Department for
Business, Energy
& Industrial Strategy

BEIS PUBLIC ATTITUDES TRACKER

December 2018 Survey (Wave 28)

Questions on Clean Growth, Renewable Energy, Shale Gas, Condensing Boilers, Heat Networks, Renewable Heating Systems, Heat Usage in the Home and Installing or Replacing Heating Systems

February 2019

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Glossary

- **Base:** The number of people answering a survey question.
- **Cognitive testing:** An in-depth interviewing method to determine the reliability and validity of survey questions.
- **Condensing boilers:** Water heating appliances that are run on either gas or oil, to improve energy efficiency.
- **Clean Growth:** Growing national income while cutting greenhouse gas emissions.
- **Energy infrastructure:** A term used to capture a range of different energy sources that are covered by the survey and the interconnections between them. This includes a range of renewable sources (on-shore and off-shore wind, solar, wave and tidal, and biomass), nuclear, shale gas, and carbon capture and storage as well as the pipeline and other interconnectors between them.
- **Fieldwork:** The period where face-to-face interviews are conducted.
- **Heat networks:** Heating systems where heat is generated locally and then provided to yours and other homes, rather than being generated in your home.
- **Omnibus survey:** A method of quantitative survey research where data on a wide variety of subjects is collected during the same interview.
- **Quotas:** A target number of interviews for a certain characteristic during survey fieldwork (e.g. age).
- **Random location quota sampling:** A form of quota sampling that combines elements of random sampling and quota sampling. Once a random sample is drawn, interviewers are tasked with interviewing a range of sub-groups across different timing patterns based on a pre-agreed number of respondents.
- **Renewable heat:** Heating systems that use renewable energy to provide heat, such as air source heat pumps, ground source heat pumps, biomass boilers and thermal solar panels.
- **Representativeness:** Similarity of the sample profile to benchmark population statistics, such as the Office for National Statistics mid-year population estimates.
- **Sample size:** The number of people included in the sample (a subset of the population).
- **Shale gas and fracking:** Shale gas is natural gas found in shale, a non-porous rock which does not allow the gas to escape. Hydraulic fracturing or “fracking” is a process of pumping water at high pressure into shale to create narrow fractures which allow the gas to be released and captured. The gas can then be used for electricity and heating.

- **Social grade:** Social grade is a classification system based on occupation. It contains the following categories:
    - A: Higher managerial, administrative and professional
    - B: Intermediate managerial, administrative and professional
    - C1: Supervisory, clerical and junior managerial, administrative and professional
    - C2: Skilled manual workers
    - D: Semi-skilled and unskilled manual workers
    - E: State pensioners, casual and lowest grade workers, unemployed with state benefits only
- **Statistical significance:** A statistical test to determine whether relationships observed between two survey variables are likely to exist in the population from which the sample is drawn. We only report on findings that are statistically significant at the 95% level.
- **Survey outputs:** The key deliverables from the survey. This includes:
    - A key findings report, presenting summary headline findings from December 2018.
    - Summary tables (Excel), showing trends across all waves of the tracker.
    - An Excel dataset containing questionnaire variables, demographic variables and derived variables for further analysis. An SPSS version of the dataset is available upon request.
    - Excel label data (CSV), containing labels for all variables.
    - Excel numeric data (CSV), containing numeric values for all variables.
    - Cross tabulation tables (PDF) for the current wave, including demographic and key question sub-group comparisons for all questions.
- **Weighting:** An adjustment made to the data to ensure that survey results are representative of the target population (in this case, all UK adults).

Executive Summary

Clean growth

- In December 2018, 82% of the public had not heard of “Clean Growth”, up from 78% in September 2018.

Renewable energy

- Just over three quarters (77%) of the public expressed support for renewable energy in December 2018. This proportion has slightly decreased over the last three waves since the peak of 85% in March 2018.

Shale gas

- In December 2018, 78% of people were aware of fracking, up from 75% in September 2018 but equal to the proportion in July 2018. Awareness of fracking has remained between 70% and 80% over the last five years.
- In December 2018, just under half of the public (47%) neither supported nor opposed fracking, largely because they did not know enough about it.
- In December 2018, 13% supported fracking (a slight decrease from 15% in September 2018) while 35% opposed fracking (a slight increase from 31% in September 2018). There has been a general downward trend in support of fracking and a general upward trend in opposition of fracking since the question was first asked in December 2013.
- The most common reason for opposing fracking was the loss or destruction of the natural environment (62%), followed by the risk of earthquakes (40%, up from 26% in September 2018).

Condensing boilers

- Around half (51%) of the public said they had a condensing boiler in December 2018, a similar proportion to previous waves.

Heat networks

- In December 2018, 15% of the public said they had heard of heat networks. Awareness has remained between 15% and 18% over the course of the tracker.
- Of those that had heard of heat networks in December 2018, almost half (47%) said they were likely to install one given the opportunity. Over half (56%) of those that were aware of heat networks were also positive about them.

Renewable heating systems

- Awareness of renewable heating systems decreased from 65% in December 2017 to 52% in December 2018, its lowest point across the tracker.
- In December 2018, people were more aware of solar thermal panels (71%), than other renewable heating systems (38% were aware of biomass boilers, 33% were

aware of ground source heat pumps, and 27% were aware of air source heat pumps).

- Similarly, people were more likely to have had solar panels installed (7%) than other types of renewable heating system (1% or less). They were also more likely to say they would install solar panels in the next few years (6%) than any other renewable heating system (2% or less).

- The most common reasons given for being unlikely to install renewable heating systems were that it would cost too much to install (30%) and not being able to install them as they did not own the property (24%).

Heat usage in the home

- Nearly a fifth (18%) of the public paid a lot of attention to the amount of heat they used in their home in December 2018, a similar proportion to previous waves.

- The main reason given for paying attention to the amount of heat used in the home was to minimise the amount of money spent on heat (55%). The main reason given for not paying attention to the amount of heat used in the home was because people used as much heat as needed to be comfortable (54%).

Installing or replacing heating systems

- In December 2018, two thirds (66%) of the public said they would only replace their heating system when their current one breaks down or starts to deteriorate, with 12% saying they would consider replacing their heating system while it was still working.

- People would mainly change their heating system to save bills (43%) or to switch to a more environmentally friendly heating system (33%).

- In December 2018, a fifth (19%) said they had a boiler or heating system installed in the last three years.

- Most people who had installed a new boiler or heating system had been involved in the decision-making process when choosing one (60%). Of these people, just over half (53%) used information from their heating engineer or installer as a source of information to make their decision. Other less common sources of information included friends and family (28%), internet and websites (21%) and an energy supplier (15%).

- People generally found all sources of information to be helpful. The sources most likely to be found to be very helpful were heating engineers/installers (79%) and friends and family (74%).

- The majority of people who were involved in the decision-making process about a new boiler or heating system found it very easy to get the information they wanted (60%) and felt they had the right information to help them make a good decision (91%).

- The public were most likely to trust a tradesperson or their friends and family to provide advice about which heating system install in their home.

Introduction

The Public Attitudes Tracker (PAT) survey covers public attitudes towards Department for Business, Energy and Industrial Strategy (BEIS) policies such as energy, climate change and workers' rights. The survey began in March 2012 and runs four times a year. Questions on issues where we think attitudes might shift quickly or be affected by seasonal changes are repeated quarterly; other questions are asked annually. The tracker is regularly reviewed to ensure that the dataset continues to offer valuable insight.

This report presents summary headline findings from December 2018 (Wave 28).

Data for wave 28 were collected between 5 December and 16 December using face-to-face in-home interviews with a representative sample of 4,273 households in the UK. Data was collected using the Kantar TNS Omnibus, which uses a random location quota sampling method. The questionnaire was designed by BEIS and Kantar Public drawing on several questions from previous surveys. Questions were refined through cognitive testing. Full details of the methodology are provided in the technical note.[1]

The wave 28 questionnaire covers the following topics:

- Clean Growth
- Renewable energy
- Shale gas
- Condensing boilers
- Heat networks
- Renewable heating systems
- Heat usage in the home
- Installing or replacing heating systems

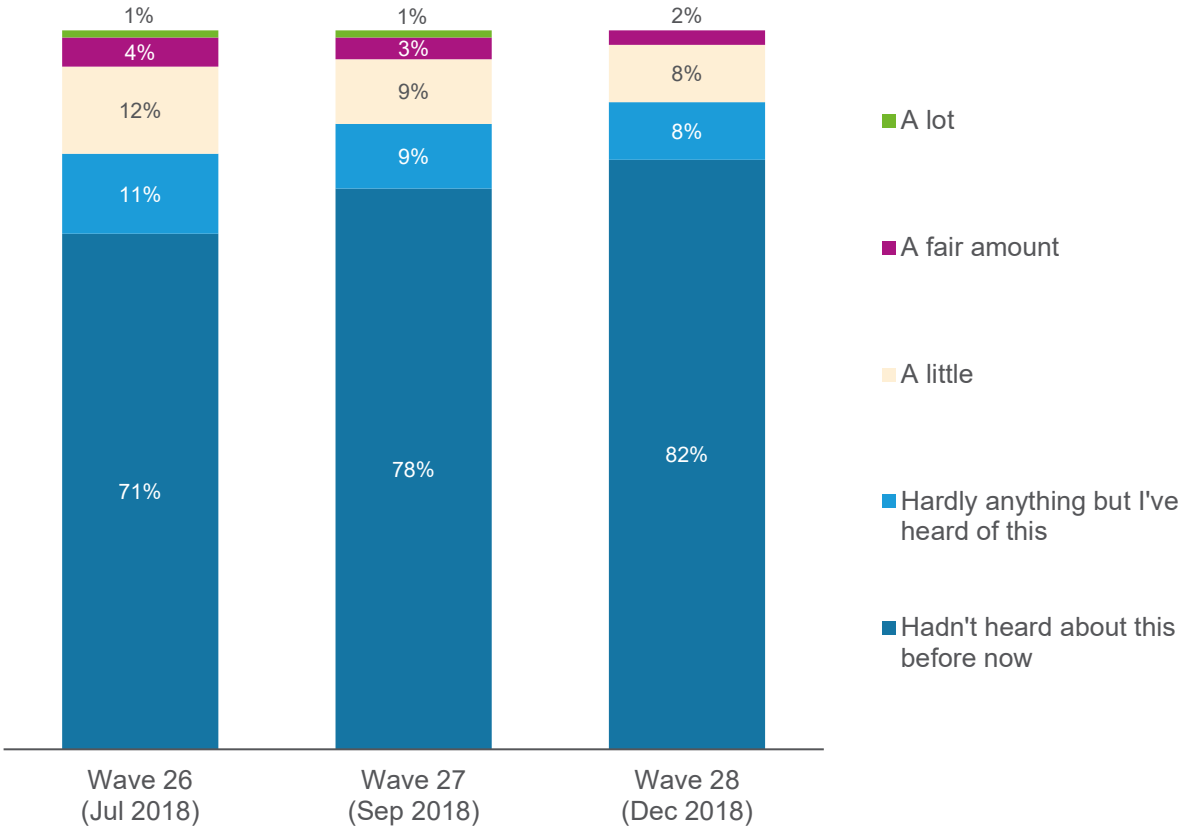
[1] Full details can be found in the technical note. Available at: https://www.gov.uk/government/publications/public-attitudes-tracker-technical-note-on-use-of-wave-1-and-wave-2-datasets

Headline findings

Clean growth

In December 2018, 82% of the public had not heard of “Clean Growth”, up from 78% in September 2018 and up from 71% from when the question was first asked in July 2018. In December 2018, 2% said they knew a lot or a fair amount about “Clean Growth”, with 18% claiming any awareness.

Figure 1: Awareness of the Concept of ‘Clean Growth’



Q80. The Government has recently begun to promote the concept of ‘Clean Growth’. Before today, how much, if anything, did you know about this concept?

Bases: All wave respondents – July 2018 (4,268); September 2018 (4,258); December 2018 (4,273)

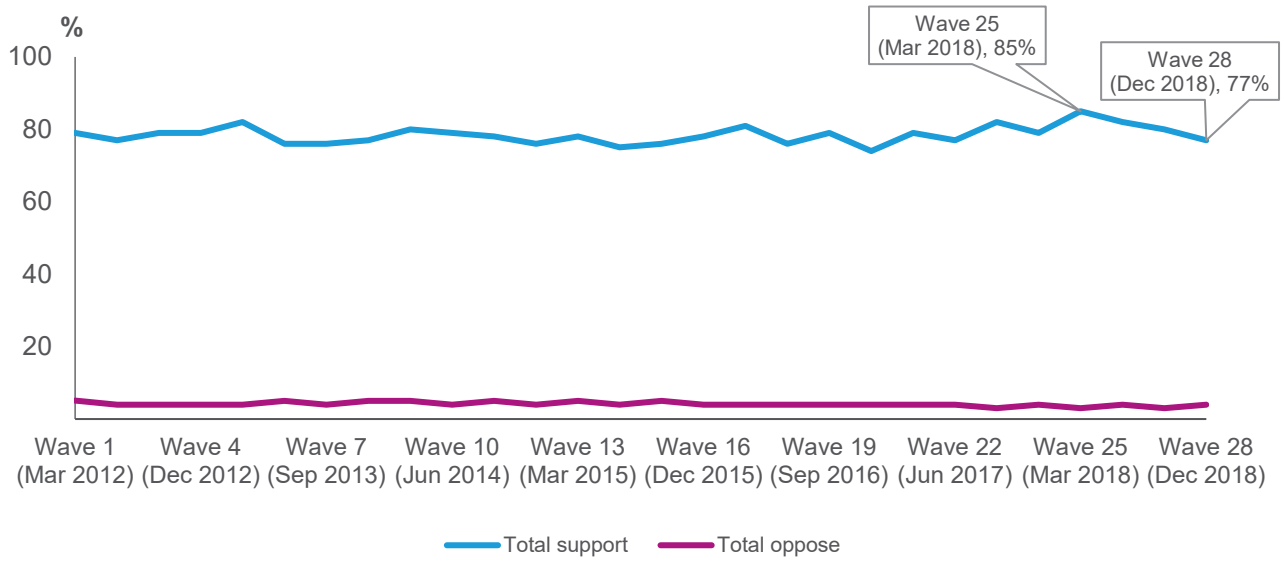
Those more likely to claim having any awareness of “Clean Growth” included men (21%, compared with 15% of women), those in social grade AB (23%, compared with 13% of those social grade DE), those with household incomes of £50,000 and over (28%, compared with 15% with household incomes under £16,000) and those living in London (28%, compared with 8% of those living in the North East).

