

EPRG Poll on Energy Security: Policy Preferences & Personal Behaviour

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EPRG Survey

- Conducted in May 2006 by YouGov, the internet polling firm
- 1018 responses (45% response rate) from UK residents over 18 drawn from a panel of 46,000
- 20 questions on national energy and environmental priorities, individual behaviour (energy consumption, purchasing decisions), willingness to pay

Internet vs Traditional Survey Instruments

- Concerns over biases in sampling with internet panel:
 - May oversample the more technologically aware,
 - Bias away from the poor or those employed in certain jobs
- Benefits of internet surveys:
 - Telephone surveys may be biased towards those who are home more often and those using mobile phones exclusively
 - People tend to conceal responses when traditional survey methods are used because of interaction with questioner
 - Certain types of question can more easily be presented (e.g., providing information in graphical format).
- A comparison of the final polls to final election results in several countries show that online polling is roughly equal or better in predicting the final result

What are the 3 most important issues facing the UK today?

Asylum seekers	45%	Aging population	8%
Crime	30%	Family values	8%
Health care	26%	Foreign policy	7%
Terrorism	22%	Economy	7%
Pensions	22%	EU	5%
Fuel prices	17%	Public transport	4%
Environment	14%	Unemployment	3%
Education	12%	Social Exclusion	3%
Drugs	11%	Euro/Pound	2%
Race	11%	Welfare	2%
Poverty	11%	Deficit	2%
Energy	10%	AIDS	1%
Taxes	9%	Abortion	1%
		Stock Market	0%

National Priorities - Demographics

•By Age Group:

Concern	<30	30-44	45-59	60+
Asylum seekers	30%	44%	44%	49%
Pensions	12%	15%	30%	37%
Fuel prices	14%	11%	19%	16%
Environment	20%	22%	15%	8%

• By Political Party Affiliation:

- 51% of Conservatives list asylum seekers as a top 3 concern compared to 22% of Lib Dems (and 40% Labour).
- 18% of Lib Dems list Energy vs 7% Tories and 10% Labour

Media Impact on National Priorities

Concern	Guardian/ Independent	FT/Times/ Telegraph	Sun/Star
Asylum seekers	10%	31%	58%
Crime	14%	29%	36%
Health care	31%	23%	25%
Terrorism	10%	15%	33%
Pensions	22%	28%	16%
Fuel prices	3%	9%	18%
Environment	40%	20%	8%
Education	21%	18%	9%
Poverty	31%	9%	9%
Energy	15%	15%	6%
Foreign policy	15%	7%	2%
Social exclusion	13%	3%	0%

Most important and 2nd most important environmental problems facing the UK?

	1st priority	2nd priority
Water pollution	2%	3%
Destruction of ecosystems	4%	11%
Toxic Waste	4%	8%
Overpopulation	18%	11%
Ozone depletion	4%	11%
Global warming/ Climate change	38%	17%
Urban sprawl/ Lack of green space	11%	13%
Smog	1%	1%
Endangered species	1%	2%
Acid rain	0%	0%
Resource depletion	10%	15%
GM crops	2%	3%

