Department for Business, Energy & Industrial Strategy

ENERGY AND CLIMATE CHANGE PUBLIC ATTITUDE TRACKER

Wave 18

July 2016

Introduction

In March 2012 the Department of Energy and Climate Change launched a tracking survey to understand and monitor public attitudes to the Department's main business priorities. On 14 July 2016, the Department of Energy and Climate Change (DECC) merged with the Department of Business, Innovation and Skills (BIS), to form the Department of Business, Energy and Industrial Strategy (BEIS). As such, the survey has now been rebranded as BEIS's Energy and Climate Change Public Attitudes Tracker (PAT). The PAT still 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. In 2015, the tracker was reviewed to ensure that the dataset would continue to offer valuable insight. A list of the changes made to date, covering both question content and frequency, is included in the annex.

This report presents summary headline findings from June / July 2016 (wave 18) and primarily makes comparisons with data from the previous quarter, March 2016 (wave 17).

The eighteenth wave of data was collected between 29 June 2016 and 3 July 2016 using face-to-face in-home interviews with a representative sample of 2,114 households in the UK. Data was collected using the TNS UK omnibus, which uses a random location quota sampling method. The questionnaire was designed by BEIS and TNS BMRB drawing on a number of questions from previous surveys. Questions were refined through cognitive testing. Full details of the methodology are provided in the technical note.

A complete list of changes to question set and frequency in the past 12 months is included in the annex of this report.

This summary provides selected headlines and highlights statistically significant differences between wave 18 and previous waves. Please refer to the Excel summary tables for a full comparison of these findings: https://www.gov.uk/government/collections/public-attitudes-tracking-survey.

Table 1. Fieldwork dates and sample sizes for each wave.

	Fieldwork dates	Sample size
Wave 1	21 - 25 March 2012	2,121
Wave 2	27 June - 1 July 2012	2,100
Wave 3	26 - 30 September 2012	2,118
Wave 4	12 December 2012 - 2 January 2013	2,107
Wave 5	27 - 31 March 2013	2,051
Wave 6	3 - 7 July 2013	2,124
Wave 7	25 - 29 September 2013	2,103
Wave 8	11 - 15 December 2013	2,110
Wave 9	26 - 30 March 2014	2,040
Wave 10	25 - 29 June 2014	2,087
Wave 11	24 - 28 September 2014	2,103
Wave 12	10 December 2014 - 8 January 2015	2,119
Wave 13	18 - 29 March 2015	1,981
Wave 14	24 - 28 June 2015	2,118
Wave 15	23 - 27 September 2015	2,121
Wave 16	9-13 December 2015	2,121
Wave 17	23 March 2016 - 27 March 2016	2,105
Wave 18	29 June - 3 July 2016	2,114

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.

Energy bills

Worries over paying for energy bills dropped to their lowest level since the tracker began. At wave 18, only 22% were either very or fairly worried about paying for their energy bills. The level of worry was at its lowest amongst those with household incomes over £50,000 (11%), over 65s (14%) and social grade AB (14%), and highest amongst those with household incomes under £16,000 (28%), private renters (30%), social renters (29%), 35-44 year olds (31%), and those in social grade DE (29%).

Concern about energy bills relative to other household bills has also decreased. At wave 18, six per cent were more worried about energy bills than paying for transport, food and other household shopping costs. At wave 17, 9% were more worried about energy bills relative to other household bills.

Energy suppliers and switching

Trust in energy suppliers has shown an increase on all measures at wave 18 compared with wave 17. In fact, trust in energy suppliers across all six measures is the highest it has been since the tracker began. Respondents were most likely to trust suppliers to provide a bill which accurately reflects energy use (72%), and to provide a breakdown of the components of your bill (71%). There were notable increases in trust for other measures, including giving customers a fair deal (from 54% to 63%) and providing information on the best tariff (50% to 57%).

