



Headline Findings

ECIU Launch Survey

4th August 2014



METHODOLOGY

ComRes interviewed 2,021 GB adults online between 1st August and 3rd August 2014. Data were weighted to be representative of all GB adults aged 18+.

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- The company conducting the research (ComRes)
- The client commissioning the survey
- Dates of interviewing
- Method of obtaining the interviews (e.g. in-person, post, telephone, internet)
- The universe effectively represented (all adults, voters etc.)
- The percentages upon which conclusions are based
- Size of the sample and geographic coverage.

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EXECUTIVE SUMMARY

Objectives

This research has the following objectives:

- Explore the British public's understanding of climate change issues;
- Understand where misconceptions lie around the climate change debate;
- Provide interesting data which can be used to generate media impact around the ECIU's launch.

Summary

- A majority (56%) of the British public say that they feel well informed about global climate change; however, there remains a significant minority (40%) who say they feel uninformed. Only 4% of the public say that climate change is not happening, while a majority (57%) say that it is happening and is mainly caused by human activity.
- There appear to be some widespread misconceptions about energy and climate change among the public. Only one in nine (11%) British adults think that almost all climate scientists agree that human activity is the main cause of climate change. Furthermore, the public tends to underestimate public support for renewable energy, with only one in twenty (5%) estimating that between 75% and 100% of the public support the use of renewables, despite findings¹ showing that 80% of the public support this.
- Half (51%) of the British public say that the government's green policies have increased energy bills. Notably, they are unlikely to think that the extraction of shale gas will reduce energy bills (27%), with a higher proportion saying that it will make little or no difference (46%).
- BBC News is the most used and trusted news source for information about energy and climate change issues. The majority of the public tend to think that the media has struck the right balance between different viewpoints in the climate change debate. Around a third (36%) of the British public say that media coverage of energy and climate change issues should be increased.

¹ Department for Energy and Climate Change. April 2014. *DECC public attitudes tracker survey – wave 9*. [Online]. [Accessed 4 Aug 2014]. Available from: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/306898/summary_of_key_findings_wave_9.pdf

FINDINGS IN DETAIL

Results

- A majority of adults in Britain feel that they are well informed about the sources of energy used in the UK (53%) and global climate change (56%); but they are less likely to say that they are well informed of the reasons for energy prices charged to consumers in the UK (36%).

Q. How well informed, if at all, do you feel about each of the following? Base: All GB adults (n=2,021)

Options	Very well informed	Fairly well informed	Not very well informed	Not at all informed	Don't know	NET: WELL INFORMED	NET: NOT WELL INFORMED
The sources of energy used in the UK (eg. coal, gas, electricity) and why it costs what it does?	6%	47%	36%	8%	4%	53%	43%
The reasons for energy prices charged to consumers in the UK	4%	32%	42%	18%	4%	36%	60%
Global climate change	7%	49%	35%	5%	4%	56%	40%

- Although many say that they are well informed on these issues, very few say that they are very well informed.
- Men are more likely than women to say that they are well informed on the sources of energy used in the UK (61% compared to 45%), the reasons for energy prices charged to consumers in the UK (43% vs. 29%) and global climate change (61% vs. 51%). However, we know from other research that men are more likely than women to say that they are knowledgeable on most subjects.
- British adults from the AB social grade (65%) are more likely than those from C2 and DE (both 50%) to say that they are well informed about global climate change.

- Although the majority (57%) of the British public say that climate change is happening and is mainly caused by human activity, there is a significant minority (28%) who say that human activity is not mainly responsible for climate change.

Q. Which of these views about climate change is closest to your own? Base: All GB adults (n=2,021)

Options	%
Climate change is happening and is mainly caused by human activity	57%
Climate change is happening but human activity is not mainly responsible for it	28%
Climate change is not happening	4%
Don't know	11%

- There is a notably high proportion (20%) of 18-24 year olds who say that they do not know whether climate change is mainly caused by human activity or not.
- British adults aged 65+ (48%) are the least likely to agree that climate change is happening and is mainly caused by human activity, with those aged 25-34 (65%) the most likely to agree.
- Men (32%) are more likely than women (24%) to say that climate change is happening but human activity is not mainly responsible for it.