Top 2 Environmental Priorities

Global Warming Overpopulation

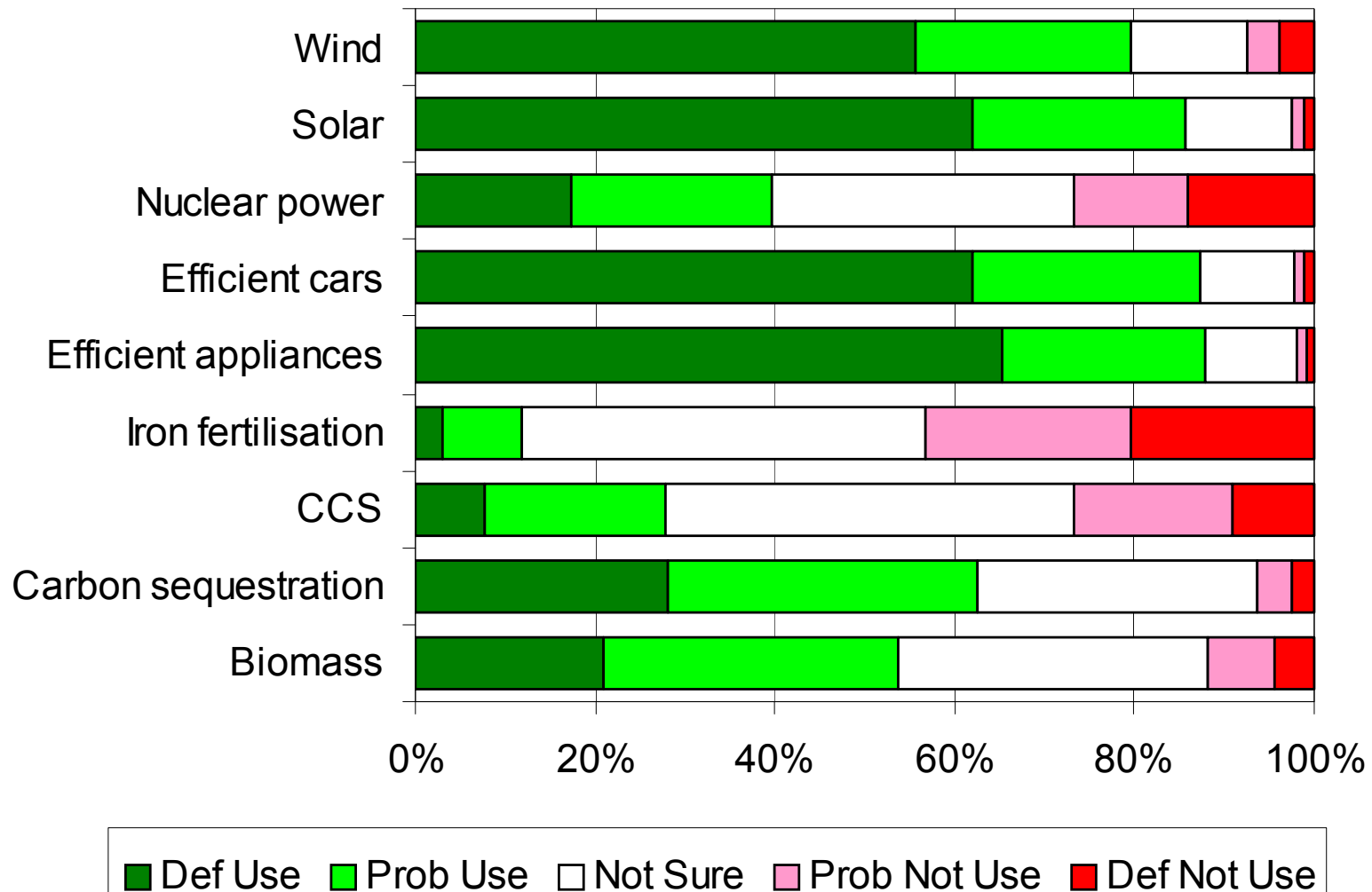
PARTY

Labour	64%	22%
Conservatives	48%	41%
Lib Dems	68%	15%

AGE

<30	65%	20%
30-44	61%	27%
45-59	50%	30%
60+	48%	46%

Technology Preferences to Address Global Warming



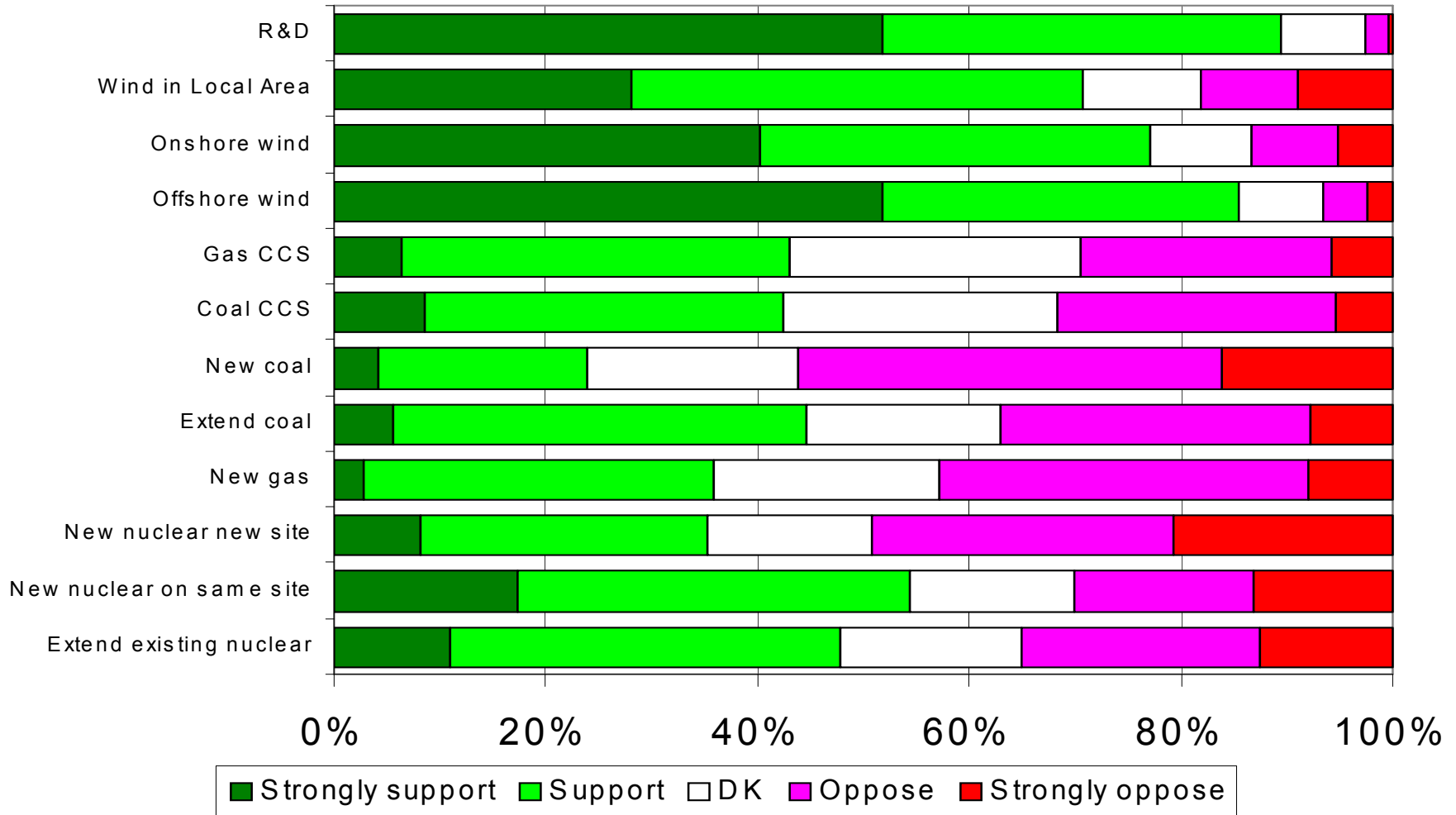
Technology Demographics

	Total Opposed to Nuclear	Total Opposed to Wind
Labour	27%	4%
Tories	22%	13%
Lib Dems	40%	3%
<30	34%	5%
30-44	30%	5%
45-59	24%	8%
60+	22%	16%
Guardian/Indep't	42%	1%
Sun/Star	28%	8%
FT/Times/DT	18%	18%

To avoid a potential shortfall, would you support Government to:

- Significant investment in research and development into advanced technologies such as solar power, tidal power, hydrogen, and fuel cells (R&D)
- Build wind farms in my local area (Local Wind)
- Build onshore wind farms (Onshore Wind)
- Build offshore wind farms (Offshore Wind)
- Build more efficient gas-fired power stations that can capture carbon dioxide and store it underground (Gas CCS)
- Build more efficient coal-fired power stations that can capture carbon dioxide and store it underground (Coal CCS)
- Build new coal-fired power stations (New Coal)
- Extend the life of existing coal stations (Extend Coal)
- Build new gas-fired power stations (New Gas)
- Build new nuclear stations at new sites around the UK (New nuclear on new site)
- Build new nuclear stations on the same site of existing nuclear plants being phased out (New nuclear on same site)
- Extend the life of existing nuclear power stations (Extend existing nuclear)

To avoid a potential shortfall, would you support:



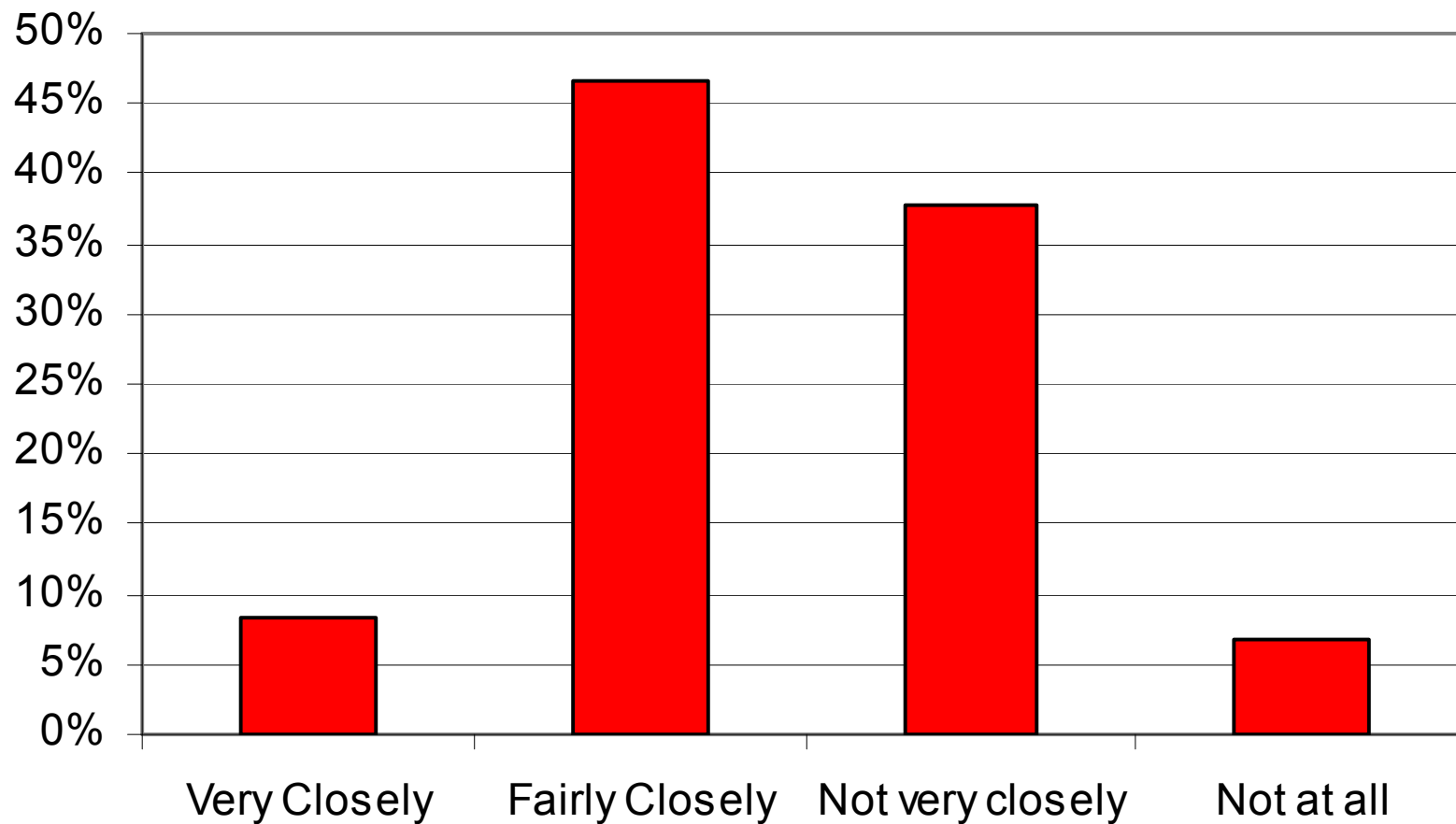
Total Support for Electric Sector Options: Demographics

	Extend nuclear	New nuclear same site	New plants new site
M	60%	71%	51%
F	35%	37%	19%
Labour	43%	52%	33%
Tories	66%	69%	45%
Lib Dem	41%	45%	24%

Total Support for Electric Options: Demographics II

	<30	30-44	45-59	60+
• Extend nuclear plants	43%	66%	41%	41%
• New nuclear same site	50%	53%	58%	62%
• New nuclear new site	31%	30%	39%	45%
• New coal	14%	20%	31%	27%
• Local wind	79%	78%	70%	51%
• Offshore wind	89%	90%	86%	74%
• Similar pattern in those expressing “strong support” for the different options				

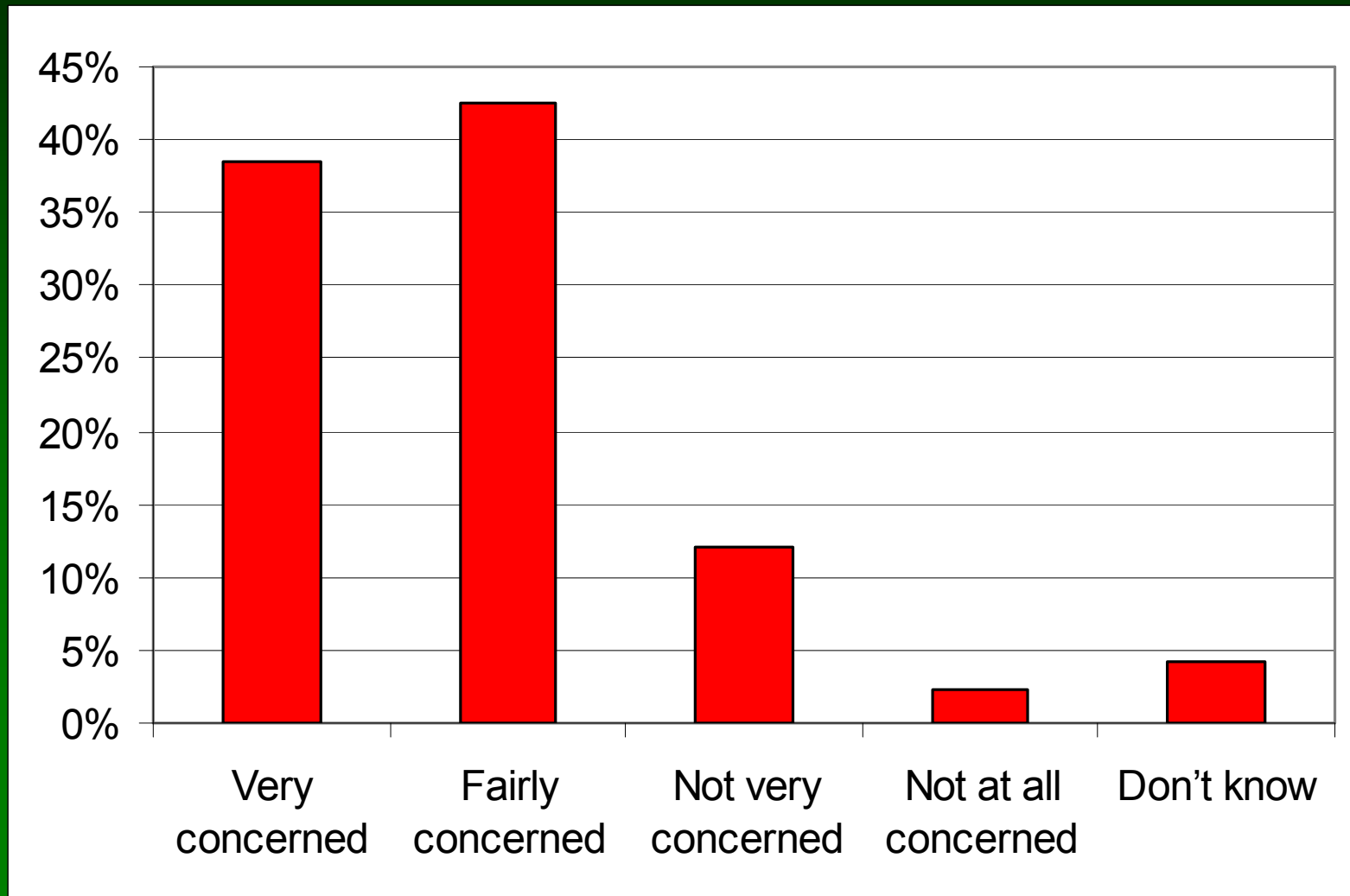
How closely have you been following debates over the future of energy in UK?



How closely have you been following debates over the future of energy in UK?

- Those following “not very closely” or “not at all”:
- **Gender:**
 - M 36%
 - F 56%
- **Newspaper Readership:**
 - Sun/Star 76%
 - Other tabloids 49%-54%
 - Guardian/Independent 21%
 - FT/Times/Telegraph 17%

Concerned UK is becoming more dependent on foreign energy sources?

