

Environment Strategy – supporting quantitative insights

Methodology

Surveys have been conducted on the following dates:

- 12th–15th June 2017, with a response of 1,047 London adults
- 24th–27th July 2017, with a response of 1,000 London adults
- 21st–24th August 2017, with a response of 1,051 London adults
- 18th–21st September 2017, with a response of 1,014 London adults

The figures have been weighted to be representative of all Londoners aged 18+. Respondents completed the surveys online from an email link. YouGov Profiles data is based on the respondents to this survey and a database of over 250,000 UK adult panellists, with 40,000 in London.

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Air quality

Air pollution policies (June 2017)

Reducing exposure to air pollution, especially around schools and upgrading the bus and taxi fleets to lower emission models were the policies most strongly supported (net 74% and 73% support respectively).

Even the policy of charging high polluting vehicles in London to encourage people to update their vehicles received net 47% support. When a similar question was asked before, it received a similar result of 45% support ('would you support introducing a higher Congestion Charge for vehicles who use the congestion zone the most, such as vans?').

To what extent would you support or oppose the following policies being implemented in London?	Net support %	Strongly support %	Tend to support %	Total support %	Neither support nor oppose %	Tend to oppose %	Strongly oppose %	Total oppose %	Don't know %
Reducing exposure to air pollution, especially in areas around schools	74	47	30	77	12	2	1	3	8
Upgrading the bus and taxi fleet by phasing out diesel vehicles and switching to lower and zero emission models	73	45	31	77	11	3	1	4	9
Working with freight and delivery companies to reduce vehicle emissions and the number of journeys	71	40	35	75	13	3	1	3	9
Requiring construction sites to limit their air pollution emissions	68	36	35	71	16	2	1	3	10
Providing more information during periods of high air pollution on bus shelters, tube stations and on roadside signs	62	28	37	65	22	3	1	3	9
Charging road users of high polluting vehicles in London to encourage people to update their vehicles	46	31	29	60	18	9	5	13	9

When ranked against each other, the policy most Londoners would want to see implemented in London is upgrading the bus and taxi fleet by phasing out diesel vehicles and switching to lower and zero emission models – 32% of Londoners held this view.

Just 7% say providing more information during periods of high air pollution on bus shelters, tube stations and on roadside signs is the policy they would most like to see implemented, and 4% for requiring construction sites to limit their air pollution emissions.

ABC1 Londoners are much more likely to support most of these policies, although there is still net support from C2DE Londoners. There is less of an age difference as there is for recycling policies.

Which of the following policies would you MOST like to see implemented in London?	%
Upgrading the bus and taxi fleet by phasing out diesel vehicles and switching to lower and zero emission models	32
Reducing exposure to air pollution, especially around schools	19
Working with freight and delivery companies to reduce vehicle emissions and the number of journeys	14

Charging road users of high polluting vehicles in London to encourage people to update their vehicles	11
Providing more information during periods of high air pollution on bus shelters, tube stations and on roadside signs	7
Requiring construction sites to limit their air pollution emissions	4
Don't know	14

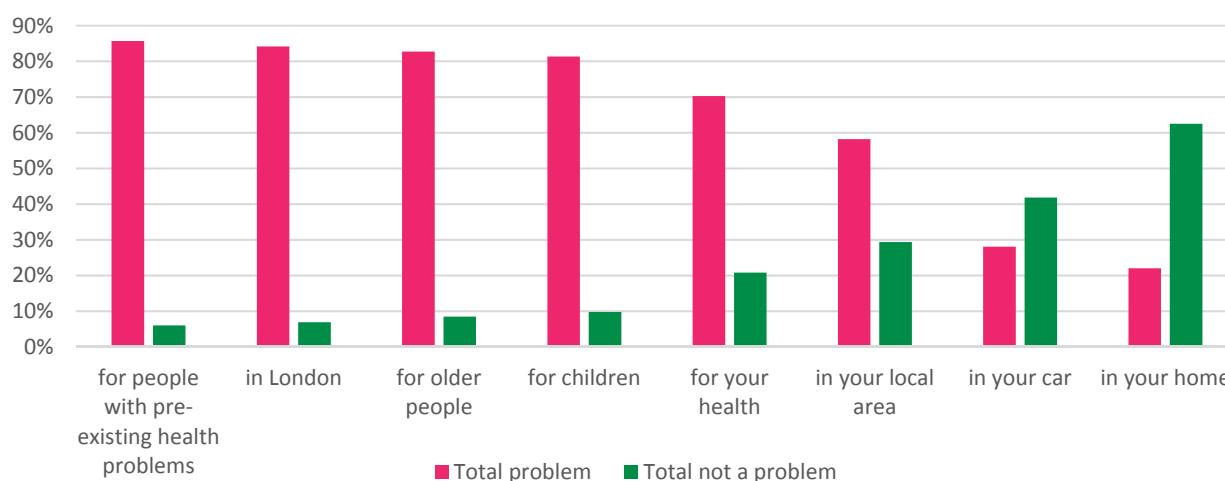
Problem of air pollution (August 2017)

Air pollution is seen as posing the biggest problem for people with pre-existing health problems, for older people and for children.

It is also seen as more of a problem for London as a whole than in the respondent's local area.

Londoners don't think air pollution is a big problem in their cars or in their home.

Extent to which air pollution is a problem



Women are all round more likely to think that air pollution is a problem for all these places and people tested. Londoners aged 65+ are less likely to think air pollution is a problem in their local area, in their home and in their car, but are equally likely to think that it is a problem for London and for old people.