Energy infrastructure

Renewable energy

In December 2018, 77% of the public expressed support for the use of renewable energy. This proportion has slightly declined over the last three waves since the peak of 85% in March 2018. Opposition to renewable energy remained low in December 2018 at 4%, with only 1% strongly opposed.

Figure 2: Support for Renewable Energy



Q3. The next question is about renewable energy. This covers a number of different forms, including wind power, solar energy and biomass. Do you support or oppose the use of renewable energy for providing our electricity, fuel and heat?

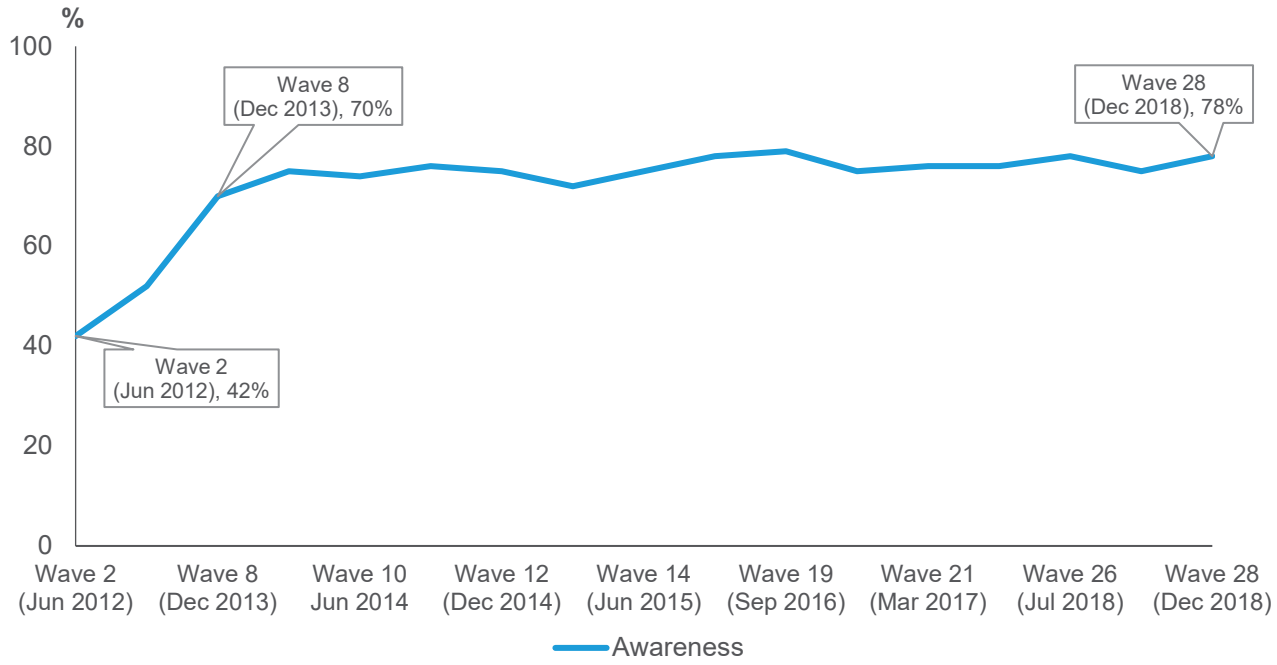
Bases: All wave respondents - March 2012 (2,121); June 2012 (2,100); September 2012 (2,118); December 2012 (2,107); March 2013 (2,051); July 2013 (2,124); September 2013 (2,103); December 2013 (2,110); March 2014 (2,040); June 2014 (2,087); September 2014 (2,103); December 2014 (2,119); March 2015 (1,981); June 2015 (2,118); September 2015 (2,121); December 2015 (2,121); March 2016 (2,105); June 2016, (2,114); September 2016 (2,080); December 2016 (2,138); March 2017 (2,180); June 2017 (2,097); September 2017 (2,105); December 2017 (2,078); March 2018 (2,102); July 2018 (4,268); September 2018 (4,258); December 2018 (4,273)

Support for renewable energy was higher among men (81%, compared with 73% of women), those in social grade AB (86%, compared with 67% of those in social grade DE), and those with household incomes of £50,000 and over (85%, compared with 71% of those with household incomes under £16,000).

Shale gas

In December 2018, 78% of people were aware of fracking, up slightly from 75% in September 2018 but equal to the proportion in July 2018. Awareness of fracking has remained between 70% and 80% over the last five years of the tracker, following an increase between June 2012 (42%) and December 2013 (70%).

Figure 3: Awareness of fracking



Q15a. Before today, how much, if anything did you know about hydraulic fracturing for shale gas, otherwise known as 'fracking'?

Bases: All wave respondents - June 2012 (2,100); March 2013 (2,051); December 2013; (2,110); March 2014 (2,040); June 2014 (2,087); September 2014 (2,103); December 2014 (2,119); March 2015 (1,981); June 2015 (2,118); September 2015 (2,121); December 2015 (2,121); March 2016 (2,105); June 2016, (2,114); September 2016 (2,080); December 2016 (2,138); March 2017 (2,180); June 2017 (2,097); September 2017 (2,105); December 2017 (2,078); March 2018 (2,102); July 2018 (4,268); September 2018 (4,258); December 2018 (4,273)

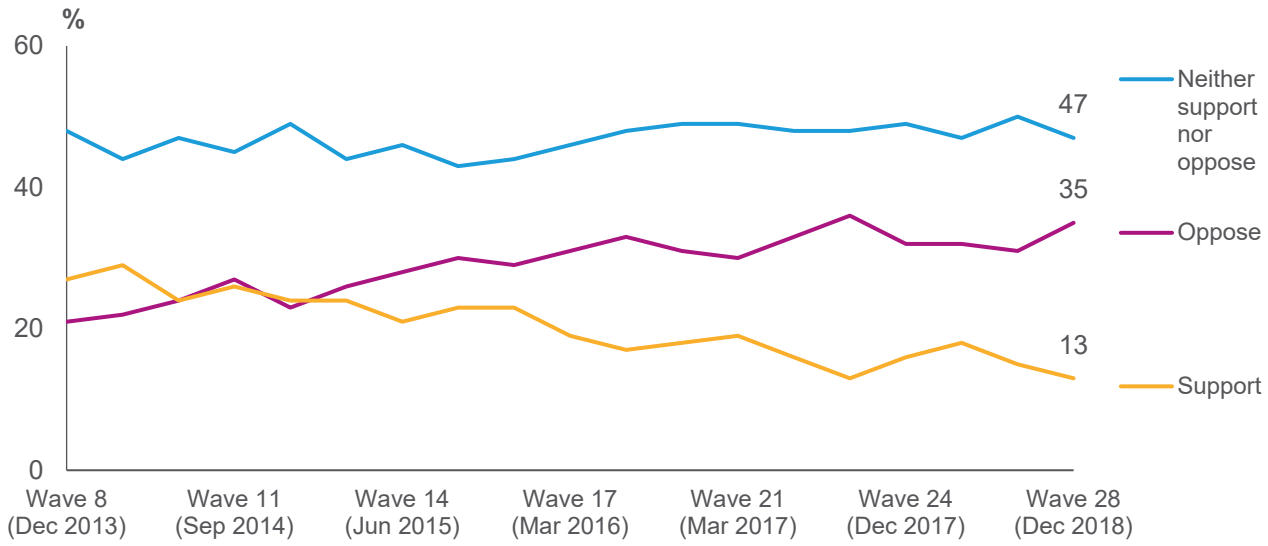
In December 2018, only a small proportion claimed to know a lot about fracking (11%). Just under half (46%) claimed they knew a little about fracking, and two in ten (20%) were aware of fracking but did not really know what it was.

Awareness of fracking was higher amongst those aged 65 and over (89%, compared with 59% of 16 to 24 year olds), those in social grade AB (90%, compared with 66% in social grade DE), those with household incomes of £50,000 and over (88%, compared with 74% with household incomes under £16,000) and those living in Northern Ireland and the North West (88% and 87% respectively, compared with 59% of those living in London).

When asked whether they support or oppose fracking, in December 2018 13% supported it (a slight decrease from 15% in September 2018) while 35% opposed it (a slight increase from 31% in September 2018). The rest said they neither supported nor opposed it (47%) or did not know (4%). There has been a general downward trend in support of fracking and

a general upward trend in opposition of fracking since the question was first asked in December 2013.

Figure 4: Whether support or oppose fracking

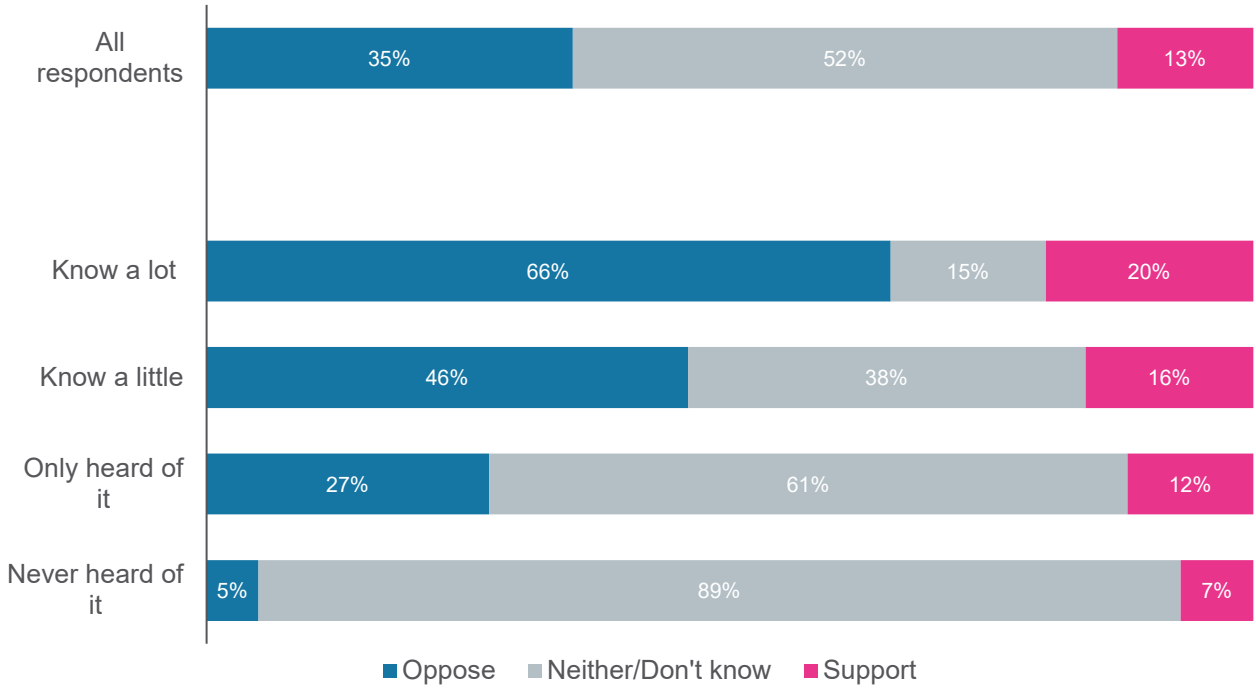


Q15b. From what you know, or have heard about, extracting shale gas to generate the UK's heat and electricity, do you support or oppose its use?

Base: All wave respondents – December 2013 (2,110); March 2014 (2,040); June 2014 (2,087); September 2014 (2,103); December 2014 (2,119); March 2015 (1,981); June 2015 (2,118); September 2015 (2,121); December 2015 (2,121); March 2016 (2,105); June 2016 (2,114); September 2016 (2,080); December 2016 (2,138); March 2017 (2,180); June 2017 (2,097); September 2017 (2,105); December 2017 (2,078); March 2018 (2,102); September 2018 (4,258); December 2018 (4,273)

Those who claimed greater knowledge of fracking were more likely than others to oppose it and more likely than others to support it. In December 2018, of those who claimed to know a lot about fracking, 66% opposed it and 20% supported it. Unsurprisingly, those who claimed less knowledge about fracking were much more likely to say they neither supported or opposed it.

Figure 5: Levels of fracking support by levels of fracking knowledge, December 2018



Q15b. From what you know, or have heard about, extracting shale gas to generate the UK's heat and electricity, do you support or oppose its use?

