Consumer Council

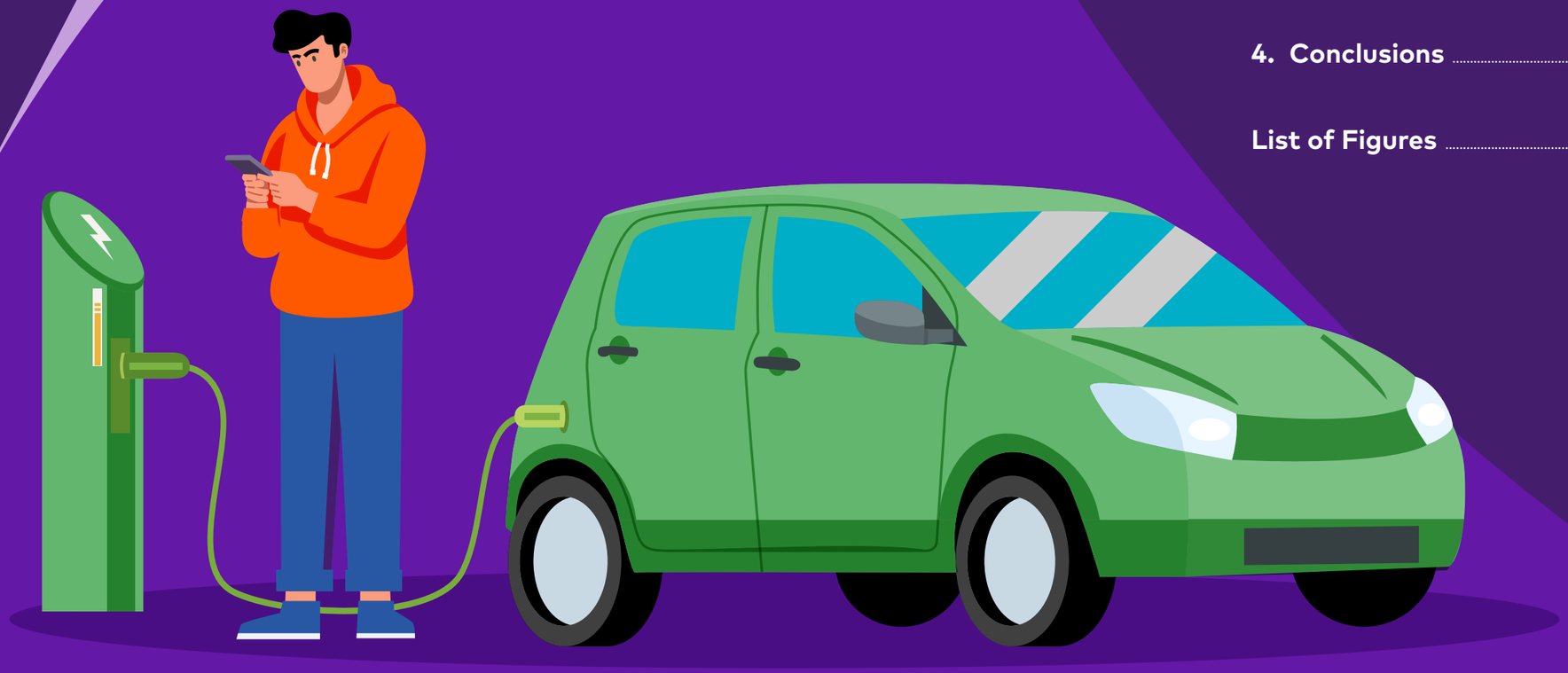
Attitudes to the Energy Transition

Spring 2023

consumercouncil.org.uk

Cognisense

Contents



Foreword

As the Consumer representative body for Northern Ireland, whose research and engagement provides us with an in-depth understanding of consumers' needs, we know the energy transition will prove challenging for many citizens.

We are clear in our view that achieving net zero greenhouse gas emissions is essential for long-term consumer protection. However, it is also apparent that to achieve net zero will require us all to make significant changes to our attitudes and behaviour. This will include changes to how we travel, heat our homes, and perhaps even to our diets.

This research has been conducted to gather evidence of public opinion and sentiment regarding energy transition and to provide insights into the level of consumer support, education and protection required to meet established net zero goals.

We plan to repeat this research annually to ensure we are equipped to provide policy makers and the Northern Ireland energy sector with a detailed understanding of consumer needs, experiences, and attitudes as we progress with the energy transition. Deep understanding of consumers' needs will be essential to the success of the energy transition.

What is clear from this first annual report is that to help Northern Ireland reach its net zero goals, significant further education of the population is essential.

For many, overcoming the barrier of cost will also be necessary before household alterations that contribute to decarbonisation can be implemented. Incentives and grants will play a crucial role in addressing cost-related concerns.

Consumers also tell us that simple solutions will be the successful solutions and behavioural change should not be demanded without first providing appropriate support and incentives. The achievement of net zero must come about through the development of a sustainable energy future that works for us all.

It is essential that we achieve a just and fair transition by ensuring affordability, security of energy supply and protection for all consumers, particularly our vulnerable citizens. Consumers play an essential role. Empowering individuals and mobilising communities to actively embrace Northern Ireland's energy transition is critical.

Noyona Chundur

Chief Executive

1. Executive Summary

In October 2022, the Consumer Council commissioned Cognisense to conduct a quantitative survey regarding consumer attitudes to energy transition issues, the purpose of which was to gather evidence of public opinion and sentiment in order to provide the Consumer Council and key stakeholders with insights into the level of consumer support, education and protection required to meet established net zero goals.

To address the research objective identified, an online quantitative survey of 1000 Northern Ireland (NI) residents was administered in November 2022. Quota controls based on official population estimates were employed throughout survey fieldwork and corrective rim was applied during data analysis to ensure that the final sample was representative of the NI population in terms of age, sex, socio-economic group and area. The questionnaire used in the survey was developed by the Consumer Council.

Key findings

Understanding of terms related to decarbonisation and awareness of net zero goals

A large majority (84%) of respondents had some understanding of the term greenhouse gas emissions, though there was no consensus as to the contributor of the largest amount of greenhouse gas emissions in Northern Ireland. Significantly fewer respondents were familiar with the terms net zero (70%) and decarbonisation (62%).

Understanding of terms relating to decarbonisation

84%
of respondents stated that they had some understanding of the term greenhouse gas emissions

70%
stated that they had some understanding of the term net zero

62%
stated that they had some understanding of the term decarbonisation

Almost seven in ten (68%) respondents were aware that from 2035 it will only be possible to buy new electric cars in the UK. However, only about half (54%) were aware that the NI government is aiming to reduce greenhouse gas emissions to net zero by 2050 and notably fewer (30%) knew that by 2030 Northern Ireland must deliver 20% energy savings from buildings and industry.

Support for energy transition

A significant majority (78%) of respondents supported the use of renewable energy for providing NI's power, heat and transport, and a considerable proportion (58%) supported the building of new infrastructure in their local area to aid the increased use of renewable energy.

78%
of respondents supported the use of renewable energy for providing our power, heat and transport.

There was substantial support for the provision of government grants to make electric vehicles (78%) more affordable, for government grants to encourage residential and commercial building owners to install cleaner and more efficient heating systems (78%), and for increased government investment in public transport (67%) instead of motorways.

78%
supported government grants to encourage residential and commercial building owners to install cleaner and more efficient heating systems.

However, bans on the burning of fossil fuels for home heating purposes and the implementation of higher taxes on cars that use petrol and diesel were much more likely to be opposed than supported.

Household changes to contribute to decarbonisation

A considerable number (62%) of respondents were concerned about how much energy is used in their home, and a sizeable majority (72%) stated that their household was already saving energy at home as much as possible.

62% **of respondents agreed that they are concerned about how much energy is used in their home.**

A significant proportion of respondents stated that their household had already made changes or that they will do so regarding driving a car less (59%), active travelling (58%), and saving energy by improving their home's energy performance (56%).

However, in terms of not flying (32%), replacing some flights with bus or train journeys (23%), and using public transport more often (21%), notable minorities stated that their household will not change their behaviour.

When it comes to making upgrades or installations in the home that would contribute to decarbonisation, or replacing petrol or diesel vehicles with electric or plug-in hybrid alternatives, cost was the main barrier for many of the respondents who stated that they are unlikely to take these actions.

Recommendations

To help Northern Ireland reach its net zero goals, further education of the population will likely be required regarding the following:

- the terminologies relating to decarbonisation;
- the decarbonisation targets and associated government schemes that are in place;
- the importance of energy transition; and
- the positive impact that household changes can make in relation to decarbonisation.

For many, overcoming the barrier of cost will be necessary before household alterations that contribute to decarbonisation could be implemented. Incentives and grants will play a crucial role in addressing cost-related concerns.

The establishment of a 'one-stop shop' for energy advice and education could also serve an important function, with almost half (48%) of respondents having suggested that they would be likely to use such a resource.

48% **of respondents stated that they would be likely to use a 'one-stop shop' for energy advice and education.**

2. Background and Methodology

The Consumer Council is a non-departmental public body (NDPB) established through the General Consumer Council (Northern Ireland) Order 1984. Its principal statutory duty is to promote and safeguard the interests of consumers in Northern Ireland. The Consumer Council has specific statutory duties in relation to energy, postal services, transport, water and sewerage, and food affordability, which include considering consumer complaints and enquiries, carrying out research and educating and informing consumers.

To support the delivery of its duties, the Consumer Council undertakes research activities which provide insight into consumer issues in Northern Ireland. This insight forms the basis for future planning and strategic decision making.

Research objectives

Consumers are central to the Energy Strategy for Northern Ireland, the Path to Net Zero[1], and a key risk that could result in Northern Ireland not meeting its decarbonisation targets is a lack of consumer action and behavioural change. In October 2022, the Consumer Council commissioned Cognisense to conduct a quantitative survey regarding consumer attitudes to energy transition issues, the purpose of which was to gather evidence of public opinion and sentiment in order to provide the Consumer Council and key stakeholders with insights into the level of consumer support, education and protection required to meet the net zero goals.

It is anticipated that this survey will be the first in a series, potentially running until 2050.

Methodology

To meet the research objective identified, an online quantitative survey of 1000 Northern Ireland (NI) residents was administered in November 2022. Quota controls based on official population estimates were employed throughout survey fieldwork and corrective rim was applied during data analysis to ensure that the final sample was representative of the NI population in terms of age, sex, socio-economic group and area.

The questionnaire that was used for the online survey was developed by the Consumer Council and a full copy is available on request. The questions selected were comparable to those asked in similar surveys in other UK jurisdictions and have relevance until at least 2030.

[1] https://www.economy-ni.gov.uk/sites/default/files/publications/economy/energy-strategy-path-to-net-zero-action-plan.pdf

3. Main Findings

This section of the report provides detailed analysis regarding the main findings of the survey.

