DECC PUBLIC ATTITUDES TRACKER – WAVE 2

SUMMARY OF KEY FINDINGS

18th September 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 second 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 second wave of data was collected between 27th June and the 1st July 2012 using face-to-face in-home interviews with a representative sample of 2,100 households in the UK. As outlined above, only a subset of the questions asked in wave 1 were asked. The wording for some of the questions has changed since wave 1 – this is primarily to ensure that questions are as effective and as clear as possible. Where the question has changed, wave 2 will be treated as a new baseline. Questions that have changed are denoted by an asterisk and it is not meaningful to draw comparisons with wave 1. Please refer to the excel tables to see the responses to all of the wave 2 questions and differences between waves 1 and 2.
http://www.decc.gov.uk/en/content/cms/statistics/public_att/public_att.aspx#

The note below does highlight any statistically significant differences between waves 1 and 2 where this is meaningful 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.

TOPLINE RESULTS FROM WAVE 2

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.

CLIMATE CHANGE AND ENERGY SECURITY: In general, concern about energy security is higher than concern about climate change

- The proportions of people who were very concerned about various aspects of future energy security was as follows:
    - Steep rises in energy prices (40%)*.
    - The UK becoming too dependent on energy from other countries (35%)*.
    - The UK not investing fast enough in alternative sources of energy (27%)*.
    - UK supplies of fossil fuels not being sufficient to meet UK demand (21%)*.
    - The UK not developing technology to use existing sources of fossil fuels sufficiently (21%)*.
    - Power cuts becoming more frequent (17%)*.

- In comparison, 20% of people said that they were very concerned about climate change*.

 * Question has changed since wave 1 so it is not meaningful to draw comparisons.

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

- Just under three-quarters (73%) said that they gave a lot (22%) or a fair amount (51%) of thought to saving energy in the home but when asked about specific actions around heating their home, it is clear that there is still potential to change behaviour:
  - Forty four per cent said they left the heating on at least occasionally when going out for a few hours
  - Three in ten (31%) said that they always tried to keep rooms they were not using at a cooler temperature than those they were using.

  These results do not differ significantly from wave 1.

- In terms of awareness and interest in installing low carbon heat measures, almost half of people (46%) said they had not heard of an air source heat pump and more than 2 in 5 (42%) said they had not heard of a ground source heat pump. Almost a quarter (22% for an air source heat pump and 24% for a ground source heat pump) had not thought about installing one and a similar proportion said they did not want to, at least at this stage. Similar patterns were reported regarding installing a biomass boiler or a micro-CHP unit*.

ENERGY INFRASTRUCTURE: There are positive views on renewables and split views on the balance of benefits and risks for nuclear

- Views in relation to renewable energy were generally positive. Just over three quarters (77%) said they supported renewable energy for providing our electricity, fuel and heat, with 26% strongly supporting. Just 4% opposed renewable energy.

- Perceptions of a range of renewable energy sources were mostly positive. Highest levels of support were found for solar (82%), off shore wind (73%) and wave and tidal (72%). On-shore wind had the highest level of opposition, though still only 12% opposed this, with 4% strongly opposing (compared with 66% supporting). Across all of the technologies, and in terms of overall support for renewable energy there has been a slight reduction in the proportion strongly supporting renewables when compared to wave 1 but the proportion of people opposing renewable energy has not changed significantly and remains low.

- The sample was broadly split when asked to weigh up the benefits of nuclear energy against the risks although there was a slight increase in the proportion who felt that the benefits of nuclear outweighed the risks when compared to wave 1. A third (33%) felt that the benefits outweighed the risks while 28% felt that the risks outweighed the benefits. A further 28% felt that the benefits and risks were about the same, with one in ten (11%) saying they did not know.

* Question has changed since wave 1 so it is not meaningful to draw comparisons.

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

- Fifteen percent said they had been very worried about their energy bills over the last three months with a further third (32%) fairly worried. This is a slight decrease compared to wave 1 but reflects a lower level of worry about all household bills.

- Nine 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 wave 1.

- Five per cent said they planned to switch supplier in the next year with a further 26% saying they may or may not switch. This is consistent with the findings from wave 1.

TECHNICAL NOTES

Results shown here are based on 2,100 UK face-to-face in-home interviews conducted with a representative sample of adults aged 16+. Fieldwork was conducted between 27th June and the 1st July 2012 on the TNS UK omnibus, which uses a random location quota sampling method. The questionnaire was designed by DECC and TNS BMRB drawing on a number of questions from previous surveys. Questions were refined though cognitive testing.

The representativeness of the data were controlled through sample design, fieldwork quotas and post-fieldwork weighting. Data were weighted for the following characteristics: sex, age, social grade, region and tenure. Results included here are based on weighted data.

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

* Question has changed since wave 1 so it is not meaningful to draw comparisons.

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