Department of Energy & Climate Change

DECC Public Attitudes Tracker – Wave 12

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 twelfth quarterly wave of the survey.

This wave of data was collected between 10 December 2014 and 8 January 2015 using face-to-face in-home interviews with a representative sample of 2,119 households in the UK. The wave 12 questionnaire is essentially the same as that used in wave 11 but with additional questions on renewable heat, as included in the wave 10 survey. Wave 9 was the last annual survey.

The headline findings of the wave 12 survey results are generally compared below with the last wave (September 2014 - wave 11), 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 12 findings with the eleven previous waves: https://www.gov.uk/government/collections/public-attitudes-tracking-survey.

SUMMARY OF KEY FINDINGS FROM WAVE 12

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 wave 12 survey are broadly consistent with waves 1-11 and largely unchanged since the previous two waves in September 2014 and June 2014.

ENERGY BILLS, SWITCHING AND SUPPLIERS: concern over paying energy bills has dipped to the lowest level since the survey began; in contrast, trust in suppliers across the different measures remains at the highest level since the survey began.

- In December 2014/January 2015 31% reported feeling concerned about their energy bills, compared to 34% in September 2014 and 47% in December 2013. This represents the lowest since the survey began and seems to sit in a context of a decline in concern over prices more widely - with worry about household shopping at 24%, mortgages at 16% and transport at 24% both down at least 10 percentage points on a year ago.

- Across the various components, trust in energy suppliers remains at the highest level since the survey began;
    - 67% trust energy suppliers to provide a breakdown of the components of their bill (up from 60% in December 2013)
    - 53% trust energy suppliers to inform them of the best tariff for them (up from 42% in December 2013)
    - Over half (54%) of people trust their energy supplier to give them a fair deal (an increase from 51% in September 2014 and 45% in December 2013) which represents the highest proportion since the survey began
    - 69% trust energy suppliers to provide them with a bill that accurately reflects the energy they have used (up from 63% in December 2013)
    - 50% trust energy suppliers to improve their home to make it more energy efficient, if the paid them to do this (up from 44% in December 2013)
    - 56% trust suppliers to provide impartial and accurate advice on energy efficiency measures (up from 49% in December 2013).
- The percentage of those who plan to take action on switching in the next year remains stable; with 4% planning to switch supplier and nearly two-thirds (63%) of respondents have no plans to switch energy supplier in the next year. This very similar to all previous results, except March 2014, when energy prices rose.

ENERGY SECURITY: concern about likelihood of power cuts remains stable at the lower level reported since June 2014.

- Concern over steep rises in energy prices in the future (76%) is comparable to the level reported in wave 11, which is the lowest since the survey began and significantly lower than 86% in December 2013.
- 49% of people were concerned about power cuts becoming more frequent in future, which remains around the lowest since this question was first asked (down from 54% in December 2013).

RENEWABLE ENERGY SOURCES: continue to receive high levels of support, over three-quarters of UK adults (76%) support the use of renewables to generate electricity, fuel and heat in the UK, a similar proportion to September 2014 (78%) and December 2013 (77%).

- Level of support for individual renewable energy sources also remain stable to that reported in September 2014; off-shore wind (74%), onshore wind (68%), wave and tidal (74%) and solar (81%). Support for biomass represents a slight increase at 65%, up from 60% in December 2013.

SHALE GAS: three quarters of people had some awareness of fracking; with around a quarter of people in support of shale gas extraction and an equivalent proportion opposed to it.

- The proportion of those with some awareness of shale gas in December 2014/January 2015 (75%), was similar to that reported in September 2014 (76%) but up from December 2013 (70%).

- 24% of people said they support shale gas extraction which is comparable to the most recent wave (26% in September 2014). Almost half (49%) say they neither support nor oppose it, and there was a slight dip in opposition (at 23% compared to 27% in September 2014) which is comparable to levels reported in June 2014 (24%).

NUCLEAR ENERGY: support has remained reasonably stable since the question was first asked in September 2012.

- 39% of the public supported the use of nuclear energy to generate electricity in the UK in December 2014/January 2015, compared to 42% in September 2014, and 37% in December 2013.

ENERGY SAVING AND WASTING: the proportion of people who think about saving energy remains stable.

- Three quarters of people (74%) gave a lot or a fair amount of thought to saving energy in their home, which represents a similar proportion to that reported in September 2014 (75%) and December 2013 (76%).
- There has been a rise in the proportion that report leaving the heating on when they are not in the house, 50% in December 2014/January 2015 up from 41% in September 2014 and 45% in December 2013.

RENEWABLE HEAT: although there are slight fluctuations across time, awareness and support of the various renewable heat measures has remained fairly stable since the questions were first asked in June 2012.

- 76% of respondents were aware of renewable heat, which represents an increase from the last time the question was asked (69% in June 2014) but consistent with that reported in December 2013 (78%)
- The proportion of those who are positive about having a renewable heating system in their home is 42%, similar to 44% in December 2013, although there is an increase in those who report being neither positive nor negative (at 47% compared to 43% in December 2013).
- The proportions of those who had already installed measures, were in the process of installing, or considering installing remains largely consistent; biomass boiler (2%), air source heat pump (2%), ground source heat pump (1%), solar thermal panels (8%), installing micro CHP unit (2%), replacing old boiler with condensing boiler (52%, a rise from 45% in September 2014 but consistent with 51% reported in December 2013),
- Friends and family (35%) remained the most trusted source for advice on which heating system to install which is comparable to June 2014 (33%). There was a rise in those trusting the advice of tradespeople from 26% in December 2014/January 2015 from 21% in June 2014.

Technical notes

The results shown here are based on 2,119 face-to-face in-home interviews conducted with a representative sample of UK adults aged 16+. Fieldwork was conducted between 10 December 2014 and 8 January 2015 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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