- Despite recent research suggesting that more than 90% of climate scientists agree that climate change is happening and human activity is the main cause, only one in nine (11%) of the British public estimate that almost all climate scientists believe that to be the case.

Q. What proportion of climate scientists do you think believe that climate change is mainly the result of human activities? Base: All GB adults (n=2,021)

Options	%
NET: Almost all/ a majority	53%
NET: A minority/ almost none	11%
Almost all	11%
A majority	43%
About half and half	35%
A minority	9%
Almost none	2%
Mean ²	62.69

- Around half (53%) of British adults believe that most climate scientists think climate change is happening and is mainly caused by human activity.
- Around a third (35%) of the British public think that climate scientists are split on whether climate change is happening and that human activity is the main cause.

² For mean: Almost all = 100, a majority = 75, about half and half = 50, a minority = 25 and almost none = 0.
 Mean = [(100 x number selecting 'almost all') + (75 x number selecting 'a majority') + (50 x number selecting 'about half and half') + (25 x number selecting 'a minority')] / total number of respondents.

- Half (50%) of British adults say that recent flooding has made them more convinced that climate change is happening. A similar proportion (47%) say that it has had no effect on their views.

Q. What impact, if any, did the flooding that happened earlier this year in the UK have on your opinion of climate change? Base: All GB adults (n=2,021)

Options	%
NET: Made me more likely to think that climate change is happening	50%
It made no difference to my views	47%
It made me more likely to think that climate change is happening and that human activity is the main cause	27%
It made me more likely to think that climate change is happening, but made no difference to my view of the cause	22%
It made me less likely to think that climate change is happening	3%

- Although half of the British public say the recent flooding has made them more convinced climate change is happening. A little over a quarter (27%) say that it has also made them more convinced that human activity is the main cause.
- Londoners (38%) are the most likely to say that the recent flooding has made them more convinced that climate change is happening and that is mainly caused by human activity. Those in the East of England (18%), the South East (23%) and the East Midlands (23%) are the least likely to say this.

- **Gas is seen as the main contributor to the UK's electricity generation. On average, the British public think that 27% of our electricity is generated using gas and 20% is generated using coal.**

Q. Now for some questions on energy in the UK. First, what proportion of the UK's electricity do you think is currently generated by the following methods? Base: All GB adults (n=2,021)

Options	Mean
Gas	27
Coal	20
Oil	18
Nuclear	16
Renewables (such as wind, solar and hydroelectricity)	10
Imported from abroad on cables	10

- On average, British adults think that renewables contribute a lot less than gas, coal, oil and nuclear to the UK's electricity generation.
- Those aged 18-24 (11.98) and 25-34 (11.50) are more likely than those aged 55-64 (9.09) and 65+ (7.97) to think that renewables contribute towards generating a larger share of the UK's electricity.

- Around two thirds of British adults think that only up to half of Britons support the use of renewable energy to provide the UK’s electricity, fuel and heat. Given that a survey by DECC in March 2014³ showed that support was almost twice as high (80%), this finding reveals that there is a large misconception among British adults about the level of support for renewables.

Q. According to a recently published government survey, what proportion of the people in the UK do you think support using renewable energy such as wind and solar power to provide the UK’s electricity, fuel and heat? Base: All GB adults (n=2,021)

Options	%
0%-25%	20%
26%-50%	43%
51%-74%	32%
75%-100%	5%

- Only one in twenty (5%) of Britons estimate public support for renewables to be between 75% and 100%.
- A quarter of those aged 55-64 (24%) and 65+ (25%) say that public support for the use of renewables is as low as 0%-25%. This compares to only a sixth of those aged 18-24 (16%) and 25-34 (17%).

³Department for Energy and Climate Change. April 2014. *DECC public attitudes tracker survey – wave 9*. [Online]. [Accessed 4 Aug 2014]. Available from: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/306898/summary_of_key_findings_wave_9.pdf



- **Around three in four (78%) British adults believe up to half of the public oppose the use of renewable energy to generate electricity in the UK.**

Q. According to the same survey, what proportion of the people in the UK do you think oppose using renewable energy such as wind and solar power to generate electricity in the UK? Base: All GB adults (n=2,021)

Options	%
0%-25%	37%
26%-50%	41%
51%-74%	19%
75%-100%	3%

- Although British adults are unlikely to think a majority of the public support the use of renewables, they are also unlikely to think that a majority oppose them. Only 3% estimate public opposition to be between 75% and 100%, while a fifth (19%) estimates public opposition to be between 51%-74%.