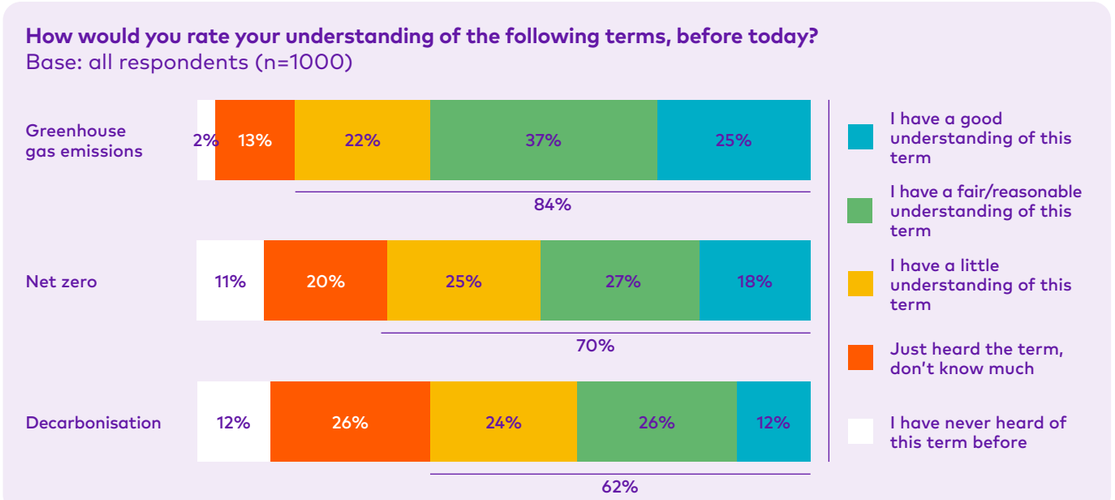
Please note the following:

- Where differences by demographics have been referenced, these have been tested at the 95% confidence level.
- As a result of the rounding of figures or the use of questions for which multiple answers could have been given, the sums on charts may not always add to 100 per cent.

3.1 Understanding of terms relating to decarbonisation

Respondents were asked to rate their understanding of the terms greenhouse gas emissions, decarbonisation, and net zero.

Figure 1: Understanding of terms relating to decarbonisation



More than four in five (84%) respondents stated that they have some understanding of the term greenhouse gas emissions (Figure 1). Males (30%) were more likely than females (21%), and those aged 18-24 (46%) were more likely than those from other age groups to have stated that they have a good understanding of the term.

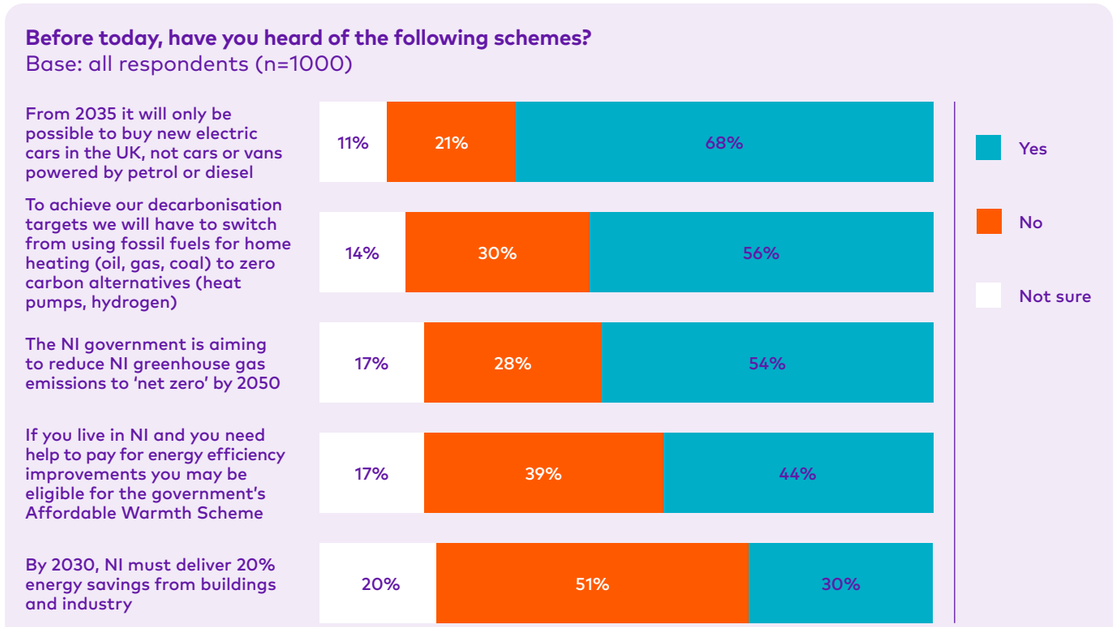
Seven in ten (70%) respondents stated that they have some understanding of the term net zero, with males (23%) more likely than females (13%), and those from the socio-economic group ABC1 (21%) more likely than those from a C2DE (15%) background to have stated that they have a good understanding of the term.

Around three in five (62%) respondents stated that they have some understanding of the term decarbonisation, making it the term of the three with which respondents were least likely to be familiar. As with the term net zero, males (16%) were more likely than females (9%), and those from an ABC1 (15%) background more likely than those from the C2DE (10%) socio-economic group to have stated that they have a good understanding of the term.

3.2 Awareness of schemes relating to decarbonisation

Respondents were asked if prior to the survey they had heard of the following schemes relating to decarbonisation.

Figure 2: Awareness of schemes relating to decarbonisation



Almost seven in ten (68%) respondents were aware that from 2035 it will only be possible to buy new electric cars in the UK, not cars or vans powered by petrol or diesel, making it the scheme that respondents were most likely to have heard of prior to the survey (Figure 2). Awareness of the scheme was higher amongst males (74%) than females (62%), amongst those aged 65+ (78%) when compared to other age groups, and amongst those from an ABC1 (73%) background when compared to those from the C2DE (64%) socio-economic group.

Approaching three in five (56%) respondents were aware that to achieve decarbonisation targets it will be necessary to switch from fossil fuels for home heating to zero carbon alternatives, with awareness higher amongst males (64%) than females (49%), and amongst the ABC1 (65%) socio-economic group when compared to those from a C2DE (49%) background.

56% **were aware that to achieve Northern Ireland's decarbonisation targets it will be necessary to switch from fossil fuels for home heating to zero carbon alternatives.**

Around half (54%) of respondents had heard that the NI government is aiming to reduce greenhouse gas emissions to net zero by 2050. Awareness of this aim was higher amongst males (64%) than females (45%), and amongst those from an ABC1 (62%) background when compared to those from a C2DE (49%) one.

54% **were aware that the Northern Ireland government is aiming to reduce greenhouse gas emissions to net zero by 2050.**

About two in five (44%) respondents were aware that if you live in Northern Ireland and need help to pay for energy efficiency improvements you may be eligible for the government's Affordable Warmth Scheme. Those aged 18-24 (34%) and those aged 65+ (35%) were less likely to have heard of this scheme than those from other age groups.

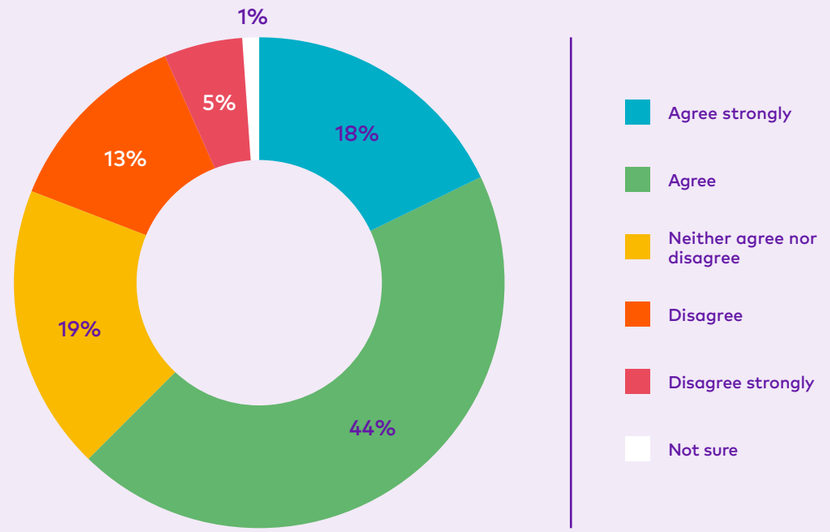
Three in ten (30%) respondents were aware that by 2030, Northern Ireland must deliver 20% energy savings from buildings and industry, making it the scheme with which respondents were least likely to have been familiar. Awareness was higher amongst males (36%) than females (24%), and amongst those aged 25-34 (41%) when compared to other age groups.

3.3 Concern about how much energy is used in the home

On a scale ranging from agree strongly to disagree strongly, respondents were asked to what extent they agree or disagree that they are concerned about how much energy is used in their home.

Figure 3: Extent of agreement: I am concerned about how much energy is used in our home

Thinking about energy generally, to what extent do you agree or disagree with the following statement: I'm concerned about how much energy is used in our home.
Base: all respondents (n=1000)



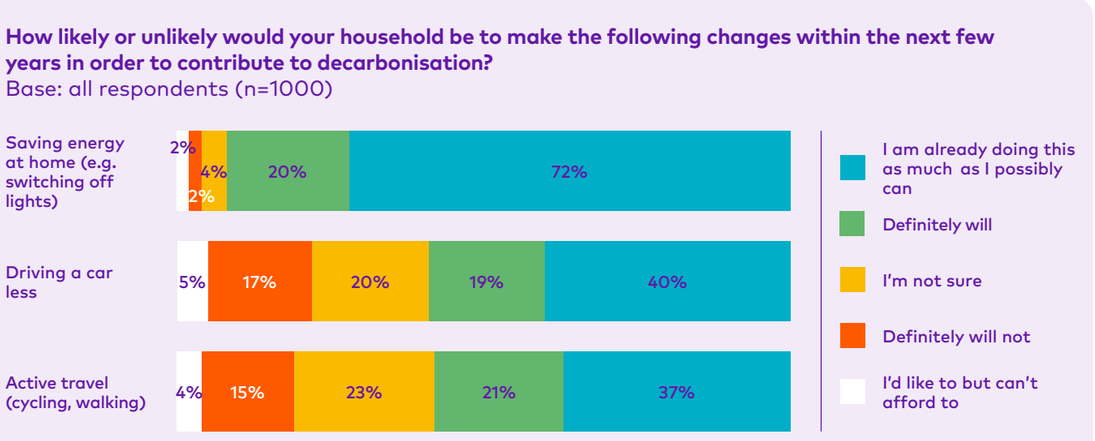
Around three in five (62%) respondents agreed that they are concerned about how much energy is used in their home, around a fifth (18%) disagreed, whilst a similar number (19%) neither agreed nor disagreed (Figure 3).

62% **of respondents agreed that they are concerned about how much energy is used in their home.**

3.4 Likelihood of household making changes within the next few years to contribute to decarbonisation

Respondents were asked how likely or unlikely their household would be to make the following changes within the next few years in order to contribute to decarbonisation. They were asked to indicate the likelihood of their household making each of these changes.

