Department of Energy & Climate Change

DECC Public Attitudes Tracker – Wave 13

Summary of key findings

April 2015

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Any enquiries regarding this publication should be sent to us at [insert contact for department].

Introduction

In March 2012 the Department of Energy and Climate Change (DECC) launched a tracking survey to understand and monitor public attitudes to the Department's main business priorities. The Public Attitudes Tracker consists of one annual survey every March and three shorter surveys, in June, September and December, which repeat a subset of questions where we think attitudes might shift with greater regularity or be influenced by seasonal factors. New questions are generally piloted in the shorter surveys.

This report presents summary headline findings from the fourth annual survey (wave 13) and primarily makes comparisons with previous annual waves: March 2014 (Wave 9), March 2013 (wave 5) and March 2012 (wave 1). In some cases, for example when questions were rephrased or introduced in later waves, comparisons are made with other waves.

The thirteenth wave of data was collected between 18 and 29 March 2015 using face-to-face in-home interviews with a representative sample of 1,981 UK households. The March 2015 questionnaire was in most respects the same as that used in March 2012 (wave 1). Where questions had been rephrased in July 2012 (wave 2) the revised version is used here; some small adjustments were made to align questions with other DECC tracking surveys. Please refer to the full technical note for full details.

This summary provides selected headlines and highlights statistically significant differences between wave 13 and previous waves. Please refer to the Excel summary tables for a full comparison of these findings.

Summary of headline findings

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.

Climate change and energy security

- The proportion of people that rank energy supply (20%) and climate change (15%) as the top three challenges facing Britain has significantly dropped (from 31% and 22% respectively in March 2014), and now rank in the bottom three.
- When asked directly however, two thirds of people (66%) reported feeling very or fairly concerned about climate change, this is unchanged from both March 2013 and 2014 (66%).
- There has been an increase in the proportion of people who attribute climate change solely to human activity, from 35% in March 2014 to 40% in March 2015. Although the largest proportion of respondents remain those who believe climate change to be caused by a mixture of natural and human causes (42%).

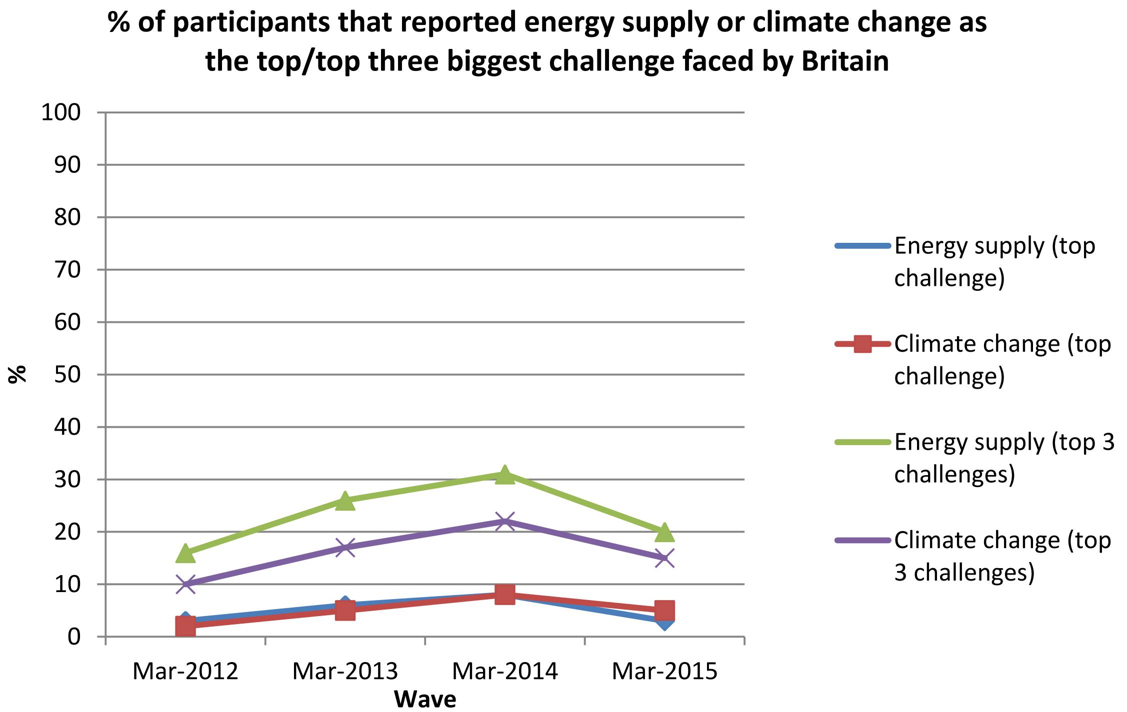

Figure 1: Proportion of participants who rank energy supply/climate change as the top or top 3 challenges facing Britain (Base: 1,981 UK adults, March 2015)