- British adults are most likely to say that many countries in the world, both rich and poor, have laws in place to address climate change (41%). Only one sixth (18%) believe that only European countries have laws in place, whereas even fewer (7%) say that Britain is the only country with laws in place.

Q. The UK has laws in place designed to address climate change. But what about other countries? Which of the following statements comes closest to what you believe is true? Base: All GB adults (n=2,021)

Options	%
Many countries in the world, rich and poor, have laws in place to address climate change	41%
Only rich countries around the world have laws in place to address climate change	34%
Only European countries have laws in place to address climate change	18%
Britain is the only country in the world that has laws in place to address climate change	7%

- Demographic groups are fairly consistent in the extent to which they think climate change laws are in place around the world.

- A similar proportion of the British public think that the UK government’s laws (25%) and the EU’s laws (23%) are most responsible for the recent increase in the number of wind farms and solar panels in the UK. However, the public are most likely to think that these two legislatures are equally responsible (34%).

Q. What do you think is most responsible for the recent increase in the number of wind farms and solar panels in the UK: laws from the UK government or laws from the European Union, or both equally?

Base: All GB adults (n=2,021)

Options	%
UK government laws	25%
The European Union (EU) laws	23%
Both equally	34%
Don't know	18%

- More than a quarter (28%) of those aged 18-24 say that they don’t know who, out of these two legislatures, is most responsible for the recent increase in wind farms and solar panels in the UK. Moreover, women (24%) are twice as likely as men to say that they don’t know (12%).
- Those from the AB social grade (29%) are more likely than those from the C1C2 (23%) and the DE (22%) to think that the recent increase in renewables is due to UK government laws.

- Half (51%) of the British public think that the government's policies of encouraging use of green energy have increased energy bills. A third (34%) feel that they have made no difference.

Q. What impact do you think the government's policies of encouraging use of green energy have had on energy bills in the UK? Base: All GB adults (n=2,021)

Options	%
NET: Increased	51%
NET: Reduced	6%
Increased a great deal	14%
Increased somewhat	37%
Make no difference	34%
Reduced somewhat	6%
Reduced a great deal	<1%
Don't know	9%

- Men (61%) are significantly more likely than women (42%) to think that the government's policies towards green energy have increased energy bills. Similarly, those aged 55-64 (60%) and 65+ (62%) are more likely than those aged 18-24 (35%) and 25-34 (45%) to think that these policies have increased energy bills.

- Although around a quarter (27%) of British adults think that the extraction of shale gas would reduce bills, around half (46%) think that it would make no difference, while a sixth (16%) think it would increase bills.

Q. Shale gas is a gas that is found in shale rock. A number of companies want to start extracting it in the UK. If shale gas is extracted, what impact, if any, do you think that would have on energy bills in the UK? Base: All GB adults (n=2,021)

Options	%
NET: Increase	16%
NET: Reduce	27%
Increase a great deal	3%
Increase somewhat	12%
Make little difference either way	46%
Reduce somewhat	24%
Reduce a great deal	3%
Don't know	12%

- Only 3% of the British public think the extraction of shale gas would reduce energy bills a great deal.
- Those aged 55-64 (31%) and 65+ (39%) are the most likely out of all age groups to think that the extraction of shale gas will reduce energy bills, with only a fifth (19%) of those aged 18-24 and 25-34 saying the same.
- A third (33%) of those from the AB social grade say that shale gas will reduce energy bills, compared to only a quarter (23%) of those from the DE social grade.

- TV news outlets tend to be the most popular source for news about energy and climate change, with BBC News (62%) being significantly the most popular.