Figure 4.1: Likelihood of household making changes to contribute to decarbonisation



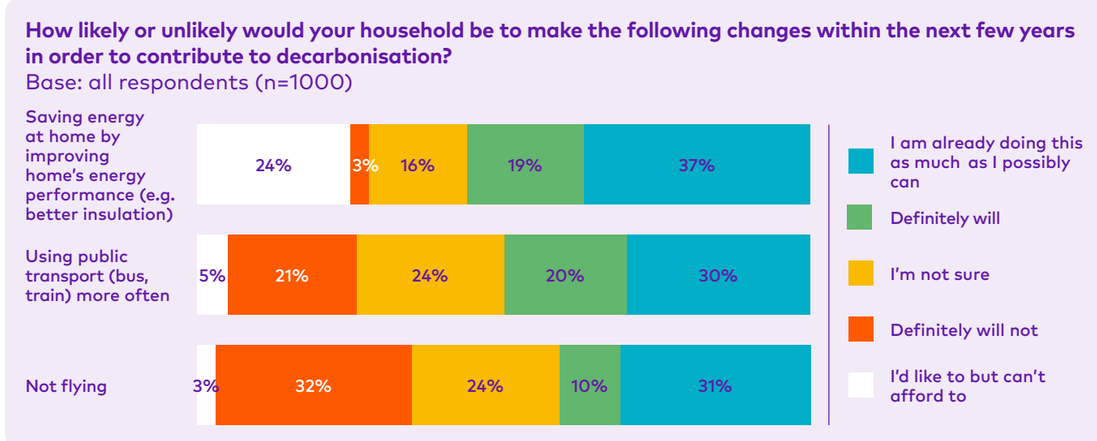
Around seven in ten (72%) respondents stated that their household was already saving energy at home (e.g., by switching off lights) as much as possible, whilst a fifth (20%) stated that their household definitely will do this within the next few years (Figure 4.1). A small number of respondents stated that they definitely will not save energy at home (2%), that they were not sure (4%), or that they would like to but cannot afford to do so (2%).

72% **of respondents stated that their household was already saving energy at home as much as possible.**

Two in five (40%) respondents stated that their household was already driving a car less, whilst nearly a fifth (19%) stated that their household definitely will do so within the next few years, with those from an ABC1 (23%) background more likely than those from a C2DE (15%) one to have been of this view. Around a fifth (17%) of respondents stated that their household definitely will not drive a car less within the next few years, with males (21%) more likely than females (13%) to have stated that this is the case. A fifth (20%) of respondents were not sure whether or not their household will drive a car less within the next few years, whilst a small number (5%) stated that they would like to drive a car less but cannot afford to do so.

Nearly two in five (37%) respondents stated that their household was already active travelling (cycling, walking) as much as possible, whilst about a fifth (21%) stated that their household definitely will make this change within the next few years, with those from an ABC1 (25%) background more likely to do so than those from a C2DE (18%) one. Around one in seven (15%) respondents stated that their household definitely will not make this change, about a quarter (23%) were not sure, whilst a small number (4%) would like to do so but cannot afford it.

Figure 4.2: Likelihood of household making changes to contribute to decarbonisation



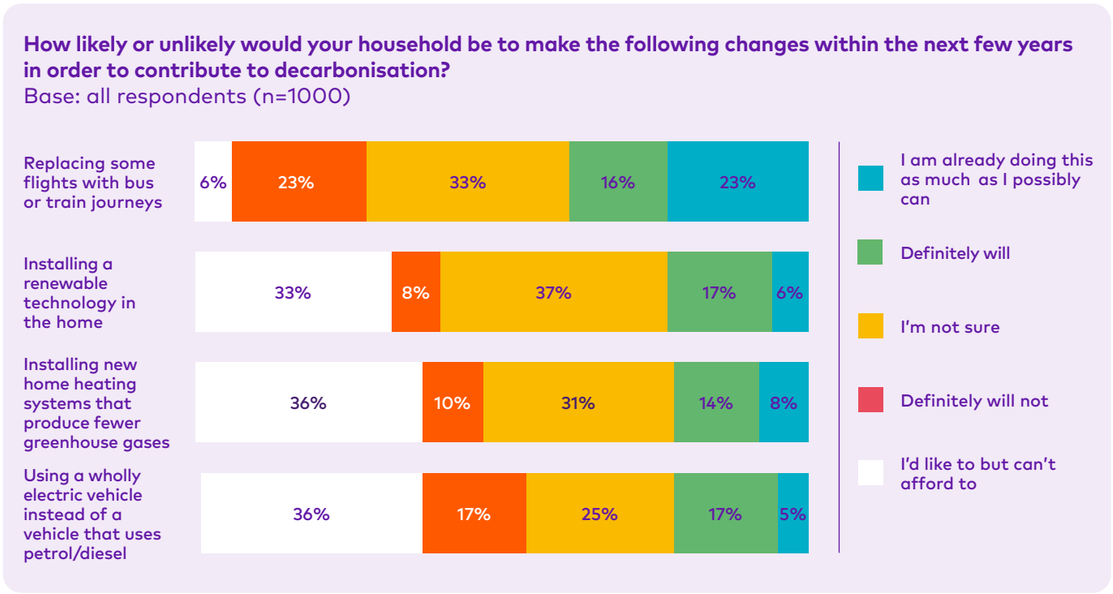
Almost two in five (37%) respondents stated that their household was already saving energy at home by improving the home's energy performance (e.g., better insulation) (Figure 4.2), with those aged 65+ (53%) more likely than those from other age groups to have stated that this was the case. About a fifth (19%) of respondents stated that their household definitely will make changes in this regard in the next few years, with those aged 25-34 (32%) more likely than those from other age groups to have stated that this is so. Approaching a fifth (16%) were not sure whether their household would make changes regarding their home's energy performance, whilst a small number (3%) stated that they definitely will not. About a quarter (24%) of respondents stated that they would like to make such changes, but they cannot afford to do so, with those from a C2DE (29%) background more likely than those from the ABC1 (19%) socio-economic group to have stated that this is the case.

37% **stated that their household was already saving energy at home by improving the home's energy performance.**

Three in ten (30%) respondents stated that they were already using public transport as much as possible, with those aged 18-24 (46%) more likely than any other age to have stated so. A fifth (20%) of respondents stated that their household definitely will use public transport more often within the next few years, with those from an ABC1 (23%) background more likely than those from a C2DE (17%) one to have been of this view. About a fifth (21%) of respondents stated that they definitely will not use public transport more often in the next few years, around a quarter (24%) were unsure, whilst a small number (5%) stated they would like to but cannot afford to do so.

Around three in ten (31%) respondents stated that they were already not flying as much as possible, whilst one in ten (10%) stated that their household definitely will make this change within the next few years. About three in ten (32%) stated that they definitely will not stop flying, about a quarter (24%) were not sure, whilst a small number (3%) stated that they would like to but cannot afford to do so.

Figure 4.3: Likelihood of household making changes to contribute to decarbonisation



Nearly a quarter (23%) of respondents stated that they were already replacing some flights with bus or train journeys, whilst about one in six (16%) stated that they definitely will do so within the next few years (Figure 4.3). Almost a quarter (23%) of respondents stated that they definitely will not replace some flights with bus or train journeys, with males (27%) more likely than females (19%) to have been of this view. A third (33%) of respondents were not sure whether or not they would make this change, whilst a small number (6%) would like to but cannot afford to do so.

A small number of respondents (6%) stated that they were already installing renewable technology in their home, whilst about a fifth (17%) stated that they definitely will in the next few years. About one in ten (8%) respondents stated that their household definitely will not make this change, whilst almost two in five (37%) were not sure. A third (33%) of respondents would like to install renewable technology in the home, but cannot afford to do so.

33% **stated that they would like to install a renewable technology in their home but can't afford to.**

Around one in ten (8%) respondents stated that they were already installing new home heating systems that produce fewer greenhouse gases, whilst about one in seven (14%) stated that they definitely will in the next few years. One in ten (10%) respondents stated that they definitely will not make this change, whilst around three in ten (31%) were not sure. Approaching two in five (36%) would like to install new home systems that produce fewer greenhouse gases but cannot afford to do so, with females (41%) more likely than males (30%) to have stated that this is the case.

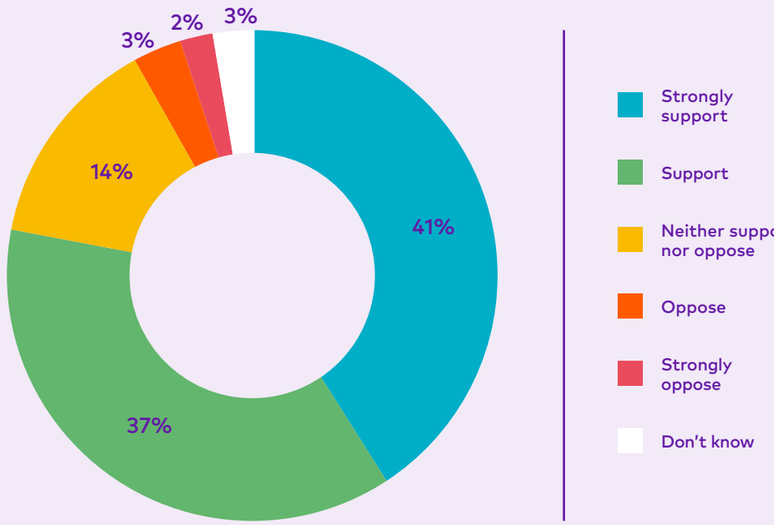
A small number of respondents (5%) stated that they were already using a wholly electric vehicle instead of one that uses petrol/diesel, whilst about a fifth (17%) stated that they definitely will in the next few years, with those from the ABC1 (21%) socio-economic group more likely than those from a C2DE (14%) background to have been of this view. Almost a fifth (17%) stated that they definitely will not use a wholly electric vehicle, with those aged 65+ (26%) more likely than those from other age groups to have stated that this is the case. A quarter (25%) of respondents were not sure whether they would make this change, whilst approaching two in five (36%) would like to but cannot afford to do so.

3.5 Consumer support for the use of renewable energy for providing our power, heat and transport

On a scale ranging from strongly support to strongly oppose, respondents were asked if they support or oppose the use of renewable energy for providing our power, heat and transport.

Figure 5: Consumer support for the use of renewable energy for providing our power, heat and transport

Do you support or oppose the use of renewable energy for providing our power, heat and transport?
Base: all respondents (n=1000)



Almost four in five (78%) respondents supported the use of renewable energy for providing our power, heat and transport (Figure 5). About one in seven (14%) respondents neither supported nor opposed the use of renewable energy for these purposes, whilst small numbers opposed (5%) the idea or did not know (3%).

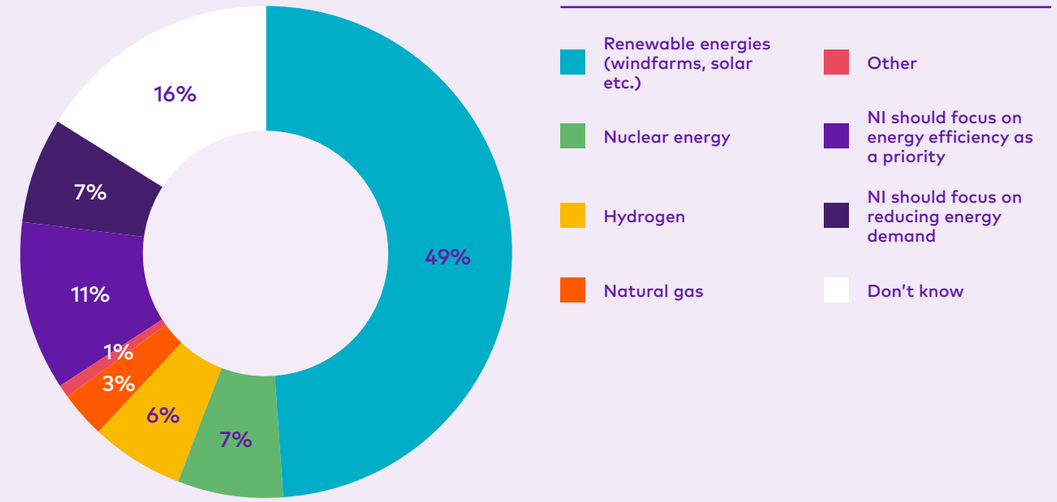
78% **of respondents supported the use of renewable energy for providing our power, heat and transport.**

3.6 The source of energy consumers believe Northern Ireland should rely on most to aid decarbonisation

From a list provided, respondents were asked which source of energy they believe Northern Ireland should rely on most to aid decarbonisation.

