Department of Energy & Climate Change

DECC Public Attitudes Tracker – Wave 11

Summary of key findings

4 November 2014

URN: 14D/414

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DECC Public Attitudes Tracker

DECC set up a tracking survey in early 2012 to understand and monitor public attitudes to the Department's main business priorities. The survey runs four times a year and consists of one longer, annual survey and three shorter, quarterly surveys which focus on a subset of questions where we think attitudes might shift quickly or be affected by seasonal changes. This summary note presents headline findings from the eleventh quarterly wave of the survey.

This wave of data was collected between 24 and 28 September 2014 using face-to-face in-home interviews with a representative sample of 2,103 households in the UK. The wave 11 questionnaire is essentially the same as that used in wave 10 but without the questions on radioactive waste and a reduced question set for renewable heat technologies, wave 9 was the last annual survey.

The headline findings of the September 2014 survey results are generally compared below with the last wave (June 2014 - wave 10), although bearing in mind that it is a tracking survey so trends over time are key. Please refer to the Excel tables for a full comparison of wave 11 findings with the ten previous waves https://www.gov.uk/government/collections/public-attitudes-tracking-survey.

SUMMARY OF KEY FINDINGS FROM WAVE 11

This note provides selected headlines and is not an exhaustive overview of the findings. Please refer to the accompanying excel summary tables and excel dataset to see full responses to all survey questions.

Summary findings from the September 2014 survey are broadly consistent with waves 1-10 and largely unchanged since the previous two waves in June 2014 and March 2014.

ENERGY BILLS, SWITCHING AND SUPPLIERS: concern over paying energy bills dipped in the previous wave and remains, in wave 11, at the lowest level since the survey began; trust in suppliers across the different measures has risen.

- Level of worry about bills (34%) is comparable to the level reported in wave 10 and remains at the lowest since the survey began. Again these results seem to sit in a context of a decline in concern over prices more widely - with worry about household shopping at 28%, mortgages at 18% and transport at 31%.
- Trust in energy supplier has risen;

- 67% trust energy suppliers to provide a breakdown of the components of their bill which represents the highest proportion ever reported (up from 60% in June 2014)
- 51% trust energy suppliers to inform them of the best tariff for them which represents the highest recorded level (up from 47% in June 2014)
- Over half (51%) of people trust their energy supplier to give them a fair deal (up from 47% in June 2014, but comparable to when the question was first asked in March 2012, 50%)
- 68% trust energy suppliers to provide them with a bill that accurately reflects the energy they have used use (63% in June 2014, 68% in March 2012)
- 49% trust energy suppliers to improve their home to make it more energy efficient, if the paid them to do this (44% in June 2014, 48% in March 2012)
- 54% trust suppliers to provide impartial and accurate advice on energy efficiency measures (50% in June 2014, 53% in March 2012).

- The percentage of those planning to switch next year has remained stable at 5%.
- 27% of people said they may or may not switch energy supplier in the next 12 months, which remains at the level reported in June 2014 (27%).

RENEWABLE ENERGY SOURCES: continue to receive high levels of support, over three-quarters of UK adults (78%) support the use of renewables to generate electricity, fuel and heat in the UK, a similar proportion to June 2014 (79%) and March 2014 (80%).

- Level of support for individual renewable energy sources are similar to that reported in the previous wave; off-shore wind (74%), biomass (61%), onshore wind (67%), wave and tidal (73%) and solar (80%).

SHALE GAS: awareness of fracking is comparable to that from June 2014; with similar levels of support for shale gas extraction but a slightly higher rate of opposition.

- Three quarters of people had some awareness of shale gas (76%), which is similar to that reported in June 2014 (74%).
- 26% of people said they support shale gas extraction which is comparable to the most recent wave (24% in June 2014) but down slightly from March 2014 (29%). Almost half (45%) say they neither support nor oppose it, and there was a slight increase in opposition (27%) up from 24% in June 2014.

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

- In wave 11 42% of the public supported the use of nuclear energy to generate electricity in the UK compared to 36% in June 2014, and 42% in March 2014.

ENERGY SAVING AND WASTING: the proportion of people who think about saving energy is unchanged

- Three quarters of people (75%) gave a lot or a fair amount of thought to saving energy in their home, which represents a similar proportion to that reported in June 2014 (75%) and March 2014 (77%).

ENERGY SECURITY: concern about likelihood of power cuts dipped in wave 10 and remains, in this wave, at the lowest level since the survey began

- Concern over steep rises in energy prices in the future (77%) is comparable to the level reported in wave 10, which is the lowest since the survey began in March 2012.
- 49% of people were concerned about power cuts becoming more frequent in future, which is similar to June 2014 (48%) and continues to represent the lowest level since this question was first asked.

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

- In wave 11 the proportions of those who had already installed, were in the process of doing so, or thinking about installing the measure, compared to those who had not heard of the various measures were as follows;
    - Biomass boiler; 3% already installed or thinking about it, 26% had not heard of this technology
    - Air source heat pump; 1% already installed or thinking about it, 52% unaware of technology
    - Ground source heat pump; 1% already installed or thinking about it, 39% unaware of technology
    - Solar thermal panel; 7% already installed or thinking about it, 6% unaware of technology
    - Micro CHP unit, 2% already installed or thinking about it, 52% unaware of technology

Technical notes

The results shown here are based on 2,103 face-to-face in-home interviews conducted with a representative sample of UK adults aged 16+. Fieldwork was conducted between 24 and 28 September 2014 on the TNS UK Omnibus, which uses a random location quota sampling method.

The questionnaire was designed by DECC and TNS BMRB drawing on a number of questions from previous surveys. Questions were refined through cognitive testing.

The representativeness of the data was controlled through sample design, fieldwork quotas and post-fieldwork weighting. Data were weighted for the following characteristics: sex, age, social grade, region and tenure. Results included here are based on weighted data.

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URN 14D/414