The proportion that plan to switch energy supplier in the next year has decreased over the last wave of the tracker. At wave 18 only five per cent had firm plans to switch their supplier in the next year, whilst 28% felt that they 'may or may not switch supplier'. At wave 17, six per cent had firm plans to switch and 34% said they may or may not switch. At wave 18, six in ten (62%) stated that they would not be switching supplier. Those with household incomes over £50,000 (12%), those aged between 35-44 (9%), 45-54 (7%), and those in social grades AB (7%) were most likely to have firm plans to switch their energy supplier. In comparison, those with household incomes under £16,000 (4%), aged over 65 (3%), under 24 (3%) and in social grades C2 (4%) and DE (4%) were less likely to have firm plans to switch.

Energy Security

The level of concern over steep rises in energy prices in the future dropped slightly, from 68% at wave 16 (when this question was last asked), to 65% at wave 18. Concern over power cuts becoming more frequent also dropped over the same period, from 45% to 38%. Both of these show concerns at their lowest level since the tracker began.

Energy saving and wasting

The proportion of people that claim to give a lot of thought to saving energy in the home remained relatively stable at wave 18, when accounting for seasonal trends. Just under a quarter claimed to give a lot of thought to saving energy at home (23%), whilst half claimed to give it a fair amount of thought (47%). Although significantly different to wave 17 responses, the findings at wave 18 were very similar to those at wave 14, which was conducted at the same point of the year.

Renewable energy

Support for renewable energy has been consistently high during the tracker at around 75-80%. This pattern has continued at wave 18, with 76% expressing support for the use of renewables, although this is a slight dip from 81% at wave 17. Opposition to renewables was very low at 4%, with only 1% strongly opposed.

Support for renewables was particularly high for people with incomes over £50,000 (89%), in social grade AB (85%), or aged 45-54 (83%) or 35-44 (82%). Support for renewables was lower amongst those aged 65+ (68%), in social grades DE (67%), and those with household incomes under £16,000 (64%).

Nuclear energy

Support for the use of nuclear energy has remained fairly stable over the life of the tracker. At wave 18, 36% supported nuclear energy compared with 22% who were opposed. There was a significant drop in both strong support and strong opposition to nuclear energy. Both were down to 6% at wave 18 from 10% at wave 17. At wave 18, males (46%), those with household incomes over £35,000 (45%), in social grades AB (43%), and aged over 65 (42%) were the most likely to support the use of nuclear energy.

Four in ten (40%) selected the neutral option at this question, to indicate that they neither support nor oppose the use of nuclear energy.

Radioactive waste

At wave 18, 14% said they knew a lot or a fair amount about the way the UK manages radioactive waste, whilst 86% knew not very much or nothing at all. These results are consistent with previous waves.

Four in ten (40%) claimed to have some knowledge or awareness of Geological Disposal Facilities (GDF). Most who were aware did not have a lot of knowledge; 19% said they were aware but did not really know what they are, and 17% knew a little about them. Only 3% said they knew a lot about GDF. Knowledge of GDF differs by gender and also social grade, with men (50%) more likely to claim knowledge/awareness than women (30%), and those in social grades AB (52%) more likely to claim knowledge/awareness than those in social grades DE (33%).

Shale gas

Over three quarters of the public were aware of fracking at wave 18 (78%); this is the highest level of awareness since this question was first asked in 2012, and a slight increase on the 74% who were aware of fracking at wave 17. Despite many people being aware of fracking, only a small proportion claimed to have detailed knowledge. At wave 18, 15% claimed to know a lot about fracking, whilst 43% said they knew a little, and 19% were aware of it but did not really know what it was. Awareness of fracking was higher for those in social grade AB (90%), aged over 45 (88%), with incomes over £50,000 (94%), and home owners (86%).

When asked whether they support or oppose extracting shale gas 48% neither supported nor opposed it (46% neither supported nor opposed it and 2% did not know). This is likely (in part at least) a reflection of the lack of knowledge about fracking. Of those who did offer an opinion, more people were opposed (31%) to fracking than supported it (21%). Strong support for shale gas was significantly down from 4% at wave 17, to 2% at wave 18.