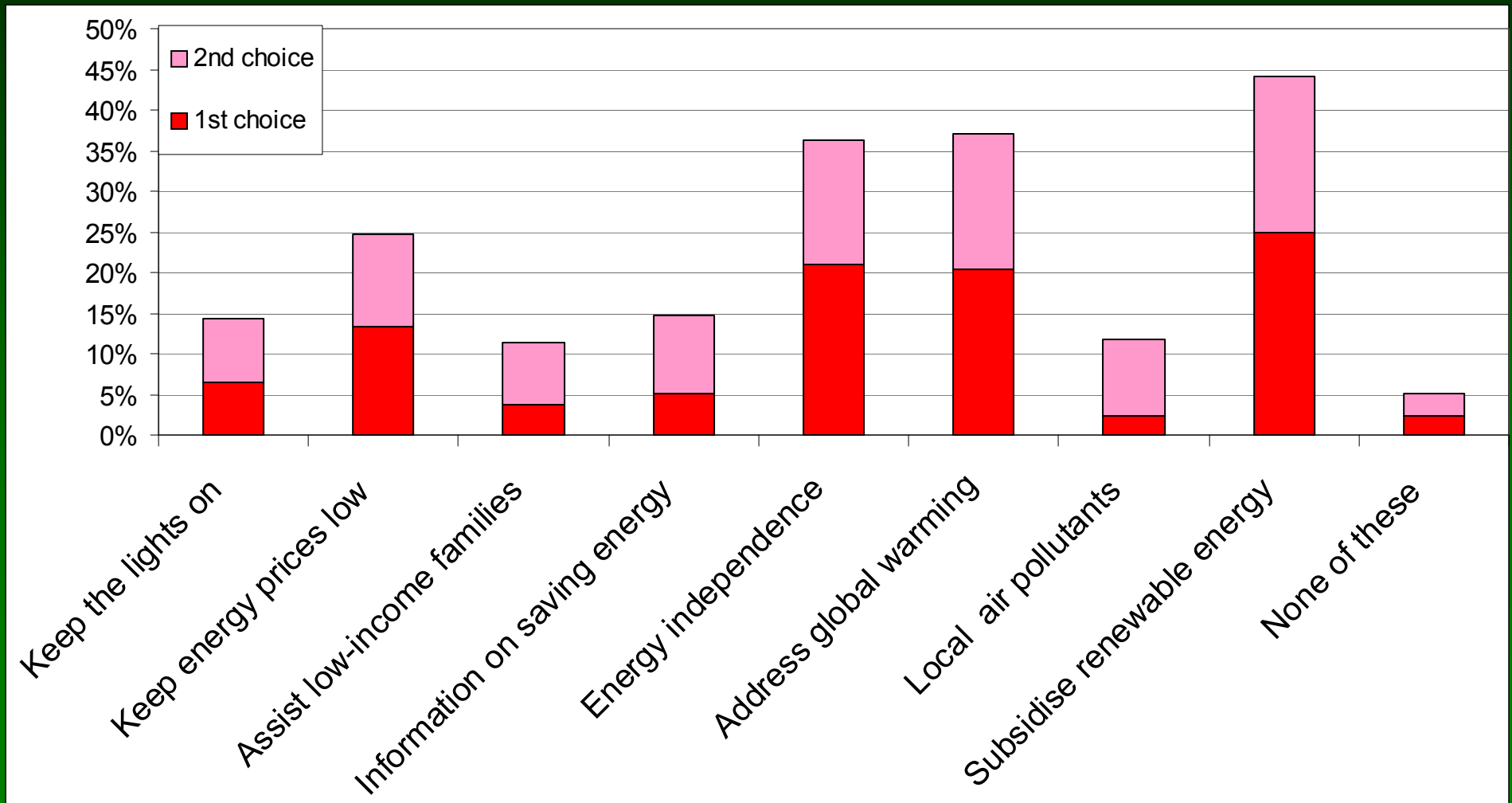


Dependence on Foreign Sources: Demographics

- Those “very concerned”: Older, Male and Tory
- Gender: *M* 42% *F* 34%
- Age: <30: 21% 30-44: 37% 45-59: 50% >60: 60%
- Parties: *Tories*: 44% *Lib Dems*: 27%, *Labour*: 38%

- Those “not very”/ “not at all” concerned: Young, Lib Dem
- Age: <30: 25% 30-44: 16% 45-59: 5% >60: 7%
- Parties: *Tories*: 10% *Lib Dems*: 21%, *Labour*: 17%

Two most important priorities of a national energy policy?



Energy Policy Demographics

Energy Independence: Older, Male, Tory, Reads FT

- **Gender:** M 41% F 29% **Age:** 26/33/44/48 **Parties:** L32/C45/LD21
Papers: Guardian/Ind 26% tabloids 28%-43%, FT/Times/DT 48%

Address Global Warming: Young, Lib Dem, Reads Guardian

- **Age:** 45/39/30/31 **Parties:** L37/C30/LD52
- **Papers:** Guardian/Ind 58%, FT/Times/DT 33%, tabloids 27%-32%

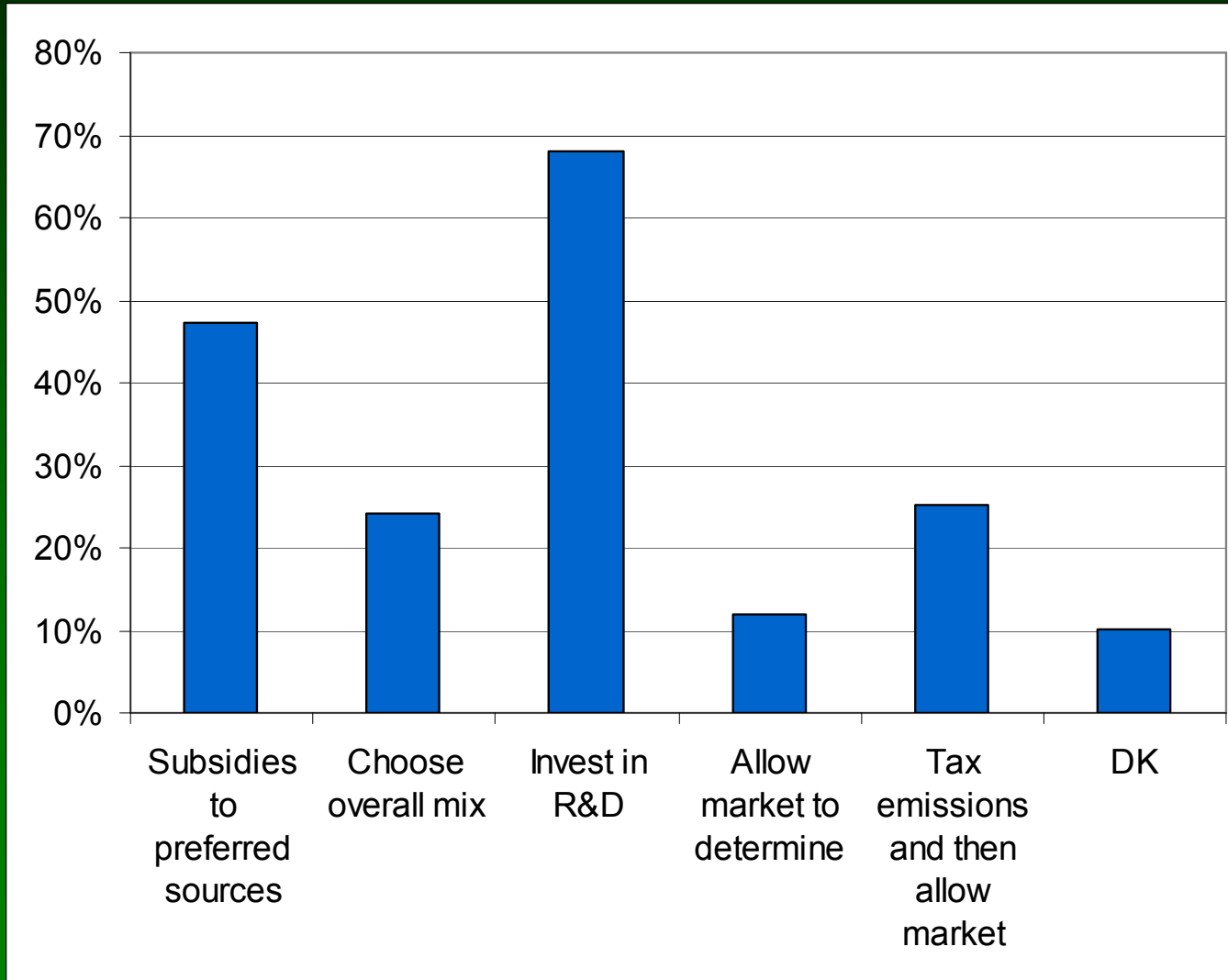
Subsidise Renewables: Youngish, Female, Lib Dem