- The majority of respondents remain concerned about energy security, although this has fallen across a range of indicators:
    - 79% reported being very/fairly concerned about steep rises in energy prices in the future (compared to 85% in March 2014)
    - 72% reported being very/fairly concerned about the UK becoming too dependent on energy from other countries (compared to 80% in March 2014)
    - 64% reported being very/fairly concerned about UK supplies of fossil fuels not being sufficient to meet the UK's demand for them (compared to 71% in March 2014)
    - 62% reported being very/fairly concerned about the UK not developing technology to use existing sources of fossil fuels sufficiently (compared to 69% in March 2014)
    - 52% reported being very/fairly concerned about power cuts becoming more frequent in the future (compared to 61% in March 2014)

Energy sources

Renewable Energy: receives stable majority support

- In March 2015, nearly four fifths of the public (78%) said they supported the use of renewable energy to provide the UK's electricity, fuel and heat, this is consistent with results from the past three years (79%, 82%, 80% for March 2012-2014 respectively).

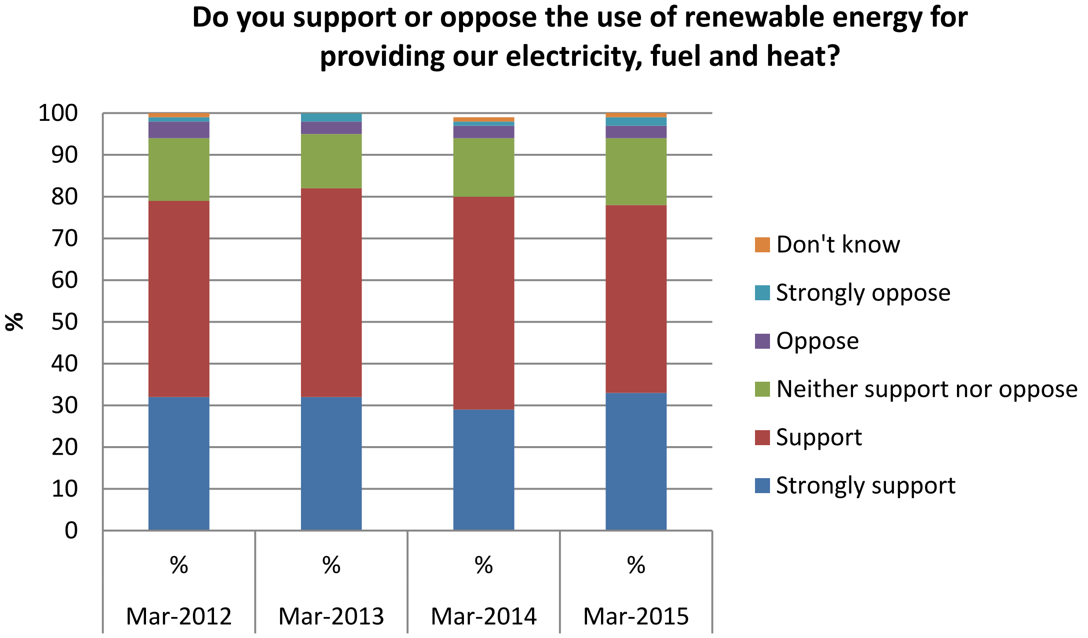

Figure 2. Level of support for the use of renewable energy to provide the UK's electricity, fuel and heat (Base: c.2,000 UK adults, March 2012-2015)

- 71% strongly or slightly agree that renewable energy industries and developments provide economic benefits to the UK (unchanged from March 2014 and 2013, 70% and 71% respectively), 6% strongly or slightly disagree.
- 78% strongly or slightly support the idea that renewable energy developments should provide direct benefit to the communities in which they are located (a slight dip from March 2014 and 2013, 81%), 5% strongly or slightly disagree.
- However, level of support varies across renewable technologies:
    - Solar sees 81% in favour (compared to 85% in both March 2014 and 2013);
    - Wave and tidal, 74% in favour (compared to 77% in both March 2014 and 2013);
    - Off-shore wind, 73% in favour (compared to 77% in March 2014 and 76% in March 2013);
    - On-shore wind, 65% in favour (compared to 70% in March 2014, and 68% in March 2013)
    - Biomass, 63% in favour (compared to 60% in March 2014, and 64% in March 2012)

Nuclear energy: support for nuclear has dipped, although the highest proportion of the public remain in favour

- 39% support, or strongly support the use of nuclear energy to generate the UK's electricity, this represents a dip since March 2014 (42%) but is constant with the public response when the questions was first asked in September 2012 (38%)[1].
- Opposition has fluctuated over this period, 21% opposed or strongly opposed in March 2015 (compared to 20% in March 2014, and 27% in September 2012). Over a third of people (36%) neither support nor oppose the use of nuclear (consistent with March 2014 and September 2012, 34%).

