



Department for
Business, Energy
& Industrial Strategy

ENERGY AND CLIMATE CHANGE PUBLIC ATTITUDE TRACKER

Wave 24



January 2018

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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 December 2017 (Wave 24) and primarily makes comparisons with data from Wave 20 which was conducted at the same point last year (December 2016).

The twenty-fourth wave of data was collected between 13th-17th December 2017 using face-to-face in-home interviews with a representative sample of 2,078 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 24 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>

Energy bills

Worries over paying for energy bills remained at similar levels to previous waves, with 22% either very or fairly worried about paying their energy bills. The level of worry was lowest amongst those with household incomes over £50,000 (14%), 16-24 year olds (12%) and social grade AB (14%). It was highest amongst those in social grade DE (30%), social renters (32%) and those with household incomes up to £15,999 (33%).

Between wave 14 (June 2015) and wave 24 (December 2017), the proportion of respondents who were very or fairly worried about their energy bills has remained between 20% and 30%. In earlier waves of the survey, levels of worry were much higher. Nearly half (47%) were fairly or very worried at the equivalent wave of fieldwork in 2013 (wave 8, December 2013).

The level of relative concern about energy bills versus other household bills has remained stable since last year. When comparing energy bills against other bills at Wave 24, 5% of respondents were more worried about energy bills than paying for food, transport and housing costs. This is considerably lower than the peak of 14% in wave 8 of the tracker.

Energy suppliers and switching

Consumers' levels of trust in energy suppliers showed little change from recent waves. Respondents remained most likely to trust suppliers to provide a bill which accurately reflects energy use (73%). They were less likely to trust suppliers to improve their home to make it more energy efficient, if asked to do this (51%), to inform customers about their best tariff (54%) and to provide impartial and accurate advice on energy efficiency measures (59%).

The proportion of the public that plan to switch energy supplier in the next year has increased slightly since wave 20. At wave 24, 7% had firm plans to switch their supplier in the next year, whilst around a third (31%) felt that 'they may or may not switch supplier'. Over half (56%) stated that they would not be switching supplier. The most likely groups to

have firm plans to switch in the next year were those with a household income between £25,000 and £34,999 and above £50,000 (14%), those in social grade AB (11%) and 25-34 year olds (11%). In comparison, 16-24 year olds (3%) and those in social grade DE (3%) 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 has remained very stable over recent waves. Twenty-four per cent of people claimed to give a lot of thought to saving energy at home, whilst 50% claimed to give it a fair amount of thought. The findings at wave 24 are very similar to those at all previous waves conducted at this point of the year.

Renewable energy

At wave 24, 79% of respondents expressed support for the use of renewable energy, a slight decrease from 82% at wave 23, but an increase from 74% at this stage last year (wave 20). Opposition to renewables remained very low, at 4%, with only 1% strongly opposed.

Nuclear energy

Support for the use of nuclear energy has remained fairly stable over the course of the tracker. At wave 24, 35% supported nuclear energy compared with 22% who were opposed. Those aged over 65 (41%), males (45%), and those in social grade AB (45%) were 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 24, knowledge about the way the UK manages radioactive waste was at its highest since the question was first asked. One in five (19%) said they knew a lot or a fair amount, whilst 81% knew not very much or nothing at all. This was an increase from wave 23, where 14% said they knew a lot or a fair amount.

There was a slight decrease in the proportion of respondents who claimed to have some knowledge of Geological Disposal Facilities (GDF), from 46% at wave 23 to 43% at wave 24. Twenty per cent were aware of GDF but did not know what they are, and 19% knew a little about them. Only 3% said they knew a lot about GDF. Self-assessed knowledge of GDF differs by gender, age and social group, with men (51%, compared with 35% for women), those who are aged 65 or over (55%, compared with 32% of 16-24 year olds) and those in social grades AB (57%, compared with 31% in social grades DE) more likely to claim knowledge of GDF.

Shale gas

Three quarters of the public were aware of fracking at wave 24 (76%). Awareness of fracking has remained between 70% and 80% over the last four years of the tracker, following an increase between wave 2 (42%) and wave 8 (70%). Despite these high levels of awareness, only a small proportion claimed to know a lot about it (15%). Forty-two per cent claimed they knew a little bit about fracking, and 20% were aware of fracking but did not really know what it was. These findings have shown little change since wave 20. Awareness of fracking was higher among those aged 55-64 and 65+ (88% and 87%, respectively), those in social grade AB (90%), home owners (85%) and those who earn over £50,000 (93%).