Figure 6: The source of energy consumers believe Northern Ireland should rely on most to aid decarbonisation

To aid decarbonisation, which source of energy do you believe Northern Ireland should rely on most?
Base: all respondents (n=1000)



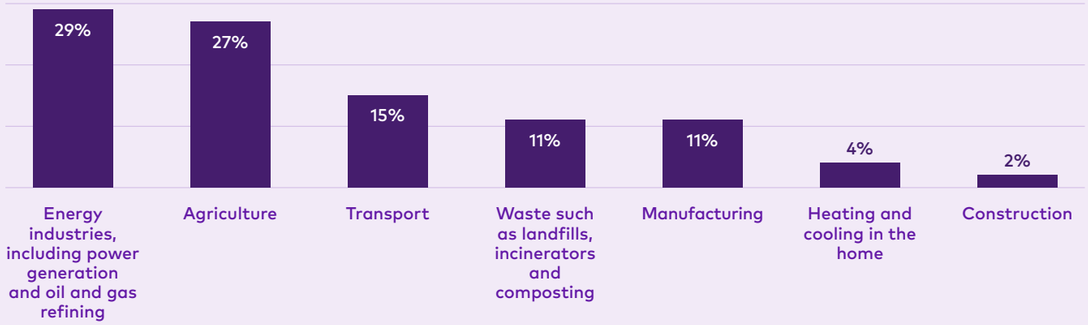
Renewable energy (49%) was by a considerable distance the most likely source of energy to have been selected (Figure 6). Fewer than one in ten respondents selected nuclear energy (7%) or hydrogen (6%), whilst an even smaller number (3%) chose natural gas. Around one in ten (11%) respondents believed that Northern Ireland should focus on energy efficiency as a priority, whilst a smaller number (7%) believed that Northern Ireland should focus on reducing energy demand. About one in six (16%) respondents did not know which source of energy Northern Ireland ought to rely on most to aid decarbonisation.

3.7 Consumers' perception of the largest contributor of greenhouse gas emissions in Northern Ireland

Respondents were shown a list of options and asked which one, to the best of their knowledge, contributes the largest amount of greenhouse gas emissions in Northern Ireland.

Figure 7: Consumers' perception of the largest contributor of greenhouse gas emission in Northern Ireland

To the best of your knowledge, which one of the following contributes the largest amount of greenhouse gas emissions in Northern Ireland? If you're not sure, please provide your best guess.
Base: all respondents (n=1000)



Almost three in ten (29%) respondents thought that energy industries contribute the largest amount of greenhouse gas emissions in Northern Ireland, whilst a similar number felt that agriculture (27%) did so (Figure 7) - those aged 65+ (37%) were more likely than those from other age groups to have been of this view, whilst those from an ABC1 (31%) background were more likely than those from the C2DE (23%) socio-economic group to have felt this way.

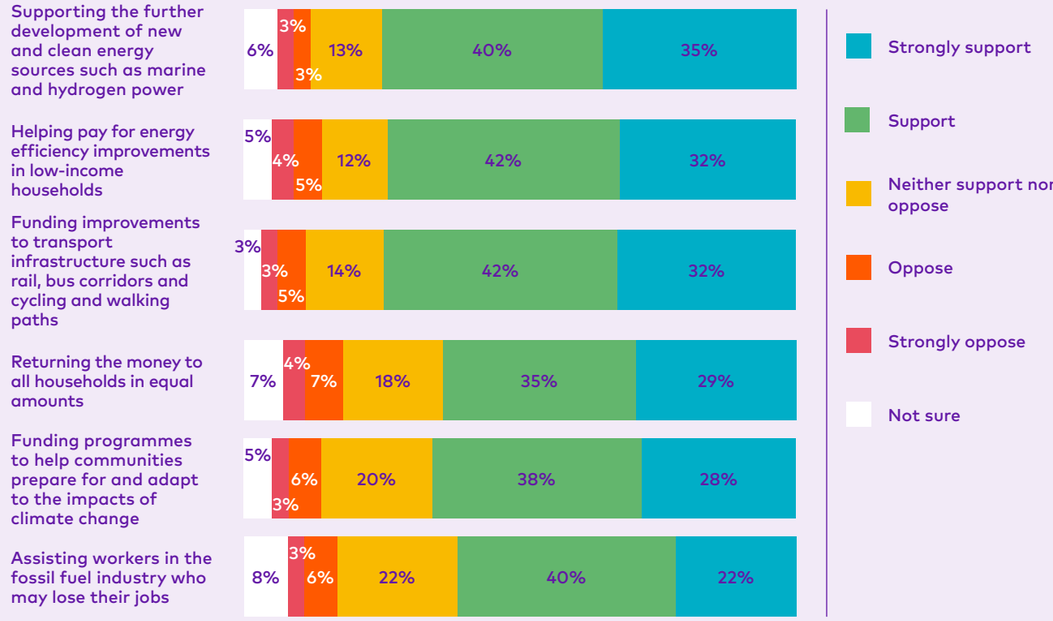
Around one in six (15%) respondents thought that transport was the biggest contributor of greenhouse gas emissions in Northern Ireland, about one in ten (11%) felt that it was waste, whilst the same number (11%) believed it to be manufacturing. Small numbers of respondents thought that the biggest contributor of greenhouse gas emissions in Northern Ireland was heating and cooling in the home (4%) or construction (2%).

3.8 Consumer support for the use of increased taxes to be used to help decarbonisation

Respondents were informed that to aid decarbonisation, taxes on fossil fuels will be rising in Northern Ireland over the next ten years. Respondents were then asked to use a scale ranging from strongly support to strongly oppose to indicate to what extent they support or oppose possible uses for the money collected from these tax rises.

Figure 8: Consumer support for the use of increased taxes to be used to help decarbonisation

To aid decarbonisation, taxes on fossil fuels will be rising in Northern Ireland over the next 10 years. To what extent do you support or oppose using the money collected from these taxes for each of the following purposes?
Base: all respondents (n=1000)



Three quarters (75%) of respondents supported the use of money from tax rises on fossil fuels to support the further development of new and clean energy sources, such as marine and hydrogen power (Figure 8). Similar numbers supported helping pay for energy efficiency improvements in low-income households (74%), funding improvements to transport infrastructure (74%), and returning the money to all households in equal amounts (74%).

Two-thirds (66%) of respondents supported funding programmes to help communities prepare for and adapt to the impacts of climate change, whilst slightly fewer (62%) supported assisting workers in the fossil fuel industry who may lose their jobs.

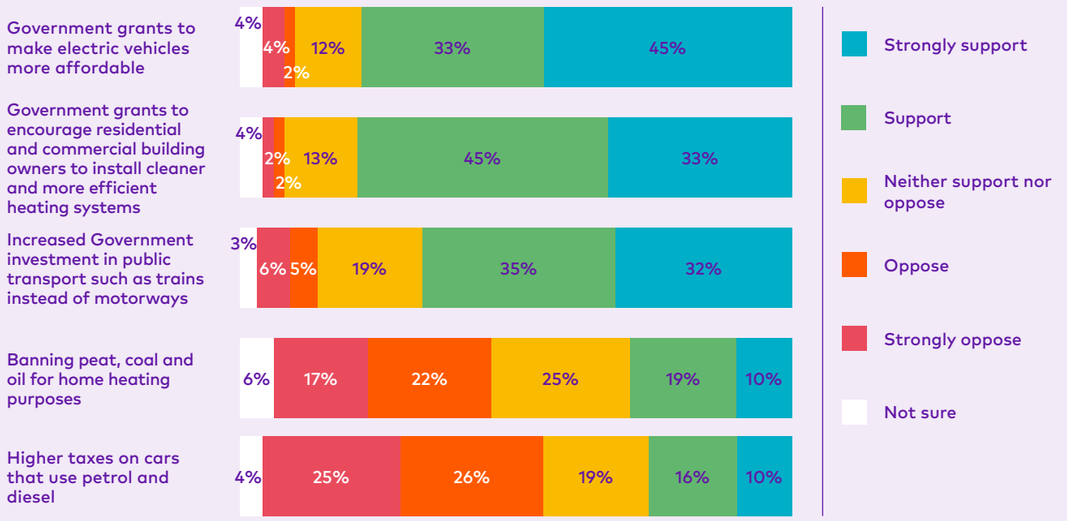
Each proposed use was only opposed by a minority of respondents, with the number in opposition never exceeding eleven per cent.

3.9 Consumer support for policies to help Northern Ireland reduce its greenhouse gas emissions

Using a scale ranging from strongly support to strongly oppose, respondents were asked to what extent they support or oppose various policies to help Northern Ireland reduce its greenhouse gas emissions.

Figure 9: Consumer support for policies to help Northern Ireland reduce its greenhouse gas emissions

To what extent do you support or oppose the following policies to help Northern Ireland reduce its greenhouse gas emissions?
Base: all respondents (n=1000)



Almost four in five respondents (78%) supported government grants to make electric vehicles more affordable, the same number (78%) supported government grants to encourage residential and commercial building owners to install cleaner and more efficient heating systems, whilst about two-thirds (67%) supported increased government investment in public transport (Figure 9).

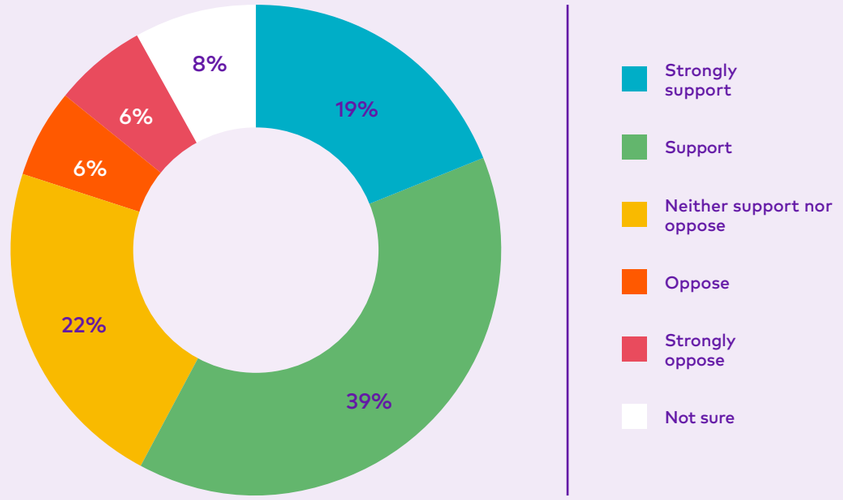
There was significantly less support and much higher opposition regarding the banning of peat, coal and oil for home heating purposes (support: 29%; oppose: 39%) and higher taxes on cars that use petrol and diesel (support: 26%; oppose: 51%).

3.10 Consumer support for the building of new infrastructure in local area to support increased use of renewable energy

Respondents were informed that the Northern Ireland Government has set a renewable electricity target of 70% by 2030 and that new infrastructure such as pylons and substations are needed to meet these targets. Respondents were then asked to use a scale ranging from strongly support to strongly oppose to rate to what extent they would support or oppose the building of such infrastructure in their local area in order to support the increased use of renewable energy.