Shale gas: awareness has stabled since March last year but nearly half the population remain undecided

- 72% were to some degree aware of hydraulic fracturing for shale gas (fracking) in March 2015, which is largely stable with March 2014 (75%) but markedly higher than when the question was first introduced in July 2012 (42%).
- In March 2015, nearly a quarter of respondents (24%) supported or strongly supported the extraction of shale gas to generate the UK's heat and electricity, compared to 29% in March 2014 and 27% when the question was first asked in December 2013. This proportion is generally equivalent to those who oppose or strongly oppose (26% in March 2015, and 22% in March 2014).
- However the largest proportion of respondents remain undecided. Combined, nearly half of respondents neither support or oppose shale (44%) or don't know (5%), which is unchanged from March 2014.).

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[1] September 2012 is used as the baseline here as the question was substantially rephrased at that stage (wave 3)

Carbon Capture and Storage (CCS): dip in support among those who are aware of CCS

- In March 2015 38% of people were aware of CCS technology, consistent with findings from March 2014 (40%) and March 2013 (41%).
- 52% of those who knew a lot or a little about CCS technology said they support or strongly support its use, this represent a dip in support from March 2014 and March 2013 (both 57%). A large proportion neither support nor oppose its use (39%, up from 32% in March 2014 and 36% in March 2013). Opposition remains constant at 6%.

From what you know, or have heard about using carbon capture and storage in the UK, do you support or oppose its use?

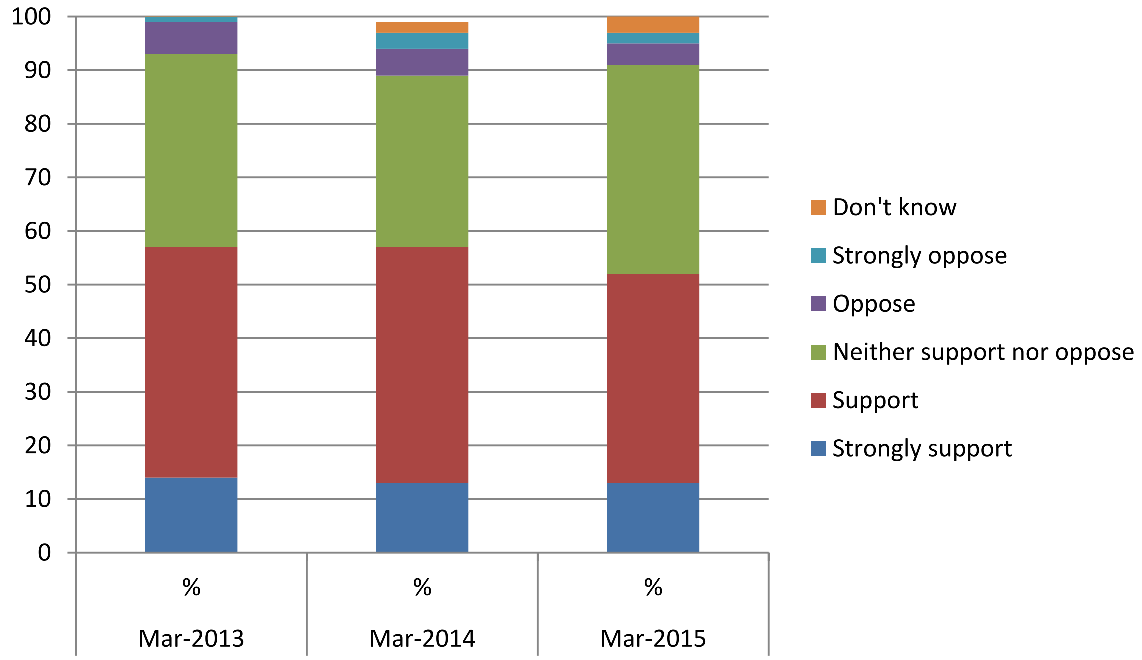

Figure 3. Support for use of carbon capture and storage (Base: All respondents know a lot/ a little about carbon capture and storage; 403/394/ 374 March 2013-2015)

