

Ipsos MORI



Energy Issues 2009

Survey of British public opinion

2 February 2010

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Summary

Summary

- The British public has a preference for renewable forms of electricity generation, especially hydro power, followed by tidal, wave, offshore wind and solar energy. Onshore wind energy is least popular of the renewable methods. Fossil fuel methods are less popular, especially coal, which is ranked bottom of the list. Nuclear power is ranked just above coal in terms of preference
- While price of domestic energy is the most frequently mentioned concern overall (combining first and second level priorities), several other concerns are significant. Affordability for all comes a close second to price as a concern, followed by the ability to save costs by being energy efficient and being able to save the environment by reducing emissions. Britain being able to provide all the electricity and gas people want is relatively least mentioned as a first or second level concern
- When asked about future imports of gas from abroad the public show a high level of concern – 69% are very or fairly concerned. Concern about Britain running out of gas is even higher (74%). While concern is highest among the higher social grades, a strong majority of DEs is also concerned about both eventualities
- Knowledge of who is responsible for making sure Britain has enough gas and electricity varies, with a range of answers and one in ten stating they do not know. A small majority (57% gas; 56% electricity) attributes responsibility to the Government in the cases of gas and of electricity, with the second most frequently mentioned actor being the energy companies
- There is considerable interest in some of the proposed energy saving measures, though none would find overwhelming majority acceptance, and some are unpopular. The highest likelihood of adoption is for heating water and using appliances at different times of the day to current practice. A little less popular, but still on balance likely rather than unlikely to be adopted is the use of technology for automatic switching on or off of appliances to match costs of energy. There is more resistance to varying the times of completing household tasks, the proportion likely to adopt the measure is balanced by the proportion who will not. On the other hand, it is generally thought to be unlikely that there will be greater use of electric storage heaters.

Background and Methodology

Background and Methodology

This report is based on data from a nationally representative omnibus (CAPIBUS) survey of the population of Great Britain aged 15+. Ipsos MORI conducted 1,961 quota controlled face-to-face interviews in the period 11-21 December 2009 using computer aided personal interviewing in 174 systematically-selected sampling points (more than on a standard week due to bad weather – fieldwork period was also extended). The data is weighted to the known demographic profile of the population. Percentages are rounded to the nearest whole number; values of less than one per cent are shown as *.

CAPIBUS Methodology

1. Methodology

- Capibus was launched in 1992 and was the first omnibus of its kind to use ‘computer assisted personal interviewing’ (CAPI) to administer the questionnaire. This new approach instantly improved the quality and accuracy of the information collected and has become a quality standard in the omnibus industry worldwide.

2. How Are People Selected?

- Capibus provides a high quality sample of adults aged 15+, representative of the population at a national and regional level. In this respect it is ideal for reporting what the population at large feels about current issues or certain products.
- Capibus uses a two stage random location design to select respondents to take part in the weekly survey. The two stages are as follows:

i) Stage One - Selection of Primary Sampling Units

- The first stage is to define primary sampling units which will be fixed for at least one year. A total of approximately 145 Local Area Authorities are randomly selected from our stratified groupings with probability of selection proportional to size. This ensures that the most populated areas in Britain are always represented in the sample.

ii) Stage Two - Selection of Secondary Sampling Units

- The second stage of sampling happens every week on Capibus. At this stage, one or two output areas (OA) are randomly selected from each Local Area Authority, this then becomes the secondary sampling unit.
- An Output Area (OA) is a very small area made up of between 60 to 100 addresses. Although we could just choose 145 OAs each week completely at random and set our interviewer quotas for sex, age, working status and social grade - a common approach for ensuring a sample is nationally representative - we use the CACI ACORN geodemographic system in the selection process.
- Adopting this approach helps to eliminate any possible bias in the sample caused by interviewing people all with the same background. Using CACI ACORN allows us to select OA's with differing profiles such that we can be sure we are interviewing a broad cross-section of the public; since clearly even people of the same age and working status may have a different viewpoint depending on their background.

- Because the sampling process is repeated every week, the Capibus sample is matched wave on wave, making it ideal for taking successive measurements on the same issue.

3. Geography

Uses the standard regions, which are defined at county level by the Department of the Environment.

4. The Interviewing Process

- The Capibus questionnaire is collected by the interviewers via modem and is downloaded onto their laptop computer. The computer controls which questions are asked, depending on the respondent's particular circumstances, and will rephrase questions to respond to previous answers. This makes the questionnaire 'intelligent' allowing the interviewing process to be more interactive; in turn this allows for more complex questionnaire design and provides more accurate and insightful research findings.