Figure 10: Consumer support for the building of new infrastructure in local area to support the increased use of renewable energy

The Northern Ireland Government has set a renewable electricity target of 70% by 2030. New infrastructure such as pylons and substations are needed to meet these targets. To what extent would you support or oppose building new infrastructure such as pylons or substations in your local area to support the increased use of renewable energy?
Base: all respondents (n=1000)



Nearly three in five (58%) respondents supported the building of new infrastructure in their local area to support the increased use of renewable energy, whilst around a fifth (22%) neither supported nor opposed the idea (Figure 10). Around one in ten (12%) respondents opposed the building of new infrastructure in their local area, whilst a smaller number (8%) were not sure.

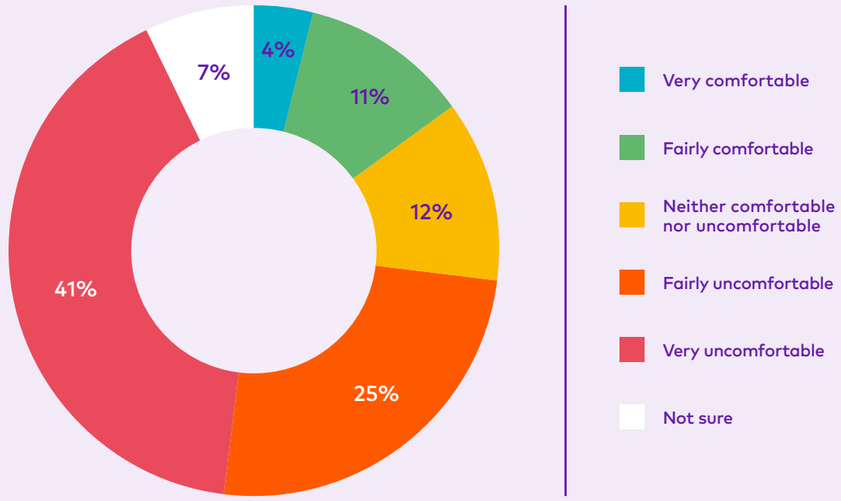
58% **of respondents supported the building of new infrastructure in their local area to support the increased use of renewable energy.**

3.11 Comfort with an external company controlling when appliances and heating run or when plug-in electric vehicles are charged

Respondents were asked to use a scale ranging from very comfortable to very uncomfortable to indicate their level of comfort with an external company controlling when their appliances and heating run or when their plug-in electric vehicles are charged.

Figure 11.1: Comfort with an external company controlling when appliances and heating run or when plug-in electric vehicles are charged

How comfortable or uncomfortable would you feel about an external company controlling when your appliances and heating run or when your plug-in electric vehicles charge?
Base: all respondents (n=1000)



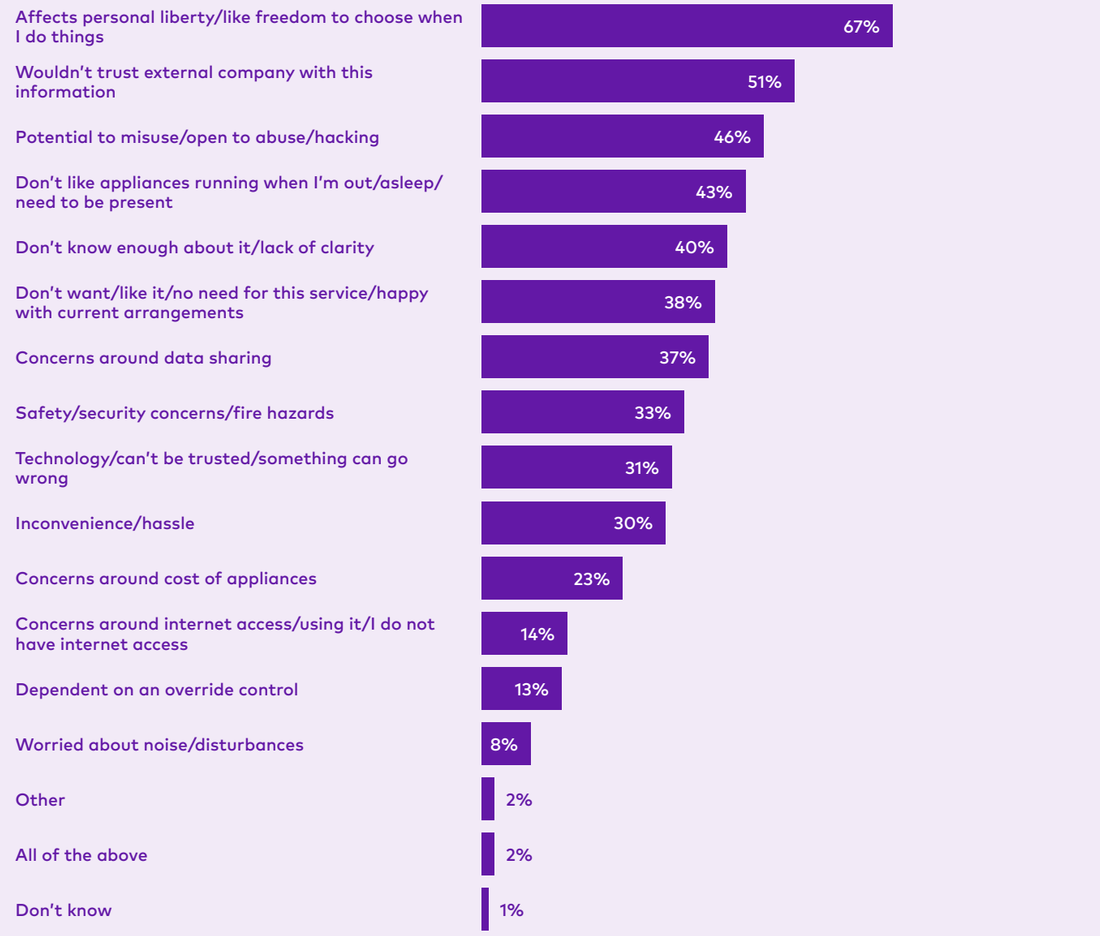
Only about one in six (15%) respondents were comfortable with this idea, whereas two-thirds (66%) were uncomfortable (Figure 11.1). About one in ten (12%) were neither comfortable nor uncomfortable, whilst a smaller number (7%) were not sure.

66% **of respondents were uncomfortable with an external company controlling when appliances and heating run or when plug-in vehicles are charged.**

Respondents who indicated that they would be uncomfortable with an external company having this control were asked a follow-up question asking them to explain why this was the case.

Figure 11.2: Reasons for discomfort with an external company controlling when appliances and heating run or when plug-in electric vehicles are charged

Can you please explain why you feel fairly/very uncomfortable about an external company controlling when your appliances and heating run or when your plug-in electric vehicles charge?
Base: all respondents fairly/very uncomfortable with an external company controlling when appliances and heating run or when plug-in electric vehicles charge (n=676)



Around two-thirds (67%) of respondents who would be uncomfortable with an external company controlling when their appliances and heating run or when their plug-in electric vehicles charge felt this way because they did not want their personal liberty to be affected - this was the most likely reason to be cited (Figure 11.2).

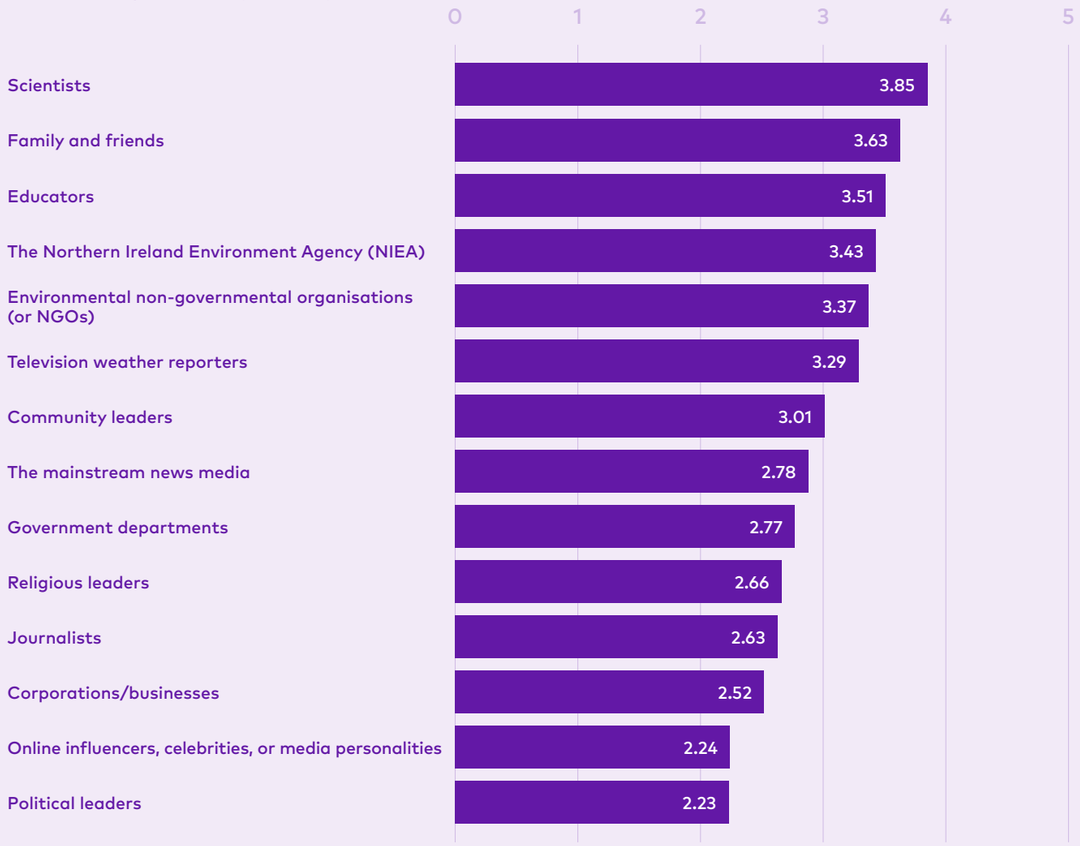
About half (51%) of those who would be uncomfortable stated that they would not trust an external company with this information, whilst a similar number (46%) were concerned about the potential for misuse. Around two in five (43%) stated that they do not like appliances running when they are not present, whilst a similar number (40%) stated that they would be uncomfortable with an external company having such control as they do not know enough about it.

3.12 Extent of trust in sources of information about climate change

Respondents were shown various sources of information and asked to rate on a scale of 1 - 5, where 5 represented completely trust and 1 completely distrust, to what extent they trusted each regarding climate change. A mean score was calculated for each source of information based on respondents' ratings, where the maximum possible score was five.