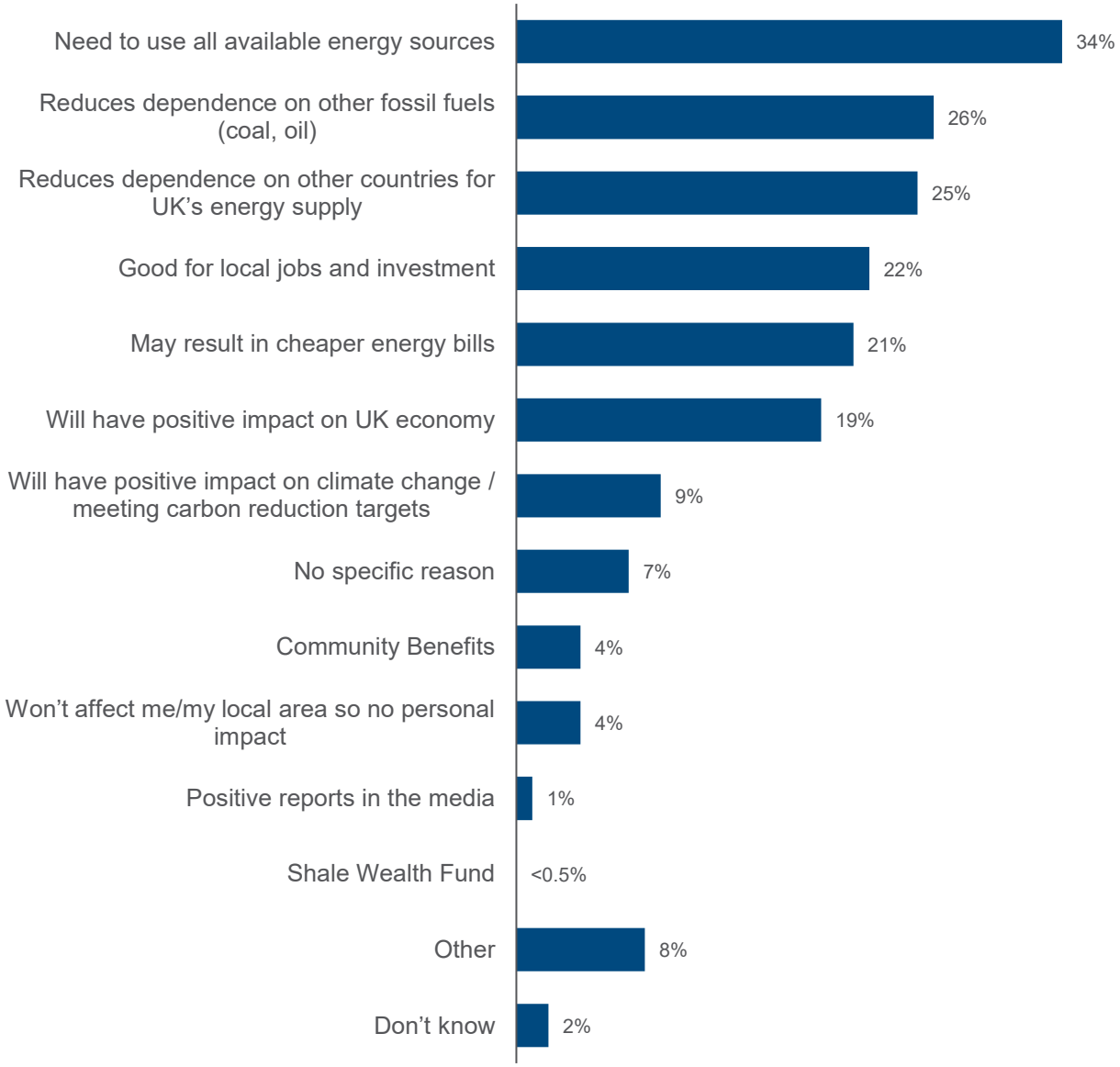
Base: All wave respondents (4,273); Know a lot (410); Know a little (1,867); Only heard of it (893); Never heard of it (1,103)

Men (18%, compared with 9% of women) and those aged 65 and over (18%, compared with 7% of 35 to 44-year olds) were most likely to support fracking.

Those most likely to oppose fracking included: those in social grade AB (42%, compared with 27% in social grade DE); home owners (39%, compared with 29% of private renters and 25% of social renters); and those living in Scotland (50%), Wales (45%), the North West (41%) and the South West (40%).

Follow-up questions were asked to determine why people support, oppose or are neutral about fracking. The most common reasons for supporting fracking were the need to use all available energy sources, to reduce dependence on other fossil fuels, to reduce dependence on other countries for the UK's energy supply, because it is good for local jobs and investment, that it may result in cheaper energy bills, and that it will have a positive impact on the UK economy.

Figure 6: Reasons for supporting fracking, December 2018



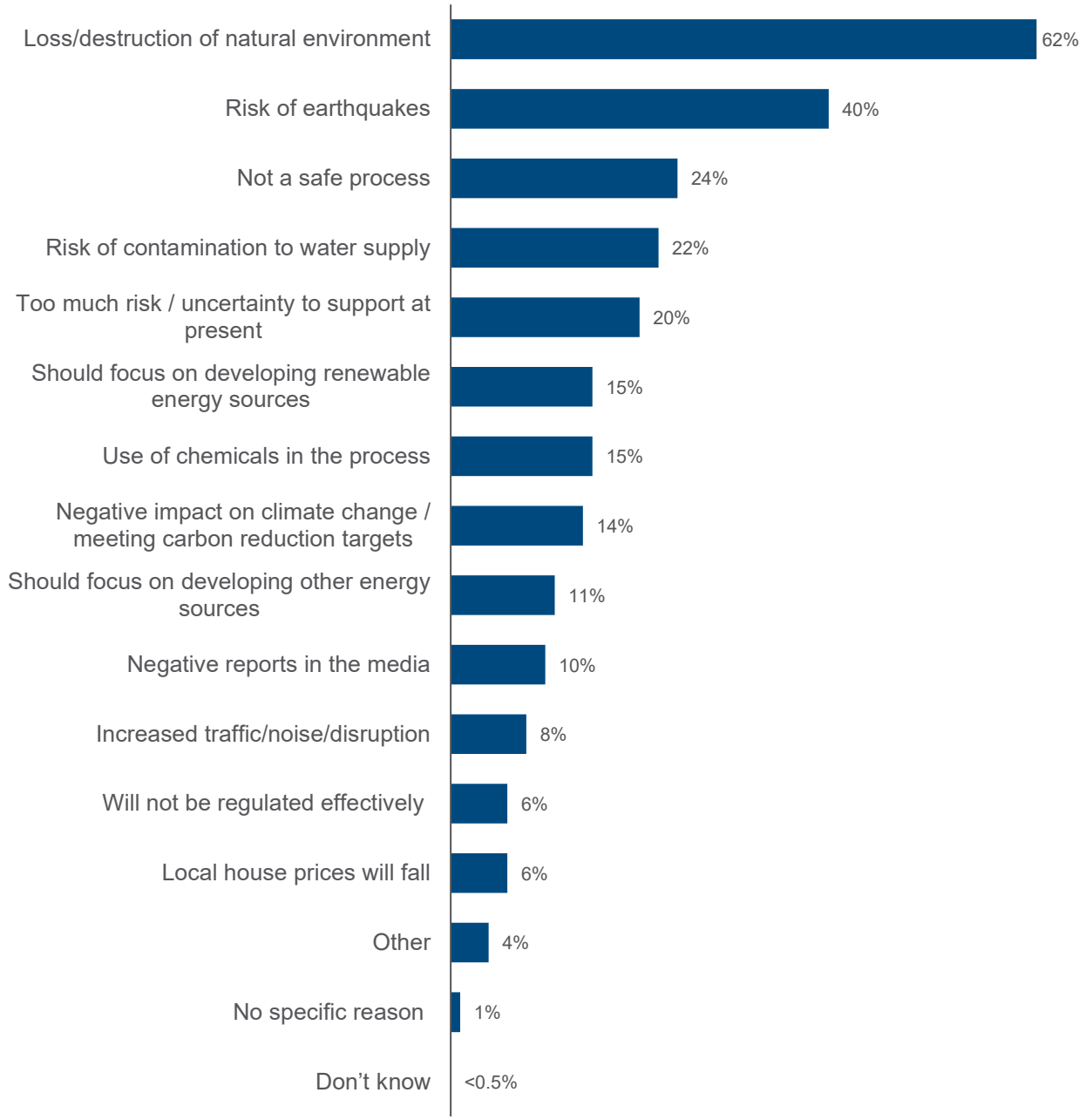
Q15c. You said that you support hydraulic fracturing for shale gas, otherwise known as fracking. Why is this?

Base: All who support fracking – December 2018 (582)

The most common reason for opposing fracking was the loss or destruction of the natural environment. Another common reason for opposing fracking was the risk of earthquakes. Four in ten (40%) cited this as a reason in December 2018, a notable increase from previous waves where the proportion remained between 20% and 29%.[2] Other common reasons for opposing fracking were that it is not a safe process, the risk of contamination to water supplies, and that there is too much risk and uncertainty to support it at present.

[2] This notable increase may be due to fracking operations in Lancashire being paused in October due to seismic activity.

Figure 7: Reasons for opposing fracking, December 2018



Q15d. You said that you oppose hydraulic fracturing for shale gas, otherwise known as fracking. Why is this?

Base: All who oppose fracking – December 2018 (1,402)

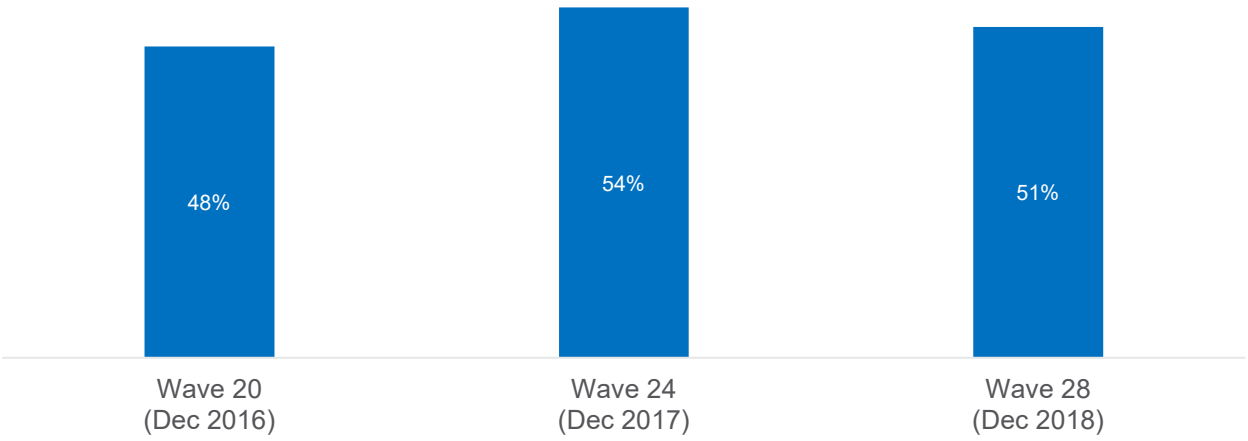
Unsurprisingly, the main reason for neither supporting nor opposing fracking was a lack of knowledge about it (76%).

Heat

Condensing Boilers

In December 2018, around half (51%) of people said they had a condensing boiler. This was a similar level to previous waves when this question was asked (December 2017 and December 2016).

Figure 8: Whether have a condensing boiler



Q52. As far as you know, do you have a condensing boiler in your home? If you're not sure, any gas boiler installed since 2006 will be condensing. Any oil boiler installed since 2008 will be condensing.

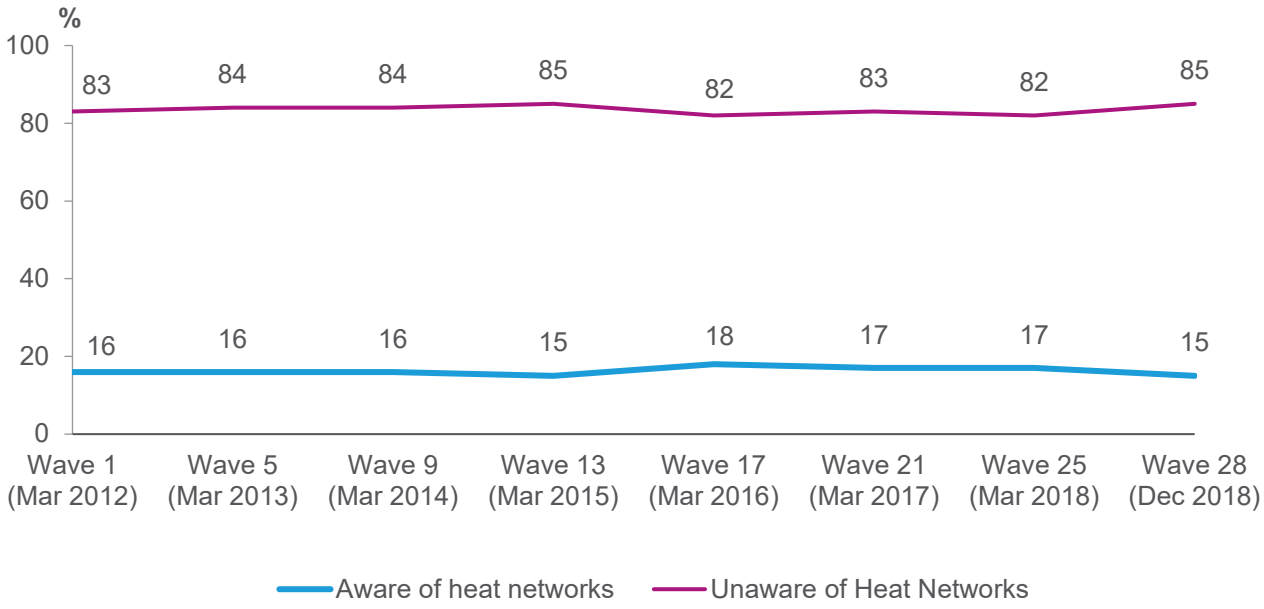
Base: All wave respondents – December 2016 (2,138); December 2017 (2,078); December 2018 (4,273)

Owner occupiers were most likely to say they had a condensing boiler (57%, compared with 36% of private renters and 44% of social renters). Those who rented their accommodation were more likely than owner occupiers to say they did not know whether they had a condensing boiler.