When asked whether they support or oppose extracting shale gas, half of the public neither supported or opposed it (49%), with a further 4% saying they did not know whether they supported or opposed it. Of those who offered an opinion, more people were opposed to fracking (32%) than supported it (16%). There has been a small increase in the level of support for fracking compared with the previous wave, when it fell to its lowest level on the tracker so far (13%).

Follow-up questions were asked to find the reasons why people support, oppose or are neutral about fracking. The most common reasons for supporting fracking were the need to use all available energy sources (36%), to reduce dependence on other fossil fuels (34%) and to reduce dependence on other countries for the UK's energy supply (25%).

The most common reason for opposing fracking was the loss or destruction of natural environment (62%). Other common reasons for opposing fracking were the risk of contamination to water supplies (27%), too much risk and uncertainty (24%) that it is not a safe process (24%) and a risk of earthquakes (23%).

The most common reason for neither supporting nor opposing fracking was a lack of knowledge about it (78%).

Renewable Heat

Awareness of renewable heating systems remained stable at wave 24 (65%). Of those who were aware, 57% were aware of air source heat pumps, 64% were aware of ground source heat pumps, 72% were aware of biomass boilers and 74% were aware of solar thermal panels. In spite of this, only 3% had a renewable heating system installed in their home. Moreover, only a small proportion of those without these systems were likely to install them in their home. Seven per cent were likely to install solar thermal panels, 2% a biomass boiler, 2% an air source heat pump and 1% a ground source heat pump.

Of those who were unlikely to install renewable heating systems, the most common reasons given were it would cost too much to install (26%) and not being able to install this as they did not own the property (25%).

A large proportion selected either the neither agree or disagree or do not know option when presented with a series of statements about renewable heating systems. This included whether renewable heating systems were expensive to install (41%), whether they would heat the home better than the respondent's current system (63%), whether they are cheap to run (55%) and whether they are less reliable than conventional heating systems (64%). This suggests that there is still a lack of knowledge among those who are aware of renewable heating systems, consistent with what was observed at this point last year (wave 20).

Respondents were asked which sources of information they would most trust for advice on which heating system to install in their home. The most trusted sources were a tradesperson (24%) and family and friends (22%).

The majority of respondents claimed to either pay a lot (22%) or a fair amount (49%) of attention to the amount of heat they use in their homes (72%), a slight increase from the proportion who claimed to do so at wave 20 (69%). The main reason for paying attention was to minimise the amount of money spent on energy (53%).

Three in ten respondents said they did not pay very much, or any, attention to heat use at home (28%). This was most commonly due to households using as much heat as is required to be comfortable (51%).

Seven in ten would only replace their heating system if their current one breaks down or starts to deteriorate (69%). Of those who would replace a working heating system (14%), the main reason would be to save money on current bills (45%). A smaller proportion cited getting a more environmentally friendly system (24%) and getting a more reliable heating system (29%).

A little over half of respondents claimed to have a condensing boiler installed in their home (54%), an increase from 48% at wave 20. Of those that did not have a condensing boiler installed, only 14% were likely install one in the next few years.

Heating Systems

A new series of questions regarding heating systems was introduced for wave 24 of the tracker. A quarter (23%) of respondents had installed a boiler or heating system in the last three years. Of those who had, the vast majority (92%) had installed a gas boiler or heating system.

Just over half (55%) said that they were involved in the decision making process for choosing a new boiler or heating system. Most of this group claimed that they used their heating engineer/installer (54%) or their friends and family (29%) as a source of information to decide, and that the information provided was very helpful (77% and 76%, respectively).

Nine in ten (90%) of those that were involved in the decision making process of choosing a new boiler or heating system felt that they had the right information to help them make a good choice, with only 8% feeling like they would have liked more or different information.

Energy Suppliers

New questions were introduced at wave 24 to provide information on any issues experienced with energy suppliers. Three per cent of respondents had experienced a problem with their energy supplier that they could not resolve directly with them in the last 12 months.*

Respondents were also asked if they were aware of a number of organisations connected with the energy sector. Most respondents had heard of Which? (68%), Ofgem (62%), the Citizens Advice Consumer Helpline (61%), and Money Saving Expert (57%). However, only 5% of respondents had heard of Resolver.

*No further analysis is possible as the base sizes are too low for all other questions (57 for Q71 24 for Q72).