Q. From which three of the following news organisations do you personally most hear about energy and climate change issues? Base: All GB adults (n=2,021)

Options	%
BBC News	62%
ITV News	27%
Sky News	15%
The Daily Mail	14%
Channel 4 News	10%
The Guardian	8%
The Sun	8%
Your local newspaper	7%
The Daily Telegraph	6%
Your local radio station	6%
The Times	5%
The Independent	4%
The Mirror	3%
The Financial Times	1%
None of these	18%

- The Daily Mail (14%) is the most popular newspaper source for information about climate change.
- More than a third (35%) of 18-24 year olds and around a quarter (23%) of those aged 25-34 say that none of these sources are their primary resource for news about energy and climate change, suggesting that a significant proportion of younger adults are either getting their news from less traditional sources or not getting this news at all.

- More than half (55%) of the public say that BBC News is the most trustworthy provider of reliable information on energy and climate change issues. Around half as many people (25%) would say the same about ITV, the second most trusted of all those tested.

Q. Which three of the following news organisations would you trust most to provide reliable information on energy and climate change issues? Base: All GB adults (n=2,021)

Options	%
BBC News	55%
ITV News	25%
Sky News	17%
Channel 4 News	13%
The Guardian	10%
The Times	8%
The Daily Mail	7%
The Independent	7%
The Daily Telegraph	6%
Your local newspaper	5%
Your local radio station	4%
The Financial Times	3%
The Sun	3%
The Mirror	2%
None of these	25%

- Although the Daily Mail is the most popular newspaper source for information on energy and climate change, it is unlikely to be seen as the most trustworthy, with only 7% of the public saying this.
- Significantly, two in five (41%) 18-24 year olds say that they trust none of the news organisations tested to provide reliable information about energy and climate change.

- A third (35%) of the British public feel that the media exaggerates the threat of climate change.

Q. For each of the following, which is closest to your view about the British media? Base: All GB adults (n=2,021)

Options	%
The British media tends to exaggerate the threat of climate change	35%
The balance is about right	50%
The British media tends to downplay the threat of climate change	15%

- Men (40%) are more likely than women (30%) to say that the media exaggerates the threat of climate change. Similarly, those aged 55-64 (42%) and 65+ (48%) are more likely than those aged 18-24 (25%) to think that the media exaggerates the threat.
- Those aged 18-24 (20%) and 25-34 (20%) and adults from London (28%) are particularly likely to say that the media downplay the threat of climate change.

- The majority (59%) of the public feel that the media strikes a good balance in airing the views of coal, oil and gas companies on the one hand, and renewable energy companies on the other.

Q. Which three of the following news organisations would you trust most to provide reliable information on energy and climate change issues? Base: All GB adults (n=2,021)

Options	%
The British media tends to give too much prominence to the views of coal, oil and gas companies	25%
The balance is about right	59%
The British media tends to give too much prominence to the views of renewable energy companies	16%

- Those aged 65+ (27%) are the most likely of all age groups to say that the media gives too much prominence to the views of renewable energy companies.

- Again, the majority (54%) of the public feel that the media has struck the right balance on giving prominence to climate change sceptics and environmental pressure groups.

Q. Which three of the following news organisations would you trust most to provide reliable information on energy and climate change issues? Base: All GB adults (n=2,021)

Options	%
The British media tends to give too much prominence to climate change sceptics	21%
The balance is about right	54%
The British media tends to give too much prominence to environmental pressure groups	25%

- Demographics groups are fairly consistent in the extent to which they think that the British media give too much prominence to climate change sceptics.
- Older adults aged 55-64 (30%) and 65+ (34%) are more likely than younger demographics to think that too much prominence is given to environmental pressure groups in the British media.

- **More than a third (36%) of British adults say that the media should increase coverage of energy and climate change issues.**

Q. Which three of the following news organisations would you trust most to provide reliable information on energy and climate change issues? Base: All GB adults (n=2,021)

Options	%
The British media should increase coverage of energy and climate change issues	36%
The balance is about right	51%
The British media should reduce coverage of energy and climate change issues	13%

- Those from London (43%) are the most likely of all regions to say that coverage around energy and climate change issues should increase.
- Although age demographics are fairly consistent in the proportion that would like to see an increase in coverage, older adults are significantly more likely to say that they coverage should be reduced. A fifth of those aged 55-64 (19%) and 65+ (21%) say that the coverage should be reduced, compared to only less than one in ten of those aged 18-24 (8%) and 25-34 (7%).



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