Department for
Business, Energy
& Industrial Strategy

ENERGY AND CLIMATE CHANGE PUBLIC ATTITUDE TRACKER

Wave 21

May 2017

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 for Business, Innovation and Skills (BIS), to form the Department for Business, Energy and Industrial Strategy (BEIS). As such, the survey is now BEIS's Energy and Climate Change Public Attitudes Tracker (PAT). The PAT still consists of one annual survey every March and three shorter surveys, usually 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. The tracker is regularly reviewed to ensure that the dataset continues 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 March – April 2017 (Wave 21) and primarily makes comparisons with data from Wave 17 which was conducted at the same point last year (March 2016).

The twenty-first wave of data was collected between 29 March – 2 April 2017 using face-to-face in-home interviews with a representative sample of 2,180 households in the UK. Data was collected using the Kantar TNS Omnibus, which uses a random location quota sampling method. The questionnaire was designed by BEIS and Kantar Public (formerly 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.

Tables with fieldwork dates and sample sizes for each wave and a complete list of changes to the question set and frequency in the past 12 months is included in the annex of this report.

Summary of headline findings

This summary provides selected headlines and highlights statistically significant differences between Wave 21 and previous waves. It 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:

https://www.gov.uk/government/collections/public-attitudes-tracking-survey.

Climate change

The level of concern over climate change has remained stable at wave 21, following a slight increase between waves 13 and 17. At wave 21, seven in ten (71%) said they were very or fairly concerned about climate change. Levels of concern over climate change were highest amongst those earning over £50,000 per year (78%), social grade AB (78%) and 35-54 year olds (77%). Concern was lowest amongst social renters (61%) and those in social grades DE (62%).

Respondents were more likely to see climate change as a result of human activity rather than a natural process. Four in ten (42%) believe it is caused mainly by human activity, compared to only one in ten (10%) that believe it is mainly down to natural processes. Four in ten think it is caused by a mixture of human activity and natural causes (43%).

Energy Security

Levels of concern in relation to the UK's future energy security have remained fairly stable over recent waves, though they did increase slightly from recent waves. This was most notable for 'steep rises in energy prices in the future' (73% concerned at wave 21 compared with 65% at waves 18 and 19), and 'power cuts becoming more frequent in the future' (47% concerned at wave 21 compared with 40% at wave 19 and 38% at wave 18). However, the current proportions remain below the peak levels of concern at wave 9 (March 2014). At wave 21 the issues of greatest concern to the public were the potential for steep rises in energy prices in the future, concerns in relation to the UK becoming too dependent on energy from other countries (66%), and concerns that the UK is not investing fast enough in alternative sources of energy (66%).

A follow up question was also asked of those who said they were concerned about the UK becoming too dependent on energy from other countries. The question asked respondents to identify any specific sources of energy which they were concerned about. Gas (48%) and oil (40%) were the most common sources of energy mentioned. A smaller proportion mentioned electricity (25%), whilst just over a quarter (26%) had no specific energy source in mind. The results at wave 21 were consistent with the findings at previous waves when this question was asked.

Energy bills

Worries over paying for energy bills have remained relatively consistent over the last two years of the tracker. At wave 21, 30% were either very or fairly worried about paying for their energy bills. This was a similar result to the previous annual wave in March 2016 (wave 17), when worry over energy bills stood at 28%. The level of worry was at its highest amongst those with household incomes under £16,000 (38%), private renters (37%), 35-44 year olds (36%), and social renters (35%).

Between wave 14 and wave 21, there has consistently been 20-30% of respondents that were either “very” or “fairly” worried about their energy bills. In earlier waves of the survey levels of worry were much higher – for example, more than half (59%) were very or fairly worried four years ago at wave 5 (March 2013), whilst around half (49%) were very or fairly worried three years ago at wave 9 (March 2014).

Concern about energy bills in relation to other household bills has also remained fairly stable over the last year of the tracker. When energy bills are compared against other bills at wave 21, 8% were more worried about energy bills than paying for food, transport, and housing costs. Again this was similar to the result one year ago at Wave 17 (9%), whilst it’s also slightly lower than the peak of 14% in wave 8 of the tracker. Those who were more worried about paying for their energy bills than other items were followed up with a question to ask their reasons for this. The highest number felt that energy prices had increased more than other expenses on shopping or transport (44%). Four in ten (37%) in this group felt that energy bills were generally more expensive than other items, a decrease from 55% this time last year.