Heat Networks

In December 2018, 15% said they had heard of heat networks. Awareness has remained between 15% and 18% over the course of the tracker. Those aged 65 and over (23%, compared with 8% of those aged between 25 and 34), those in social grade AB (26%, compared with 8% in social grade DE), and those with household incomes of £50,000 and over (24%, compared with 10% of those with household incomes under £16,000) were more likely to claim awareness of heat networks.

Figure 9: Awareness of Heat Networks[3]



Q24. The next two questions are about heat networks, also called district heating. These are heating systems where heat is generated locally and then provided to yours and other homes, rather than being generated in your home. Have you ever heard of these networks?

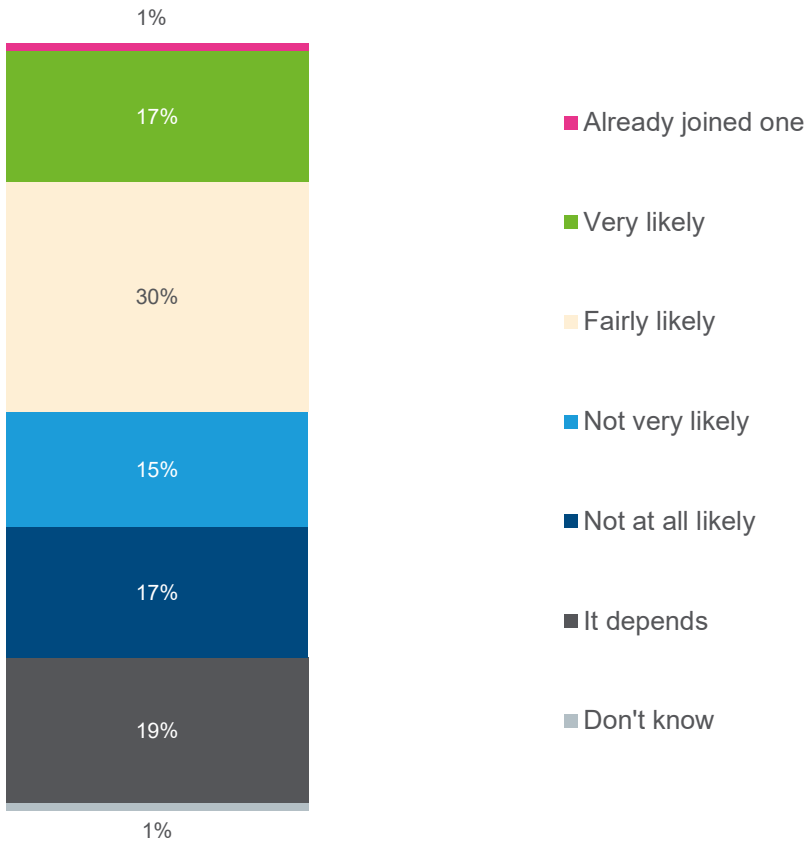
Base: All wave respondents - March 2012 (2,121); March 2013 (2,051); March 2014 (2,040); March 2015 (1,981); March 2016 (2,105); March 2017 (2,180); March 2018 (2,102); December 2018 (4,273).

[3] Please note that this question used to be asked every March on an annual basis. This question is now asked as part of the December wave.

In December 2018, of those who were aware of heat networks, almost half (47%) said they were likely to install one if given the opportunity. This equates to 7% of all people interviewed.

Likelihood to join a heat network among those aware of them has decreased from 57% in March 2018. It's possible this difference may partly be due to the latest wave of the survey being conducted at a different time of year compared with the previous wave (December compared with March).

Figure 10: Likelihood of joining a heat network if given an opportunity, December 2018

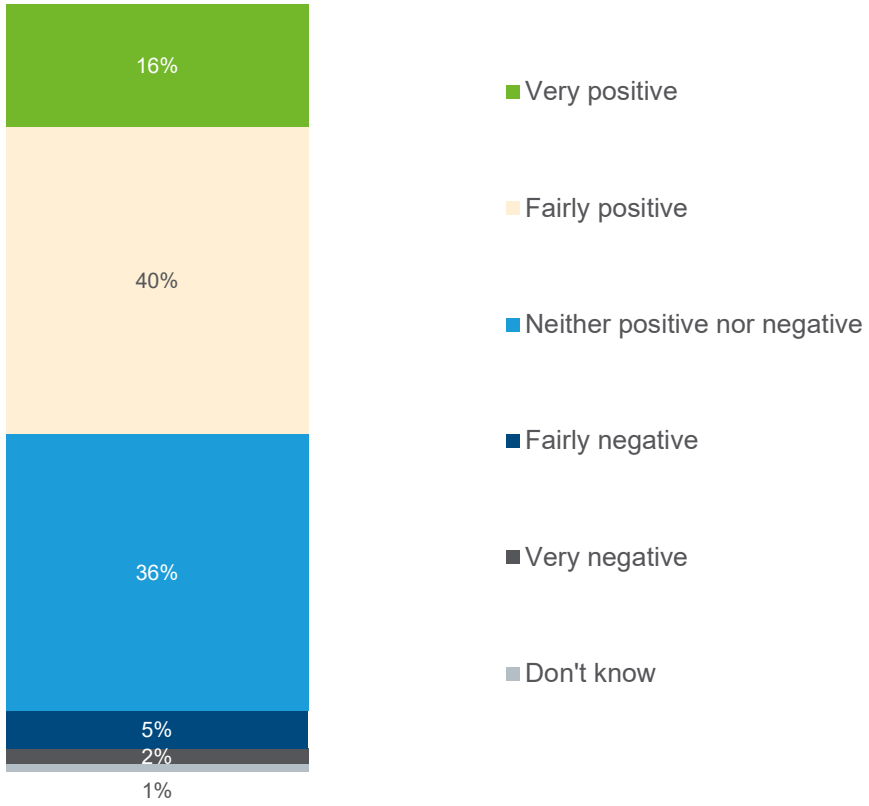


Q25 How likely do you think you will be to join a heat network like this if you were given the opportunity? When answering, please assume you would pay no more than you do at present.

Base: All respondents who have heard of heat networks - December 2018 (595)

Of those that were aware of heat networks in December 2018, nearly six in ten (56%) were positive about them, with 16% being very positive. These results are in line with the last wave when this question was asked (March 2018).

Figure 11: Positivity towards heat networks, December 2018



Q25i. From what you know, or have heard about heat networks, generally how positive or negative would you say you are towards them?

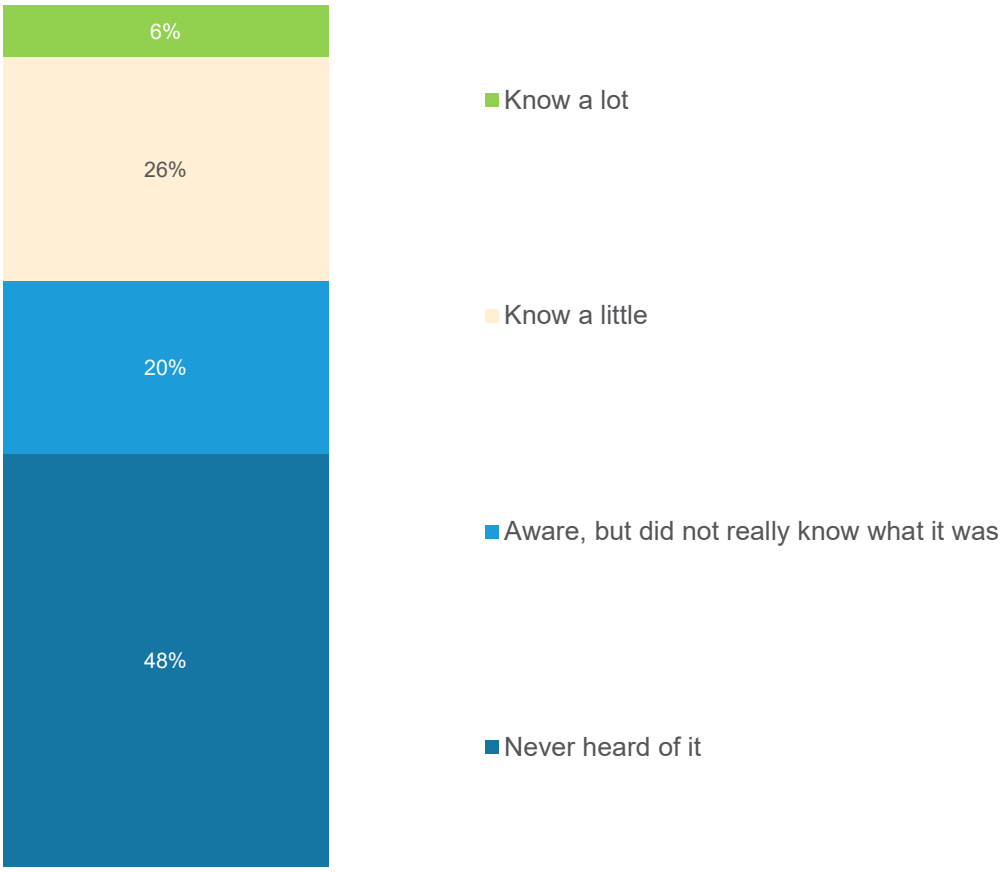
Base: All respondents who have heard of heat networks – December 2018 (595)

Renewable Heating systems

Just over half (52%) of the public were aware of renewable heating systems in December 2018. Most of those who were aware of renewable heating systems said they did not really know what it was or knew a little. Only 6% said they knew a lot about renewable heating systems.

Awareness in December 2018 was at its lowest point, having decreased from 65% in December 2017. Perceived awareness was higher among those in social grade AB (70%, compared with 37% of those in social grade DE), those with household incomes of £50,000 and over (70%, compared with 44% of those with household incomes under £16,000) and those who support renewable energy (60%).

Figure 12: Awareness of Renewable Heating Systems, December 2018

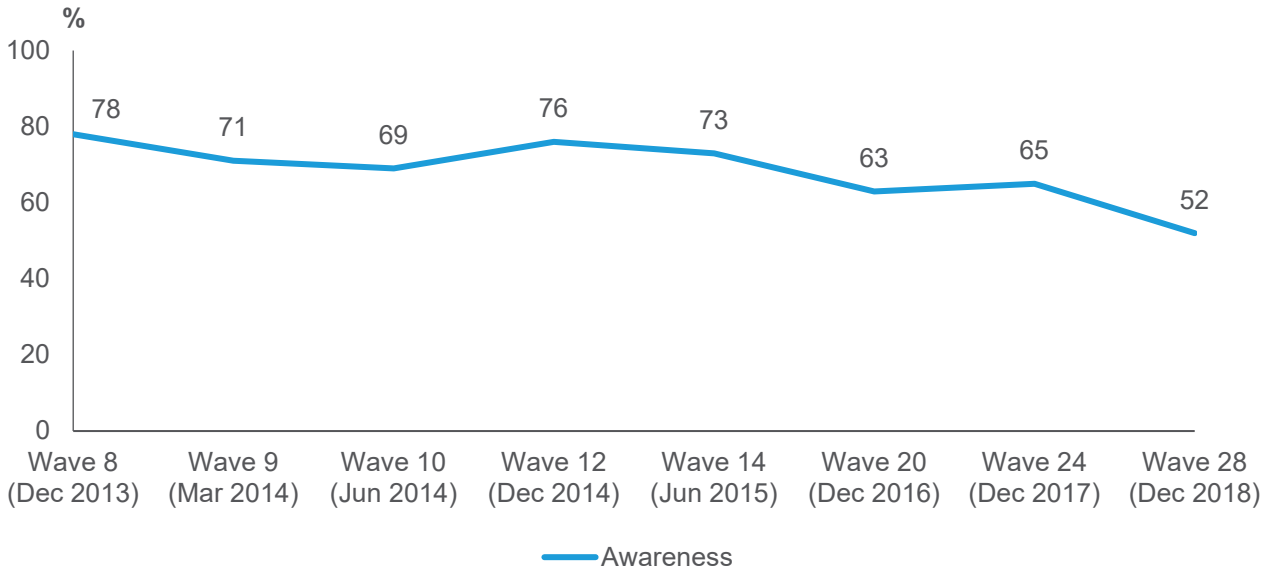


Q7_1. The next few questions are about renewable heating systems. By renewable heat we mean heating systems which use energy from biomass or the sun, or which use electricity to draw heat from the ground, water, or air to heat your home.

How much would you say you know about renewable heating systems? This includes air source heat pumps, ground source heat pumps and biomass boilers.