Technical notes

The results shown here are based on 2,078 face-to-face in-home interviews conducted with a representative sample of UK adults aged 16+. Fieldwork was conducted between 13th and 17th December 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/publications/public-attitudes-tracker-technical-note-on-use-of-wave-1-and-wave-2-datasets> 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
Wave 22	30 June – 4 July 2017	2,097
Wave 23	27 September – 1 October 2017	2,105
Wave 24	13 th -17 th December 2017	2,078

Table 2. Changes to question set and frequency

Question	Frequency
<p>Q4) How often, if at all, do you personally do any of the following?</p> <ul style="list-style-type: none"> 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 	<p>Q4_d and Q4_e asked in the Annual wave from wave 13.</p>
<p>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?</p> <ul style="list-style-type: none"> • 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 	<p>Question removed after wave 17.</p>
<p>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</p>	<p>Moved to Bi-annual wave (winter) from wave 20 (published on an annual basis).</p>

<p>produce electricity. How much would you say you know about renewable heat?</p> <ul style="list-style-type: none"> • 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 	
<p>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)?</p> <ul style="list-style-type: none"> • Know a lot • Know a little about it • Aware of it but did not really know what it is • Never heard of it 	<p>New question in wave 15. 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).</p>
<p>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?</p> <ul style="list-style-type: none"> • Very positive • Fairly positive • Neither positive nor negative • Fairly negative • Very negative • Don't know 	<p>Question removed after wave 17.</p>
<p>Q7_3) And still thinking about renewable heating systems, how much do you agree or disagree with the following statement?</p> <ul style="list-style-type: none"> • Strongly agree • Slightly agree • Neither agree nor disagree • Slightly disagree • Strongly disagree • Don't know 	<p>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).</p>
<p>Q7_6) How confident are you that...?</p>	<p>Question removed</p>

<ul style="list-style-type: none"> • 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 	<p>after wave 17.</p>
<p>Q7_7a) Which of the following would you trust to provide advice about which heating system to install in your home?</p> <ul style="list-style-type: none"> • A tradesperson (e.g. builder, plumber, gas fitter) • Heating system manufacturer • Friends/Family • Your energy supplier/another energy supplier • Green Deal assessor / adviser • 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 	<p>Moved to Bi-annual Wave (winter) from Wave 20 (published on an annual basis).</p>
<p>Q7_7b) And which one would you trust the most to provide advice about which heating system to install in your home?</p> <p>(same answer options as in Q7_7a)</p>	<p>Moved to Bi-annual Wave (winter) from Wave 20 (published on an annual basis).</p>
<p>Q7_8) How much attention do you pay to the amount of heat you use in your home?</p> <ul style="list-style-type: none"> • A lot • A fair amount • Not very much • None at all • Don't know 	<p>New question in Wave 15. Annual from March 2016. Moved to Bi-annual Wave (winter) from Wave 20 (published on an annual basis).</p>
<p>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?</p> <ul style="list-style-type: none"> • 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 	<p>New question in Wave 15. Moved to Bi-annual Wave (winter) from Wave 20 (published on an annual basis).</p>

<ul style="list-style-type: none"> • 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 	
<p>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?</p> <ul style="list-style-type: none"> • 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 need to adjust them • Other reason (please specify) • Some/all of these reasons equally • None of these / for another reason • Don't know 	<p>New question in Wave 15. Moved to Bi-annual Wave (winter) from Wave 20 (published on an annual basis).</p>
<p>Q7_11) Now thinking about your heating system. Which of the statements on this screen comes closest to your view?</p> <ul style="list-style-type: none"> • 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 	<p>New question in Wave 15. Moved to Bi-annual Wave (winter) from Wave 20 (published on an annual basis).</p>
<p>Q7_12) Which of these would be the more important consideration in changing your heating system?</p> <ul style="list-style-type: none"> • 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 	<p>New question in Wave 15. Moved to Bi-annual Wave (winter) from Wave 20 (published on an annual basis).</p>
<p>Q7_13) Have you heard of the Domestic Renewable Heat Incentive?</p> <ul style="list-style-type: none"> • Yes • No • Don't know 	<p>New question in Wave 15 (not asked in subsequent waves).</p>

<p>Q15c) You said that you support hydraulic fracturing for shale gas, otherwise known as fracking. Why is this?</p> <ul style="list-style-type: none"> • 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 • Community benefits (included from Wave 19) • Shale Wealth Fund (included from Wave 19) • No specific reason (SINGLE CODE) • Other (specify) • Don't know 	<p>New question in Wave 16. Quarterly from Wave 17.</p>
<p>Q15d) You said that you oppose hydraulic fracturing for shale gas, otherwise known as fracking. Why is this?</p> <ul style="list-style-type: none"> • 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 	<p>New question in Wave 16. Quarterly from Wave 17.</p>
<p>Q15e) You said that you neither support nor oppose hydraulic fracturing for shale gas, otherwise known as fracking. Why is this?</p> <ul style="list-style-type: none"> • Don't know enough about it • Not interested in it • I can see the positives and negatives • Haven't made up my mind yet 	<p>New question in Wave 17. Quarterly from Wave 17.</p>