- **Gender:** M 39% F 52% **Age:** 47/50/43/35 **Parties:** L49/C43/LD54

Keep Energy Prices Low: Reads Sun/Star

- **Papers:** Guardian/Indep't 6%, FT/Times/DT 19%, Sun/Star 37%

In response to concerns over future of electricity supply in UK, do you believe Government should:



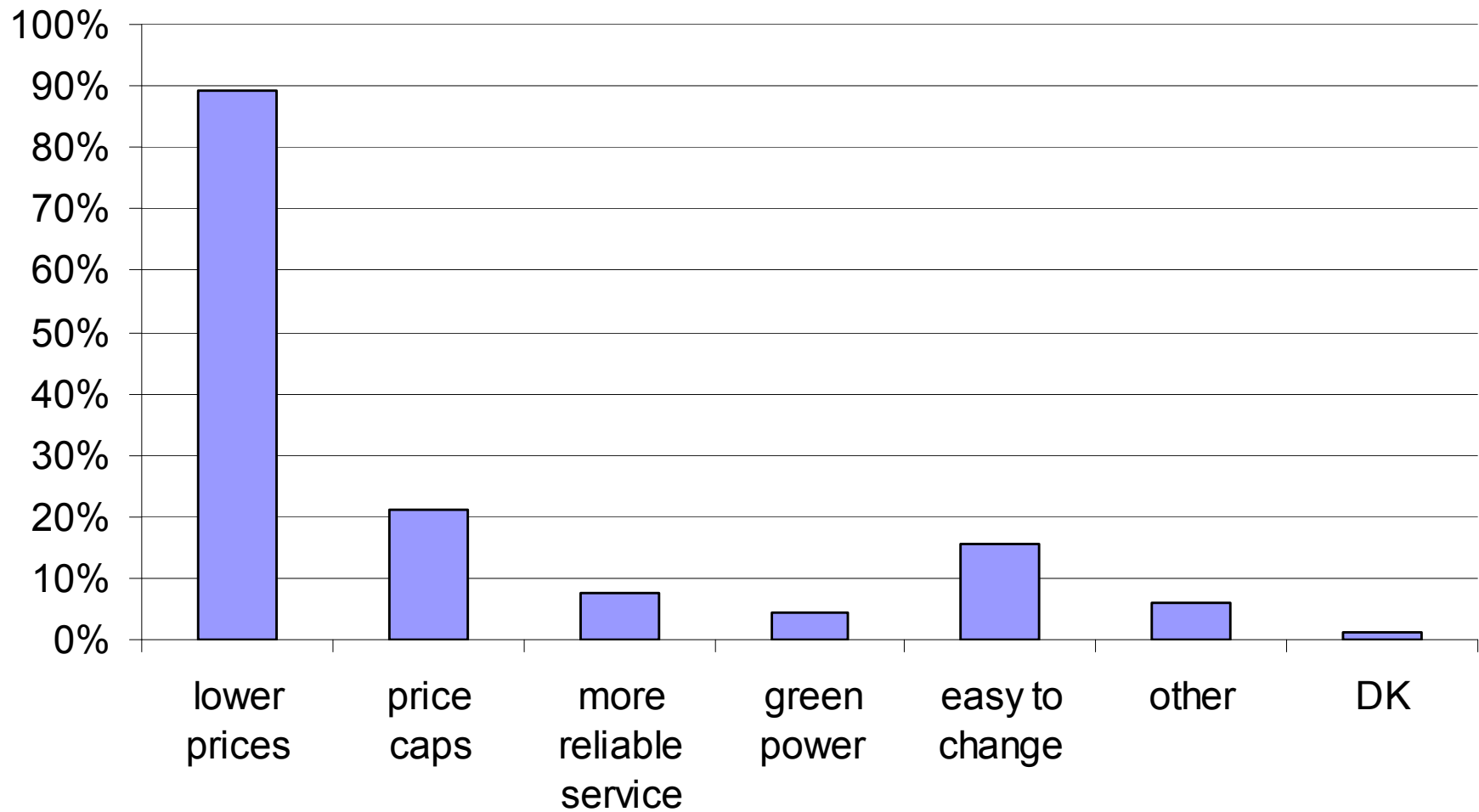
Choosing the Mix: Demographics

- 3% of G/I readers support allowing the market to determine the mix as at present compared to 12-14% of tabloid readers and 17% FT/Times/Daily Telegraph
- 60% of G/I readers favour subsidies compared to 40% of Sun/Star readers and 45%-48% for all others
- Labour least likely to favour taxing emissions (19%) compared to 27% Conservatives and 33% Lib Dems
- Sun/Star readers least likely to favour investing in R&D (54%) compared to G/I readers (86%)

Demographics of Changing Suppliers

- 48% of respondents had changed electric or gas supplier over past 5 years
- Few significant differences across main groups
- Gender: M: 47% F: 49%
- Age: <30: 30% 30-45: 54% >45: 58%
- Parties: Lab: 54% Tories: 49% LD: 44%
- Papers: Guardian/Independent 41%
Sun/Star 42%
FT/Times/DT 49%
Mail/Express/Mirror 51%-54%

