Department of Energy & Climate Change

DECC PUBLIC ATTITUDES TRACKER – WAVE 3

SUMMARY OF KEY FINDINGS

4th December 2012

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 third wave of the 2012/13 survey. The survey runs four times a year, with one longer survey annually and three shorter quarterly surveys focused on a subset of questions where we think attitudes might shift quickly or be affected by seasonal changes.

The third wave of data was collected between 26th and the 30th September 2012 using face-to-face in-home interviews with a representative sample of 2,118 households in the UK. As outlined above, only a subset of the questions asked in wave 1 were asked in waves 2 and 3. In addition, some of the questions asked in wave 2 in order to establish a new baseline have not been asked in wave 3, and will only be asked annually in future years. The only new question included in wave 3 is on support for nuclear energy[1]. Please refer to the excel tables to see the responses to all of the wave 3 questions and differences between waves 1, 2 and 3. http://www.decc.gov.uk/en/content/cms/statistics/public_att/public_att.aspx#

This summary highlights statistically significant differences between wave 3, wave 2 and where appropriate, wave 1 but the value of a tracking survey is in looking at how attitudes change over time so the full value of the findings will only be apparent when we have a number of waves of data.

Where questions from wave 1 were replaced with new questions in wave 2 (see summary of key findings from wave 2), no comparison is made with wave 1.

TOPLINE RESULTS FROM WAVE 3

This note 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.

ENERGY SECURITY: A substantial proportion of the public are concerned about energy security when asked directly

- When asked directly, the proportions of people who were very concerned about future energy security was as follows:
    - Steep rises in energy prices (40%)
    - UK supplies of fossil fuels not being sufficient to meet UK demand (20%)

- There was a small increase in the proportion who were not at all concerned about UK supplies of fossil fuels not being sufficient to meet UK demand from 7% in wave 2 to 10% in wave 3.

[1] In this case it is not meaningful to draw comparisons with waves 1 and 2

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

- Around a quarter of people (26%) said they gave a lot of thought to saving energy in the home with a further (50%) giving it a fair amount of thought. Although not significantly different from wave 2, the proportion of people very concerned is more comparable with wave 1 (27%) than wave 2 (22%).

- When asked about specific actions around heating their home, it is clear that there is still potential to change behaviour:
  - Forty five per cent said they left the heating on at least occasionally when going out for a few hours
  - Around a third (32%) said that they always tried to keep rooms they were not using at a cooler temperature than those they were using.

  There was a slight increase compared to waves 1 and 2 in the proportion who, at least occasionally, try to keep rooms that they are not using at a cooler temperature than those they are using (from 75% and 76% in waves 1 and 2 respectively to 79% in wave 3).

- In terms of awareness and interest in installing low carbon heat measures, there has been a small increase (compared to wave 2) in the proportion saying they had not heard of measures or not thought about installing them[2]. Around half of people (51%) said they had not heard of an air source heat pump and 44% said they had not heard of a ground source heat pump, compared to 46% and 42% respectively in wave 2. Around one in five (17% for an air source heat pump and 20% for a ground source heat pump) had not thought about installing one and a similar proportion said they did not want to at this stage. Similar patterns were reported regarding installing a biomass boiler or a micro-CHP unit.

- There has been an increase in the proportion of people thinking about installing solar thermal panels (from 4% to 7%) and saying that they would like to install this measure (but not at this stage) (from 14% to 18%). There has also been a drop in the proportion who have not thought about this (from 29% to 23%). It is not yet possible to determine whether this is a trend.

ENERGY INFRASTRUCTURE: There are positive views on renewables and broadly split views on nuclear but with slightly more people supporting than opposing the use of nuclear energy

- Views in relation to renewable energy were generally positive. Just over three quarters (79%) said they supported renewable energy for providing our electricity, fuel and heat, with 28% strongly supporting. Just 4% opposed renewable energy.

[2] This increase reflects a decrease in the proportion of people saying they could not install these measures due to renting their property (from around 12% to around 7%). This is unlikely to reflect a "real" change and may be a product of the fact that respondents were less familiar with the 'renting' code (which is not visible to respondents) than in waves 1 and 2 given changes to the number of questions asked and question ordering.

- Perceptions of a range of renewable energy sources were mostly positive. Highest levels of support were found for solar (82%), off shore wind (74%) and wave and tidal (74%). On-shore wind had the highest level of opposition, though still only 12% opposed this. Across all of the technologies, and in terms of overall support for renewable energy, these results are broadly consistent with wave 2 and slightly less positive than wave 1.

- Nearly 2 in 5 (38%) support the use of nuclear energy for generating electricity in the UK; Just over a quarter (27%) oppose the use of nuclear energy and around a third (34%) neither support or oppose. This question is new and cannot be compared to the questions asked in waves 1 and 2.

ENERGY RETAIL MARKET: High level of concern about bills, but relatively small proportions of people planning to switch

- Fourteen per cent said they had been very worried about their energy bills over the last three months with a 30% fairly worried. This is broadly consistent with wave 2 (June 2012) and is significantly lower than for wave 1 (March 2012).

- Eight per cent of those who were worried about their energy bills said they were more worried about their energy bills than both their transport costs and food and other household costs, which is consistent with the findings from waves 1 and 2.

- Six per cent said they planned to switch supplier in the next year with a further 27% saying they may or may not switch. This is consistent with the findings from waves 1 and 2.

TECHNICAL NOTES

Results shown here are based on 2,118 UK face-to-face in-home interviews conducted with a representative sample of adults aged 16+. Fieldwork was conducted between 26th and the 30th September 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.

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