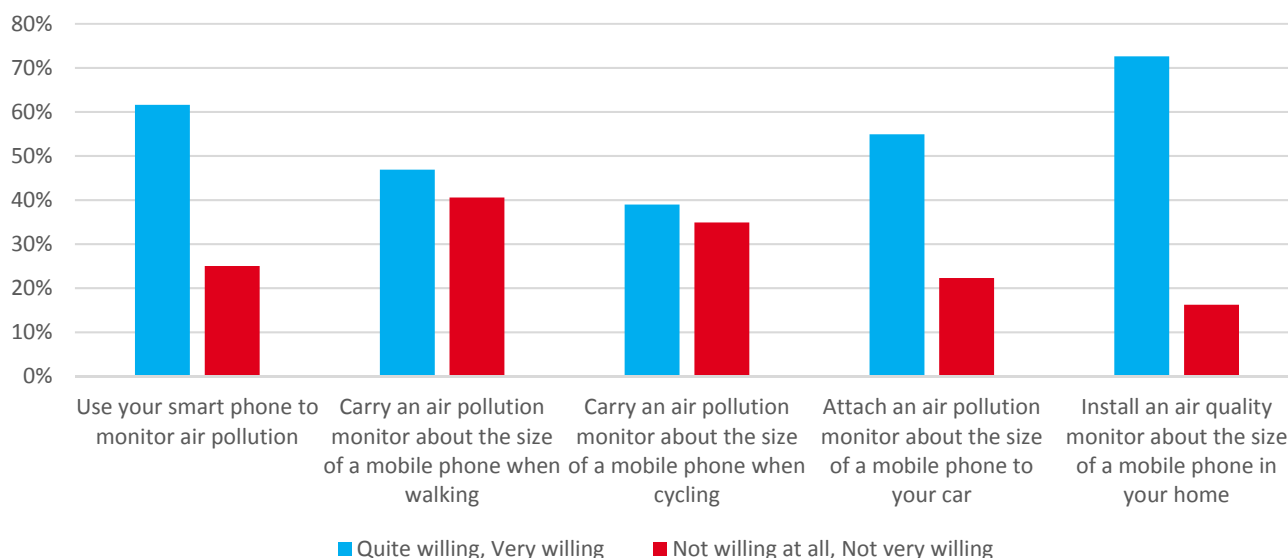
ABC1 Londoners are also more likely to think air pollution is a problem in London, but no difference by social grade for the respondent's local area.

Willingness to use an air pollution monitors (August 2017)

Generally, Londoners are willing to use air pollution monitors. This willingness is highest for an air pollution monitor **in the home**, 73% willing compared to 16% not. This is followed by using an app on your smart phone (62% willing, 25% not willing) and using a monitor on your car (55% willing, 22% not willing).

Londoners are less willing to carry an air pollution monitor when walking (47% willing to 41% not willing), or when cycling (39% to 35%)

Willingness to use a pollution monitor



Arguments for carrying an air pollution monitor (August 2017)

Londoners are most convinced to use an air pollution monitor by knowing that it would help monitor and map pollution across London, slightly above mapping personal air pollution exposure.

21% of Londoners say neither reason would convince them to use an air pollution monitor, and these people tend to be outer London residents and white ethnicity. There aren't many other demographic differences.

Green infrastructure

Visiting a local park (September 2017)

10% of Londoners visit a park or green space every day, whilst 48% do so at least once a week. 9% never visit a park or green space. Male, white, ABC1 Londoners are more likely to regularly visit a park; women, under 25s, C2DE and social renters visit parks less often.

84% of Londoners say they have a park within roughly a 10 minute walk of their house. This rises to 92% for those aged 65+. ABC1 and white Londoners are more likely to have a park nearby, as are those who own their home. 93% of home owners have a park within roughly a 10 minute walk of their house, compared to 82% of private renters.

Of those who have a park within roughly a 10 minute walk of their house, 88% like visiting their local park whilst 5% don't think the park, but still visit it or pass through it.

For those who don't regularly visit their local park (49%), by far the most common reason for not doing so is not having enough time (54%). This is followed by not feeling safe (15%), the parks not offered the desired facilities (11%) and not being well maintained (9%).

Women are almost three times as likely to cite not feeling safe as a reason (22%), as are home owners and Indian, Pakistani and Bangladeshi ethnicity Londoners. As would be expected, full time workers are more likely say they don't have enough time.

Helping run a local park (September 2017)

46% of Londoners would be interested in helping run a local park, compared to 45% who would not. Working age Londoners are most likely to be interested, as are those with children in the household. There are not significant differences by gender, social grade or ethnicity.

The most common concerns held for helping to run a local park are not having enough spare time (34%), it not fitting around other commitments (22%), not having the right skills (19%) and not knowing how to get involved (17%). 17% also said they were not interested in this kind of work, whilst 8% think this kind of work isn't for them.

Younger and working Londoners are more likely to say they don't have the time, whilst older Londoners are more likely to say they have an illness or disability that prevents them from getting involved (30% of those 65+).

Climate change mitigation and energy

Energy policies (June 2017)

Policies to increase clean energy and energy efficiency are strongly supported by Londoners. There is between 66%-79% net support for these measures. The most strongly supported measure are requiring new buildings to be energy efficient and low carbon and funding and support to make London's homes better insulated and more energy efficient, both with 79% support.

To what extent would you support or oppose the following policies being implemented in London?	Net support %	Strongly support %	Tend to support %	Total support %	Neither support nor oppose %	Tend to oppose %	Strongly oppose %	Total oppose %	Don't know %
Requiring new buildings to be energy efficient and low carbon	79	46	34	81	9	1	0	2	8
Funding and support to make London's homes better insulated and more energy efficient	78	41	39	80	10	1	0	1	9
Support for boroughs to supply more renewable energy in London	73	39	37	76	13	2	1	3	9
Setting up a new not for profit energy company to offer fairer energy tariffs for Londoners, and reinvest profits to support further energy efficiency and clean energy in London	72	43	32	75	13	2	1	3	9
Help for Londoners and community groups to increase the amount of solar energy generated in London	68	38	34	71	17	3	1	3	9
Targeting energy efficiency and supporting income maximisation approaches to help those affected by fuel poverty	67	32	36	68	17	1	1	2	13

The policy that Londoners would most like to see implemented is the setting up of a London energy company – 29% of Londoners selecting this as their top option. This is followed by funding and support to make London's homes better insulated and more energy efficient (17%).