<ul style="list-style-type: none"> • 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 	
<p>Q20a) Over the course of a year, which of these do you think uses the most energy in your home?</p> <ul style="list-style-type: none"> • Large appliances (e.g. fridge, washing machine) • Small appliances (e.g. toasters, hair dryers, vacuum cleaners) • Technological appliances (TV, laptop, phone - including charging these) • Keeping the house warm with central or other heating • Hot water I use (e.g. for showering, washing up) • Don't know 	<p>New question in Wave 15. Bi-annual from Wave 17.</p>
<p>Q20b) Over the course of a year, which of these do you think uses the second most energy in your home?</p> <p>(same answer options as in Q20a)</p>	<p>New question in Wave 15. Bi-annual from Wave 17.</p>
<p>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...</p> <ul style="list-style-type: none"> • Steep rises in energy prices in the future • UK supplies of fossil fuels not being sufficient to meet the UK's demand for them 	<p>Bi-annual</p>
<p>Q23b) And still thinking about the next 10-20 years, how concerned, if at all, are you about...</p> <ul style="list-style-type: none"> • 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 	<p>Bi-annual</p>
<p>Q23c) You said that you are [very / fairly] concerned about the UK becoming too dependent on energy from other countries. When you</p>	<p>New question in Wave 16. Bi-annual</p>

<p>gave this answer, were you thinking about specific energy types?</p> <ul style="list-style-type: none"> • No specific sources • Oil • Gas • Electricity • Other source (specify) • Don't know 	<p>from the Wave 17.</p>
<p>Q24a) Do you know what the Energy performance certificate (EPC) rating for your property is?</p> <ul style="list-style-type: none"> • 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 my home is • I've not heard of EPCs 	<p>New question in Wave 15. Annual from Wave 17.</p>
<p>Q26a) How much, if anything, do you know about the way the UK currently manages radioactive waste?</p> <ul style="list-style-type: none"> • A lot • A fair amount • Not very much • Nothing at all 	<p>Quarterly</p>
<p>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?</p> <ul style="list-style-type: none"> • 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 	<p>Quarterly</p>
<p>Q35) Which of these energy types do you think is most used by UK households overall?</p> <ul style="list-style-type: none"> • Gas • Electricity (including renewable energy) • Petroleum • Bioenergy and waste • Solid fuels (wood, coal) • Other 	<p>Piloted in Wave 16. Replaced with Q37, Q38 and Q39.</p>

<ul style="list-style-type: none"> • Don't know 	
<p>Q36) And which energy type do you think is second most used by UK households overall?</p> <p>(same answer options as Q35)</p>	<p>Piloted in Wave 16. Replaced with Q37, Q38 and Q39.</p>
<p>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.</p> <ul style="list-style-type: none"> • Electricity • Natural gas (mains gas) • Bottled gas • Oil • Wood • Coal • Other • Don't know 	<p>Replaced Q35 and Q36. Piloted in Wave 19.</p>
<p>Q38) And over the course of the year, which of these types of energy do you think your household spends the most money on?</p> <p>(same answer options as Q37)</p>	<p>Replaced Q35 and Q36. Piloted in Wave 19.</p>
<p>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?</p> <p>(same answer options as Q37)</p>	<p>Replaced Q35 and Q36. Piloted in Wave 19.</p>
<p>Q8) Before today, had you heard of smart meters?</p> <p>IF YES ASK: Do you have one?</p> <ul style="list-style-type: none"> • Yes, I have one • Yes, but I do not have one • No – I have never heard of them 	<p>Increased frequency to bi-annual from Wave 19.</p>
<p>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.</p> <ul style="list-style-type: none"> • Yes, I look at it every day • Yes, I look at it occasionally • Yes, but I never look at it 	<p>Question asked only in Wave 17.</p>

<ul style="list-style-type: none"> • Yes, but I have never installed it • No, I was not offered one • No, I was offered one but refused it • Don't know 	
<p>Q41-51) See Wave 20 questionnaire for question text</p>	<p>New questions in Wave 20.</p>
<p>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.</p> <ul style="list-style-type: none"> • Yes – have a condensing boiler • No – don't have a condensing boiler • Don't know 	<p>New question in Wave 20.</p>
<p>Q53) How likely do you think you are to install a condensing boiler in your home over the next few years?</p> <ul style="list-style-type: none"> • Very likely • Fairly likely • Not very likely • Not at all likely • Don't know 	<p>New question in Wave 20.</p>
<p>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.</p> <ul style="list-style-type: none"> • Very likely • Fairly likely • Not very likely • Not at all likely • Already joined one • It depends • Don't know 	<p>From Wave 21, filtered to only ask those who say they know about heat networks.</p>