Base: All wave respondents – December 2018 (4,273)

Figure 13: Awareness of Renewable Heating Systems over time



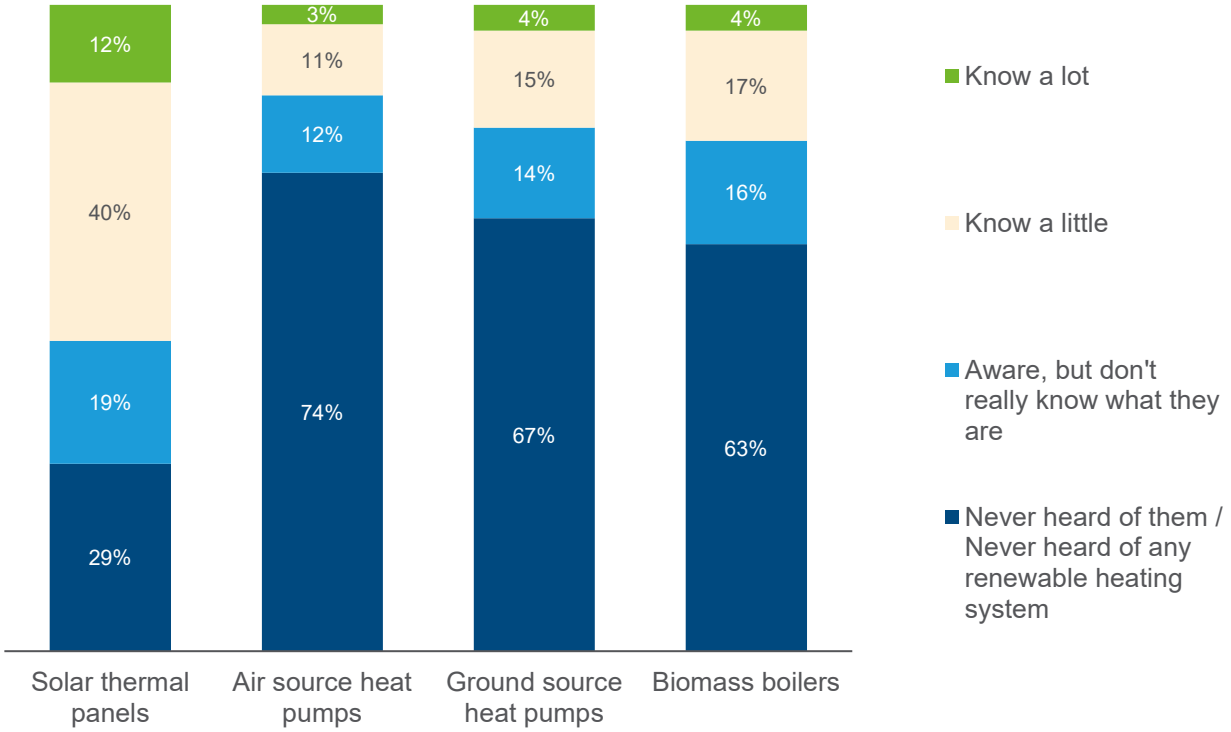
Q7_1. The next few questions are about renewable heating systems. By renewable heat we mean heating systems which use energy from biomass or the sun, or which use electricity to draw heat from the ground, water, or air to heat your home.

How much would you say you know about renewable heating systems? This includes air source heat pumps, ground source heat pumps and biomass boilers.

Bases: All wave respondents - December 2013 (2,110); March 2014 (2,040); June 2014 (2,087); December 2014 (2,119); June 2015 (2,118); December 2015 (2,121); December 2016 (2,138); December 2017 (2,078); December 2018 (4,273)

In December 2018, people were also asked about their awareness of specific renewable heating systems. Awareness was highest for solar thermal panels (71%), with those who support renewable energy more likely to be aware of them (76%, compared with 60% who opposed it). Around four in ten respondents (38%) claimed to be aware of biomass boilers, with 33% claiming to be aware of ground source heat pumps and 27% aware of air source heat pumps.

Figure 14: Awareness of specific renewable heat systems, December 2018



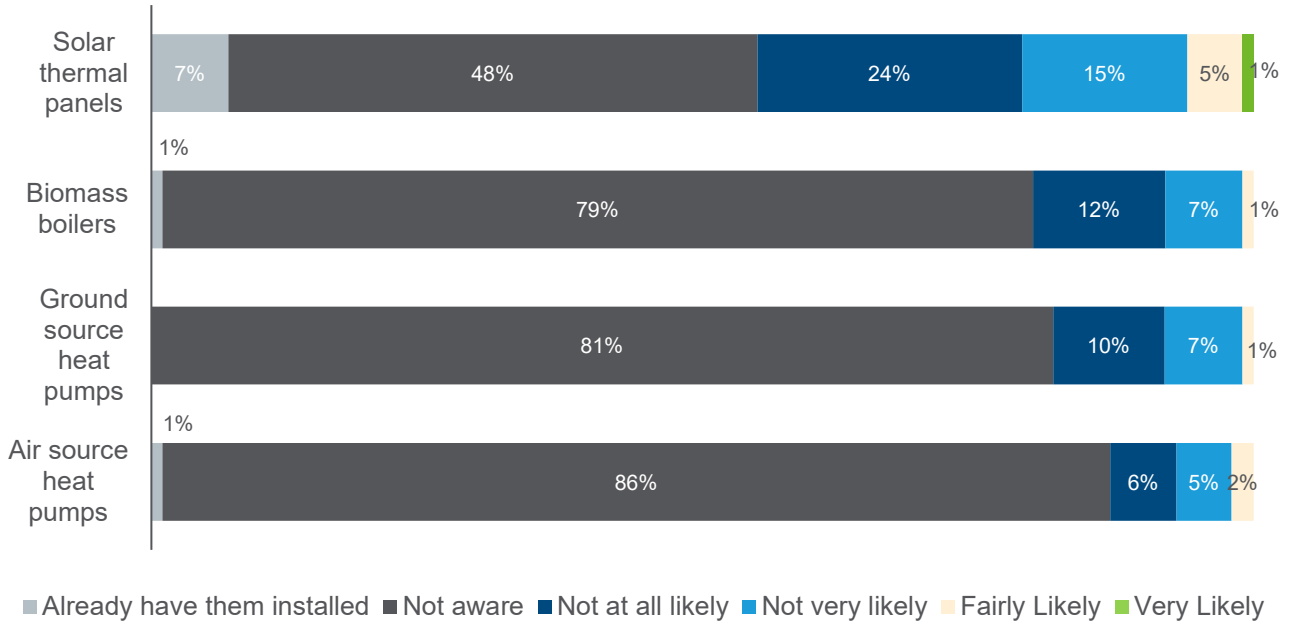
Q41. And how much would you say you know about solar thermal panels? By this we mean solar panels for hot water, not solar PV panels that generate electricity.

Q7_1A. And now thinking about three different types of renewable heating system…How much, if anything, do you know about… …Air source heat pumps / ...Ground source heat pumps / …Biomass boilers

Base: All wave respondents – December 2018 (4,273)

In December 2018, the most common renewable heating system to have been installed in homes was solar thermal panels, with 7% of respondents claiming they had done so. Only 1% said they had a biomass boiler, 1% an air source heat pump and fewer than 1% a ground source heat pump. Further, 6% of all respondents claimed they would be likely to install a solar thermal panel in the next few years. Only 2% said they would be likely to install an air source heat pump, 1% a ground source heat pump and 1% a biomass boiler.

Figure 15: Likelihood of installing renewable heat systems in the next few years, December 2018

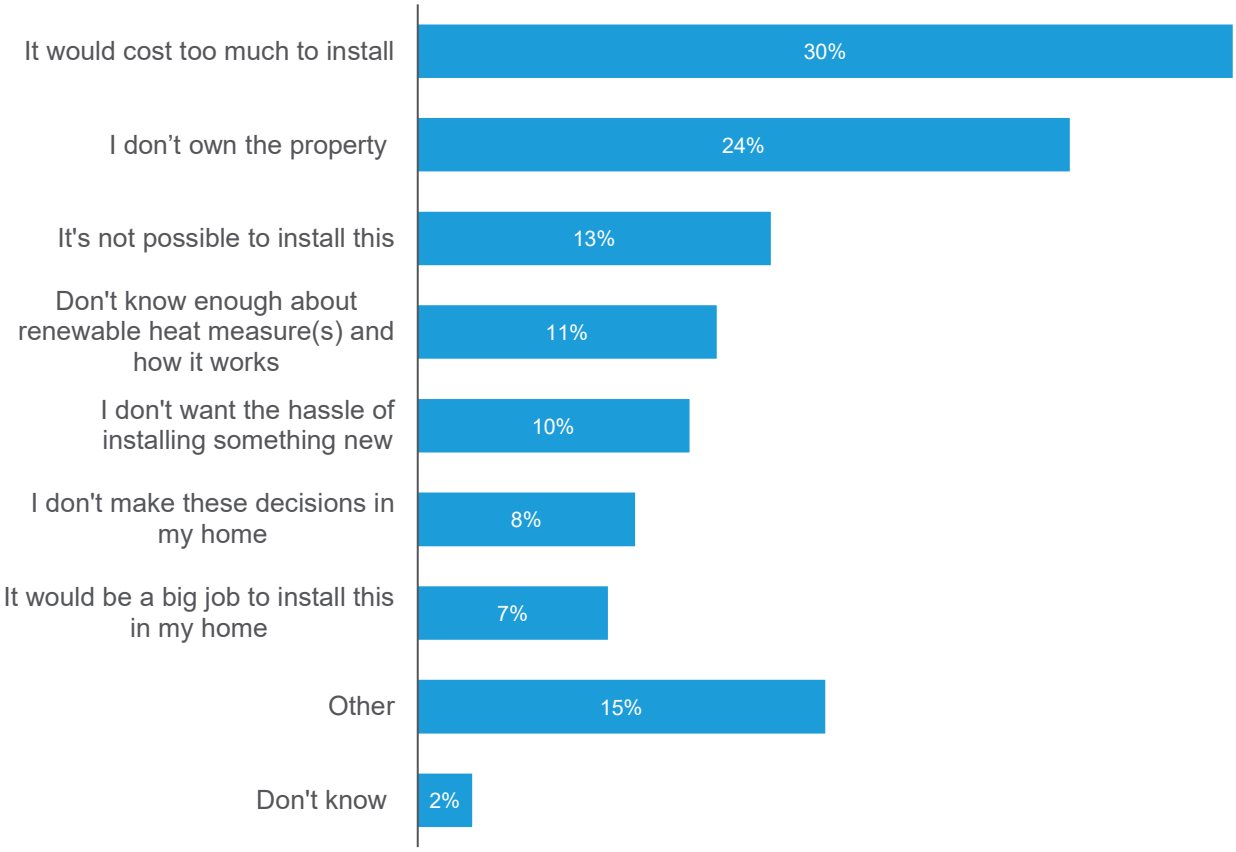


Q43. How likely do you think you would be to install an air source heat pump in your home over the next few years? / Q44. How likely do you think you would be to install a ground source heat pump in your home over the next few years? / Q45. How likely do you think you would be to install a biomass boiler in your home over the next few years? / Q46. How likely do you think you would be to install solar thermal panels in your home over the next few years?

Base: All wave respondents - December 2018 (4,273)

In December 2018, of those who were unlikely to install renewable heating systems, the most common reasons given were it would cost too much to install (30%) and not being able to install them as they did not own the property (24%). Other common reasons given were that it's not possible to install one, a lack of knowledge of renewable heat systems and thinking that it would be too much hassle.

Figure 16: Why respondents are unlikely to install any renewable heat measures in their home, December 2018



Q51. Why are you unlikely to install any renewable heat measures in your home?

Base: All aware of at least one renewable heat measure and unlikely to install measures in their home – December 2018 (1,904)

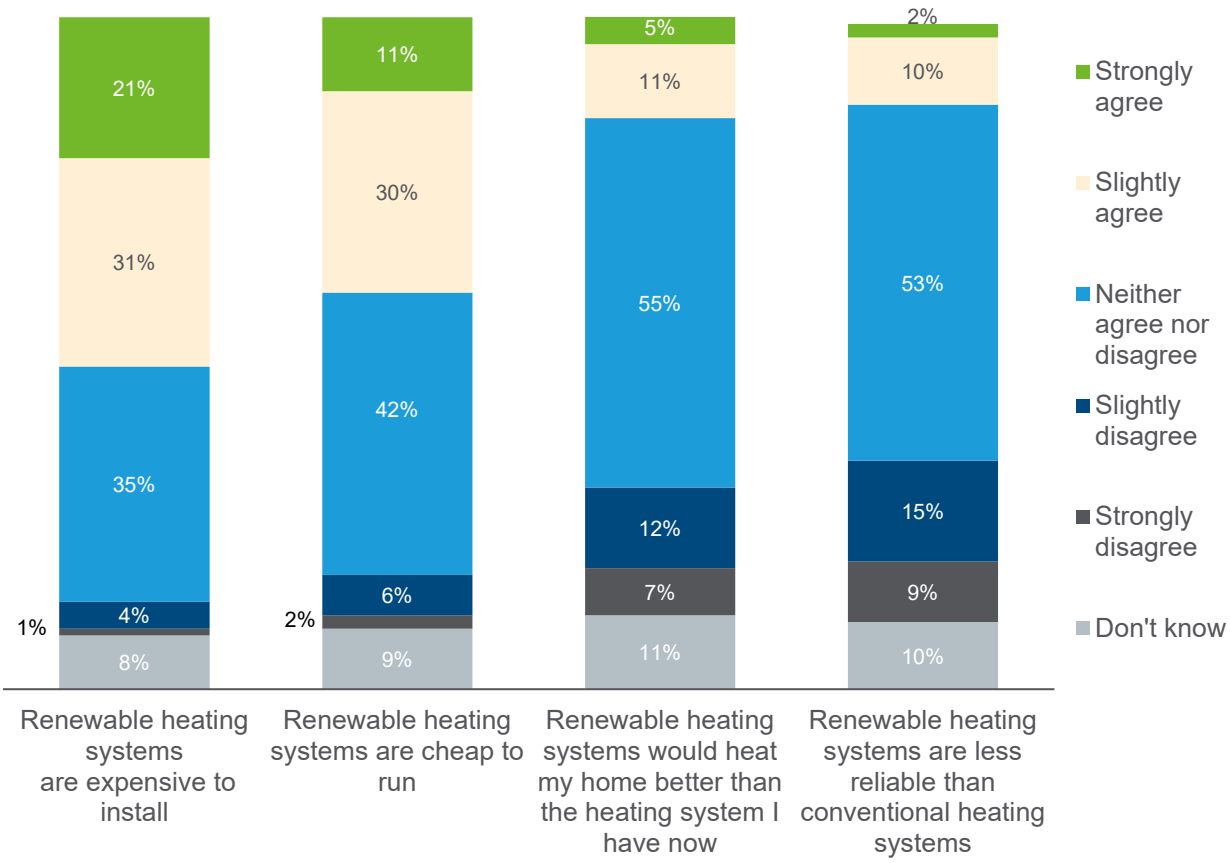
Respondents who were aware of renewable heating systems were asked whether they agreed or disagreed with the following four statements:

- Renewable heating systems are expensive to install
- A renewable heating system would heat my home better than the heating system I have now
- Renewable heating systems are cheap to run
- Renewable heating systems are less reliable than conventional heating systems (for example a gas or oil boiler)

In December 2018, a large proportion said they neither agreed or disagreed with any of the statements. This suggests that there is still a lack of knowledge among those who are aware of renewable heating systems, consistent with observations from the last two waves this question was asked (wave 20 and wave 24).