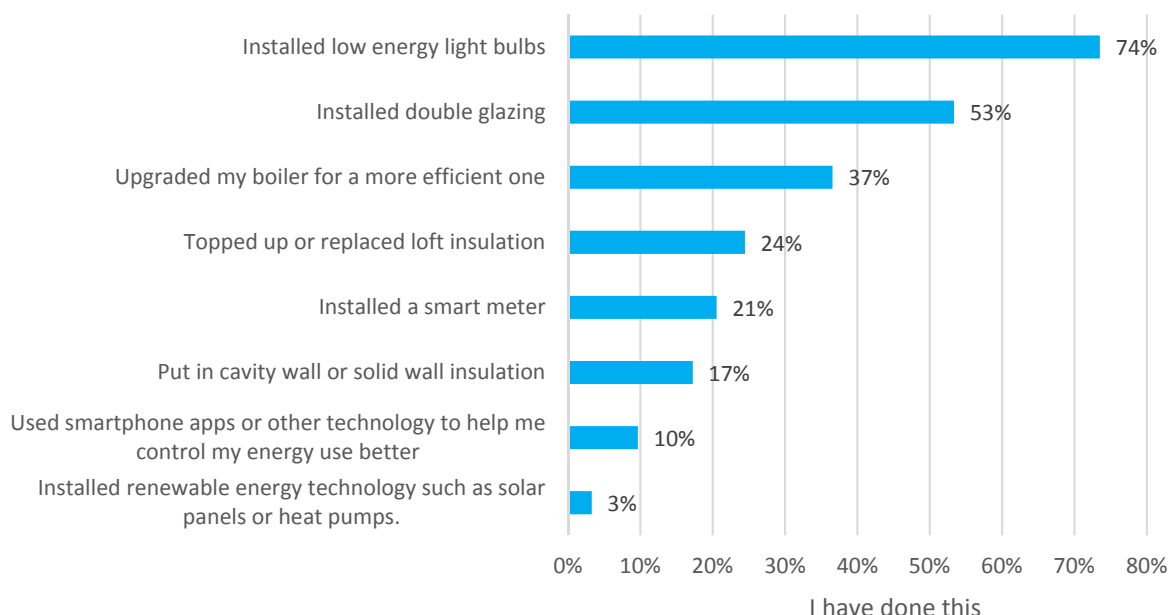
Most of these policies are supported more by females than males. A number of policies, particularly those around renewable and solar energy, had more support from ABC1 Londoners.

Which of the following policies would you MOST like to see implemented in London?	%
Setting up an energy company to offer fairer energy tariffs for Londoners, and reinvest profits in supporting more energy efficiency and clean energy in London	29
Funding and support to make London's homes better insulated and more energy efficient	17
Requiring new buildings to be energy efficient and low carbon	12
Support for boroughs to supply more renewable energy in London	11
Help for Londoners and community groups to increase the amount of solar energy generated in London	10
Targeting energy efficiency and supporting income maximisation approaches to help those affected by fuel poverty	8
Don't know	13

Domestic energy behaviours (July 2017)

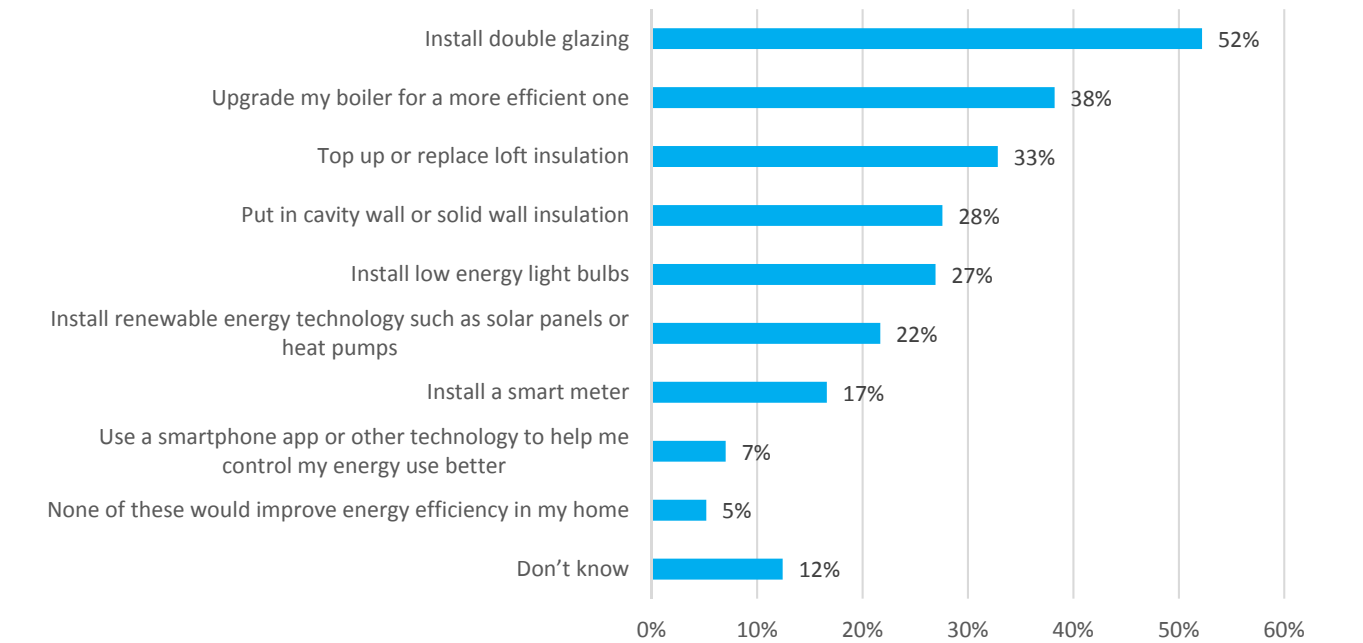
When asked which energy saving changes Londoners have made in their homes, the majority of Londoners say they have installed low energy light-bulbs (74%) and installed double glazing (53%). The next most common actions are upgrading the boiler (37%) and improving loft insulation (24%).