5. How Many People Are Interviewed?

- Capibus speaks to 2000 adults every week of the year (excluding Christmas and Easter) such that each year more than 100,000 people take part in the survey.
- This ensures the findings for the nation as a whole are statistically accurate to +/- 1 percentage point, so even a seemingly small shift in the results from one month to the next could signify a real change in public attitudes.

6. Reporting

- All information collected on Capibus is weighted to correct for any minor deficiencies or bias in the sample. Capibus uses a 'rim weighting' system which weights to NRS defined profiles for age, social grade, region, tenure, ethnicity and working status - within sex. Rim weighting is superior to the more common system of 'cell weighting' since it is far less likely to distort the data.

Main Findings

Main Findings

Preferences for Sources of Electricity

The various forms of renewable energy are most popular with the British public as sources of electricity, led by hydro power, and fossil fuels are the least popular, though nuclear energy is apparently viewed more similarly to a fossil fuel method. Tidal power, wave power, offshore wind energy and large scale solar power are also very popular. Wind farms on land are somewhat less popular, but still ahead of the various methods that involve combustion. Most favoured of these is biomass, followed by gas. Nuclear energy is less likely to be preferred than any other form except coal, which is bottom of the ranking.

Preference for sources of electricity – Overall ranking

Q3 On a scale of 1-5, where 5 means a very strong preference and 1 means a very weak preference, please indicate your preference for each of the following sources?

	Total	Social Grade				Std Region			Concerned about gas running out	
		AB	C1	C2	DE	Eng	Scot	Wales	Very/fairly	Not very/not at all
<i>Base: All respondents</i>	(1961) %	(389) %	(647) %	(418) %	(507) %	(1671) %	(149) %	(141) %	(1438) %	(474) %
Hydro power	4.03	4.21	4.00	3.99	3.86	4.01	4.21	3.99	4.10	3.83
Tidal power	3.96	4.16	3.95	3.95	3.71	3.95	4.10	3.92	4.02	3.80
Wave power	3.95	4.06	3.96	4.00	3.72	3.93	4.12	3.89	4.03	3.67
Wind farms off the coast	3.94	4.08	3.93	3.89	3.83	3.93	4.25	3.62	4.01	3.75
Large scale solar power	3.80	3.88	3.79	3.86	3.63	3.79	3.87	3.79	3.85	3.62
Wind farms on land	3.65	3.72	3.63	3.70	3.55	3.64	3.95	3.42	3.71	3.47
Biomass	3.48	3.48	3.50	3.53	3.40	3.48	3.46	3.52	3.49	3.43
Gas	3.05	2.80	3.07	3.08	3.33	3.03	3.29	3.09	3.02	3.15
Nuclear power	2.79	3.06	2.72	2.68	2.66	2.80	2.79	2.73	2.80	2.77
Coal	2.41	2.13	2.42	2.56	2.64	2.39	2.74	2.35	2.35	2.62

Source: Ipsos MORI

The most consistent variations by subgroup can be seen by social grade, where, in general terms, a higher social grade is associated with support for renewable methods. For example, ABs (professional and managerial) show a preference for hydro and offshore wind; ABs, C1s (white collar) and C2s (skilled blue collar) are all more likely than unskilled and state-supported DEs to prefer tidal and wave power. ABs and C2s also prefer solar energy and onshore wind. Nuclear power is also clearly favoured most by the AB social group. At the other end of the scale, it is the C1C2DE social groups that show a preference for both gas and coal as methods of generation, in contrast to ABs. Biomass shows no social grade-related differences in opinion.

While there is an indication of greater preference for some renewable methods among older people, the pattern by age is not particularly strong or consistent. Furthermore, male and female views do not differ greatly overall, except in the case of nuclear power, towards which men are significantly more favourable.

Scotland is distinguished by its differing pattern of views in some instances. Respondents in Scotland show a significant preference for coal, gas, offshore and onshore wind, and hydro power than those in the rest of the country. There is no significant difference from England in attitudes to nuclear energy.

Those most concerned about GB gas supplies running out show preference for wind, nuclear, tidal, hydro and wave power, while those least concerned about gas running out favour coal and gas use.

Importance of Factors in Relation to Gas and Electricity

Most important factors

Q4 Which one of these factors do you consider to be most important in relation to gas and electricity (first and second mentions shown separately)?