Energy suppliers and switching

Levels of trust in energy suppliers have remained consistent with the previous three waves (18, 19, and 20). Respondents remained most likely to trust suppliers to provide a bill which accurately reflects energy use (72%), and to provide a breakdown of the components of bills (70%).

When asked about their history of switching gas or electricity supplier, 17% had switched in the last year. A further three in ten (31%) had switched longer than a year ago, a decrease from 39% from this time last year. There was also an increase in the number who stated they have never switched at all, from 42% last year to 48% in wave 21. The proportion saying that they switched supplier in the last year has been very consistent over the course of the tracker, always falling between 15%-17% in each annual wave. However, the total in wave 21 who stated they have switched (either in the previous year or more than a year ago) is at the lowest in the history of the tracker at 48%.

The proportion of the public that plan to switch energy supplier in the next year has remained very stable. At wave 21 only 7% had firm plans to switch their supplier in the next year, whilst around a third (34%) felt that they 'may or may not switch supplier'. More than half (55%) stated that they would not be switching supplier. These results are consistent with those in previous annual waves. The most likely groups to have plans to switch in the next year were those with a household income above £50,000 (11%), and people aged between 45 and 54 (10%). In comparison, those aged 24 or under (3%), over 65 (4%), renters (5%), and with household incomes below £16,000 (5%) were least likely to have plans to switch.

Energy saving and wasting

The proportion of people that claim to give a lot of thought to saving energy in the home remained very stable at wave 21. A quarter claimed to give a lot of thought to saving energy at home (25%), whilst half claimed to give it a fair amount of thought (52%). The findings at wave 21 were very similar to those at all previous annual waves conducted at this point of the year.

Results in relation to energy saving and wasting behaviours showed little change over the last year. Three out of four people said they wash clothes at 30 degrees or lower at least some of the time (77%), and try to keep rooms they are not using at a cooler temperature (76%) at least occasionally. Two thirds at least occasionally boil the kettle with more water than they need (65%). Roughly half at least occasionally leave lights on when they are not in a room (49%), and leave the heating on when going out for a few hours (47%). Across all of the energy saving and wasting behaviours, the proportion that always do each of them has also once again stayed very consistent with the findings at wave 17.

Renewable energy

Support for renewable energy has been consistently high during the tracker at around 75-80%. This pattern has continued at wave 21, with 79% expressing support for the use of renewables. Opposition to renewables was very low at 4%, with only 1% strongly opposed.

Support for renewables was particularly high for people with incomes over £35,000 (89%), in social grade AB (86%), or aged 55-64 (84%). Support for renewables was lower amongst those in social grade DE (72%), aged 65+ (73%), and social renters (75%).

Wave 21 also asked people's opinion on three statements about renewable energy developments. Nearly eight in ten agreed that these should provide direct benefits to the communities in which they are located (77%), whilst seven in ten (70%) agreed that renewable industries and developments provide economic benefits to the UK. Six in ten said they would be happy to have a large scale renewable development in their own area (58%).

Nuclear energy

Support and opposition for the use of nuclear energy changes slightly each wave but have remained fairly stable over the course of the tracker. At wave 21 almost four in ten (38%) supported nuclear energy compared with 22% who were opposed. These findings show little change from last year at wave 17, when 38% supported and 23% opposed. Those with an income over £35,000 (48%), male (48%), aged over 55 (48%), and in social grade AB (47%) were the most likely to support the use of nuclear energy.

Four in ten (38%) selected the neutral option at this question, to indicate that they neither support nor oppose the use of nuclear energy.

Four additional statements on nuclear energy were presented to respondents at wave 21, all of which remained very consistent with the findings at wave 17. These statements focused on whether nuclear energy is seen by the public as reliable, affordable, safe, and good for combatting climate change. Of the four statements, the public were most likely to agree that nuclear energy is a reliable source of energy; 47% agreed with this statement, compared with 14% that disagreed. Respondents were also more likely to agree than disagree with each of the other three statements: whether nuclear energy provides affordable energy for the UK (38% vs. 17%), whether it will help to tackle climate change (36% vs. 20%), and whether it is safe (34% vs. 27%).

Radioactive waste

At wave 21, 15% said they knew a lot or a fair amount about the way the UK manages radioactive waste, whilst 85% knew not very much or nothing at all. These results are consistent with previous waves.

More than four in ten (42%) claimed to have some knowledge 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 19% 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 than women (35%), and those in higher social grades AB (59%) much more likely to claim knowledge than those in social grades DE (31%).