Londoners who have done the following in their homes



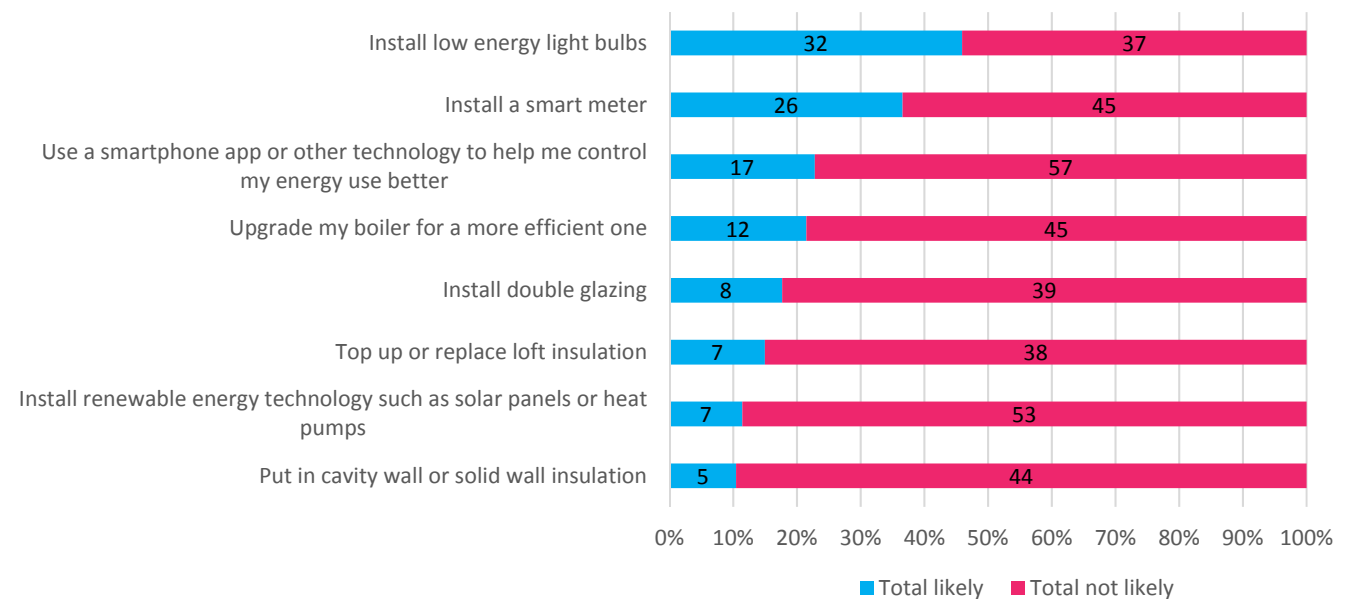
Londoners think that installing double glazing does the most to improve energy efficiency in their homes (52% say it is one of the top 3 most effective actions). This is followed by upgrading the boiler (38%). Improving insulation in the home is seen as the next most effective, with loft insulation at 33% and wall insulation at 28%.

Most effective in improving energy efficiency in your home



32% of Londoners say they are likely to install low energy lightbulbs and 26% say they are likely to install a smart meter. The next most likely action to take is using a smartphone app to better control energy use, 17% of Londoners say they are likely to do this.

And how likely, if at all, is it that you would do each of the following over the next 12 months?