Follow-up questions were asked at wave 18 to identify the most common reasons why people support, oppose, or are neutral towards fracking. The most common reason for supporting fracking was a need to use all available energy sources (39%). Other reasons for support were reducing dependency on fossil fuels (25%) and reducing dependency from other countries for the UK's energy supply (25%). In waves 16, 17 and 18, there has not been one overriding reason for support of fracking.

The most common reason for opposing fracking was the loss or destruction of the natural environment (55%). This has been the overriding reason for opposition in waves 16, 17 and 18. Of those who were neutral or did not know whether they support or oppose fracking, the vast majority put this down to not knowing enough about it (67%). In addition, some had never heard of fracking (12%). There was also a significant increase in those claiming to see both the positives and negatives of shale gas (11%), up from 8% at wave 17.

Technical notes

The results shown here are based on 2,114 face-to-face in-home interviews conducted with a representative sample of UK adults aged 16+. Fieldwork was conducted between 29 June 2016 and 3 July 2016 on the TNS UK Omnibus, which uses a random location quota sampling method. The questionnaire was designed by BEIS 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.

Annex: changes to question set and frequency

Question	Frequency
Q4) How often, if at all, do you personally do any of the following? • Leave the lights on when you are not in the room • Boil the kettle with more water than you are going to use • Wash clothes at 30 degrees or lower • Try to keep rooms that you are not using at a cooler temperature than those you are using • Leave the heating on when you go out for a few hours	Annual
Q7) Which answer best applies to you and your household at the moment with regards to the following measures to heat your home and/or provide hot water? • Installing a biomass boiler (this may involve burning wood logs, pellets or chips to provide central heating and/or hot water) • Installing an air source heat pump • Installing a ground source heat pump • Installing solar thermal panels (this means solar panels for hot water, not solar PV panels which generate electricity) • Replacing an older gas boiler with a more efficient condensing gas boiler • Installing a micro-CHP (combined heat and power) unit	Annual
Q7_1A. The next few questions are about renewable heating systems, by renewable heat we mean heating systems which use energy from biomass or the sun, or which use electricity to draw heat from the ground, water, or air to heat your home. This does not include solar panels which produce electricity. How much, if anything do you know about the following types of renewable heating system… (air source heat pumps, ground source heat pumps, biomass boiler)?	New question in wave 15. Annual from March 2016.
Q7_2. Thinking about these types of renewable heating system, how positive or negative would you say you are towards the idea of having a renewable heating system in your home?	New question in wave 15. Annual from March 2016.
Q7_7a) Which of the following would you trust to provide advice about	Annual

which heating system to install in your home?	
Q7_7b) And which one would you trust the most to provide advice about which heating system to install in your home?	Annual
Q7_8. How much attention do you pay to the amount of heat you use in your home?	New question in wave 15. Annual from March 2016.
Q7_9, You said that you pay [a lot/ a fair amount] of attention to the amount of heat you use in your home. What is the main reason for this?	New question in wave 15. Annual from March 2016.
Q7_10. You said that you pay [not very much/ no] attention to the amount of heat you use in your home. What is the main reason for this?	New question in wave 15. Annual from March 2016.
Q7_11. Now thinking about your heating system. Which of the statements on this screen comes closest to your view?	New question in wave 15. Annual from March 2016.
Q7_12. Which of these would be the more important consideration in changing your heating system?	New question in wave 15. Annual from March 2016.
Q7_13. Have you heard of the Domestic Renewable Heat Incentive?	Wave 15 (not asked in subsequent waves).