Shale gas

Three quarters of the public were aware of fracking at wave 21 (76%). Awareness of fracking has remained very stable over the last three years of the tracker, following a significant increase between wave 2 (42%) and wave 8 (70%). However, despite many people being aware of fracking, only a small proportion claimed to have detailed knowledge. At wave 21, 10% claimed to know a lot about fracking, whilst 46% said they knew a little, and 19% were aware of it but didn't really know what it was. Awareness of fracking was higher for those in social grade AB (90%), aged over 55 (87%), with incomes over £35,000 (88%), and home owners (85%).

When asked whether they support or oppose extracting shale gas, half of the public neither supported nor opposed it (49% neither supported nor opposed it and 2% did not know). This is likely to partly reflect a lack of knowledge about fracking. Of those who did offer an opinion, more people were opposed (30%) to fracking than supported it (19%).

Follow-up questions were also asked at wave 21 to identify the most common reasons why people support, oppose, or are neutral towards fracking.

The most common reasons for supporting fracking were the need to use all available energy sources (35%), reducing dependence on other countries for UK's energy supply (31%), fracking being good for local jobs and investment (30%), reducing dependency on other fossil fuels (28%), and that it may result in cheaper energy bills (27%).

The most common reason for opposing fracking was the loss or destruction of natural environment (56%). Other commonly cited reasons for opposition to fracking were that there is a risk of contamination to water supply (32%), that it's generally not a safe process (32%), that there is a risk of earthquakes (29%), and that there is too much risk or uncertainty to support it at present (29%).

Of those who were neutral or did not know whether they support or oppose fracking, the majority put this down to not knowing enough about it (74%).

District Heating

Overall awareness of district heating (or heat networks) remained very stable at wave 21, in which 17% were familiar with it. Awareness has been consistently between 15-18% in all previous annual waves.

Those who were aware of heat networks were then asked two follow-up questions to measure how likely they would be to join a heat network, and generally how positive or negative they feel about them. Six in ten (59%) of those aware of heat networks stated that they would be very or fairly likely to join one, with around three in ten (29%) not likely. Those aware of heat networks are also generally more positive (48%) about them than negative (24%), whilst a significant proportion were unsure (28%).

Perceptions of energy use

Questions were included at wave 21 to gain perceptions on what people think uses the most energy in their home, and also how familiar they are with the Energy Performance Certificate rating for their home. The results at these questions remained consistent with previous waves.

Just under half of respondents (48%) believed that central heating uses the most energy in the home over the course of a year, compared with one in five who thought large appliances used the most (21%). Respondents were also asked what they think uses the second highest amount of energy in the home. From combining the two questions the most likely things to be cited in the top two highest energy users were central heating (68%), large appliances (49%), and hot water (38%).

Six in ten claimed to be aware of the Energy Performance Certificate (58%), but only 7% said they knew the exact rating of their property. Those with incomes over £35,000 (80%), in social grades AB (76%), and aged 55-64 (71%), had the highest levels of claimed awareness.

Smart meters

At wave 21, a quarter of respondents (26%) claimed to currently have a smart meter installed in their home. This was an increase from wave 17 where 21% reported having a smart meter. This also continues a pattern of gradual increases in ownership of smart meters, which initially was at only 6% at wave 1. Over this period of 5 years the proportion to have never heard of smart meters has also dropped significantly from 53% at wave 1 down to 18% at wave 21.

Insulation

The insulation measures most commonly installed were double glazing (75%), and loft or top-up loft insulation (65%). Just under half (47%) had installed cavity wall insulation, whereas much smaller proportions had installed under floor insulation (15%), and solid wall insulation (5%). Awareness of, and interest in, under floor insulation and solid wall insulation was much lower than for the other insulation measures. For solid wall insulation, 14% had not heard of it, two in ten had not thought about installing it (21%), and a quarter did not want to install it (24%). For under floor insulation a slightly smaller proportion had not heard of it (9%), whilst one in five did not want to install it (26%), and a quarter had not thought about installing it (26%).

Electric vehicles

A question was asked about ownership and perceptions of electric vehicles. The vast majority of responses suggested a lack of interest in owning an electric vehicle, as most people had either not thought about buying one (50%), or did not drive or need a car (23%). A quarter (21%) stated that they had thought about buying an electric vehicle, whilst only 1% already owned one. These results were consistent with previous annual waves.