In December 2018, the highest levels of agreement were with the statements regarding renewable heating systems being expensive to install (with 52% agreeing) and that they are cheap to run (with 41% agreeing).

Figure 17: Agreement with various statements regarding renewable heating systems, December 2018



Q7_3. How much do you agree or disagree with the following statements? ...Renewable heating systems are expensive to install / …Renewable heating systems are cheap to run / …Renewable heating systems are less reliable than conventional heating systems (for example a gas or oil boiler)

Base: All respondents who are aware of renewable heating systems - December 2018 (2,050).

Q7_3. How much do you agree or disagree with the following statements?

A renewable heating system would heat my home better than the heating system I have now

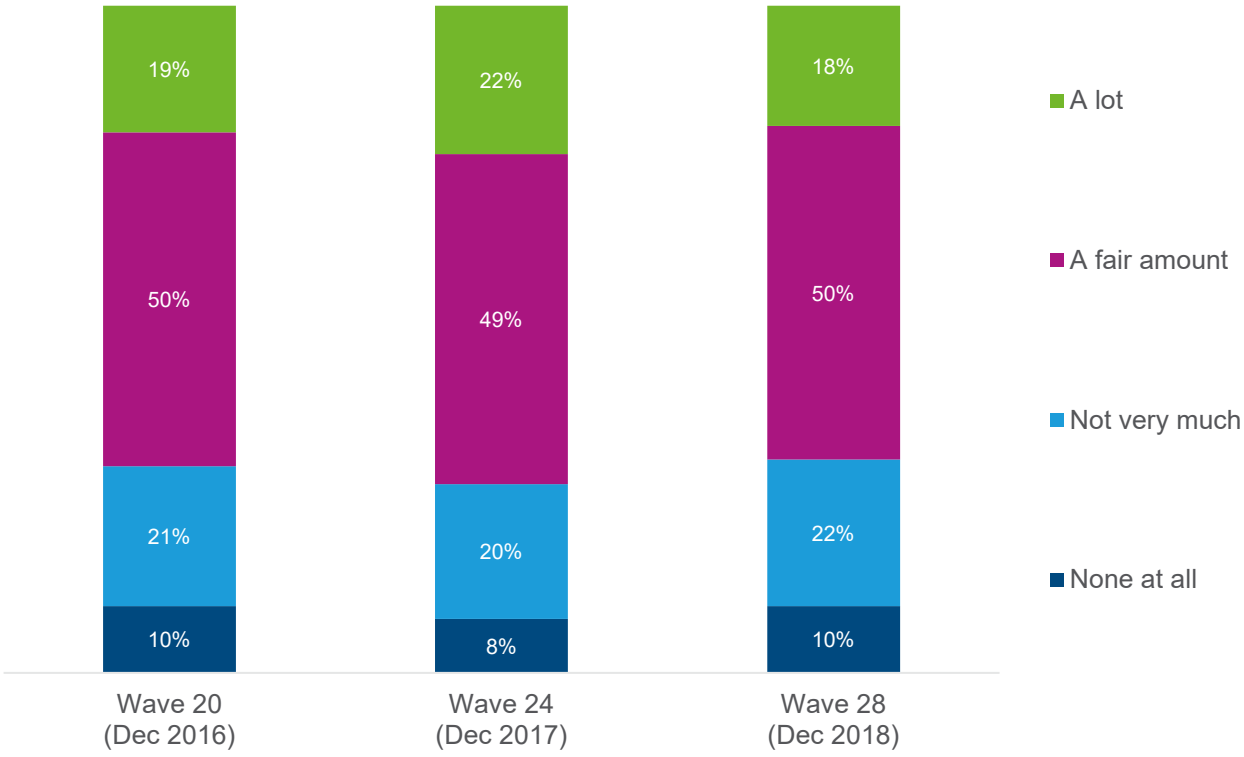
Base: All respondents who have not had a renewable heating system installed - December 2018 (1,252).

Heat usage in the home

In December 2018, people were asked how much attention they pay to the amount of heat they use in their home.[4]

Around two in ten people (18%) said they paid a lot of attention to the amount of heat they used in their home in December 2018, with a further half (50%) saying they paid a fair amount of attention. Around two in ten (22%) said they did not pay much attention and one in ten (10%) did not pay any attention at all. These results show little change from previous waves of the survey.

Figure 18: Attention paid to heat used in the home



Q7_8. How much attention do you pay to the amount of heat you use in your home?

Bases: All wave respondents – December 2016 (2,138); December 2017 (2,078); December 2018 (4,273)

Those aged between 16 and 24 were least likely to pay attention to the amount of heat used, with over half (51%) saying they paid a lot or a fair amount of attention, compared with around 70% for each of the older age groups.

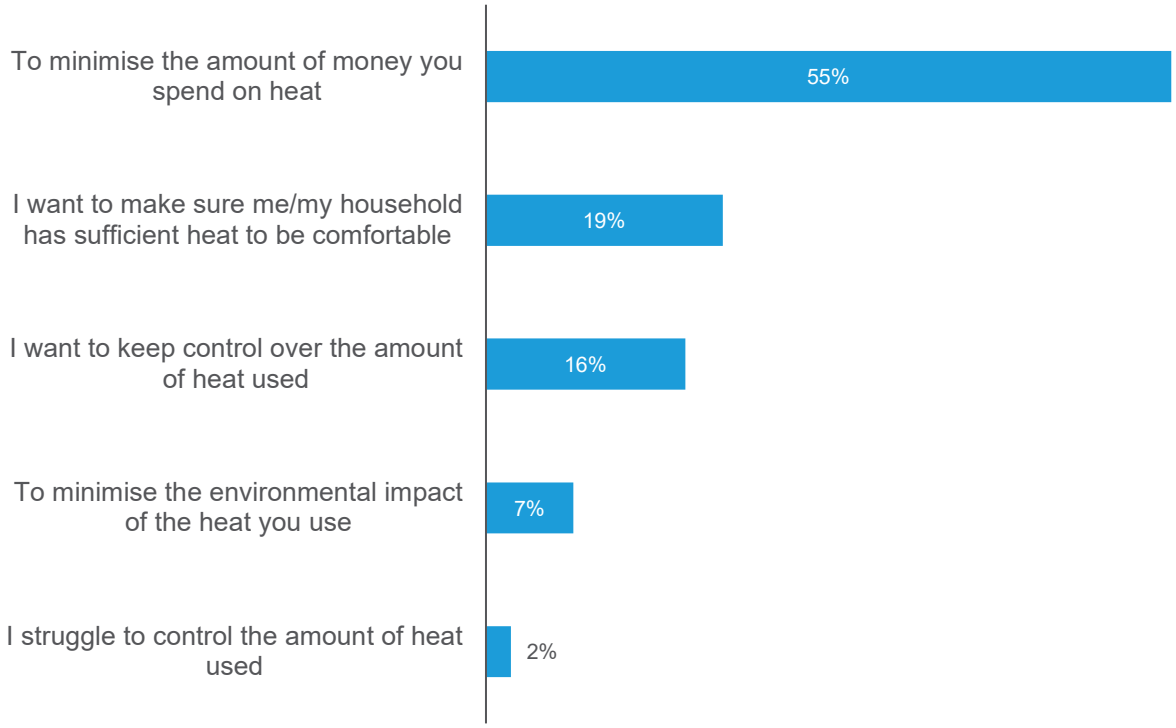
People in lower income households were a little more likely to pay a lot of attention to the amount of heat used. Around two in ten (21%) of those with household incomes below

[4] This question has been asked over five waves of the survey, dating back to September 2015. However, here we focus on the last three waves in which this question was asked, as all were conducted at the same time of year (December 2016, 2017 and 2018). Differences compared with earlier waves (September 2015 and March 2016) are likely to reflect seasonal differences in behaviour and so are excluded from our analysis.

£35,000 per year paid a lot of attention to this compared with 15% with household incomes of £35,000 or more.

In December 2018, over half (55%) of those who said that they paid a lot or a fair amount of attention to the amount of heat they used said this was to minimise the amount of money they spent. Almost two in ten (19%) said that this was to make sure they were comfortable, and a similar proportion said they wanted to keep control of the amount of heat used (16%). Only 7% said this was mainly done to reduce the environmental impact of the heat used. There were no changes in these results from previous waves of the survey.

Figure 19: Reason for paying attention to amount of heat used in home, December 2018



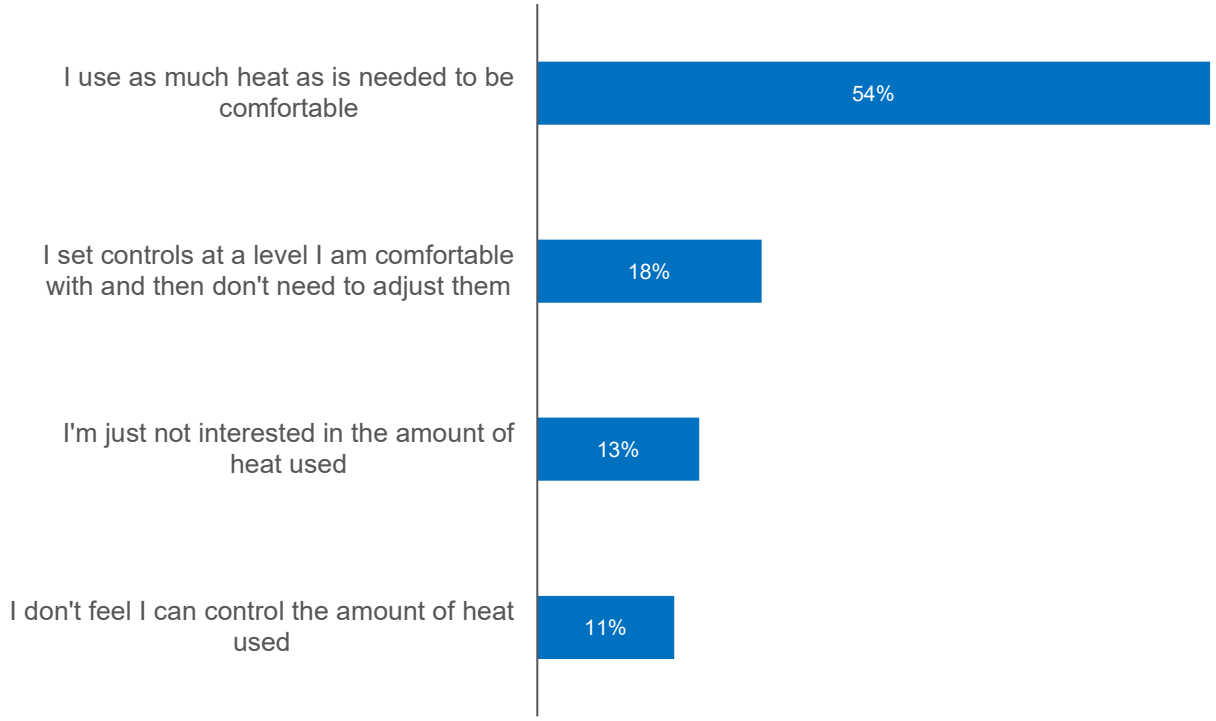
Q7_9. You said you pay [a lot/a fair amount] of attention to the amount of heat you use in your home. What is the main reason for this?

Base: All who pay a lot or a fair amount of attention to the amount of heat used in their home - December 2018 (2,848)

Those in social grade AB (12%) were more likely to say they paid attention to the amount of heat used for environmental reasons, compared with those in social grade DE (3%).

In December 2018, those who said they did not pay much or any attention to the amount of heat used were also asked their reason for this. The most common response was that they used as much heat as needed to be comfortable. There were no changes in these results from previous waves of the survey.

