Making a positive difference for energy consumers

Consumer survey 2021 - consumer attitudes towards climate change and uptake of low carbon technologies

Introduction

This document presents a brief summary of findings from the 2021 Ofgem Consumer Survey relating to consumer attitudes to climate change, energy use and uptake of low carbon technologies.

The survey interviewed 4,037 energy consumers in Great Britain who were solely or jointly responsible for their household's energy bills.[1] Fieldwork was conducted from 19th August to 17th September 2021. Comparisons are made to the 2020 survey[2], which used comparable methods and delivered a sample of 4,608 British energy consumers.

To achieve Net Zero greenhouse gas emissions, the way energy is used in Great Britain will change. For consumers, it is well established that social and behavioural change can make an important contribution to meeting Net Zero. Changes to the way we heat our homes, power our vehicles and how and when we use energy will be needed, and technology will be a key enabler. This research helps to track where consumers are at on the decarbonisation journey.

Key findings

Concern about climate change is high but many think they are doing enough

Concern about climate change is high. 80% of consumers report being worried about climate change. However, there remains a mismatch between what consumers think they need to do to reduce the impacts of climate change and the actual behavioural changes needed. Over half of consumers (56%) already think they're doing enough to tackle the effects of climate change, this figure is unchanged since the 2020 survey.

[1] The survey was conducted online by Ipsos MORI, with the sample drawn from online access panels, and quotas were used to deliver a broadly representative sample of energy consumers in Britain. Minor weighting was applied to bring profiles in line with national estimates, and only weighted data is shown.

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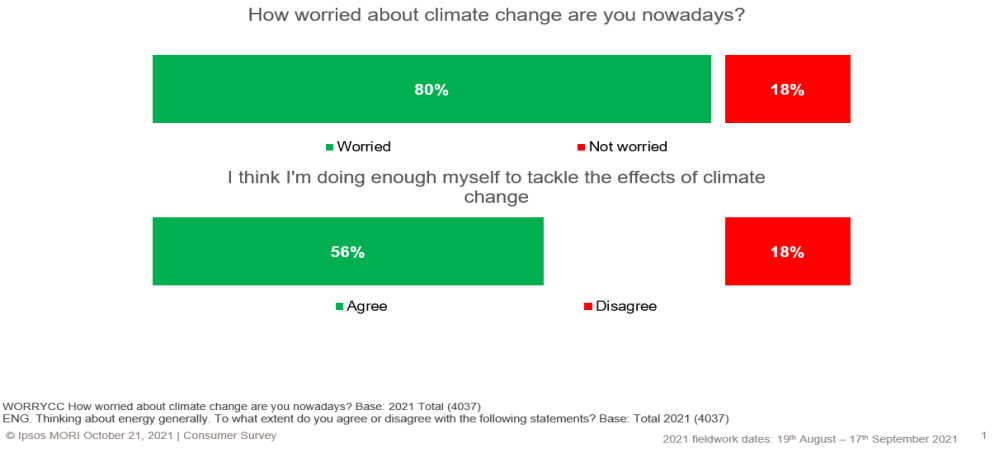
There are indications of a disconnect between climate action and home energy usage. Among those that think they are doing enough to tackle climate change, 43% do not consistently monitor energy use in their home and 72% do not have any type of low carbon technology[3].

Figure 1: Climate change concerns and actions



Understanding of energy use is high but many don't monitor their energy use

As we progress through the energy transition the way consumers use energy will change. This may require consumers to be more aware of how they use energy and when they use it (or be open to third parties doing this on their behalf).

At the time of the survey (before publicity about increasing gas prices, and subsequent supplier failures), 75% said they understand how much energy they use in their home, and 57% were concerned about their energy usage. However, only 37% of consumers said they consistently monitor their energy use (i.e. do it always or most of the time). Even amongst households who have a smart meter, only half (51%) said they consistently monitor their energy use.

Intentions to install low carbon heating are increasing, but intentions to adopt electric vehicles are unchanged

In the future it is expected that innovation will drive new products, services and technologies to support the low carbon energy transition. It is important to understand how consumers are

[3] Low carbon technologies includes: electric vehicles, solar photovoltaic panels, smart appliances, heating controls or a heat pump

engaging with these new technologies as they become available and whether we are seeing any shift in attitudes and behaviours.

Prevalence of low carbon heating remains low but there are encouraging signs that attitudes are shifting. Intentions to install low carbon heating (e.g. heat pump or hydrogen boiler) have increased (in 2021 23% of owner occupiers who don't already have low carbon heating say they will install a low carbon heating system, up from 14% in 2020).

Adoption and intentions to adopt electric vehicles remain unchanged. Despite increasing sales of plug-in vehicles over the past 12 months, our 2021 survey showed 5% of consumers said their household had a plug-in electric vehicle (2% had fully electric vehicles and 3% had plug in hybrid vehicles). Currently a quarter (24%) of all consumers said that their household is likely to buy a plug-in vehicle in the next 5 years (unchanged since 2020 survey).[4]

When it comes to energy efficiency, just over a quarter (27%) of owner-occupiers have already upgraded their home to be more energy efficient, and a similar proportion (26%) intend to do so in the future (unchanged since 2020).

There are encouraging signs that some consumers are open to smart technologies that will enable flexible energy use, but for others, barriers around third party control remain

Smart technologies are an important element in the move to greater demand side flexibility, which in turn will mean less of our energy will need to come from fossil fuels at peak times. They have the potential to make it easier for consumers to be flexible by controlling when heating, appliances or EV chargers are run. 17% of energy consumers said they have smart appliances or heating controls. Whilst there continue to be encouraging signs that EV owners are open to smart charging, barriers remain for a number of consumers around third party control. 58% of all energy consumers said they would feel uncomfortable with an external company controlling when their heating, appliances or smart chargers run, similar to 2020. Lack of trust remains the key barrier, with people concerned about safety, reliability and sharing data and information with companies.

[4] Note fieldwork ended before the shortgage of petrol period began which may have changed the balance of attitudes