Technical notes

The results shown here are based on 2,180 face-to-face in-home interviews conducted with a representative sample of UK adults aged 16+. Fieldwork was conducted between 29 March 2017 and 2 April 2017 on the Kantar TNS Omnibus, which uses a random location quota sampling method. The questionnaire was designed by BEIS and Kantar Public 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

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
Wave 19	28 September - 2 October 2016	2,080
Wave 20	14 – 18 December 2016	2,138
Wave 21	29 March – 2 April 2017	2,180

Table 2. Changes to question set and frequency

Question	Frequency
Q4) How often, if at all, do you personally do any of the following? a) Leave the lights on when you are not in the room b) Boil the kettle with more water than you are going to use c) Wash clothes at 30 degrees or lower d) Try to keep rooms that you are not using at a cooler temperature than those you are using e) Leave the heating on when you go out for a few hours	Q4_d and Q4_e asked in the Annual wave from wave 13.
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	Question removed after wave 17.
Q7_1) The next question is about renewable heat. 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 would you say you know about renewable heat? • Knew a lot about it • Knew a little about it • Aware of it but did not really know what it was • Never heard of it	Moved to Bi-annual wave (winter) from wave 20 (published on an annual basis).
Q7_1A) 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)? • Know a lot • Know a little about it	New question in wave 15. Moved to the Bi-annual wave (winter) from wave 20 (published on an annual

• Aware of it but did not really know what it is • Never heard of it	basis).Filtered to only ask those who say they know about renewable heating (from wave 20).
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? • Very positive • Fairly positive • Neither positive nor negative • Fairly negative • Very negative • Don't know	Question removed after wave 17.
Q7_3) And still thinking about renewable heating systems, how much do you agree or disagree with the following statement? • Strongly agree • Slightly agree • Neither agree nor disagree • Slightly disagree • Strongly disagree • Don't know	Moved to the Bi-annual Wave (winter) from Wave 20 (published on an annual basis). Filtered to only ask those who say they know about renewable heating (from Wave 20).
Q7_6) How confident are you that…? • A ground source heat pump would provide/provides enough heat to keep my home at a reasonable temperature • A ground source heat pump would be/is reliable • A ground source heat pump would be/is affordable • A ground source heat pump would be/is easy to use	Question removed after wave 17.
Q7_7a) Which of the following would you trust to provide advice about which heating system to install in your home? • A tradesperson (e.g. builder, plumber, gas fitter) • Heating system manufacturer • Friends/Family • Your energy supplier/another energy supplier • Green Deal assessor / adviser	Moved to Bi-annual Wave (winter) from Wave 20 (published on an annual basis).

• The Energy Saving Advice Service (ESAS) or Home Energy Scotland • Your housing association • Your landlord • A company that installs renewable heating systems • Other (specify) • None of these • Don't know	
Q7_7b) And which one would you trust the most to provide advice about which heating system to install in your home? (same answer options as in Q7_7a)	Moved to Bi-annual Wave (winter) from Wave 20 (published on an annual basis).
Q7_8) How much attention do you pay to the amount of heat you use in your home? • A lot • A fair amount • Not very much • None at all • Don't know	New question in Wave 15. Annual from March 2016. Moved to Bi-annual Wave (winter) from Wave 20 (published on an annual basis).
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? • To minimise the amount of money you spend on heat • To minimise the environmental impact of the heat you use • I want to make sure me/my household has sufficient heat to be comfortable • I struggle to control the amount of heat used • I want to keep control over the amount of heat used • Other reason (please specify) • Both of these equally • Neither of these / for another reason • Don't know	New question in Wave 15. Moved to Bi-annual Wave (winter) from Wave 20 (published on an annual basis).
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? • I use as much heat as is needed to be comfortable • I don't feel I can control the amount of heat used • I'm just not interested in the amount of heat used • I set controls at a level I'm comfortable with and then don't	New question in Wave 15. Moved to Bi-annual Wave (winter) from Wave 20 (published on an annual basis).

need to adjust them • Other reason (please specify) • Some/all of these reasons equally • None of these / for another reason • Don't know	
Q7_11) Now thinking about your heating system. Which of the statements on this screen comes closest to your view? • I will only replace my heating system when my current one breaks down or starts to deteriorate • I would consider replacing my heating system while it is still working • Not my decision to make because I'm renting the property/living with parents • Don't know	New question in Wave 15. Moved to Bi-annual Wave (winter) from Wave 20 (published on an annual basis).
Q7_12) Which of these would be the more important consideration in changing your heating system? • Saving money on what you spend on bills at present • Switching to a more environmentally friendly heating system • Having a more reliable heating system than my current one • Both of these equally • Neither of these / for another reason (state) • Don't know	New question in Wave 15. Moved to Bi-annual Wave (winter) from Wave 20 (published on an annual basis).
Q7_13) Have you heard of the Domestic Renewable Heat Incentive? • Yes • No • Don't know	New question in Wave 15 (not asked in subsequent waves).
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	New question in Wave 16. Quarterly from Wave 17.

