1,379 respondents who were concerned about this, gas (49%) and oil (42%) were the most common sources of energy mentioned. A smaller proportion mentioned electricity (21%), whilst nearly 1 in 4 had no specific energy source in mind (23%).

## 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 9 December 2015 and 13 December 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: changes to question set and frequency**

| Question | Frequency |
|---|---|
| Q4) How often, if at all, do you personally do any of the following?<br>• Leave the lights on when you are not in the room<br>• Boil the kettle with more water than you are going to use<br>• Wash clothes at 30 degrees or lower<br>• Try to keep rooms that you are not using at a cooler temperature than those you are using<br>• 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?<br>• Installing a biomass boiler (this may involve burning wood logs, pellets or chips to provide central heating and/or hot water)<br>• Installing an air source heat pump<br>• Installing a ground source heat pump<br>• Installing solar thermal panels (this means solar panels for hot water, not solar PV panels which generate electricity)<br>• Replacing an older gas boiler with a more efficient condensing gas boiler<br>• 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 |

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| 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? | New question in wave 15 (not asked in subsequent waves). |
| Q13) Generally speaking, do you support or oppose the use of the following renewable energy developments:<br>• On-shore wind<br>• Biomass<br>• Off-shore wind<br>• Wave and tidal<br>• Solar | Bi-annual |
| Q15c) You said that you support hydraulic fracturing for shale gas, otherwise known as fracking. Why is this?<br>• Good for local jobs and investment<br>• Reduces dependence from other countries for UK's energy supply<br>• Reduces dependence on fossil fuels (coal, oil) | New question in wave 16. Quarterly from wave 17. |

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| • Need to use all available energy sources<br>• Will have positive impact on climate change / meeting carbon reduction targets<br>• May result in cheaper energy bills<br>• Will have positive impact on UK economy<br>• Won't affect me/my local area so no personal impact<br>• Positive reports in the media<br>• No specific reason (SINGLE CODE)<br>• Other (specify)<br>• Don't know | |
| Q15d) You said that you oppose hydraulic fracturing for shale gas, otherwise known as fracking. Why is this?<br><br>• Loss/destruction of natural environment<br>• Increased traffic/noise/disruption<br>• Local house prices will fall<br>• Use of chemicals in the process<br>• Should focus on developing renewable energy sources<br>• Should focus on developing other energy sources<br>• Risk of contamination to water supply<br>• Risk of earthquakes<br>• Negative impact on climate change / meeting carbon reduction targets<br>• Not a safe process<br>• Will not be regulated effectively<br>• Negative reports in the media<br>• Too much risk / uncertainty to support at present<br>• No specific reason (SINGLE CODE)<br>• Other (specify)<br>• Don't know | New question in wave 16. 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 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 in wave 15. 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...<br><br>• Steep rises in energy prices in the future | Bi-annual |

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| • UK supplies of fossil fuels not being sufficient to meet the UK's demand for them | |
| Q23b) And still thinking about the next 10-20 years, how concerned, if at all, are you about...<br><br>• Power cuts becoming more frequent in the future<br>• The UK becoming too dependent on energy from other countries<br>• The UK not investing fast enough in alternative sources of energy<br>• 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?<br><br>• No specific sources<br>• Oil<br>• Gas<br>• Electricity<br>• Other source (specify)<br>• 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 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 |
| Q35) Which of these energy types do you think is most used by UK households overall?<br><br>• Gas<br>• Electricity (including renewable energy)<br>• Petroleum<br>• Bioenergy and waste<br>• Solid fuels (wood, coal)<br>• Other | New question in wave 16. Bi-annual from wave 17. |

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|---|---|
| • Don’t know | |
| Q36) And which energy type do you think is second most used by UK households overall?<br><br>• Gas<br>• Electricity (including renewable energy)<br>• Petroleum<br>• Bioenergy and waste<br>• Solid fuels (wood, coal)<br>• Other<br>• Don’t know | New question in wave 16. Bi-annual from wave 17 |

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**URN: 16D/017**