Department of Energy & Climate Change

DECC Public Attitudes Tracker – Wave 5

Summary of key findings

30 April 2013

DECC Public Attitudes Tracker

DECC set up a tracking survey in early 2012 to understand and monitor public attitudes to the Department's main business priorities. The survey runs four times a year and consists of one longer, annual survey and three shorter, quarterly surveys which focus on a subset of questions where we think attitudes might shift quickly or be affected by seasonal changes. This summary note presents headline findings from the fifth, annual, wave of the survey

The fifth wave of data was collected between 27 and 31 March 2013 using face-to-face in-home interviews with a representative sample of 2,051 households in the UK. The wave 5 questionnaire was in most respects the same as the wave 1 questionnaire. Where questions had been rephrased in wave 2 the revised version is used here, and some small adjustments have been made to align questions with other DECC tracking surveys.

This summary provides selected headlines and highlights statistically significant differences between wave 5 and previous waves. Please refer to the Excel tables for a full comparison of wave 5 findings with the four previous waves https://www.gov.uk/government/publications/public-attitudes-tracking-survey-wave-5.

SUMMARY OF KEY FINDINGS FROM WAVE 5

ENERGY BILLS & SWITCHING: six in ten people concerned about energy bills; increased interest in collective switching

- Concern about energy bills has reached the highest level since wave 1, with 59% of UK adults concerned about rising bills (56% in wave 1) and 45% to 50% over waves 2-4. This is likely to have been influenced by the unseasonably cold weather prior to and during the fieldwork period.

- Awareness of collective switching increased to 27%, from 21% in wave 1 and there was a significant increase in the proportion of people interested in joining a collective switching scheme, up to 42% from 34% in wave 1.

- 16% have switched energy supplier in the last year, similar to the wave 1 figure of 15%.

CLIMATE CHANGE AND ENERGY SECURITY: not seen as key challenges facing the UK but, when asked directly, concern about energy security is rising; strong support for mix of energy sources

- In spite of increased concern in wave 5, climate change and energy security are not viewed as key challenges facing Britain today. 5% of respondents saw climate change as the top challenge, up from 2% in wave 1; and 6% cited security of energy supply, double the wave 1 level of 3%.
- When asked directly, 66% were concerned about climate change (similar to wave 1's 65%), with 12% attributing it to natural causes, down from 15% in wave 1.
- Concern about energy security has increased since wave 2 (when the questions were first asked). 88% were concerned about steep rises in energy prices in the future (the next 10-20 years) in wave 5, up from 84% in wave 2; 79% were concerned about the UK

becoming too dependent on energy from other countries, up from 74% in wave 2; and 75% were concerned the UK is not investing fast enough in alternative sources of energy, up from 71% in wave 2.

- There is strong support for a mix of energy sources: 81% agreed that the UK needs a mix of energy sources to ensure a reliable supply of electricity. This is unchanged from the wave 1 level of 82%.

CARBON CAPTURE AND STORAGE: small rise in awareness

- Awareness of CCS increased to 41%, from 36% in wave 1. 57% of those aware of the technology supported its use to generate electricity in the UK.

SHALE GAS: awareness level rises from 42% to 52%

- Awareness, at any level, of hydraulic fracturing, or ‘fracking’, to extract shale gas rose by ten percentage points to 52% since wave 2 - the first time the question was asked.

RENEWABLE ENERGY SOURCES: steady growth in support

- Support for renewable energy sources to provide the UK’s electricity, fuel and heat rose to 82%, from 79% in wave 4 (and 79% in wave 1).

- Support for individual renewable technologies is at similar levels to wave 1, with 85% now supporting solar, around three-quarters supporting wave and tidal (77%) and off-shore wind (76%) and around two-thirds supporting on-shore wind (68%) and biomass (64%).

NUCLEAR ENERGY: support rising but a mixed picture overall

- Support for nuclear energy for generating electricity in the UK rose to 40%, from 37% in wave 4, although overall views are split, with 23% opposed and 35% neither supporting nor opposing its use.

- 46% of people agreed that nuclear energy provides a reliable source of affordable energy in the UK, no significant difference to wave 1’s 43%.

- 44% thought nuclear energy generates economic benefits to the UK, again no significant difference to the wave 1 level of 42%.

SMART METERS: more people have a smart meter

- The number of UK adults saying they have a smart meter rose to 12%, from 6% in wave 1. This finding may have been influenced by changes to the question wording and display images on the wave 5 questionnaire.

ENERGY EFFICIENCY AND INSULATION: high levels of energy wasting behaviours; increased uptake of under floor insulation

- The number of people saying they think about saving energy in the home returned to wave 1 levels, with 26% giving a lot of thought to energy saving behaviours and 54% a fair amount of thought.
- In spite of concern about energy bills and 80% saying they think about energy saving behaviours, levels of energy wasting behaviours remained high overall: with 67% of people admitting to at least occasionally boiling the kettle with more water than they intend to use; 52% leaving lights on when they are not in the room; and 52% leaving the heating on when they go out for a few hours.

- 51% of households had installed or thought about replacing an older gas boiler with a more efficient condensing boiler, up from 45% in wave 1. This is considerably higher than any of the alternative sources of heat measured - only 7% have installed or thought about installing solar panels, and 2% installed or thought about installing air source heat pumps.

- The proportion of households who had installed under floor insulation increased to 15%, from 11% in wave 2.

Technical notes

The results shown here are based on 2,051 face-to-face in-home interviews conducted with a representative sample of UK adults aged 16+. Fieldwork was conducted between 27 and 31 March 2013 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.

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URN 13D/099