• Community benefits (included from Wave 19) • Shale Wealth Fund (included from Wave 19) • No specific reason (SINGLE CODE) • Other (specify) • Don't know	
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 • No specific reason (SINGLE CODE) • Other (specify) • Don't know	New question in Wave 16. Quarterly from Wave 17.
Q15e) You said that you neither support nor oppose hydraulic fracturing for shale gas, otherwise known as fracking. Why is this? • Don't know enough about it • Not interested in it • I can see the positives and negatives • Haven't made up my mind yet • Will have no impact on me • There are many vocal campaigns and I don't know what to believe • Have never heard of it • Other (specify) • 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? • Large appliances (e.g. fridge, washing machine) • Small appliances (e.g. toasters, hair dryers, vacuum cleaners) • Technological appliances (TV, laptop, phone - including charging these)	New question in Wave 15. Bi-annual from Wave 17.

• Keeping the house warm with central or other heating • Hot water I use (e.g. for showering, washing up) • Don't know	
Q20b) Over the course of a year, which of these do you think uses the second most energy in your home? (same answer options as in Q20a)	New question in Wave 15. Bi-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 • The UK not investing fast enough in alternative sources of energy • The UK not developing technology to use existing sources of fossil fuels sufficiently	Bi-annual
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? • Yes, I know the exact rating • Yes, I have a sense of what the rating is • I'm aware of EPCs but I don't know what the EPC rating for	New question in Wave 15. Annual from Wave 17.

my home is • I've not heard of EPCs	
Q26a) How much, if anything, do you know about the way the UK currently manages radioactive waste? • A lot • A fair amount • Not very much • Nothing at all	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? • Knew a lot about them • Knew a little about them • Aware of them but don't really know what they are • Never heard of them	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. Replaced with Q37, Q38 and Q39.
Q36) And which energy type do you think is second most used by UK households overall? (same answer options as Q35)	Piloted in Wave 16. Replaced with Q37, Q38 and Q39.
Q37) As far as you know, which of these are used as energy sources in your home – for example, to provide heating or to power appliances? Please exclude anything used outside of your home – for example fuel for vehicles. • Electricity • Natural gas (mains gas) • Bottled gas • Oil	Replaced Q35 and Q36. Piloted in Wave 19.

• Wood • Coal • Other • Don't know	
Q38) And over the course of the year, which of these types of energy do you think your household spends the most money on? (same answer options as Q37)	Replaced Q35 and Q36. Piloted in Wave 19.
Q39) And over the course of the year, which of these types of energy do you think your household spends the next most money on? (same answer options as Q37)	Replaced Q35 and Q36. Piloted in Wave 19.
Q8) Before today, had you heard of smart meters? IF YES ASK: Do you have one? • Yes, I have one • Yes, but I do not have one • No – I have never heard of them	Increased frequency to bi-annual from Wave 19.
Q9) Were you given an in-home energy display or energy monitor at the time your smart meter was installed? An in-home energy display is a portable device that displays current and how much it is costing or will cost. • Yes, I look at it every day • Yes, I look at it occasionally • Yes, but I never look at it • Yes, but I have never installed it • No, I was not offered one • No, I was offered one but refused it • Don't know	Question asked only in Wave 17.
Q41-51) See Wave 20 questionnaire for question text	New questions in Wave 20.
Q52) As far as you know, do you have a condensing boiler in your home? If you're not sure, any gas boiler installed since 2006 will be condensing. Any oil boiler installed since 2008 will be condensing. • Yes – have a condensing boiler • No – don't have a condensing boiler	New question in Wave 20.

• Don't know	
Q53) How likely do you think you are to install a condensing boiler in your home over the next few years? • Very likely • Fairly likely • Not very likely • Not at all likely • Don't know	New question in Wave 20.
Q25) How likely do you think you will be to join a heat network like this if you were given the opportunity? When answering please assume that you would pay no more for your heating bills than you do at present. • Very likely • Fairly likely • Not very likely • Not at all likely • Already joined one • It depends • Don't know	From Wave 21, filtered to only ask those who say they know about heat networks.
Q25i) From what you know, or have heard about heat networks, generally how positive or negative would you say you are towards them? • Very positive • Fairly positive • Fairly negative • Very negative • Don't know	From Wave 21, filtered to only ask those who say they know about heat networks.