Figure 20: Reason for not paying attention to amount of heat used in home, December 2018



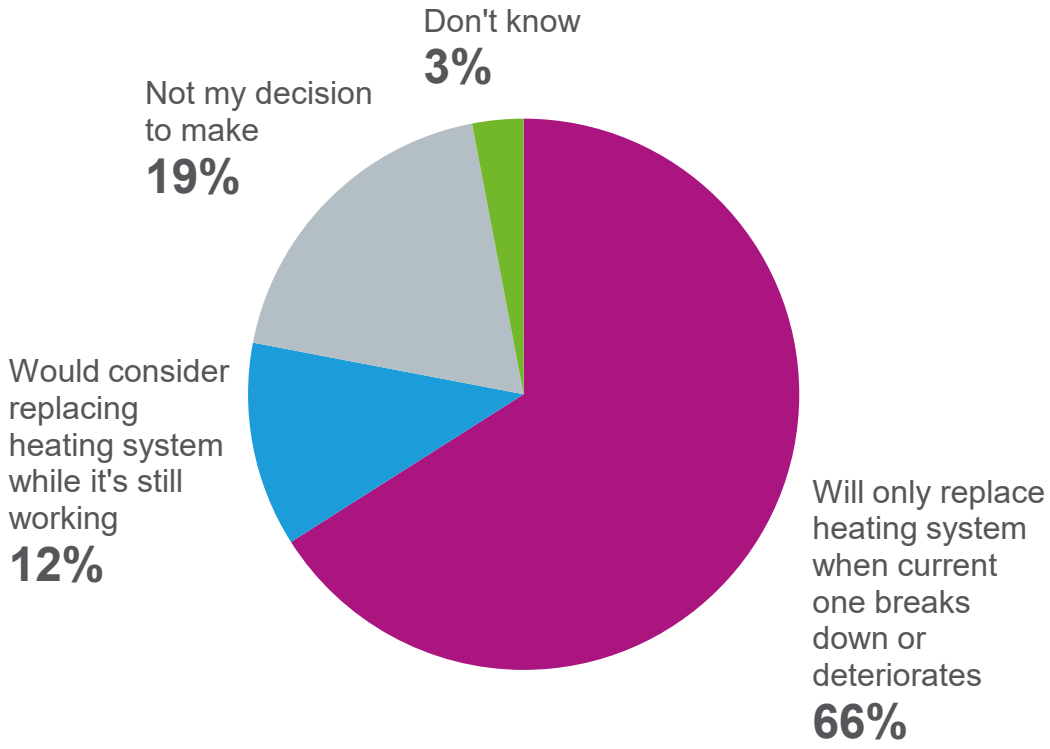
Q7_10. You said you pay [not very much/no] attention to the amount of heat you use in your home. What is the main reason for this?

Base: All who pay not very much or no attention to the amount of heat used in their home - December 2018 (1,405)

Installing or replacing heating systems

In December 2018, two thirds (66%) of people said they would only replace their heating system when their current one breaks down or starts to deteriorate. Twelve per cent said they would consider replacing their heating system while it was working. Nearly two in ten (19%) said this was not their decision to make due to renting or living with parents.

Figure 21: Plans for replacing heating system, December 2018



Q7_11. Now thinking about your heating system. Which of the statements on this screen comes closest to your view?

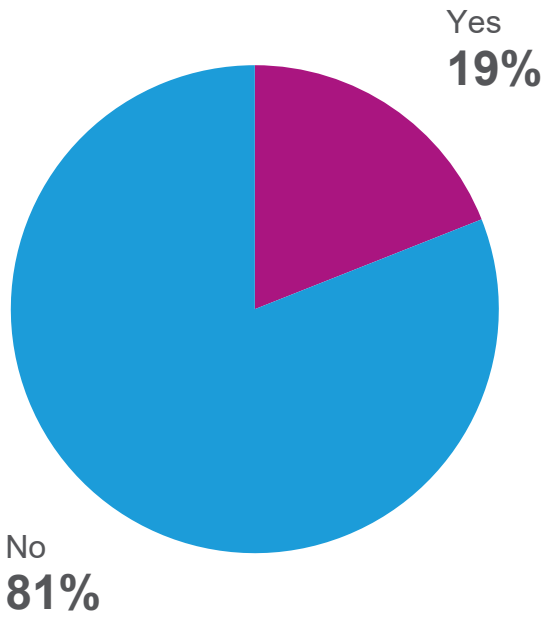
Base: All wave respondents – December 2018 (4,273)

Those who said they would replace a working heating system were asked their reasons for this. Just over four in ten (43%) said this was to save bills, while a little over three in ten (33%) said they would switch to a more environmentally friendly heating system. Around two in ten (19%) said they would switch to have a more reliable heating system than their current one.

Just under two in ten people (19%) said they had a boiler or heating system installed in the last three years. This compares with 23% when this question was previously asked in December 2017.

Owner occupiers (23%) were more likely than private renters (10%) or social renters (17%) to have installed a boiler or heating system in this period.

Figure 22: Whether had a boiler or heating system installed in the last three years, December 2018



Q60. Have you had a boiler or heating system installed in the last three years? This could either be in your current home or anywhere else you have lived in this period.

Base: All wave respondents – December 2018 (4,273)

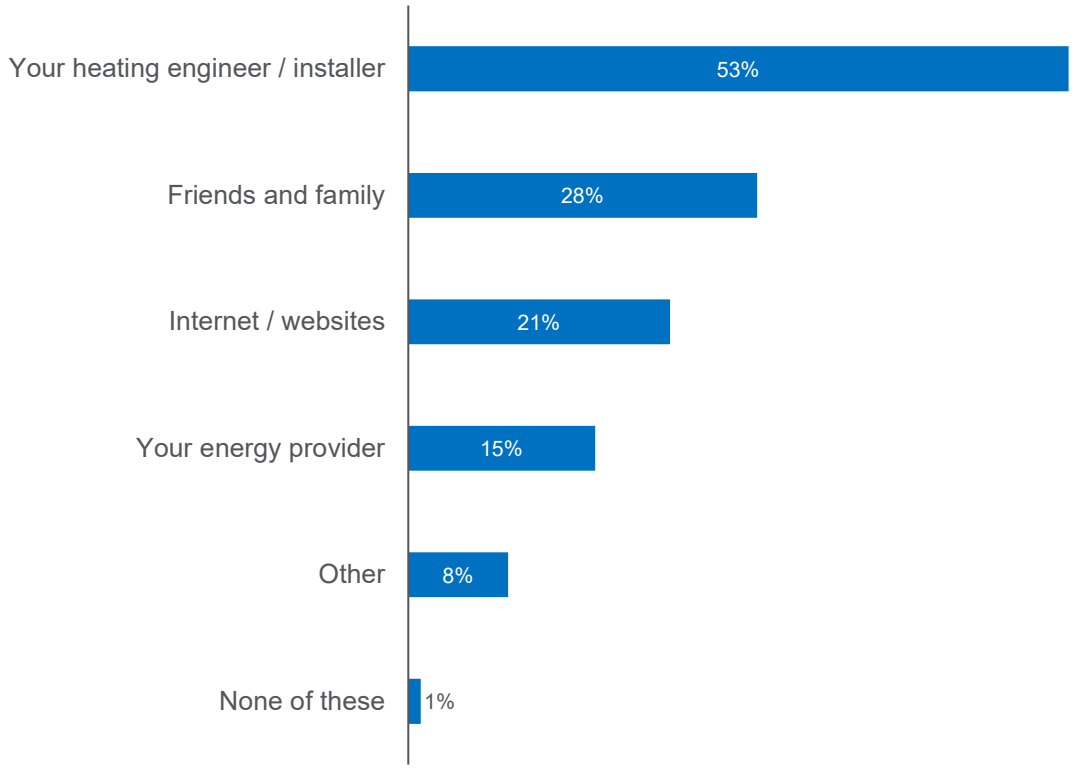
Nine in ten (90%) of those who had installed a new boiler or heating system said this was gas; 5% said they had installed an oil boiler or heating system.

Of those who had a new boiler or heating system installed, six in ten (60%) said they were involved in the decision-making process for choosing this. Unsurprising, owner occupiers (72%) were much more likely to be involved in the decision-making process than private renters (18%) or social renters (15%). Those who said they were involved in this process were then asked a further series of questions about choosing a new boiler or heating system.

Those involved in choosing a new boiler or heating system were asked which sources of information they used to make their decision. Over half (53%) said they sought information

from their heating engineer or installer, nearly three in ten (28%) from friends and family and around two in ten (21%) from the internet or websites. Fifteen per cent said they sought information from their energy supplier. These results show no change from December 2017.

Figure 23: Sources of information used to help make a decision when choosing new boiler or heating system, December 2018

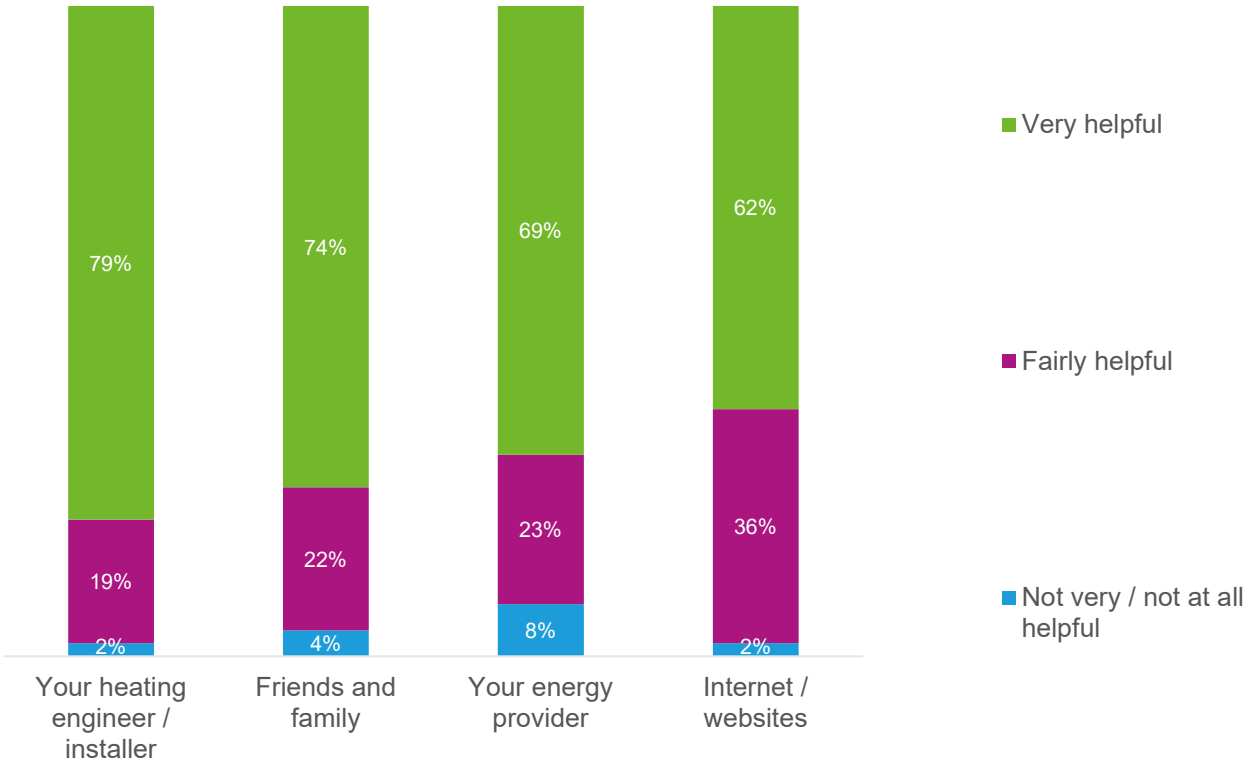


Q64. When choosing your boiler or heating system, which sources of information did you use to make your decision?

Base: All who had a new boiler or heating system installed in the last three years and were involved in the decision-making process for this – December 2018 (419)

In December 2018, those who used each of these sources of information were then asked how helpful this source was in helping them to make a decision about which boiler or heating system to install. For all sources, more than nine in ten said they were either very helpful or fairly helpful. The sources most likely to be found to be very helpful were heating engineers/installers (79%) and friends and family (74%).

Figure 24: How helpful each source was in helping make a decision about which boiler or heating system to install, December 2018

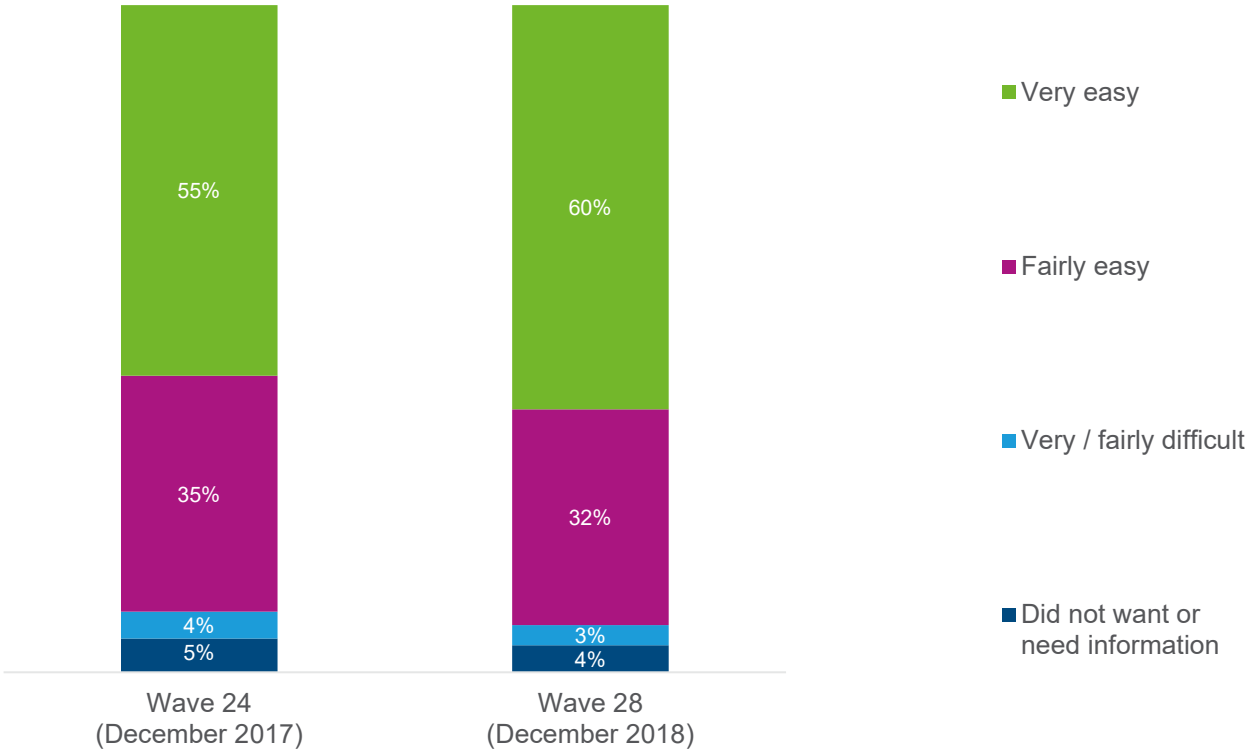


Q66. How helpful were each of these sources of information in helping you make your decision?