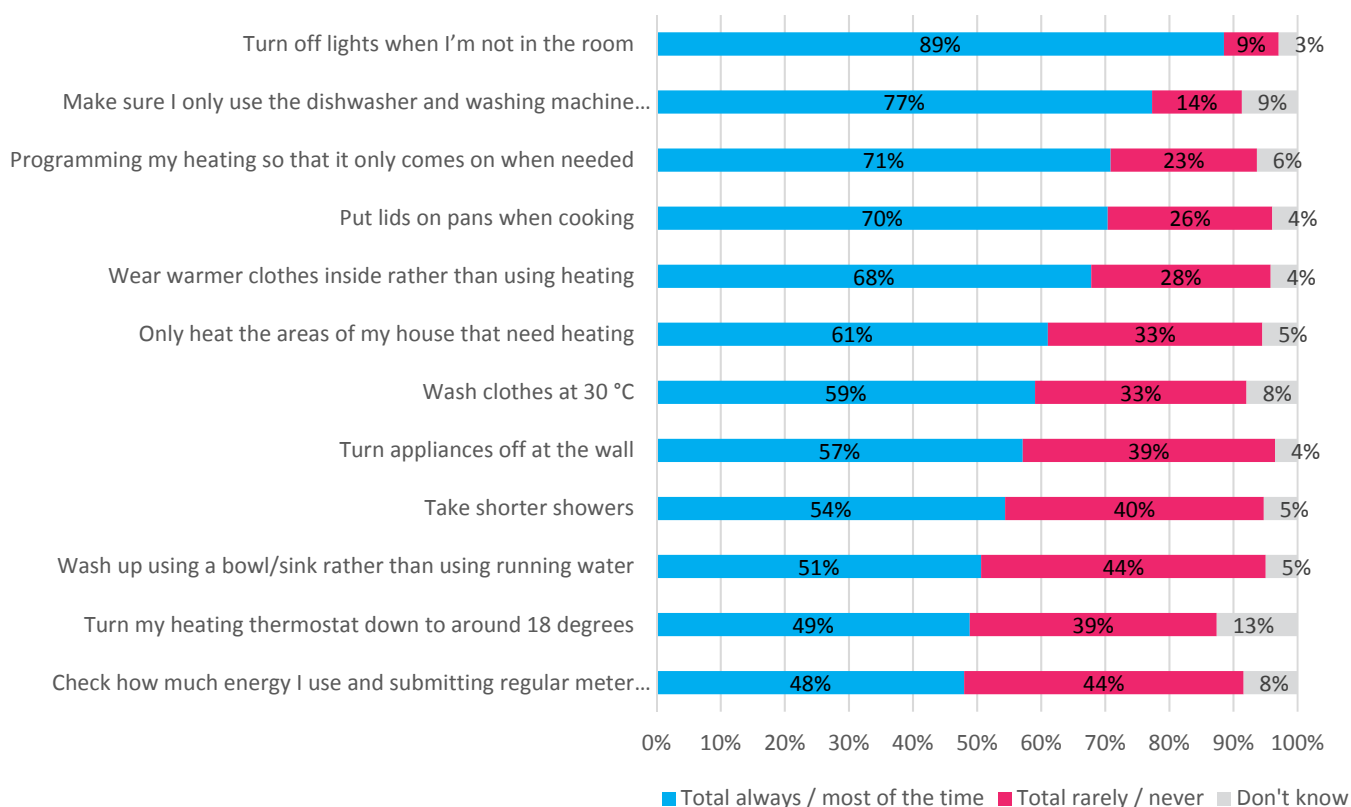


When asked why people wouldn't do the following actions, the most popular response universally is that they **don't own their home**. This is the most popular response for all actions, from installing low energy light bulbs (23%) to double glazing (40%). The cost and suitability for their homes are the next most common reasons for not doing these actions; cost more for heat pumps and boilers, and suitability for wall insulation and loft insulation. [Free text analysis to come on 'other' reasons].

When asked about energy saving behaviours in the house, the most common behaviour was turning off lights when not in the room (57% say they always do this). This is followed by programming heating to only come on when needed (48% always) and only using the dishwasher and washing machine when they are full (44% always).

Infrequent behaviours include checking energy use by submitting regular meter readings (44% rarely or never), using a washing up bowl (44% rarely or never), taking shorter showers (40% rarely or never) and only heating areas of my house that need heating (33%).

Actions at home to reduce your energy consumption, frequency



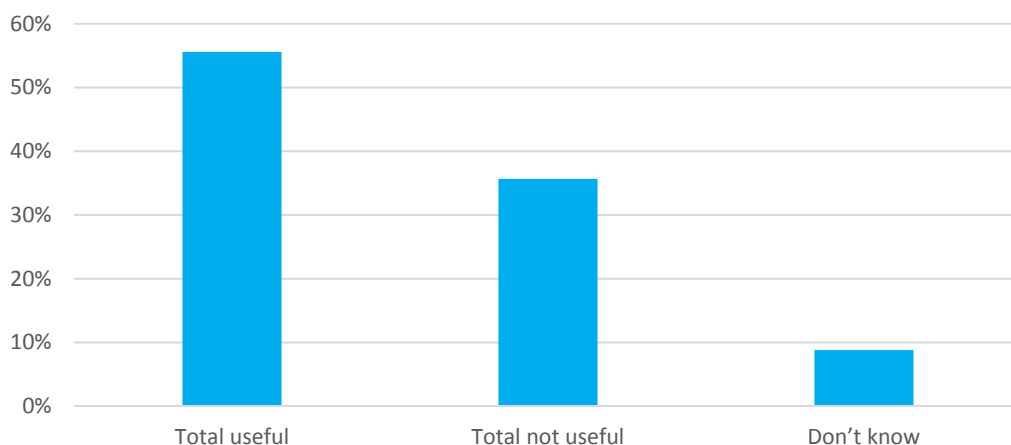
Smart meters (July 2017)

56% of Londoners who have a smart meter installed say it is useful for managing energy use.

36% say it isn't useful. Younger Londoners are much more likely to say this is useful, 78% of under 25s and 60% of 25-49 year olds. Over 50s are more likely to find them un-useful than useful, net -2% for 50-64 year olds and net -22% for 65+ year olds.

How useful, if at all, has your smart meter been in helping you manage your energy use?

[only asked to those with a smart meter; n=190]

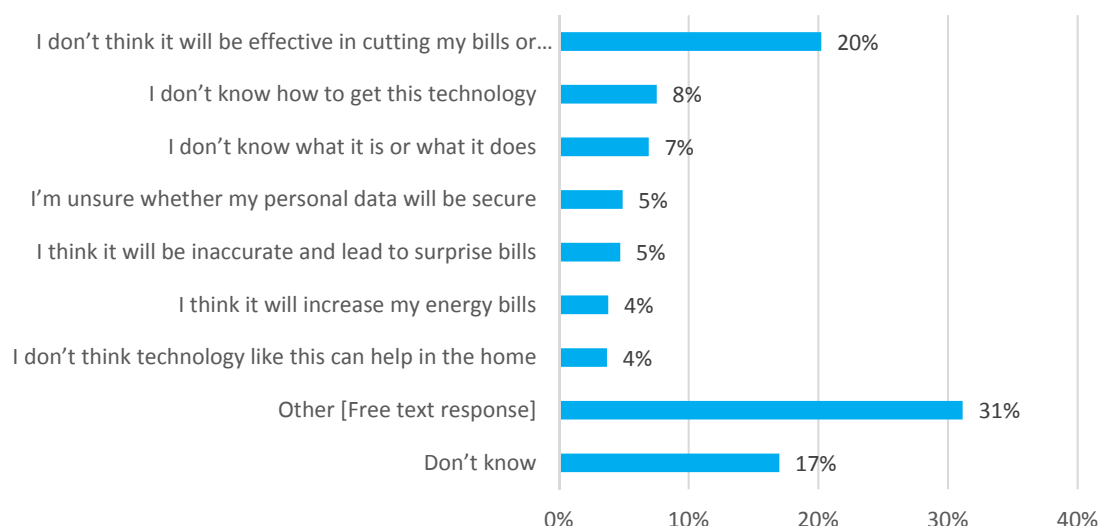


13% of Londoners say they have encountered problems with their smart meters, and these issues are mainly around technical problems – displays not working, losing connection and problems with estimates.

