Department of Energy & Climate Change

DECC Public Attitudes Tracker – Wave 10

Summary of key findings

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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 tenth quarterly wave of the survey.

The tenth wave of data was collected between 25 and 29 June 2014 using face-to-face in-home interviews with a representative sample of 2,087 households in the UK. The wave 10 questionnaire, includes a reduced question set from that in wave 9, which was the annual survey, but is essentially the same as the previous quarterly questionnaire (wave 8, December 2013), although it included additional questions on Geological Disposal Facilities that had only been asked previously in wave 6.

The headline findings of the June 2014 survey results are generally compared below with the last wave (March 2014 - wave 9), although bearing in mind that it is a tracking survey so trends over time are key. Please refer to the Excel tables for a full comparison of wave 10 findings with the nine previous waves. https://www.gov.uk/government/publications/public-attitudes-tracking-survey-wave-10

SUMMARY OF KEY FINDINGS FROM WAVE 10

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.

Summary findings from the June 2014 survey are broadly consistent with waves 1-9 and largely unchanged since March 2014 and December 2013.

- RENEWABLE ENERGY SOURCES: received continued high levels of support although there may be a seasonal decline when results are compared to the previous wave Over three-quarters of UK adults (79%) said they supported the use of renewable energy sources to generate the UK's electricity, fuel and heat, a similar proportion to March 2014 (80%) and December 2013 (77%).
- Support levels for individual renewable energy sources were lower than the previous wave but comparable to that reported at this time last year (Wave 6) which may be indicative of a seasonal effect; off-shore wind (72%), biomass (60%), onshore wind

(67%), wave and tidal (73%) and solar (82%). For all technologies there was an increase in those that neither supported nor opposed these developments.

SHALE GAS: awareness of fracking was comparable to that from March 2014; but was coupled with a decline in support for shale gas extraction

- Three quarters of people had some awareness of shale gas (74%), which is comparable to levels of awareness reported in March 2014.
- 24% of people said they support shale gas extraction which is a decline since the previous waves (29% in March 2014 and 28% in December 2013). Almost half (47%) say they neither support nor oppose it, and a quarter are opposed (24%).Seasonal effects may occur with renewable technologies as a decline in support is observed between March and June on consecutive years, however the equivalent question for shale gas and oil was only introduced in December 2013 so we do not yet have sufficient data to consider long term trends.

NUCLEAR ENERGY: views continue to be broadly split

- Wave 10 sees a decline in support for nuclear energy to generate electricity in the UK (36%) from that reported in March 2014 (42%), however there is little change to that reported in June 2013 (37%) so this may be a seasonal effect.
- Level of knowledge of how the UK manages radioactive waste has declined with 15% now reporting they know a lot or a little and 85% saying they knew not very much or nothing at all, compared to respective figures of 19% and 81% for last year.

ENERGY BILLS, SWITCHING AND SUPPLIERS: levels of concern about paying for energy bills was significantly lower; and likelihood of switching in the next year has also declined

- Level of worry about bills (35%) and concern over steep rises in energy prices in the future (32%) are both at their lowest since the survey began. These results around energy tend to be lower in the ‘summer’ wave of the survey as energy consumption is at its lowest at this point in the year. These results are however lower than we have found at the same point in the past two years and seem to sit in a context of a decline in concern over prices more widely - from household shopping, mortgages and transport.
- 27% of people said they may or may not switch energy supplier in the next 12 months, which is a drop since March 2014 (33%), although there was not a drop in those who planned to switch in the next 12 months. This may be a seasonal effect as these figures are in keeping with those from June last year.
- Nearly half (47%) of people trusted their energy supplier to inform them of the best tariff for them which is an increase since March 2014 (41%) however over the period in which this question has been asked no clear trend of trust has emerged.

- Half of people (50%) also said they trusted their supplier to provide impartial and accurate advice on energy efficiency measures, equivalent to March 2014 (50%) and March 2012 (53%), when the question was first asked.

ENERGY EFFICIENCY: number of people who think about saving energy unchanged

- Three quarters of people (75%) gave a lot or a fair amount of thought to saving energy in their home, which represents a similar proportion to that reported in March 2014 (77%) and June 2013 (74%).
- There has been a decline in the number of people who leave their heating on at least occasionally when they go out 42% compared to 46% in March 2014. However this effect may be seasonal as is comparable to June 2013.
- There was no change in the proportion of people who try at least occasionally to keep rooms they are not using at a cooler temperature: three quarters of people did this in June 2014(77%), March 2014 (77%) and December 2013 (76%).

ENERGY SECURITY: concern about likelihood of power cuts has declined

- 48% of people were concerned about power cuts becoming more frequent in future, down from March 2014 (61%), which represents the lowest level since this question was first asked.

RENEWABLE HEAT: over two thirds of people were aware of renewable heat; with over a third positive about having a renewable heating system in their home

- 69% of respondents were aware of renewable heat in June 2014 which is consistent with that reported in March 2014 (71%)
- There was a decline in those positive about having a renewable heating system in their home (42% compared to 45% in March 2014), with 42% neither positive nor negative. However this question was only introduced in December 2013 and therefore we have no annual baseline with which to compare results.
- There was an increase in those saying they had not heard of or thought about installing specific renewable heat measures; biomass boiler (53%), air source heat pump (67%), ground source heat pump (63%), replacing old boiler with condensing boiler (18%), installing micro CHP unit (71%), but again we only have two waves of results to draw on as comparison.
- Friends and family (33%) were the most trusted source for advice on which heating system to install which was an increase since March 2014 (30%). The Energy Saving Advice Service (ESAS) was again the second most trusted source of advice (25%).

Technical notes

The results shown here are based on 2,087 face-to-face in-home interviews conducted with a representative sample of UK adults aged 16+. Fieldwork was conducted between 25 and 29 June 2014 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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