Energy bills and switching

- The proportion of people very or fairly concerned about paying their energy bills has fallen significantly over the last two years, currently 35% are worried about energy bills, down from 49% in March 2014 and 59% in March 2013. This mirrors trends across other expenditure reviewed in the tracker; food and other household shopping, transport, mortgage or rent payments.
- The proportion of those who have switched supplier in the last year remains constant at 16% (15% in March 2014 and 16% in March 2013). The proportion that plan to switch supplier in the coming year is also constant at 5%.
- Across the various components, trust in energy suppliers is at the highest level since the survey began;

- 68% trust energy suppliers to provide a breakdown of the components of their bill (up from 61% in March 2014 and 63% in March 2013)
- 54% trust energy suppliers to inform them of the best tariff for them (up from 41% in March 2014 and 46% in March 2013)
- Nearly two thirds (57%) of people trust their energy supplier to give them a fair deal (an increase from 44% in March 2014 and 48% in March 2013)
- 72% trust energy suppliers to provide them with a bill that accurately reflects the energy they have used (up from 65% in March 2014 and 68% in March 2013)
- 50% trust energy suppliers to improve their home to make it more energy efficient, if the paid them to do this (up from 45% in March 2014 and 46% in March 2013)
- 56% trust suppliers to provide impartial and accurate advice on energy efficiency measures (up from 50% in March 2014 and 51% in March 2013).

- In March 2015 nearly a third of people (28%) had heard of collective switching, down from 32% in March 2014 but equivalent to March 2013 (27%). 37% expressed an interest in joining a collective switching scheme, which represents a dip from March 2014 (40%) and March 2013 (42%).

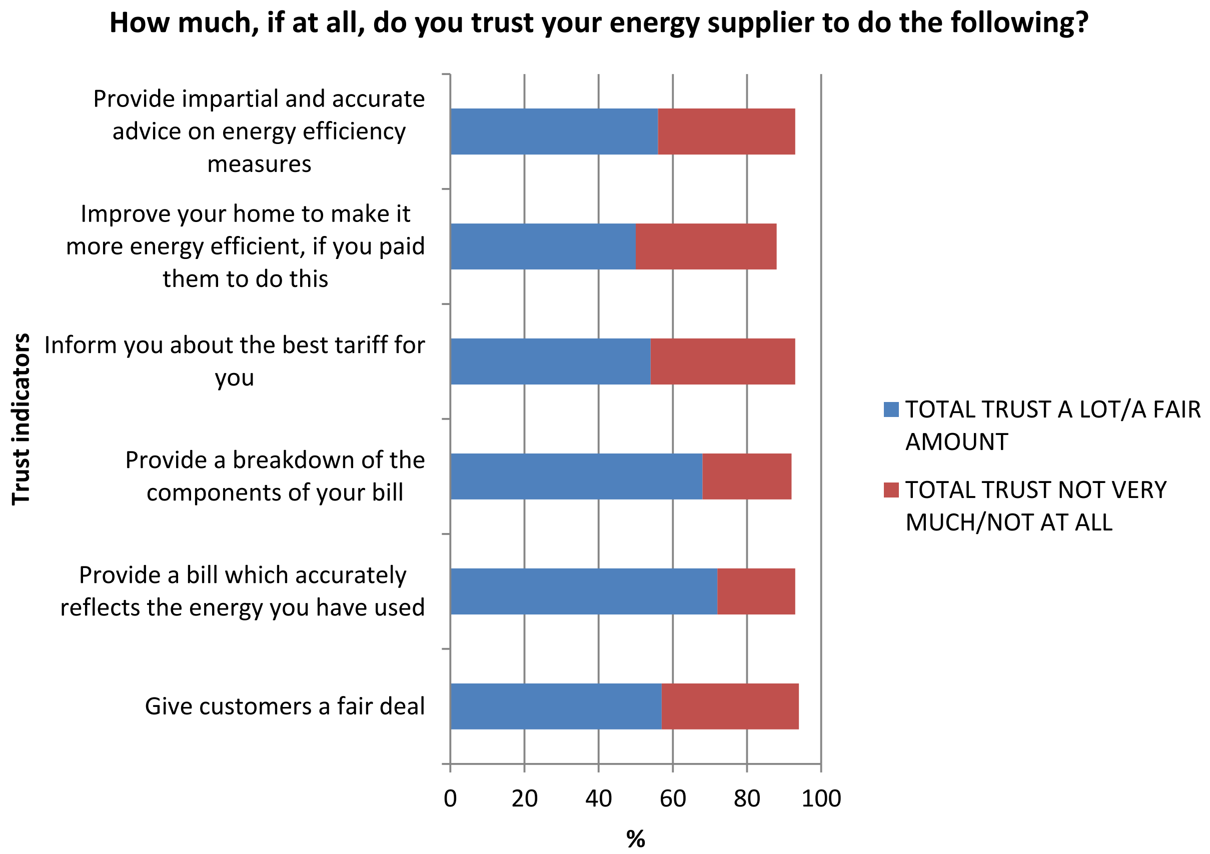

Figure 4.Trust in energy suppliers (Base, 1981 UK adults, March 2015)