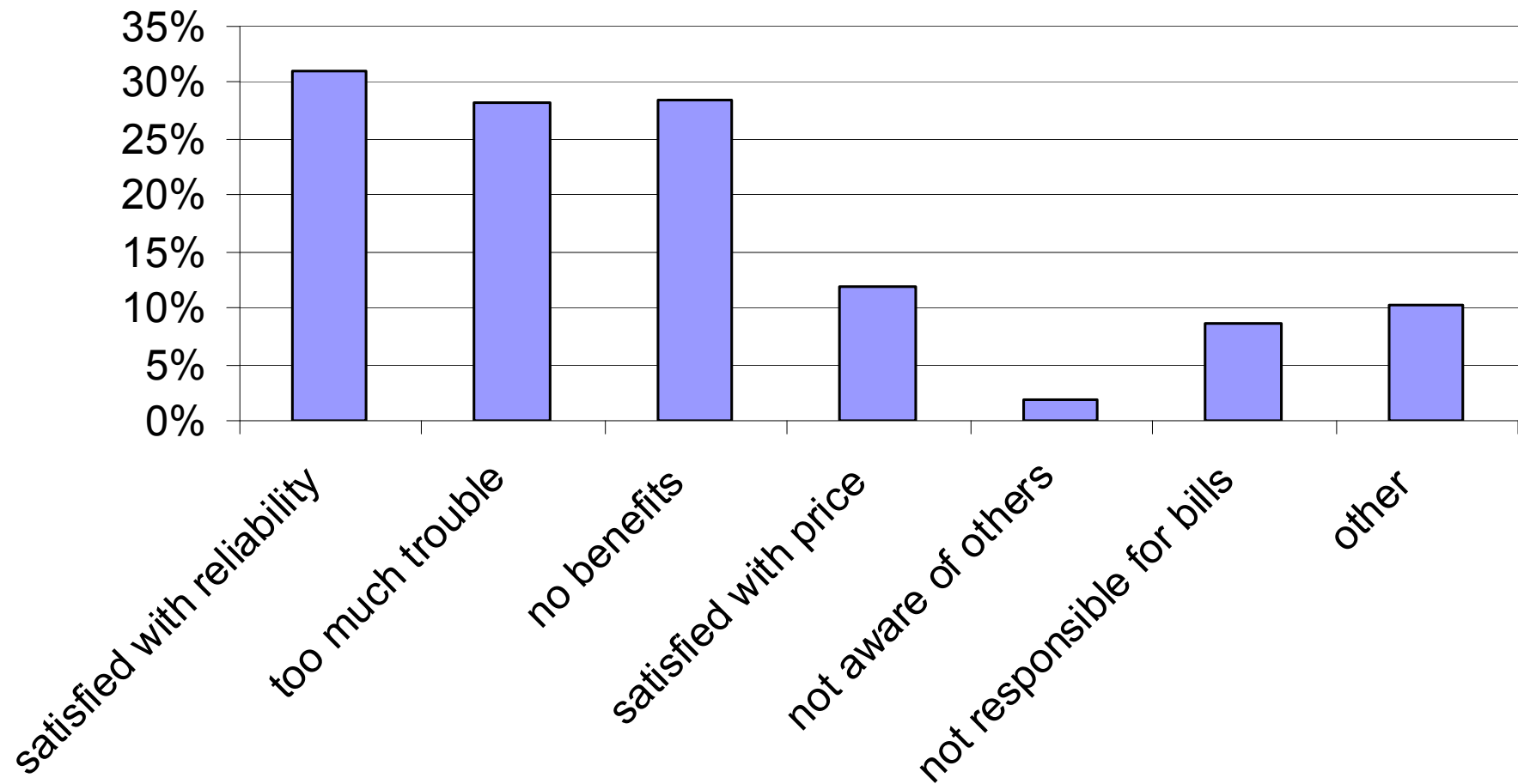
Reasons for Changing Suppliers



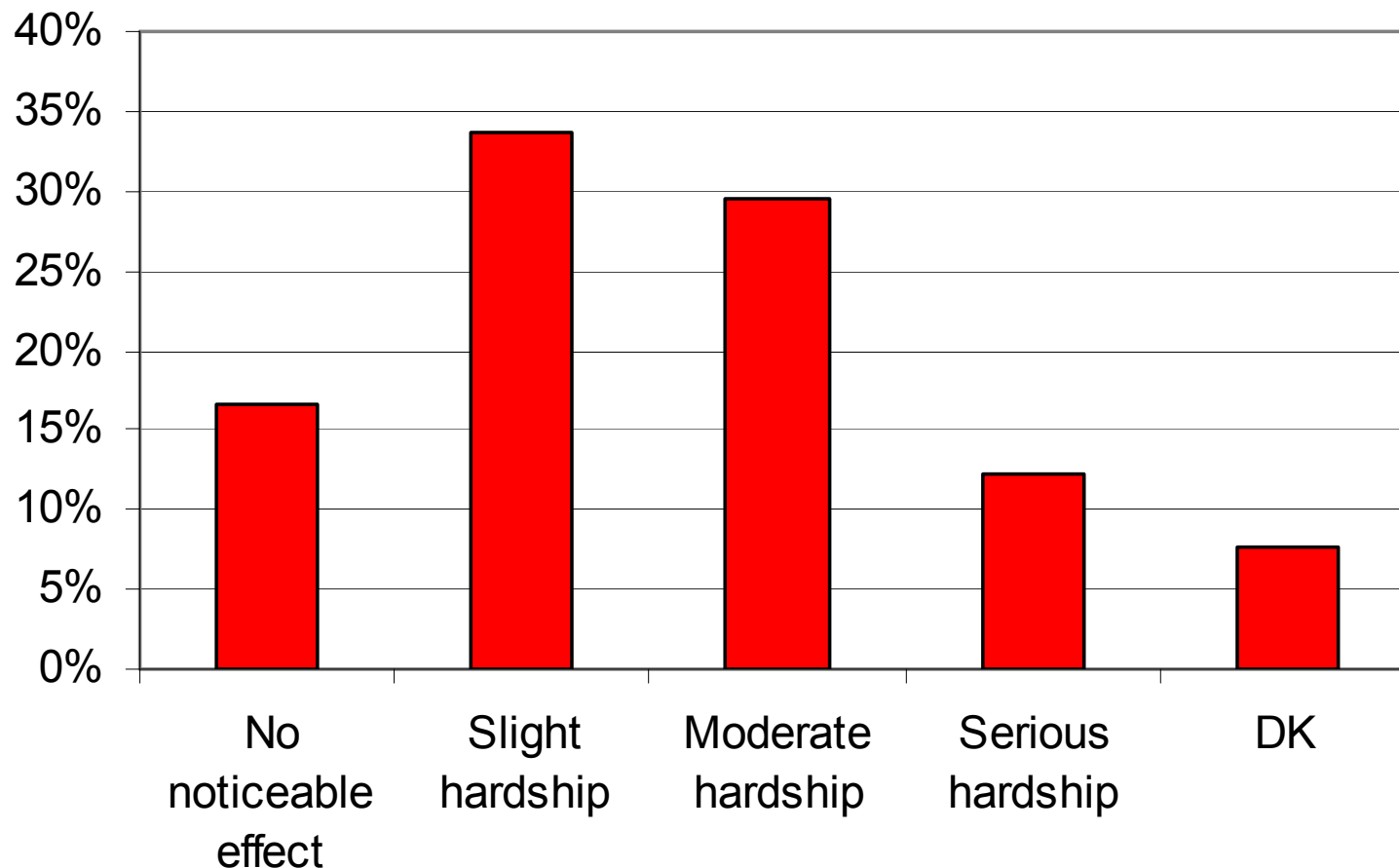
Reasons for Changing Suppliers

- **Price:** minimal differences across demographics
- **Price Caps/Guarantees:**
 - *Gender:* M 10% F 20%
 - *Papers:* Guard/Indep 3% FT 15% Tabloids 15%-20%
 - *Age:* 18-60: 10-15% 60+: 32%
- **Environmentally-friendly electricity:**
 - *Age:* 18-24 10% 29-44 6% 45-59 3% 60+ 0%
 - *Papers:* Tabloids 1%-3% FT/Times/DT 5% G/I 15%