	Total		First mention only									
	First mention	Second mention	Age			Social Grade				Std Region		
			15-34	35-64	65+	AB	C1	C2	DE	Eng	Scot	Wales
<i>Base: All respondents</i>	(1961) %	(1883) %	(610) %	(883) %	(468) %	(389) %	(647) %	(418) %	(507) %	(1671) %	(149) %	(141) %
The price you pay	34	18	36	34	32	27	30	40	43	34	42	34
Gas and electricity that is affordable to everyone (eg the vulnerable)	23	20	20	23	27	21	26	22	21	22	24	32
Being able to help the environment by reducing emissions	16	20	15	19	13	27	16	12	8	17	11	14
Being able to save costs by being energy efficient	13	26	15	13	11	13	15	12	12	13	13	11
GB being able to provide all the gas & electricity people want to use	9	13	7	9	14	10	10	8	9	10	8	7
Don't know/care	4	2	7	2	2	2	3	5	7	4	1	2

Source: Ipsos MORI

While price is the salient concern for more people than any other factor, particularly the C1C2DE social groups, other concerns do attract substantial numbers of mentions. Most notable among these is the concept of affordability to everyone, including vulnerable groups in the population. This is a particular concern for people aged 65 and over, for the C1 social group and notably for those in Wales, where it is mentioned by almost as many as mention price. Being able to help the environment is a little less frequently mentioned— this is more a concern of the 35-64 age group (especially the 45-54s) and the ABC1 social groups. Being able to save money by being energy efficient is mentioned by one in eight people and there is little variation by demographic group. Great Britain being able to provide all the gas and electricity people want (mentioned first by just 9% overall, and the least frequently mentioned concern) strikes more of a chord with the 65+.

Factors other than price are more frequently mentioned as a “second mention”, though the issue of Great Britain being able to provide all the gas and electricity people want continues to be least mentioned. Total combined mentions at first or second place yield the same ranking of factors to the first mentions, other than energy efficiency marginally overtaking environmental concerns.

Concern about Gas Supplies

Concern is high about the increasing need to import gas from abroad – seven in ten of the public are very or fairly concerned. This concern increases with age – it is greater than average among the over 35 age groups, especially the over 45s, and among the ABC1C2 social groups. While there is more concern in Scotland, the Welsh are marginally less concerned.

Concern about gas imports

Q5 As North Sea Gas supplies start to run out, Britain will need to buy more gas from other countries. How concerned are you, if at all, that more gas will be coming from abroad in the next 10-15 years?

	Total	Age			Social Grade				Std Region		
		15-34	35-64	65+	AB	C1	C2	DE	Eng	Scot	Wales
<i>Base: All respondents</i>	(1961) %	(610) %	(883) %	(468) %	(389) %	(647) %	(418) %	(507) %	(1671) %	(149) %	(141) %
Very/fairly concerned	69	59	73	77	75	72	70	60	69	79	57
Not very/not at all concerned	28	37	25	21	24	26	27	35	28	19	40
Don't know	3	4	2	3	1	2	3	4	3	2	2

Source: Ipsos MORI

Concern about Britain running out of gas in the next 10-15 years is even higher – 74% are very or fairly concerned, including 33% who describe themselves as **very** concerned (compared to just 28% who are very concerned about more gas coming from abroad). Women are more concerned than men, and the older age groups, 35+, are more concerned than young people, as are the ABC1 social groups, and those people in Scotland. Least concerned are young people, DEs and the Welsh.

Concern about Britain running out of gas

Q6 Nearly half of Britain's electricity is generated from gas and most homes have gas central heating. How concerned are you, if at all, that Britain might run out of gas in the next 10-15 years?

	Total	Age			Social Grade				Std Region		
		15-34	35-64	65+	AB	C1	C2	DE	Eng	Scot	Wales
<i>Base: All respondents</i>	(1961) %	(610) %	(883) %	(468) %	(389) %	(647) %	(418) %	(507) %	(1671) %	(149) %	(141) %
Very/fairly concerned	74	67	77	78	82	75	71	67	74	82	65
Not very/not at all concerned	24	31	21	19	17	23	25	30	24	16	33
Don't know	2	2	2	3	1	2	3	3	2	2	2

Source: Ipsos MORI

Knowledge of who is in charge of energy supplies

A majority assume it is the Government in charge of energy supplies both cases, gas and electricity, with the AB social group most likely to give this answer. The most popular alternative is the energy suppliers, mentioned by 13% for gas and 12% for electricity, and significantly more likely to be mentioned in Scotland in both cases. The pattern of responses is very similar for gas and electricity. In both cases, 10% of the public do not know who is in charge.