The main reason for not installing a smart meter is the perception that they are **not effective in cutting bills or energy use** (20%). 31% of respondents gave an 'other' response, free text analysis to come.

Reasons for not installing a smart meter

[only asked to those who haven't installed a smart meter; n=810]



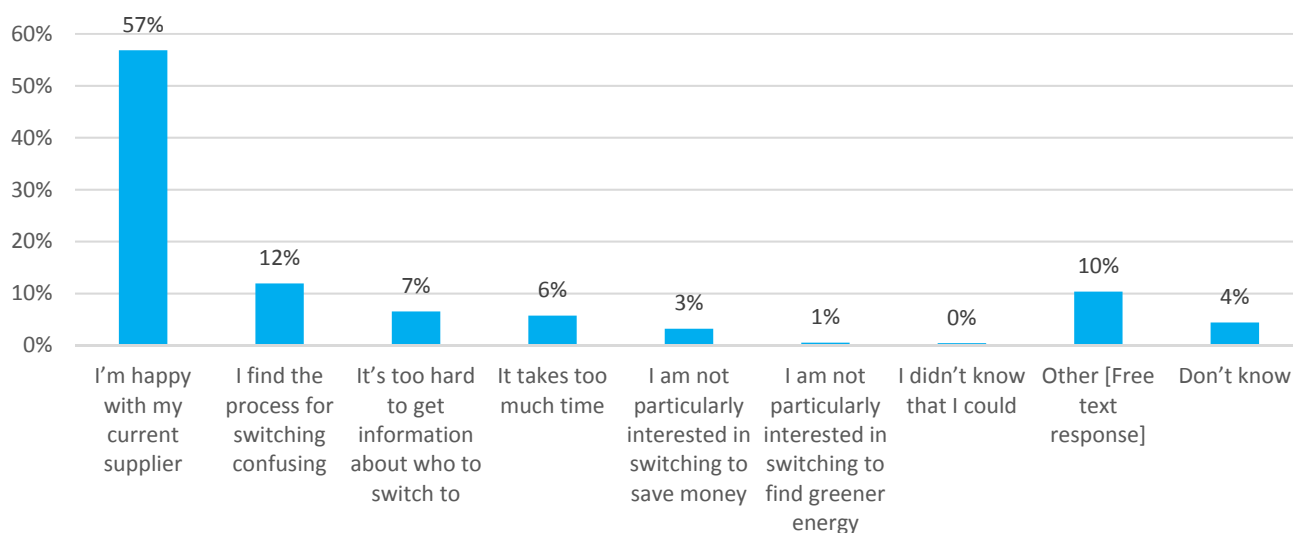
Switching energy supplier (July 2017)

35% of Londoners have chosen to switch energy supplier in the last 3 years. 23% have never chosen to switch and 18% switched over three years ago. Under 25s are much less likely to have chosen to switch in the 3 years, mostly because 45% of this age group are not responsible for household bills. ABC1 Londoners are slightly more likely to have switched in the last 3 years, 37% of ABC1 Londoners compared to 32% of C2DE Londoners.

When asked why they didn't switch, the most common reason is that the respondent is happy with the current supplier (57%). 12% say they find the process for switching confusing and 7% say that it's too hard to get information about who to switch to. ABC1 Londoners are less likely to be happy with their current supplier (52%), and the other reasons given were finding the process confusing (14%), taking too much time (10%) and not being interested in switching to save money (5%).

Main reason for not switching energy supplier in the past 2 years?

[Only asked to those who haven't switched energy supplier in the past 2 years; n=503]



Cost is by far the most important consideration when deciding on a new energy supplier; 74% say this is the number one consideration. Second most important is customer service and third is fair treatment. Offering energy from renewable sources is the last priority out of the options provided.

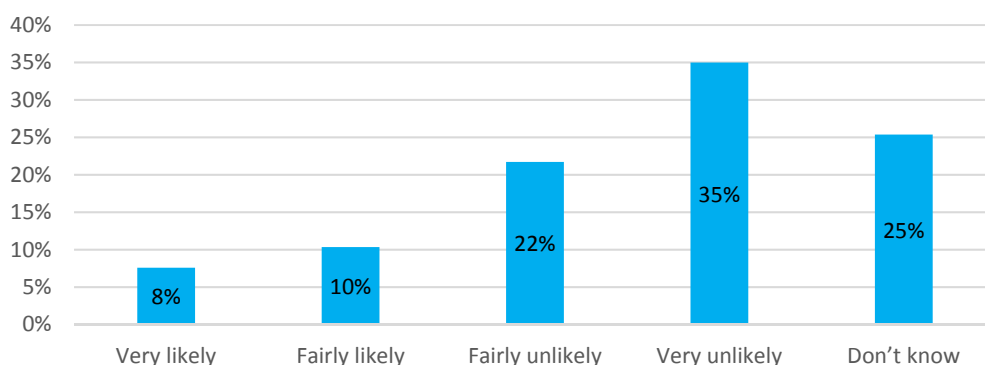
Water meters (August 2017)

26% of Londoners say they are on a water meter, 57% pay a flat rate and 17% don't know.

For those who are on a flat rate, 18% say they are likely to install a water meter in the future, compared to 57% who say they are unlikely.