Reasons for NOT Changing Suppliers



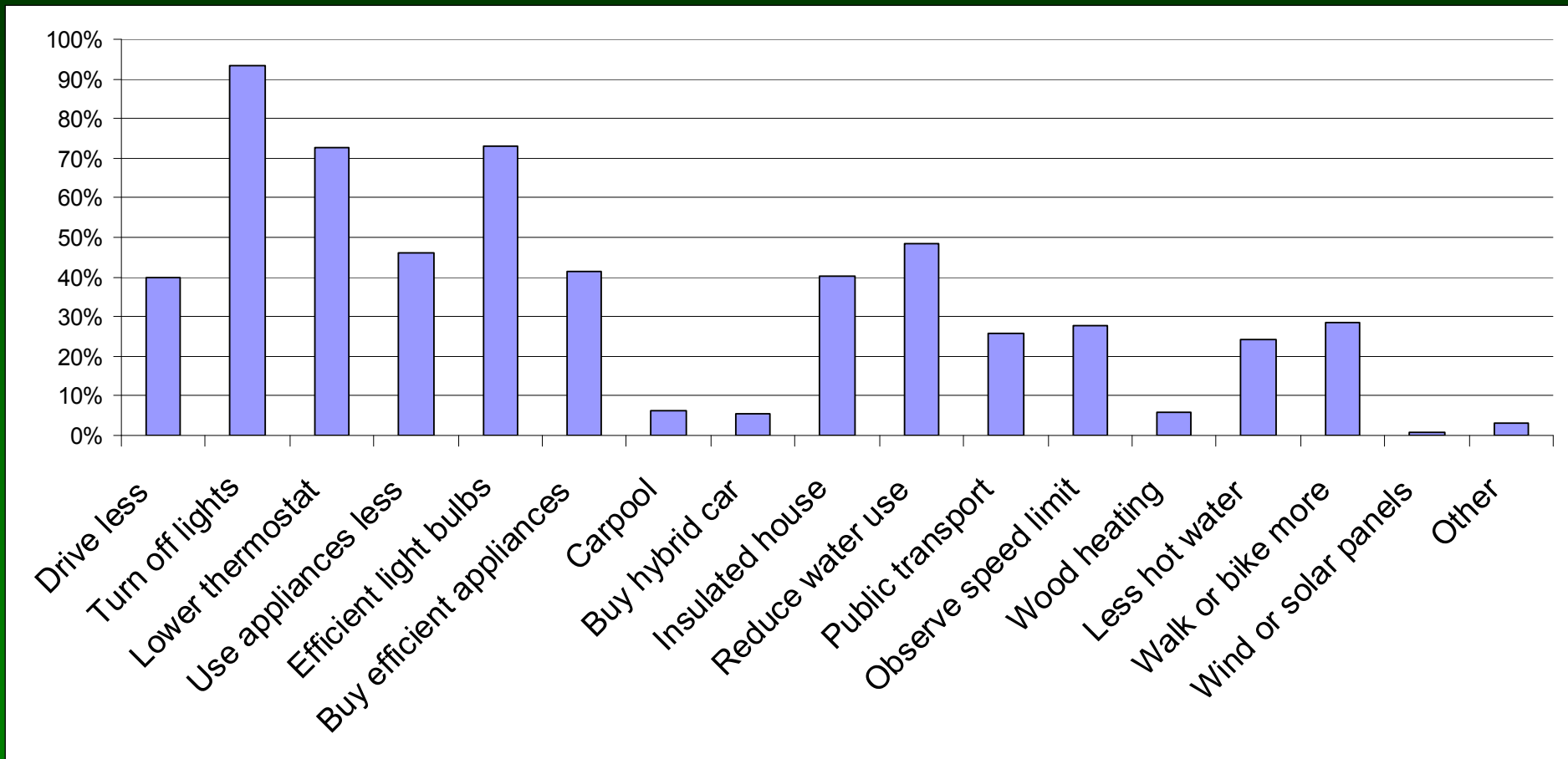
To what extent are energy prices affecting your financial situation?



Doing ANYTHING to reduce energy use?

- *Do you happen to currently be doing anything to reduce your use of energy -- that is, your use of gasoline, electricity, or natural gas? 76%*
- **Gender:** *M: 70% F: 80%*
- **Age:** *<30: 70% 30-59: 76% >60: 86%*
- **Papers:** *Sun/Star: 61% vs 78%-82% for all others (including other tabloids and Guardian/Independ't)*

Which, if any, of these are you doing to reduce energy consumption?