Home energy use and energy saving

Energy Efficiency: reported behaviours regarding energy saving and installation of measures remains stable

- There has been little consistent change in the way people use energy at home. In March 2015 report that they engage in these energy wasting behaviours:
  - 50% leave the lights on when not in the room, compared to 48% in March 2014 and 52% in March 2013
  - 65% boil the kettle with more water than will be used, compared to 64% in March 2014 and 67% in March 2013
  - 49% leave the heating on when going out for a few hours, compared to 46% in March 2014 and 52% in March 2013
- There is also no change in those who have already installed, are in the process of installing, or considering installing energy efficiency measures; loft insulation or top up insulation 67% (69% in March 2014), double glazing 80% (80% in March 2014), cavity wall insulation 48% (50% in March 2014), solid wall 8% (6% in March 2014), and underfloor insulation 13% (14% in March 2014).

Smart Meters: ownership of smart meters has trebled since question was first asked

- The proportion of respondents that own a smart meters has continued to rise and stands at 18% (up from 14% in March 2014, 12% in March 2013, and 6% in March 2012).

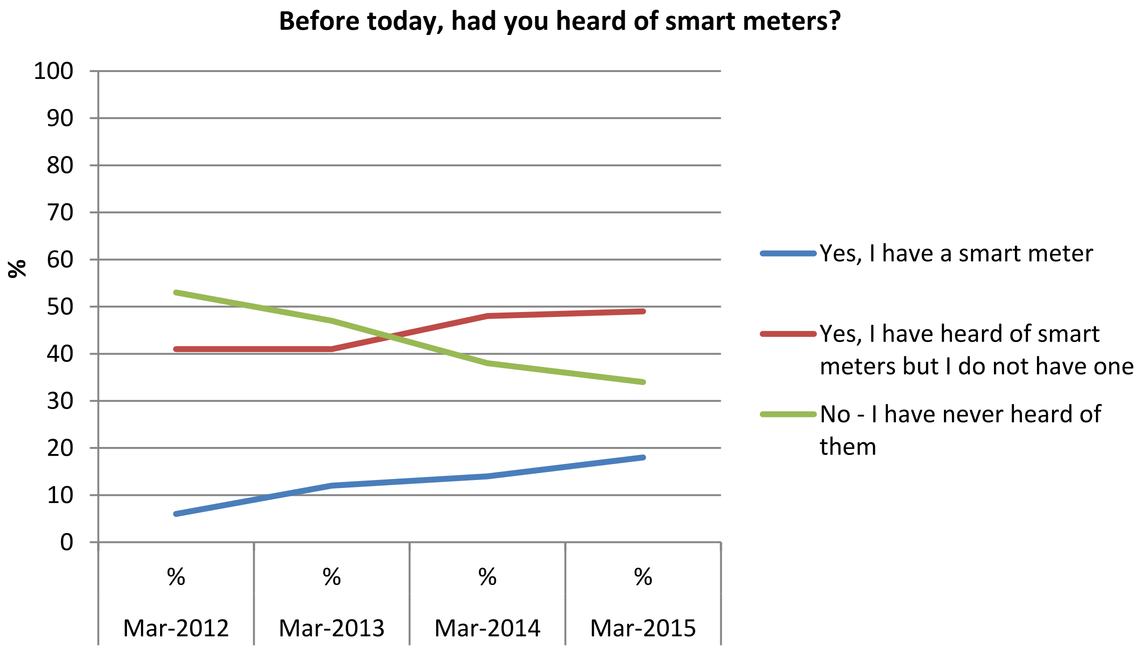

Figure 5. Ownership of smart meters (Base; c.2,000 UK adults, March 2013-2015)

Technical notes

The results shown here are based on 1,981 face-to-face in-home interviews conducted with a representative sample of UK adults aged 16+. Fieldwork was conducted between 18 and 29 March 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.

Please refer to the full technical note at https://www.gov.uk/government/collections/public-attitudes-tracking-survey for further details.

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