Knowledge of who is responsible for gas supplies

Q7a. Who do you think is in charge of making sure Britain has sufficient gas supplies?

	Total	Age			Social Grade				Std Region		
		15-34	35-64	65+	AB	C1	C2	DE	Eng	Scot	Wales
<i>Base: All respondents</i>	(1961) %	(610) %	(883) %	(468) %	(389) %	(647) %	(418) %	(507) %	(1671) %	(149) %	(141) %
The government	57	60	56	58	65	56	54	53	58	51	53
Energy suppliers	13	11	14	13	12	14	12	14	12	26	8
Ofgem	6	7	6	6	7	8	5	5	6	7	8
National Grid	6	4	7	7	5	7	4	7	6	7	6
Gas & electricity network companies	4	3	4	3	2	3	5	4	4	2	0
Generators	3	4	2	2	3	2	2	4	3	1	5
Others	1	*	2	1	2	2	*	1	1	1	3
Don't know	10	11	9	10	5	8	16	12	10	6	15

Source: Ipsos MORI

Knowledge of who is responsible for electricity supplies

Q7b. Who do you think is in charge of making sure Britain has sufficient electricity supplies?

	Total	Age			Social Grade				Std Region		
		15-34	35-64	65+	AB	C1	C2	DE	Eng	Scot	Wales
<i>Base: All respondents</i>	(1961) %	(610) %	(883) %	(468) %	(389) %	(647) %	(418) %	(507) %	(1671) %	(149) %	(141) %
The government	56	59	55	57	65	56	50	53	57	50	55
Energy suppliers	12	12	12	14	10	13	12	15	12	23	10
National Grid	8	5	10	6	7	9	8	6	7	10	6
Ofgem	5	5	5	5	6	7	4	4	5	7	4
Generators	4	4	4	3	4	3	2	5	4	3	3
Gas & electricity network companies	4	4	4	3	2	3	6	5	4	1	0
Others	1	*	1	1	1	2	0	0	1	0	2
Don't know	10	11	10	11	5	8	17	12	10	6	19

Source: Ipsos MORI

Propensity to take energy-saving measures

Likelihood of choosing options

Q8 If the cost of gas and electricity varied, for example, if it was cheaper at certain times of day, how likely would you be to...?

	Total	Age			Social Grade				Std Region		
		15-34	35-64	65+	AB	C1	C2	DE	Eng	Scot	Wales
<i>Base: All respondents</i>	(1961) %	(610) %	(883) %	(468) %	(389) %	(647) %	(418) %	(507) %	(1671) %	(149) %	(141) %
Heat your water at different times of the day											
Very/fairly likely	56	55	55	59	62	56	52	52	57	44	54
Very fairly unlikely	25	20	27	27	28	26	24	20	23	43	23
Use certain appliances after midnight											
Very/fairly likely	51	49	55	43	59	53	49	40	53	33	46
Very fairly unlikely	33	30	30	46	33	32	34	35	31	61	30
Install technology to automatically switch off appliances when prices are high											
Very/fairly likely	47	50	47	40	50	47	50	40	48	43	39
Very fairly unlikely	31	24	31	44	36	32	26	30	30	45	37
Carry out chores or cook meals in cheaper periods (eg after 7pm)											
Very/fairly likely	41	47	39	35	41	43	40	37	42	25	39
Very fairly unlikely	40	30	43	52	47	38	39	37	38	62	48
Use electric storage heaters											
Very/fairly likely	35	47	30	28	29	39	32	38	36	25	33
Very fairly unlikely	47	28	54	60	59	43	50	35	45	62	51

Source: Ipsos MORI

Of the five energy-saving measures explored, the option of heating water at different times of the day attracts the highest likelihood of adoption. This is followed by using appliances (dishwashers, washing machines etc) after midnight. Both of these options are thought very/fairly likely to be adopted by a (small) majority of the population. Slightly less popular is the concept of technology that would automatically switch off appliances when prices are high, though this still attracts more rating it as likely than unlikely. The public are evenly split

on carrying out household tasks including cooking during cheaper periods. Least popular is the use of electric storage heaters – 47% rate this as very/fairly unlikely while only 35% see it as likely.