Figure 12: Extent of trust in source of information about climate change - mean score (max = 5)

On a scale of 1 - 5, where 5 = completely trust and 1 = completely distrust, to what extent do you trust or distrust each of the following as a source of information about climate change?
Base: all respondents (n=1000)



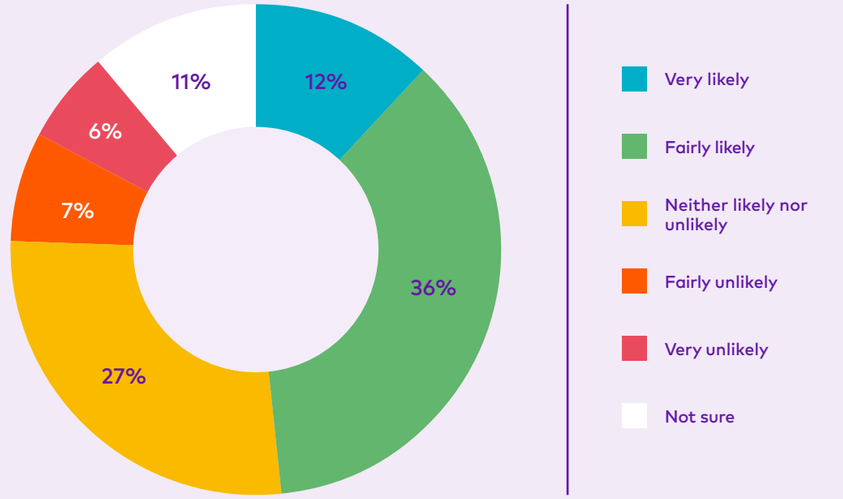
Scientists (mean score: 3.85) were the source of information most likely to have been trusted by respondents, followed by family and friends (mean score: 3.63) then educators (mean score: 3.51) (Figure 12). Political leaders (mean score: 2.23), online influencers, celebrities or media personalities (mean score: 2.24) and corporations/business (mean score: 2.52) were the least likely sources of information to be trusted regarding climate change.

3.13 Likelihood of using a 'one-stop-shop' for energy advice and education

Respondents were asked to use a scale ranging from very likely to very unlikely to indicate how inclined they would be to use a 'one-stop-shop' for energy advice and education to assist them with their bills, retrofitting, etc. as the energy market continues to change.

Figure 13: Likelihood of using a 'one-stop-shop' for energy advice and education

As the energy market continues to change how inclined (likely or unlikely) would you be to use a 'one-stop-shop' for energy advice and education to assist you with your bills, retrofitting, etc?
Base: all respondents (n=1000)



Almost half (48%) of respondents stated that would be likely to use a 'one-stop-shop' for energy advice and education, whilst around one in ten (13%) stated that they would be unlikely to do so. About a quarter (27%) of respondents stated that they would be neither likely nor unlikely to use a 'one-stop-shop', whilst about one in ten (11%) were not sure.

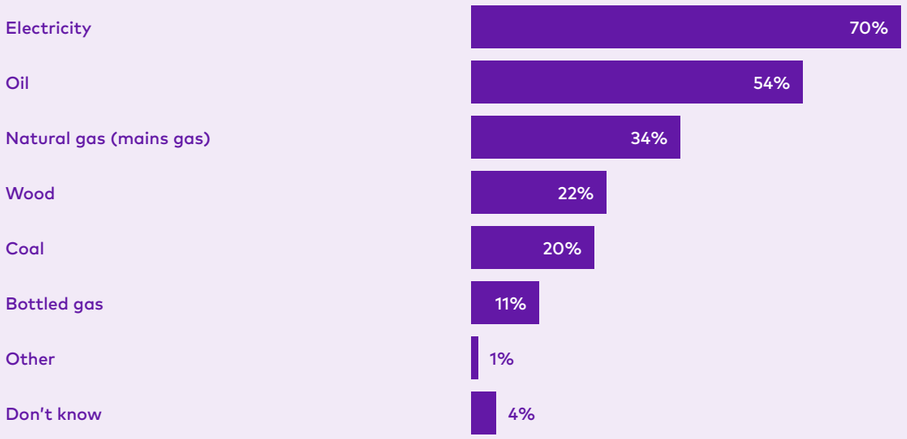
48% **of respondents stated that they would be likely to use a 'one-stop shop' for energy advice and education.**

3.14 Consumer knowledge of energy sources used in their home

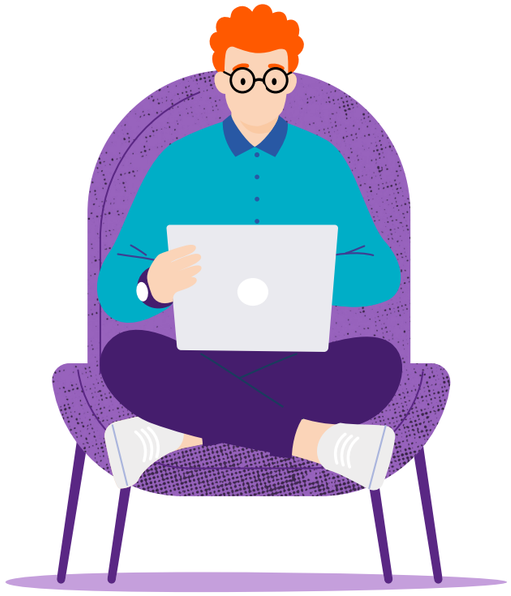
From a list of energy sources provided, respondents were asked to select, to the best of their knowledge, those used in their home.

Figure 14: Consumer knowledge of energy sources used in their home

To the best of your knowledge, which of these are used as energy sources in your home, for example, to provide heating or to power appliances?
Base: all respondents (n=1000)



Seven in ten (70%) respondents stated that electricity is used as an energy source in their home, around half (54%) stated that oil is used, whilst about a third (34%) stated that natural gas is used (Figure 14). Around a fifth (22%) of respondents stated that wood is used as an energy source in their home, a similar number (20%) stated that coal is used, whilst about one in ten (11%) stated that bottle gas is used.

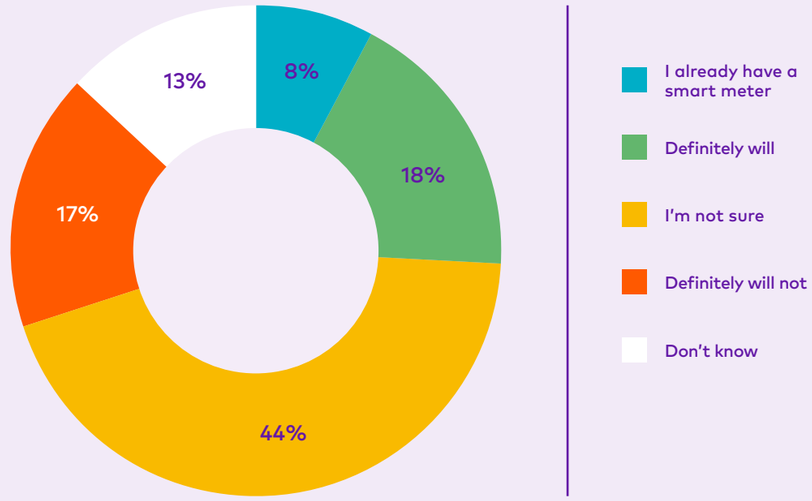


3.15 Likelihood of installing a smart meter in home in the next two years

Respondents were asked to indicate the likelihood of installing a smart meter in their home in the next two years.

Figure 15: Likelihood of installing a smart meter in home in the next two years

Which of the following best describes how likely you will be to install a smart meter in your home in the next two years?
Base: all respondents (n=1000)



Around one in ten (8%) respondents stated that they already have a smart meter installed in their home (Figure 15), with this more likely to have been the case amongst those aged 18-24 (17%) when compared to other age groups. About a fifth (18%) of respondents stated they definitely will install a smart meter in their home in the next two years, with those aged 25-34 (38%) more likely to have been of this view than those from other age categories. Almost a fifth (17%) of respondents stated that they definitely will not install a smart meter in their home in the next two years, with those aged 50-64 (25%) and 65+ (30%) more likely to have felt this way than those from younger age groups. Almost three in five (57%) respondents were either not sure or stated 'don't know' regarding the likelihood of installing a smart meter in their home in the next two years.

3.16 Ease of using appliances between 4pm - 8pm each day

Using a scale ranging from very easy to very difficult, respondents were asked how easy or difficult it would be for them to manage if they were unable to do specific household activities between 4pm - 8pm each day.

Figure 16.1: Ease or difficulty of managing if unable to use appliances between 4pm - 8pm each day

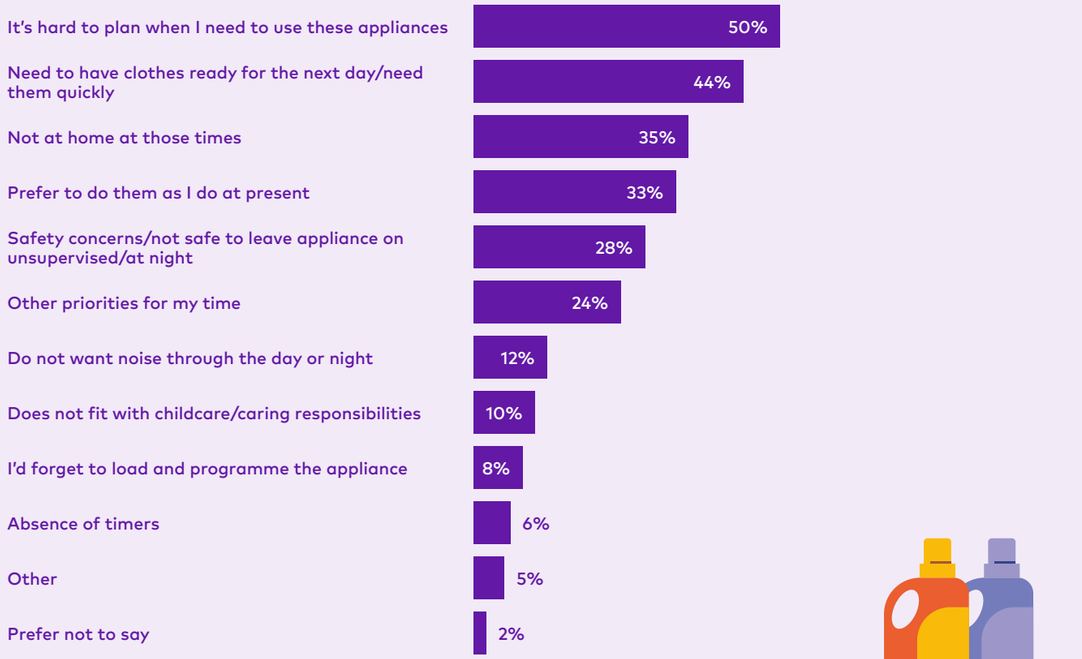
If you were unable to use the following appliances between the times of 4pm - 8pm each day, how easy or difficult would this be for you to manage?
Base: all respondents (n=1000); * all respondents that own an electric/hybrid vehicle (n=36) note the small sample size

Amongst the small number (n=36) of respondents who owned an electric vehicle/plug-in hybrid, four in five (80%) stated that they would find it easy to manage if they were unable to charge their vehicle between 4pm - 8pm each day (Figure 16.1). Around two-thirds (63%) of respondents stated that they would find it easy to manage if they were unable to use their dishwasher during this time, whilst about one in ten (13%) felt that this would be difficult. Around two-thirds (63%) of respondents stated that they would find it easy to manage if they were unable to use their tumble dryer between 4pm - 8pm, whilst about a fifth (19%) would find it difficult. Two-thirds (66%) would find it easy to manage if they were unable to use their washing machine during this time, whilst a fifth (20%) would find it difficult.

Half (50%) of these respondents stated that they find it hard to plan when they need to use these appliances, around two in five (44%) stated that they need to have clothes ready for the next day or need them quickly, whilst about a third (35%) stated that they are not at home at the times outside of the 4pm - 8pm window (Figure 16.2).

Figure 16.2: Reasons that prevent household from using appliances outside 4pm - 8pm

Can you describe in a bit more detail what prevents your household from being able to do this/these things at a different time of day (outside of 4pm - 8pm)?
Base: all respondents for whom it would be difficult/very difficult to manage using appliances outside 4pm - 8pm (n=337)



3.17 Likelihood of using appliances outside 4pm - 8pm if it meant a reduction in the cost of household energy bills

Using a scale ranging from very likely to very unlikely, respondents were asked how likely or unlikely they would be to do specific household activities outside 4pm - 8pm if it meant a reduction in the cost of household energy bills.