Likelihood of installing a water meter in the future

[Only asked to those not on a flat rate; n=611]



The types of people who say that they would be likely to install a water meter are younger, live in north and east London, ABC1 and more female than male. They are also most likely to own with a mortgage, rather than own outright – this probably relates with the age of the respondent. People under 25 are also least likely to say they don't know.

The top reasons for not installing a water meter are the **perception that it will increase bills (43%)**, followed by Londoners saying that it is **not their decision (30%)**. This latter option is particularly true for renters, 55% of which say this is their biggest reason.

Housing association renters are most likely to give the reason that they don't think they can install one in their home (44%), whilst home owners are most worried about bills increasing (62%).

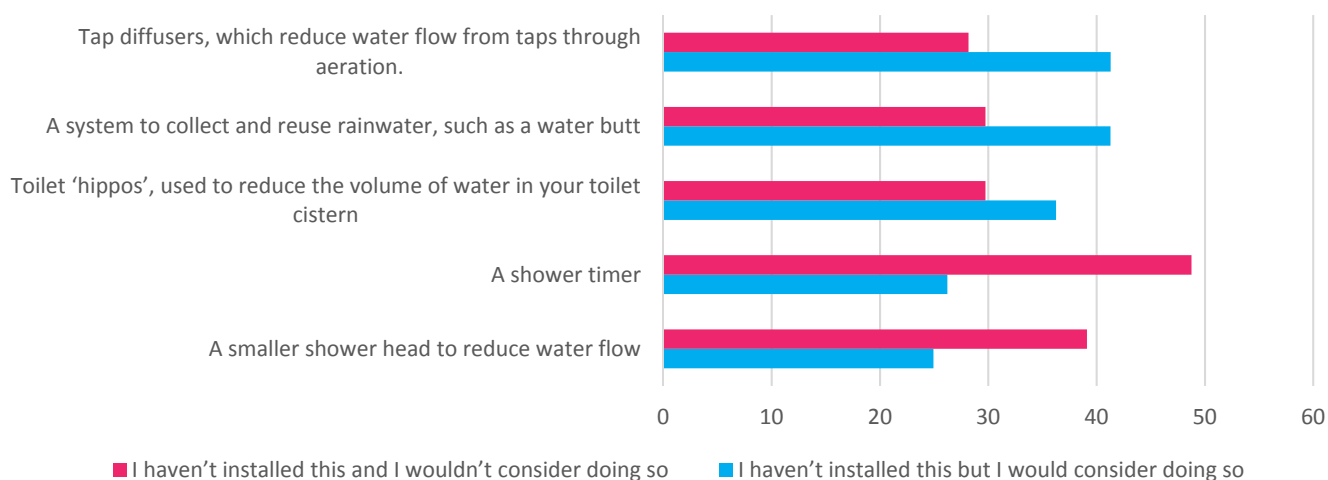
Water saving measures at home (August 2017)

Tap diffusers and **water butts** are the water saving measures most likely to be installed at home, 41% of Londoners say they would consider these.

36% of Londoners say they would consider installing a **toilet hippo**.

The measure least likely to be considered is a shower timer, 49% would not consider this, and just 10% say they already have one.

Would you install any of the following in your home?



Waste

Recycling policies

When asked about support for various recycling policies, all were very well supported with between 85% and 70% net support. The policy with the most support is the policy to collect food waste and the 6 main recyclable materials consistently across London (net +85%).

To what extent would you support or oppose the following policies being implemented in London?	Net support %	Strongly support %	Tend to support %	Total support %	Neither support nor oppose %	Tend to oppose %	Strongly oppose %	Total oppose %	Don't know %

Food waste and the main recyclable materials (glass, cans, paper, card, plastic bottles and mixed plastics) to be collected consistently across London	85	58	28	86	7	0	1	1	7
Promoting the reduction of excessive food packaging	81	56	27	82	9	1	1	2	7
Promoting the reduction of food waste	80	52	30	83	9	1	1	2	6
Promoting the reduction of single use plastic bottles and drinks cups with business partners	70	46	28	74	13	4	1	4	9
Help for boroughs to increase recycling in residential flats	79	49	32	81	10	1	1	2	7

When ranked against each other, 28% of respondents wanted to see the policy of collecting food waste and the 6 main recyclable materials consistently across London implemented the most. 21% wanted to see the reduction of excess food packaging and 19% promoting the reduction of food waste.

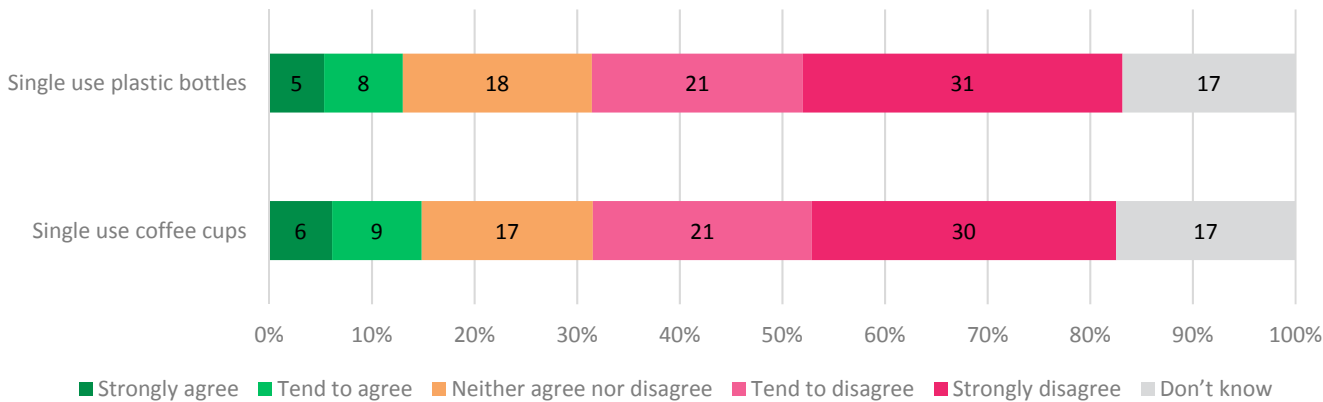
Older and ABC1 Londoners are more supportive of these measures – approximately 10% more support for each policy than younger C2DE Londoners.