The overall figures do mask some significant variations in the likelihood of adopting each measure by different demographic groups. Heating water at different times of the day is popular to a majority in all age groups, and marginally more to the 65+. But, in fact, the 15-34 age group shows wide internal variation, with 15-24s much less likely to adopt the measure than the 25-34s (48% very/fairly likely compared to 63%) There is some relationship to social grade, with AB groups more likely to adopt this behaviour than C2DEs. There is also a regional dimension: interest is concentrated in England, with some in Wales. Scotland is much less likely to adopt this behaviour.

On the prospect of heating water at different times of the day, the pattern of answers by demographics is very similar, with the youngest age group, social grade DE and those in Scotland least likely to adopt the measure.

Just under half are likely to adopt automatic switching of appliances. Interest is notably lower among social group DE compared to other social groups. In terms of age, likelihood of adoption is notably higher in the 15-34 group (50% very/fairly likely), with lower interest among the 65+ group. In contrast to the overall positive balance, the Scots are more unlikely than likely to adopt the technology (45% unlikely, compared to 43% likely). Likelihood in Wales is even lower, though not significantly so, and it just outweighs the proportion unlikely to adopt the behaviour.

Carrying out household tasks at alternative times is of most interest again to the 15-34 age group, older people being significantly less likely to adopt this measure, especially the 65+. There is little difference on this, however, by social grade. Those in Scotland are least likely to adopt this measure.

Interest in using storage heaters does not follow the same kind of pattern as the most popular measures. People aged 35 and over are unlikely to adopt storage heaters, on balance, while, in contrast, those under 35 are likely on balance to be interested. Similarly, in terms of social group, ABC1C2 grades are unlikely to adopt, on balance, while the DEs show less tendency to say they are “unlikely” to adopt the measure, though their positive enthusiasm is still not great. Enthusiasm for storage heaters is greatest in England and lowest in Scotland, where 62% are unlikely to adopt the measure.

Appendix

Electricity and gas suppliers used

Electricity and gas suppliers		
	Electricity supplier (Base: All respondents)	Gas supplier (Base: All with gas)
	(1961) %	(1737) %
Atlantic Electricity and Gas	1	1
British Gas	21	34
EBICo	*	*
Ecotricity	*	*
EDF Energy	12	8
E.ON	12	10
First Utility	*	*
Good Energy	*	0
London Energy	*	*
npower	9	9
Nwy Prydoin	0	0
OVO	0	0
Powergen	1	*
Sainsbury's Energy	*	*
Scottish Gas	2	3
Scottish Hydro	3	3
ScottishPower	7	7
ScottishPower Manweb	*	*
Seaboard Energy	*	*
Southern Electric	7	7
Spark Energy, Supply	0	0
Swalec	3	2
SWEB	1	1
Telecom Plus	0	0
Utilita	*	*
Virgin Home Energy	0	-
Other	1	1

Don't know	12	12
Any British Gas/Nwy Prydain/Scottish Gas	12	36

Source: Ipsos MORI

Questionnaire and topline results

Ofgem Energy Issues Omnibus

These are topline results from a nationally representative omnibus (CAPIBUS) survey of the population of Great Britain aged 15+. Ipsos MORI conducted 1,961 quota controlled face-to-face interviews in the period 11-21 December 2009 using computer aided personal interviewing in 174 systematically-selected sampling points. The data is weighted to the known demographic profile of the population. Percentages are rounded to the nearest whole number; values of less than one per cent are shown as *.

Base for all questions is all adults aged 15+ (1,961) except where indicated.

Q1. Do you have mains gas and/or mains electricity in your home? MULTICODE

	%
Mains gas	89
Mains electricity	94
Neither/Don't know/Refused	3

Q2. Which company currently supplies a) your gas b) your electricity?
(Spontaneous) SINGLE CODE FOR EACH

	a.) GAS %		b.) ELECTRICITY %
Atlantic Electric and Gas	1	Atlantic Electric and Gas	1
British Gas	30	British Gas	21
EBICO	*	EBICO	*
Ecotricity	*	Ecotricity	*
EDF Energy	7	EDF Energy	12
EON	9	EON	12
First Utility	*	First Utility	*
Good Energy	0	Good Energy	*
London Energy	*	London Energy	*
Npower	8	Npower	9
Nwy Prydain	0	Nwy Prydain	0
OVO	0	OVO	0
Powergen	*	Powergen	1
Sainsbury's Energy	*	Sainsbury's Energy	*
Scottish Gas	2	Scottish Gas	2
Scottish Hydro	3	Scottish Hydro	3
Scottish Power	7	Scottish Power	7
Scottish Power Manweb	*	Scottish Power	*