Base: All who had a new boiler or heating system installed in the last three years and were involved in the decision-making process for this – December 2018 (419)

In December 2018 six in ten (60%) of all who were involved in the decision-making process about a new boiler or heating system said it was very easy to get the information they wanted. Around three in ten (32%) said it was fairly easy to get the information they wanted, while 3% said this was difficult. These results show no change from when they were previously asked in December 2017.

Figure 25: Ease of finding information about a new boiler or heating system

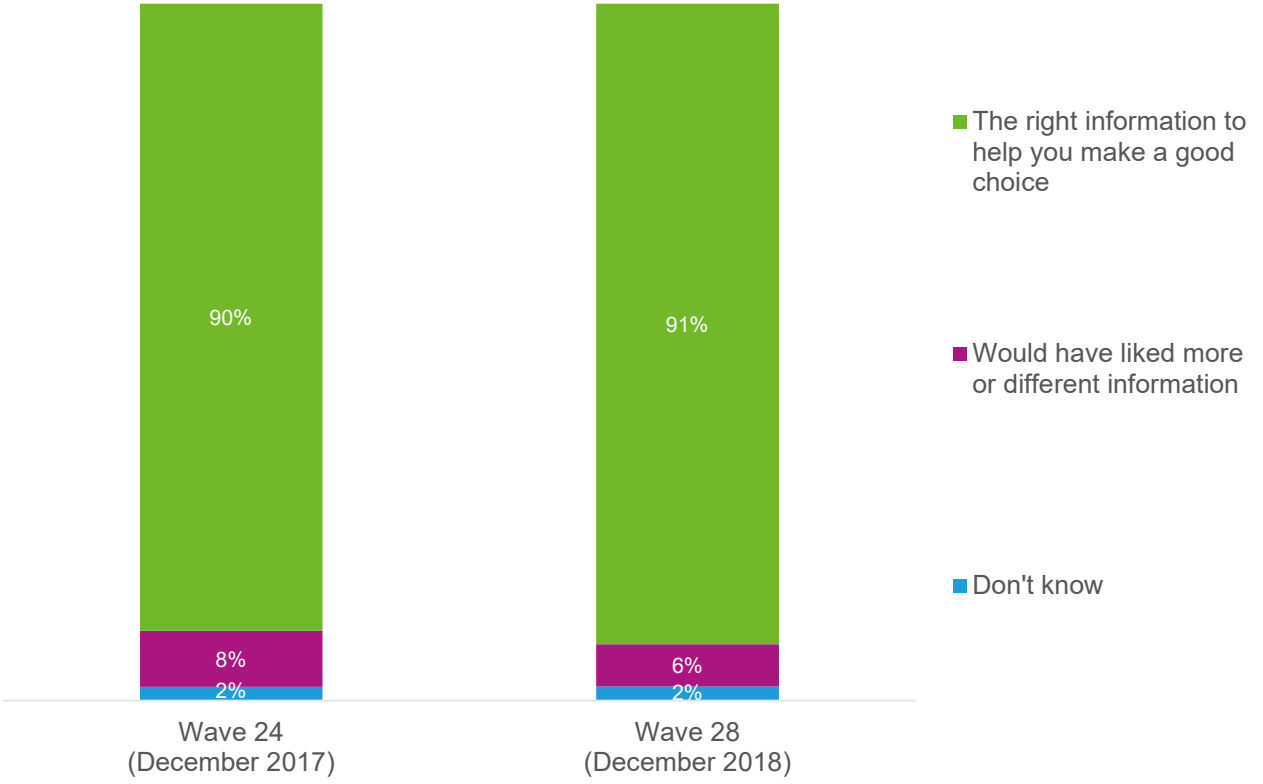


Q67. How easy or difficult did you find it to get the information you wanted about a new boiler of heating system?

Base: All who had a new boiler or heating system installed in the last three years and were involved in the decision-making process for this – December 2017 (235); December 2018 (419)

Those who were involved in the decision-making process about replacing their boiler or heating system were asked whether they felt they had the right information to help them make a good choice. Over nine in ten (91%) people said they did, unchanged from December 2017.

Figure 26: Whether had the right information in order to make a good choice about a boiler or heating system



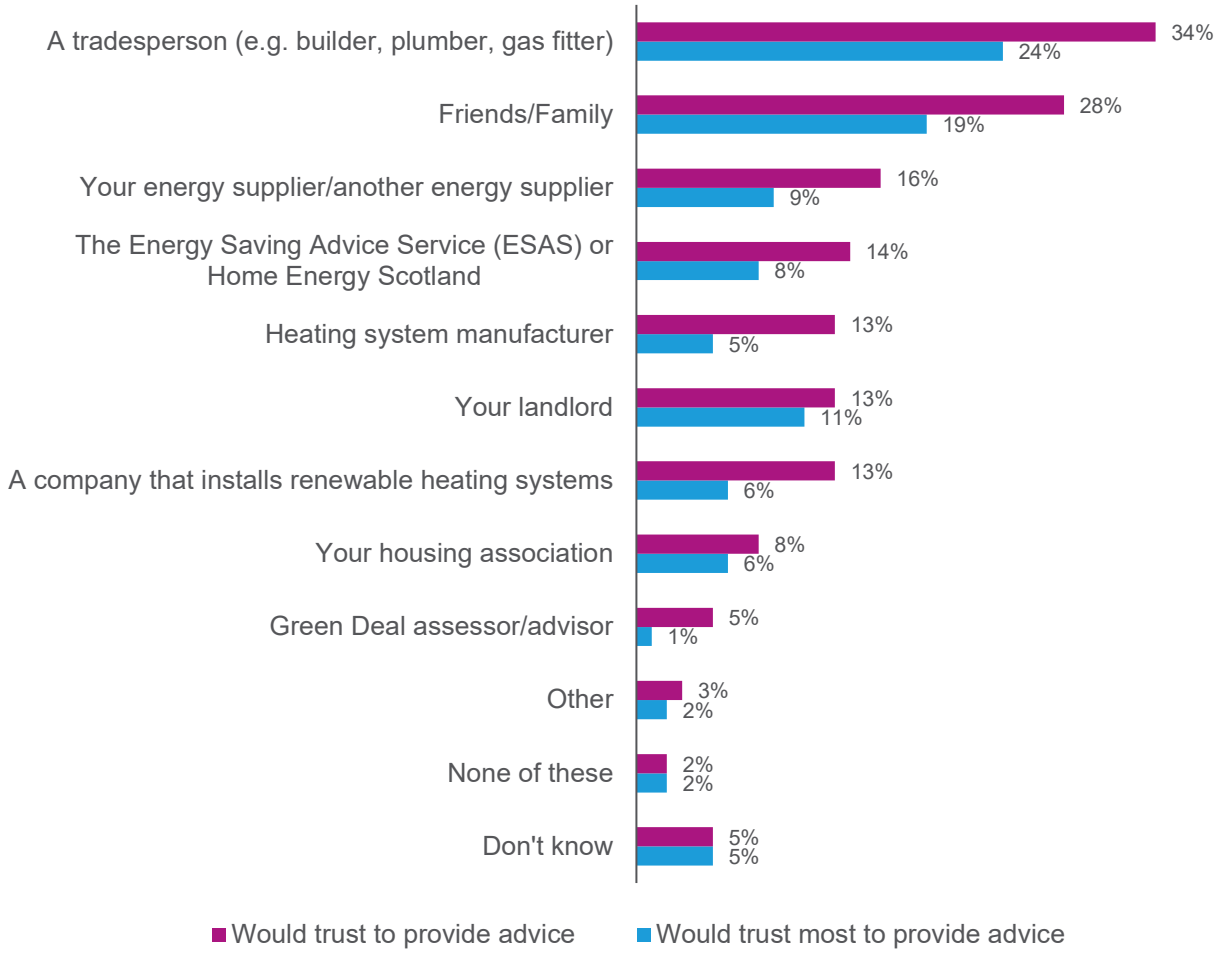
Q68. Do you feel you had the right information to help you make a good choice or would you have liked more or different information?

Base: All who had a new boiler or heating system installed in the last three years and were involved in the decision-making process for this – December 2017 (235); December 2018 (419)

People were asked who they would trust to provide advice about which heating system to install in their home. They were first asked to select all the people or organisations they would trust from a prompted list. If they selected more than one answer, they were then asked who they would trust most. Figure 20 presents both sets of responses.

In December 2018, people were most likely to trust a tradesperson (24%) or their friends or family (19%) to provide advice. A similar proportion said they would have most trust in their landlord (11%), an energy supplier (9%), the Energy Saving Advice Service (ESAS) or Home Energy Scotland (8%).

Figure 27: Sources people would trust at all and most to provide advice about which heating system to install in their home, December 2018



Q7_7A. Which of the following would you trust to provide advice about which heating system to install in your home?

Q7_7B. And which one would you trust the most to provide advice about which heating system to install in your home?

Base: All wave respondents – December 2018 (4,273)

Unsurprisingly, there were notable differences between owner occupiers and those renting their accommodation. Private renters were far more likely to say they had the most trust in their landlord (41%), while social renters had the most trust in their housing association (35%). The results for owner-occupiers largely reflect the overall findings presented in Figure 27, with a tradesperson (31%) and friends and family (22%) most likely to be trusted.

There were no notable changes in responses to this question from previous waves of the survey.

Technical appendix

Technical notes

The wave 28 report provides selected headlines and highlights statistically significant differences at the 95% level between wave 28 and previous waves.

Percentages included on charts in this report may not add up to 100% due to rounding, the exclusion of some categories (e.g. 'Don't know' and 'Refused') and the option for more than one response to be selected at some questions.

This report is not an exhaustive overview of the findings. Please refer to the accompanying Excel summary tables, Excel dataset and PDF data tables to see full responses to all survey questions.

The results shown here are based on 4,273 face-to-face in-home interviews conducted with a representative sample of UK adults aged 16+. Fieldwork was conducted between 5 December and 16 December 2018 on the Kantar TNS Omnibus, which uses a random location quota sampling method. The questionnaire was designed by BEIS and Kantar Public drawing on several 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.

More detailed information can be found in the technical note. This is available at: https://www.gov.uk/government/publications/public-attitudes-tracker-technical-note-on-use-of-wave-1-and-wave-2-datasets

Fieldwork dates and sample sizes

Table 1: Fieldwork dates and sample sizes for each wave

Wave	Fieldwork dates	Sample sizes
Wave 1 (Mar 2012)	21 - 25 March 2012	2,121
Wave 2 (Jun 2012)	27 June - 1 July 2012	2,100
Wave 3 (Sep 2012)	26 - 30 September 2012	2,118
Wave 4 (Dec 2012)	12 December 2012 - 2 January 2013	2,107

Wave 5 (Mar 2013)	27 - 31 March 2013	2,051
Wave 6 (Jul 2013)	3 - 7 July 2013	2,124
Wave 7 (Sep 2013)	25 - 29 September 2013	2,103
Wave 8 (Dec 2013)	11 - 15 December 2013	2,110
Wave 9 (Mar 2014)	26 - 30 March 2014	2,040
Wave 10 (Jun 2014)	25 - 29 June 2014	2,087
Wave 11 (Sep 2014)	24 - 28 September 2014	2,103
Wave 12 (Dec 2014)	10 December 2014 - 8 January 2015	2,119
Wave 13 (Mar 2015)	18 - 29 March 2015	1,981
Wave 14 (Jun 2015)	24 - 28 June 2015	2,118
Wave 15 (Sep 2015)	23 - 27 September 2015	2,121
Wave 16 (Dec 2015)	9 - 13 December 2015	2,121
Wave 17 (Mar 2016)	23 - 27 March 2016	2,105
Wave 18 (Jun 2016)	29 June - 3 July 2016	2,114
Wave 19 (Sep 2016)	28 September - 2 October 2016	2,080

Wave 20 (Dec 2016)	14 - 18 December 2016	2,138
Wave 21 (Mar 2017)	29 March - 2 April 2017	2,180
Wave 22 (Jun 2017)	30 June - 4 July 2017	2,097
Wave 23 (Sep 2017)	27 September - 1 October 2017	2,105
Wave 24 (Dec 2017)	13 - 17 December 2017	2,078
Wave 25 (Mar 2018)	28 March - 6 April 2018	2,102
Wave 26 (Jul 2018)	11 - 17 July 2018	4,268
Wave 27 (Sep 2018)	19 - 30 September 2018	4,258
Wave 28 (Dec 2018)	5 – 16 December 2018	4,273

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