<p>Q25i) From what you know, or have heard about heat networks, generally how positive or negative would you say you are towards them?</p> <ul style="list-style-type: none"> • Very positive • Fairly positive • Fairly negative • Very negative • Don't know 	<p>From Wave 21, filtered to only ask those who say they know about heat networks.</p>
<p>Q.7_13 Have you heard of the Domestic Renewable Heat Incentive?</p> <ul style="list-style-type: none"> • Yes • No • Don't know 	<p>Question asked only in wave 22.</p>
<p>Q60 Have you had a boiler or heating system installed in the last three years? This could either be in your current home or anywhere else you have lived in this period.</p> <ul style="list-style-type: none"> • Yes • No 	<p>New question in wave 24</p>
<p>Q61. When was this done? If you have had a new boiler or heating system more than once in the last three years, please answer based on the most recent occasion.</p> <ul style="list-style-type: none"> • 0-3 months ago • 3-6 months ago • 6-12 months ago • 1-3 years ago • Don't know 	<p>New question in wave 24</p>
<p>Q62. Which of these boilers or heating systems did you install?</p> <ul style="list-style-type: none"> • Gas • Oil • Coal • Biomass • Other (specify) • Don't know 	<p>New question in wave 24</p>

<p>Q63. Were you involved in the decision making process for choosing a new boiler or heating system?</p> <ul style="list-style-type: none"> • Yes • No 	<p>New question in wave 24</p>
<p>Q64. When choosing your boiler or heating system, which sources of information did you use to make your decision?</p> <p>SELECT ALL THAT APPLY.</p> <ul style="list-style-type: none"> • Internet / websites • Friends and family • Your heating engineer / installer • Your energy provider • Other (specify) • Don't know 	<p>New question in wave 24</p>
<p>Q65. Which websites did you use?</p> <p>INTERVIEWER: IF RESPONDENT CANNOT RECALL NAMES OF WEBSITES ASK THEM FOR TYPES OF SITES VISITED AND ENTER THIS INFORMATION. ENTER NAMES OF WEBSITES Don't know</p>	<p>New question in wave 24</p>
<p>Q66. How helpful were each of these sources of information in helping you to make your decision?</p> <p>[ONLY DISPLAY SOURCES SELECTED AT Q64]</p>	<p>New question in wave 24</p>
<p>Q67. How easy or difficult did you find it to get the information you wanted about a new boiler or heating system?</p> <ul style="list-style-type: none"> • Very easy • Fairly easy • Fairly difficult • Very difficult • Did not want or need any information 	<p>New question in wave 24</p>

<ul style="list-style-type: none"> • Don't know 	
<p>Q68. Do you feel you had... READ OUT</p> <ul style="list-style-type: none"> • The right information to help you make a good choice • Or would you have liked more or different information? • Don't know 	<p>New question in wave 24</p>
<p>Q69. Which of these organisations have you heard of? SELECT ALL THAT APPLY.</p> <ul style="list-style-type: none"> • Ofgem • Energy Ombudsman • Citizens Advice Consumer Helpline • Resolver • Energy Saving Trust • Energy Saving Advice Service (ESAS) • Which? • Money Saving Expert • None of these 	<p>New question in wave 24</p>
<p>Q70. Have you experienced a problem with your energy provider that you could not resolve directly with them in the last 12 months?</p> <ul style="list-style-type: none"> • Yes • No 	<p>New question in wave 24</p>
<p>Q71. You said that you could not resolve this problem directly with your energy provider. What else did you do in response to the problem? SELECT ALL THAT APPLY.</p> <ul style="list-style-type: none"> • Took no further action • Complained to the Energy Ombudsman 	<p>New question in wave 24</p>

<ul style="list-style-type: none"> • Took it to court • Sought advice from Citizens Advice • Complained via Resolver • Sought legal advice • Raised it on social media • Other (specify) • Don't know 	
<p>Q72. Why did you not take your complaint to the Energy Ombudsman?</p> <p>DO NOT PROMPT. PROBE FULLY. CODE ALL THAT APPLY.</p> <ul style="list-style-type: none"> • Did not know how to access Energy Ombudsman • Not confident that process would have been successful • No time to do this / would take too long • Did not get round to it • Concern about the costs involved • Complaint was of low monetary value • Not important enough • Other (specify) • Don't know 	<p>New question in wave 24</p>