Seeboard Energy	*	Manweb	
Southern Electric	7	Seeboard Energy	*
Spark Energy Supply	0	Southern Electric	7
Swalec	2	Spark Energy Supply	0
SWEB	1	Swalec	3
Telecom PLUS	0	SWEB	1
Utilita	*	Telecom PLUS	0
OTHER (write in)	1	Utilita	*
Don't know	11	Virgin Home Energy	0
		OTHER (write in)	1
		Don't know	12

Q3. The electricity used in your home comes from a number of different sources. On a scale of 1-5, where 5 means a very strong preference and 1 means a very weak preference, please indicate your preference for each of the following sources? READ OUT. ROTATE

	1	2	3	4	5	Don't Know	MEAN
	%	%	%	%	%	%	
coal	27	24	26	12	5	6	2.41
gas	11	17	33	20	12	6	3.05
wind farms on the land	6	10	23	26	29	5	3.65
wind farms off the coast	5	5	19	27	39	5	3.94
nuclear power	22	16	26	17	12	7	2.79
large scale solar power (rather than panels on your own house)	4	8	23	25	33	6	3.80
biomass (generation from biological sources, for example algae, wood or special energy crops)	6	10	28	22	21	12	3.48
tidal power (electricity produced by the movement of tides eg a barrage across a river estuary)	3	6	19	27	36	9	3.96
hydro power (electricity produced by the force of moving water e.g. water turbines in rivers)	2	5	19	28	38	7	4.03
wave power (electricity produced by the constant movement of waves)	3	6	21	25	37	8	3.95

Q4a/b.

Which one of these factors (SHOWCARD) do you consider to be the most important in relation to gas and electricity overall? Which one do you consider to be the second most important? CODE ONE ONLY FOR EACH QUESTION

a. Most important	b. Second most important*	Combined a/b
%	%	%

The price you pay	34	18	52
Being able to save costs by being energy efficient	13	26	38
Being able to help the environment through energy efficiency and reducing emissions	16	20	36
Great Britain being able to provide all the gas and electricity people want to use	9	13	22
Having gas and electricity that is affordable for everyone (for example consumers who may be considered vulnerable such as the elderly, sick or disabled)	23	20	42
Don't know/don't care	4	2	6

*Base: all who gave answer to Q4a (1,883)

- Q5. **SHOWCARD As North Sea gas supplies start to run out, Britain will need to buy more gas from other countries. How concerned are you, if at all, that more gas will be coming from abroad in the next 10-15 years?**

	%
Very concerned	28
Fairly concerned	42
Not very concerned	21
Not at all concerned	7
Don't know	3

- Q6. SHOWCARD Nearly half of Britain's electricity is generated from gas and most homes have gas central heating. How concerned are you, if at all, that Britain might run out of gas in the next 10-15 years?

	%
Very concerned	33
Fairly concerned	41
Not very concerned	18
Not at all concerned	6
Don't know	2

Q7a/b.

SHOWCARD Who do you think is in charge of making sure Britain has:

a). sufficient gas supplies? SINGLE CODE ONLY

b) sufficient electricity supplies? SINGLE CODE ONLY

	a.) GAS %	b.) ELECTRICIT Y %
The government,	57	56
Ofgem (the gas and electricity markets regulator)	6	5
Energy suppliers (the companies that sell gas or electricity to customers)	13	12
Generators (the companies responsible for the production of electricity)	3	4
National Grid (the company that manages the high pressure gas pipelines and high voltage electricity cables at a national level)	6	8
Gas and electricity network companies (the companies that manage pipes and cables systems at a local level)	4	4
Someone else? (write in)	1	1
Don't know	10	10

Q4. **SHOWCARD** If the cost of gas and electricity varied, for example if it was cheaper at certain times of day, how likely would you be to... READ OUT. ROTATE ORDER

	Very likely	Fairly likely	Neither likely nor unlikely	Fairly unlikely	Very unlikely	Don't know
	%	%	%	%	%	%
Use certain appliances (such as washing machine or dishwashers) after midnight	21	29	14	15	18	2
Use electric storage heaters (that charge up overnight to release heat during the day)	11	23	15	17	30	3
Heat your water at different times during the day	22	34	17	14	11	3
Carry out household chores or cook meals during cheaper periods (for example after 7pm)	15	26	16	21	19	3
Install technology that would automatically switch off appliances for you when prices were high	17	30	19	17	15	3