<table>
<tr><td>Q13) Generally speaking, do you support or oppose the use of the following renewable energy developments:
On-shore wind
Biomass
Off-shore wind
Wave and tidal
Solar</td><td>Bi-annual</td></tr>
<tr><td>Q15c) You said that you support hydraulic fracturing for shale gas, otherwise known as fracking. Why is this?
Good for local jobs and investment
Reduces dependence from other countries for UK's energy supply
Reduces dependence on fossil fuels (coal, oil)
Need to use all available energy sources
Will have positive impact on climate change / meeting carbon reduction targets
May result in cheaper energy bills
Will have positive impact on UK economy
Won't affect me/my local area so no personal impact
Positive reports in the media
No specific reason (SINGLE CODE)
Other (specify)
Don't know</td><td>New question in wave 16. Quarterly from wave 17.</td></tr>
<tr><td>Q15d) You said that you oppose hydraulic fracturing for shale gas, otherwise known as fracking. Why is this?
Loss/destruction of natural environment
Increased traffic/noise/disruption
Local house prices will fall
Use of chemicals in the process
Should focus on developing renewable energy sources
Should focus on developing other energy sources
Risk of contamination to water supply
Risk of earthquakes
Negative impact on climate change / meeting carbon reduction targets
Not a safe process
Will not be regulated effectively
Negative reports in the media
Too much risk / uncertainty to support at present</td><td>New question in wave 16. Quarterly from wave 17.</td></tr>
</table>

• No specific reason (SINGLE CODE) • Other (specify) • Don't know	
Q15e.You said that you neither support nor oppose hydraulic fracturing for shale gas, otherwise known as fracking. Why is this? 1. Don't know enough about it 2. Not interested in it 3. I can see the positives and negatives 4. Haven't made up my mind yet 5. Will have no impact on me 6. There are many vocal campaigns and I don't know what to believe 7. Have never heard of it 8. Other (specify) 9. Don't know	New question in wave 17. Quarterly from wave 17.
Q20A. Over the course of a year, which of these do you think uses the most energy in your home?	New question in wave 15. Annual from wave 17.
Q20B. Over the course of a year, which of these do you think uses the second most energy in your home?	New question in wave 15. Annual from wave 17.
Q23a) I'm now going to ask you how concerned you are about various things happening in the future. When I talk about 'the future' I mean the next 10-20 years. When answering please think about how concerned you would be if this happened, rather than how likely you think it is to happen. So, how concerned, if at all, are you about... • Steep rises in energy prices in the future • UK supplies of fossil fuels not being sufficient to meet the UK's demand for them	Bi-annual
Q23b) And still thinking about the next 10-20 years, how concerned, if at all, are you about... • Power cuts becoming more frequent in the future • The UK becoming too dependent on energy from other countries	Bi-annual

• The UK not investing fast enough in alternative sources of energy • The UK not developing technology to use existing sources of fossil fuels sufficiently	
Q23c) You said that you are [very / fairly] concerned about the UK becoming too dependent on energy from other countries. When you gave this answer, were you thinking about specific energy types? • No specific sources • Oil • Gas • Electricity • Other source (specify) • Don't know	New question in wave 16. Bi-annual from the wave 17.
Q24A. Do you know what the Energy performance certificate (EPC) rating for your property is?	New question in wave 15. Annual from wave 17.
Q26a) How much, if anything, do you know about the way the UK currently manages radioactive waste?	Quarterly
Q26b) The next question is about Geological Disposal Facilities. These are deep underground facilities for the permanent disposal of radioactive waste. Before today, how much, if anything, did you know about the UK's plans to dispose of radioactive waste in Geological Disposal Facilities in the UK?	Quarterly
Q35) Which of these energy types do you think is most used by UK households overall? • Gas • Electricity (including renewable energy) • Petroleum • Bioenergy and waste • Solid fuels (wood, coal) • Other • Don't know	Piloted in wave 16. Reviewing as part of a planned approach.

Q36) And which energy type do you think is second most used by UK households overall? • Gas • Electricity (including renewable energy) • Petroleum • Bioenergy and waste • Solid fuels (wood, coal) • Other • Don’t know	Piloted in wave 16. Reviewing as part of a planned approach.