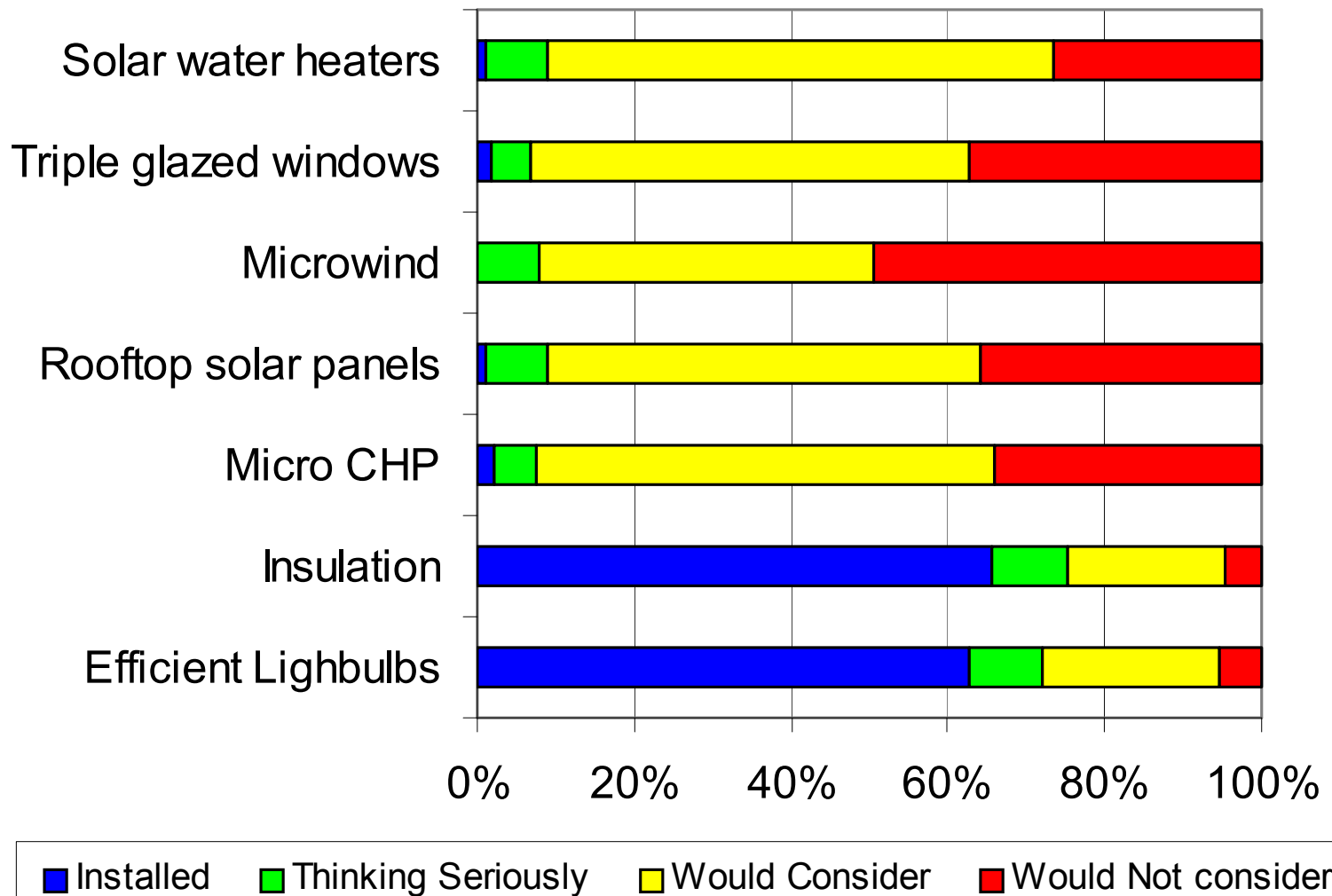


Personal Reductions in Energy Consumption

	<30	30-44	45-59	60+
▪ use public transport more	35%	25%	16%	26%
▪ buy efficient appliances	30%	45%	51%	39%
▪ drive at speed limit	15%	29%	36%	34%
▪ buy a hybrid	1%	6%	8%	8%
▪ lower thermostat	65%	71%	79%	78%
▪ insulate home	19%	40%	52%	62%

- Only significant differences between G/I readers and others is greater likelihood to bike and use public transport

Have you installed or would you consider installing the following:



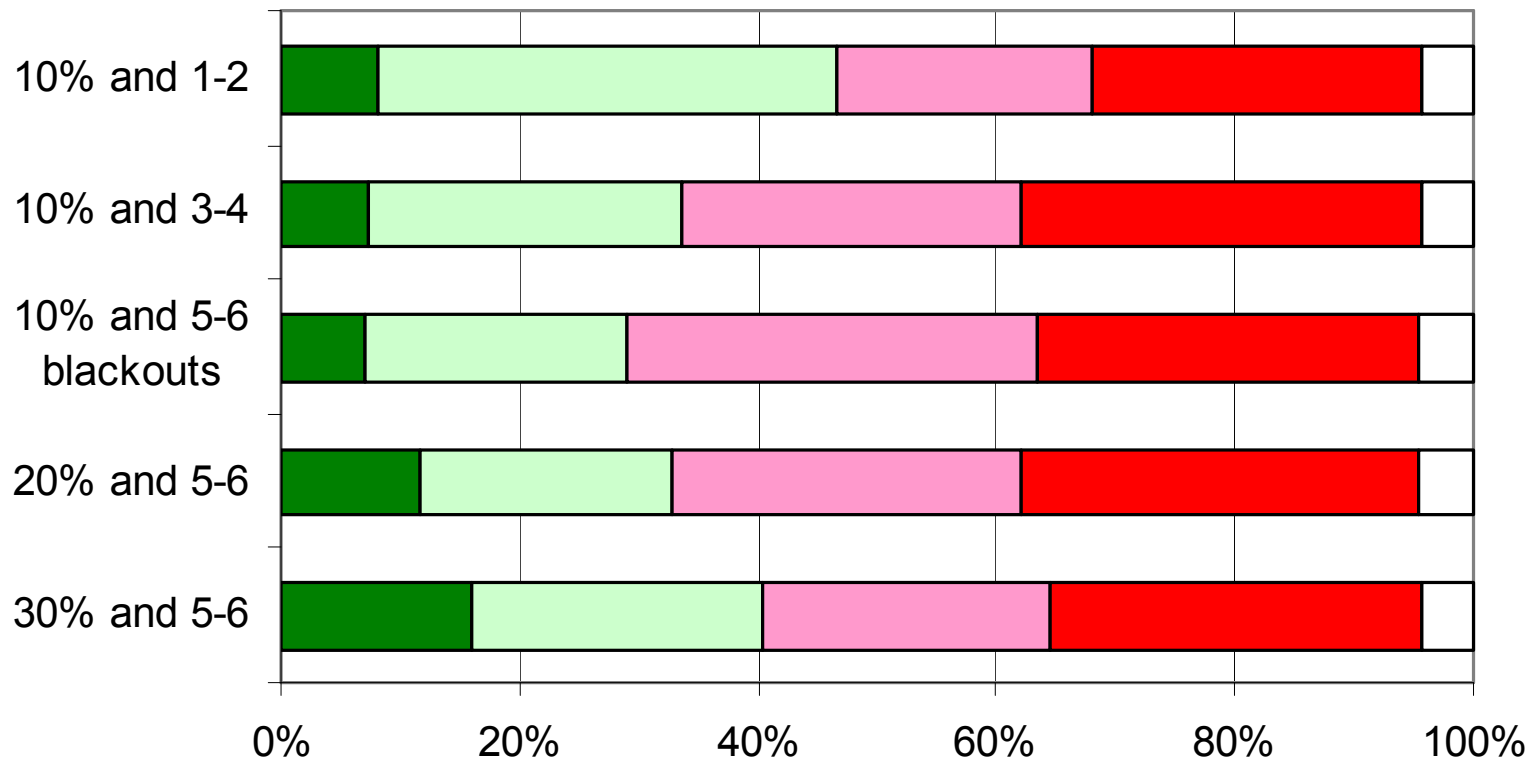
Demographics of Installations

- 53% of under 30s have installed high efficiency CF lightbulbs vs 73% of over 60s.
- 37% of under 30s have insulated vs 59% of 30-44, 79% of 45-59 year olds and 81% of over 60s.
- Only 42% of Guardian/Independent readers have insulated compared to 72% of Express readers (all other papers are 55% and above)

Trading Off Blackouts v Price

- *How likely would you be to accept electricity being 10% cheaper if this meant that you were likely to have to put up with five or six unannounced 30 minute 'blackouts' (power cuts) each winter?*
- How likely would you be to accept electricity being 10% cheaper if this meant three or four 30-minute unannounced blackouts each winter?
- What if this meant one or two unannounced blackouts?
- How likely would you be to accept electricity being 20% cheaper if this meant three or four 30-minute unannounced blackouts each winter?
- What if electricity was 30% cheaper?

Trading Off Blackouts v Price



Very likely to accept

Fairly likely to accept

Not very likely to accept

Not at all likely to accept

Don't know

Main Conclusions

- Relatively consistent views on national policy: very strong support for R&D and renewables; split over nuclear power and CCS
- Nuclear new build: stronger support for new plants on the site of existing plants than for retrofitting existing plants and especially than building nuclear power plants at new locations.
- Consumer/Citizen dichotomy: No significant relationship between professed behaviour and support for greener policies.