Figure 17: Likelihood of using appliances outside 4pm - 8pm if it meant a reduction in the cost of household energy bills

How likely or unlikely would you be to use the following appliances outside of 4pm - 8pm each day, if it meant you would reduce the cost of your energy household bills?
Base: all respondents (n=1000); *all respondents that own an electric/hybrid vehicle (n=36) note the small sample size

Of the small number (n=36) of respondents who owned an electric vehicle/plug-in hybrid, around four in five (81%) would be likely to charge their vehicle outside 4pm - 8pm if it meant a reduction in the cost of their household energy bills (Figure 17). About seven in ten (72%) respondents would be likely to use their washing machine outside these hours in order to reduce household energy bills, whilst a similar number (69%) would be likely to do the same regarding their tumble dryer. Around three in five (61%) respondents would be likely to use their dishwasher outside 4pm - 8pm if it meant a reduction in household energy bills.

81% **of the small number of respondents who owned an electric vehicle/plug-in hybrid would be likely to charge their vehicle outside of these hours if it meant a reduction in the cost of household energy bills.**

72% **of respondents would be likely to use their washing machine outside of these hours it if meant a reduction in household energy bills.**

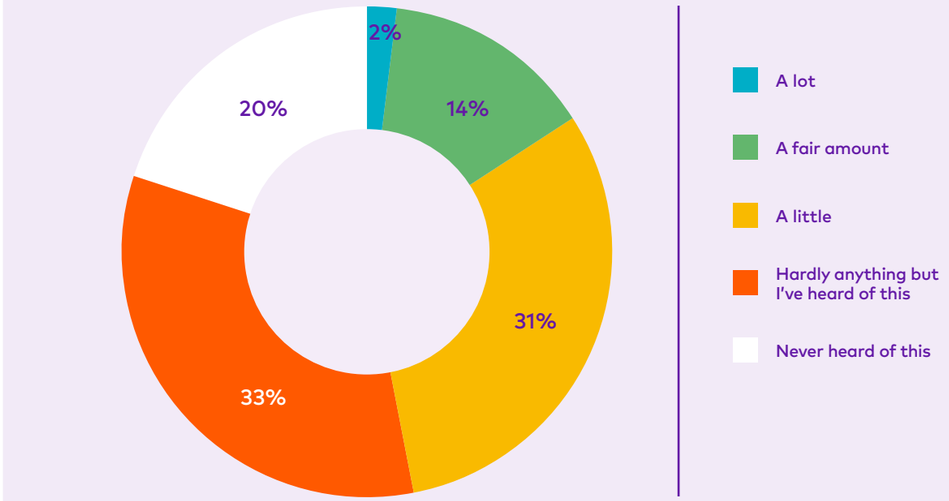
3.18 Consumer knowledge about low-carbon heating systems

Using a scale ranging from a lot to never heard of this, respondents were asked to rate how much, if anything, they knew about low-carbon heating systems prior to the survey.

Respondents were informed that low-carbon heating systems referred to environmentally friendly heating systems which no longer rely on conventional gas central heating but instead use energy from low-carbon alternatives (hydrogen, the sun, heat pumps which draw heat from the ground, etc.) to heat homes.

Figure 18: Consumer knowledge about low-carbon heating systems

Before today, how much, if anything did you know about low-carbon heating systems?
Base: all respondents (n=1000)

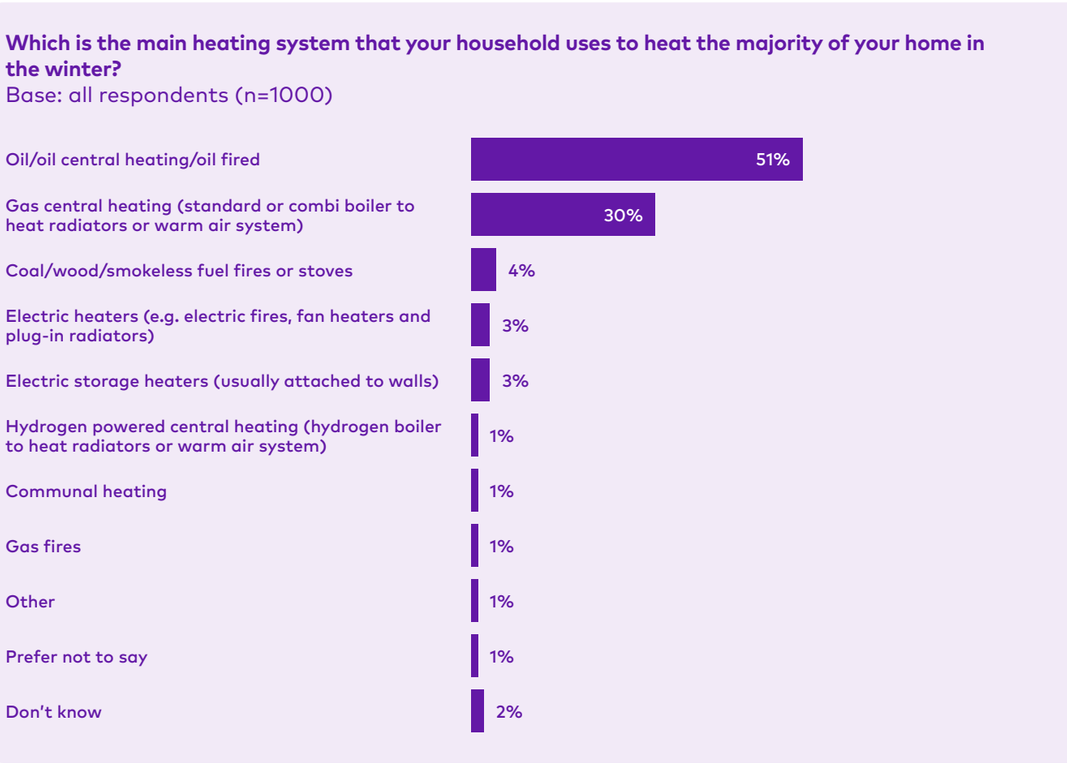


Approaching half (47%) of respondents stated that they knew at least a little about low-carbon heating systems prior to the research, whilst a third (33%) stated that they had heard of low carbon heating systems but knew hardly anything about them (Figure 18). A fifth (20%) of respondents stated that they had never heard of low-carbon heating systems, with females (24%) more likely than males (16%), and those from the C2DE (26%) socio-economic group more likely than those from an ABC1 (14%) background to have given this response.

3.19 Main heating system used by household to heat majority of home in winter

Respondents were asked to indicate the main heating system that their household uses to heat the majority of their home in the winter.

Figure 19: Main heating system used to heat home in winter



About half (51%) of respondents used oil central heating (Figure 19), with those who lived outside the Belfast/Greater Belfast area (62%) more likely to have done so than those who lived within it (34%). Three in ten (30%) respondents used gas central heating to heat the majority of their home in winter, with those living in the Belfast/Greater Belfast area (48%) more likely than those living in other parts of Northern Ireland (18%) to have done so.

Around one in seven (14%) respondents used a heating system other than oil or gas to heat the majority of their home in winter.

3.20 Awareness of household heating systems

From a list of heating systems provided, respondents were asked to identify which, if any, they had heard of prior to the research.

Figure 20: Awareness of household heating systems

Around three in five (62%) respondents had heard of electric storage heaters prior to the research, about half (53%) had heard of smart heating controls, just over two in five (44%) ground source heat pumps, whilst approaching three in ten (27%) had heard of air source heat pumps (Figure 20). A fifth (20%) of respondents had heard of hydrogen powered central heating, whilst a similar number (16%) had heard of district heating networks. Awareness of the heating systems detailed tended to be higher amongst males than females, amongst those aged fifty or older when compared to younger respondents, and amongst those from an ABC1 background when compared to those from the C2DE socio-economic group.

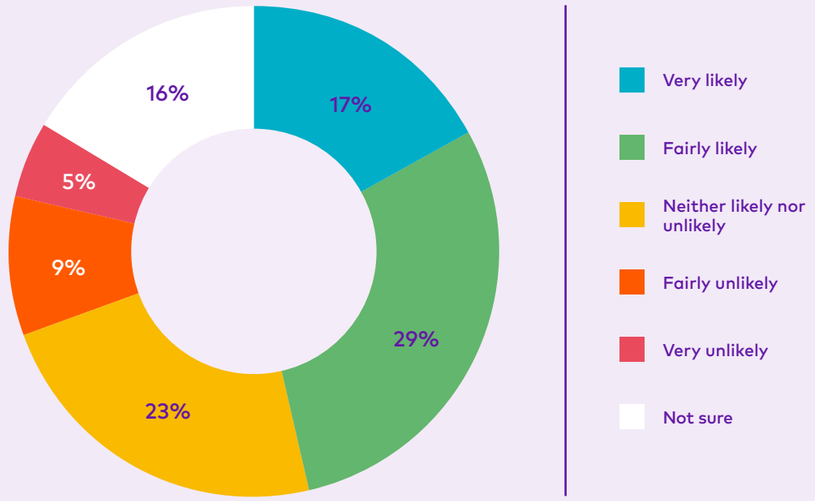
Overall, nearly nine in ten (85%) respondents had heard of at least one of the household heating systems prior to the research.

3.21 Likelihood of using a heating system listed in Question 3.20 to reduce household energy bills

Using a scale ranging from very likely to very unlikely, respondents were asked how likely or unlikely they would be to use one of the home heating systems detailed in Question 3.20 to reduce the cost of their household's energy bills.

Figure 21: Likelihood of using a heating system listed in Question 3.20 to reduce household energy bills

How likely or unlikely would you be to use one of the home heating systems listed in the previous question to reduce the cost of your household's energy bills?
Base: all respondents (n=1000)



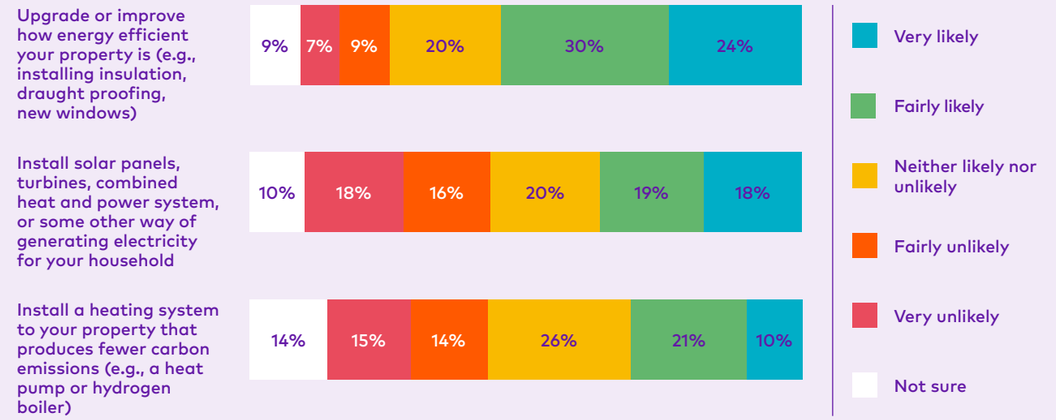
Approaching half (46%) of respondents stated that they would be likely to use one of the heating systems identified in Question 3.20 in order to reduce the cost of their household's energy bills (Figure 21). Around one in seven (14%) stated that they would be unlikely to do so, with those aged 65+ (25%) more likely to have been of this view than younger respondents. Almost a quarter (23%) of respondents stated that they were neither likely nor unlikely to use one of these heating systems in order to reduce the cost of their household's energy bills, whilst about one in six (16%) were not sure.

3.22 Likelihood of upgrading home with energy efficiency measures

Using a scale ranging from very likely to very unlikely, respondents were asked how likely or unlikely they or their household would upgrade or install different energy efficiency measures.

Figure 22.1: Likelihood of upgrading home with energy efficiency measures

How likely or unlikely are you or your household to do the following?
Base: all respondents (n=1000)



Around half (54%) of respondents stated that they or their household would be likely to upgrade or improve how energy efficient their property is, whilst about one in six (16%) stated it was unlikely that they or their household would do so (Figure 22.1). A fifth (20%) of respondents stated that they or their household were neither likely nor unlikely to take this action, whilst about one in ten (9%) were not sure.

Almost two in five (37%) respondents stated that they or their household would be likely to install solar panels, turbines or some other way of generating electricity for their household, whilst about a third (34%) stated it was unlikely that they or their household would do this. A fifth (20%) of respondents stated that they or their household were neither likely nor unlikely to take these measures, whilst one in ten (10%) were not sure.

About three in ten (31%) respondents stated that it was likely that they or their household would install a heating system in their property that produced fewer carbon emissions, whilst a similar number (29%) stated that they or their household were unlikely to do so. Around a quarter (26%) of respondents stated that they or their household were neither likely nor unlikely to take this action, whilst about one in seven (14%) were not sure.

Respondents who stated that they or their household were either unlikely or neither likely nor unlikely to make upgrades or installations were asked a follow-up question asking them to describe in a bit more detail the reasons that this was the case.

Cost was by a considerable margin the reason most likely to have been given by these respondents, with around half (52%) having stated that they would like to make such upgrades and installations but they could not afford to do so (Figure 22.2). About a quarter (24%) stated that there was no guarantee that such measures would save them money, nearly a fifth (19%) felt that they were too old to make the changes economically worthwhile, whilst a similar number (18%) stated that they did not want the hassle of making such improvements to their households.

Figure 22.2: Reasons for household being unlikely or neither likely nor unlikely to make upgrades or installations

Could you please describe in a bit more detail why you or your household are unlikely to consider any of these upgrades or installations?
Base: all respondents very unlikely/fairly unlikely/neither likely nor unlikely to make upgrades or installations (n=695)

52%
of those who were unlikely to make upgrades or installations cited cost as the main reason for this.

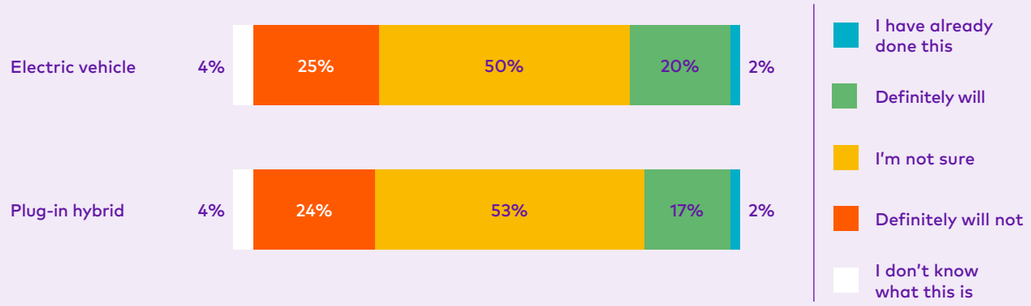
3.23 Likelihood of changing household's car or van in the next five years to an electric vehicle/plug-in hybrid

Respondents were asked how likely they would be to change their household's car or van in the next five years to an electric vehicle.

Respondents were also asked the same question regarding a plug-in hybrid.

Figure 23.1: Likelihood of changing household's car or van in the next five years to an electric vehicle/ a plug-in hybrid

Which of the following describes how likely you will be to change your household's car or van to:
An electric one in the next five years?
A plug-in hybrid one in the next five years?
Base: all respondents (n=1000)



Only a very small number of respondents had already changed their household's car or van to an electric vehicle (2%) or a plug-in hybrid (2%) (Figure 23.1).

A fifth (20%) of respondents stated that they definitely will change to an electric vehicle in the next five years, whilst a similar number (17%) stated that they definitely will change to a plug-in hybrid. In both cases, those aged 25-34 were more likely than those from other age groups to have been of this view. A quarter (25%) of respondents stated that they definitely will not change to an electric vehicle in the next five years, whilst a similar number (24%) felt this way about a plug-in hybrid – in both instances, those aged 65+ were more likely than those from other age groups to have felt this way. Half (50%) of respondents were not sure if they would change to an electric vehicle, whilst a similar number (53%) felt this way regarding a plug-in hybrid.

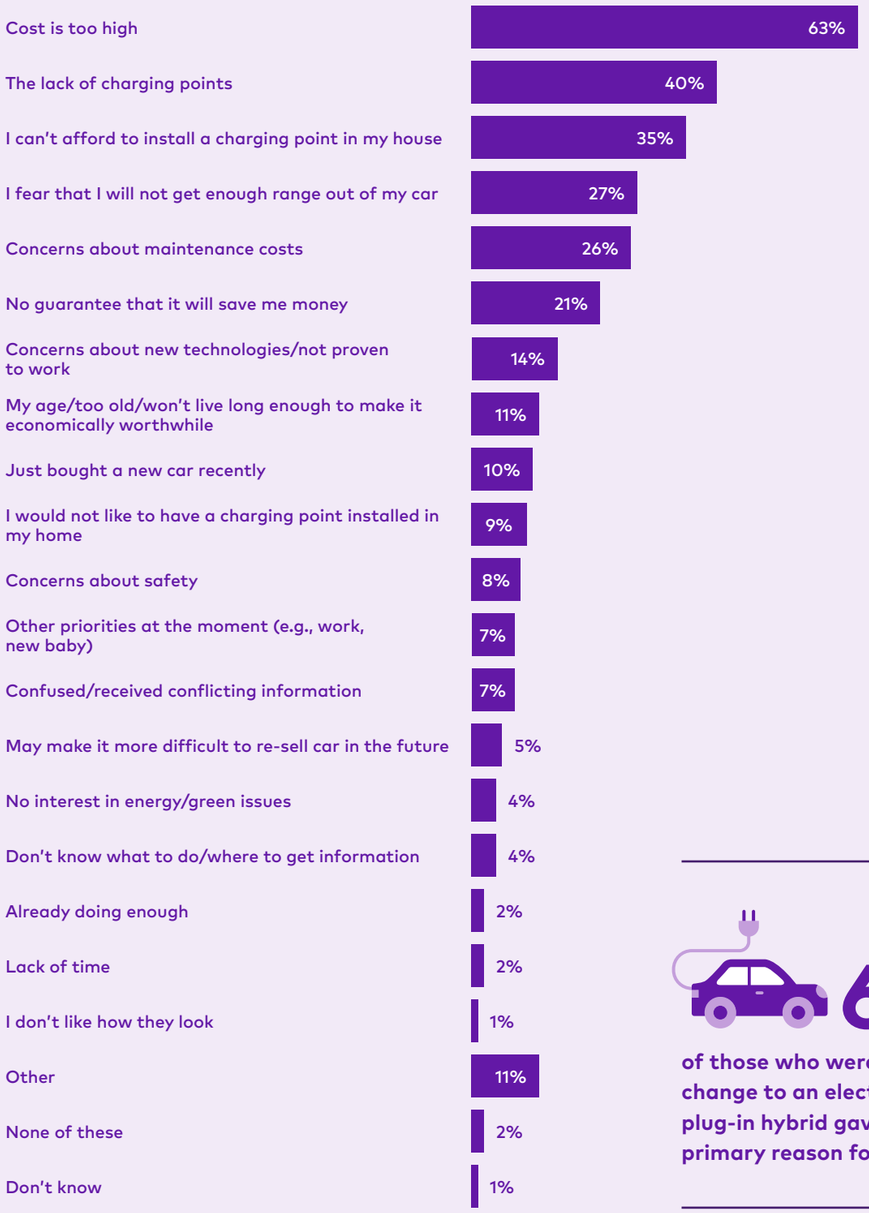
A very small number of respondents did not know what an electric vehicle (4%) or a plug-in hybrid (4%) was.

All respondents who stated that they definitely will not change their household's car or van to an electric vehicle and/or a plug-in hybrid or who stated that they were unsure if they will do so were asked a follow-up question asking if there is anything in particular stopping them or their household from purchasing a vehicle of this type.

Amongst these respondents, cost (63%) was the reason most likely have been given, followed by the lack of charging points (40%), being unable to afford to install charging points in the home (35%), then the fear that the car will not have enough range (27%) (Figure 23.2).

Figure 23.2: Reasons stopping household from purchasing a hybrid or electric car

Is there anything in particular that stops you and your household from purchasing a hybrid or electric car?
Base: all respondents who definitely will not change or who are unsure about changing their household's car or van to an electric or plug-in hybrid in the next five years (n=827)



63%

of those who were unlikely to change to an electric vehicle/ plug-in hybrid gave cost as their primary reason for this view.

4. Conclusions

The results from the survey would suggest that more education relating to decarbonisation may be required to help Northern Ireland reach its net zero goals. Whilst a large majority (84%) had some understanding of the term greenhouse gas emissions, respondents were less likely to be familiar with the terms net zero (70%) and decarbonisation (62%). Only about half (54%) of respondents were aware that the Northern Ireland government is aiming to reduce greenhouse gas emissions to net zero by 2050, notably fewer (30%) knew that by 2030 Northern Ireland must deliver 20% energy savings from buildings and industry, and there was no consensus on the contributor of the largest amount of greenhouse gas emissions in Northern Ireland.

However, a significant majority (78%) of respondents supported the use of renewable energy for providing our power, heat and transport, and a notable proportion (58%) supported the building of new infrastructure in their local area in order to support the increased use of renewable energy. There was substantial support for the provision of government grants to make electric vehicles (78%) more affordable, for government grants to encourage residential and commercial building owners to install cleaner and more efficient heating systems (78%), and for increased government investment in public transport (67%) instead of motorways; though bans on the burning of fossil fuels for home heating purposes and the implementation of higher taxes on cars that use petrol and diesel were more much more likely to be opposed than supported.

A considerable number (62%) of respondents agreed that they are concerned about how much energy is used in their home, and a sizeable majority (72%) stated that their household was already saving energy at home as much as possible.

Concerning household changes within the next few years that would contribute to decarbonisation, a significant proportion of respondents stated that their household had already made changes or that they will do so regarding driving a car less (59%), active travelling (58%), and saving energy by improving their home's energy performance (56%). However, in terms of not flying (32%), replacing some flights with bus or train journeys (23%), and using public transport more often (21%), notable minorities stated that their household will not change their behaviour.

When it comes to making upgrades or installations in the home that would contribute to decarbonisation, or replacing petrol or diesel vehicles with electric or plug-in hybrid alternatives, cost is the main barrier for many of the respondents who stated that they are unlikely to take these actions.

List of Figures

A full copy of the survey questionnaire is available on request from the Consumer Council.

Floor 3, Seatem House, 28-32 Alfred Street,
Belfast, BT2 8EN

Telephone: 0800 121 6022
Textphone: 028 9025 1600
Fax: 028 9025 1663
Email: contact@consumercouncil.org.uk