Which of the following policies would you MOST like to see implemented in London?	%
Food waste and the six main recyclable materials (glass, cans, paper, card, plastic bottles and mixed plastics) to be collected consistently across London	28
Promoting the reduction of excessive food packaging	21
Promoting the reduction of food waste	19
Promoting the reduction of single use plastic bottles and drinks cups with business partners	11
Help for boroughs to increase recycling in residential flats	8
Don't know	12

Plastic bottles and coffee cups (July 2017)

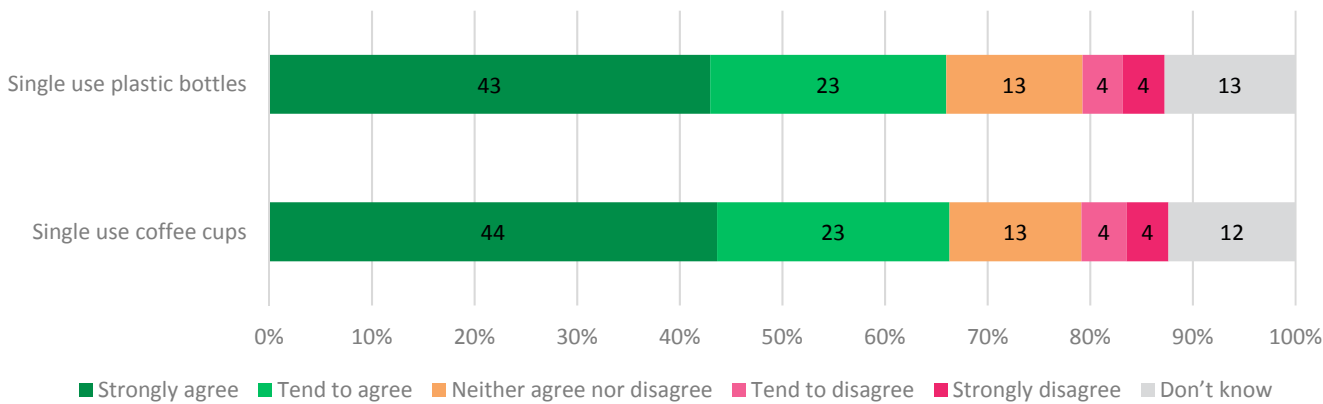
Londoners think that businesses are not doing enough to reduce waste from coffee cups or plastic water bottles. 51% say they are not doing enough for coffee cups and 52% say they are not doing enough for water bottles. ABC1 and white Londoners are most likely to hold these views.

Do you agree or disagree that businesses are doing enough to reduce waste from:



Similarly, 66% of Londoners think that businesses should do more to reduce waste from single use coffee cups and single use plastic bottles. Slightly stronger disagreement comes from older Londoners and slightly stronger agreement comes from ABC1 Londoners.

Do you agree or disagree that businesses should do more to reduce waste from:



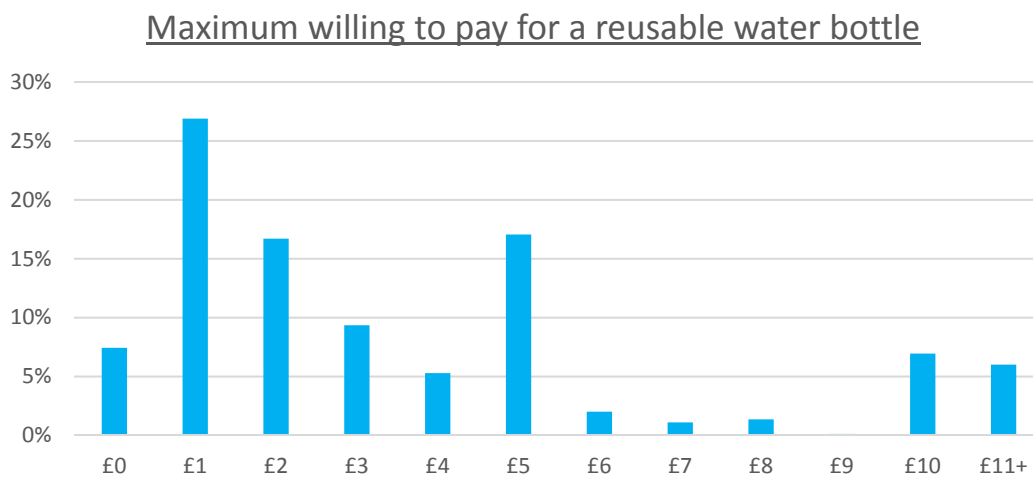
61% of Londoners say that they would be likely to consider buying a reusable water bottle to reduce the amount of single use plastic bottles sold. 19% say they are already using a reusable water bottle. People who say they are already using a reusable water bottle are more likely to be female, slightly older and white. Those who say they are not likely to consider buying a reusable water bottle are more likely to be male (16%, compared to 9% of women). Those who say they would consider buying are more likely to be an ethnic minority and under 65.

The most common reason given for not buying a reusable water bottle is **concern about chemicals in the bottle**. This is followed by Londoners saying **they wouldn't use it enough**, and that they **don't like carrying them around**.

Reason	Ranked first	Ranked second	Ranked third
[Only asked to those who don't already use a reusable water bottle; n=785]			

I would worry about the chemicals on the reusable bottle	24	14	11
I would not use it enough	17	15	18
I don't like carrying them around	13	20	17
It costs more than a single use plastic water bottle	14	16	12
I don't know where to fill them up	6	10	16
I don't really know what one is	6	4	6

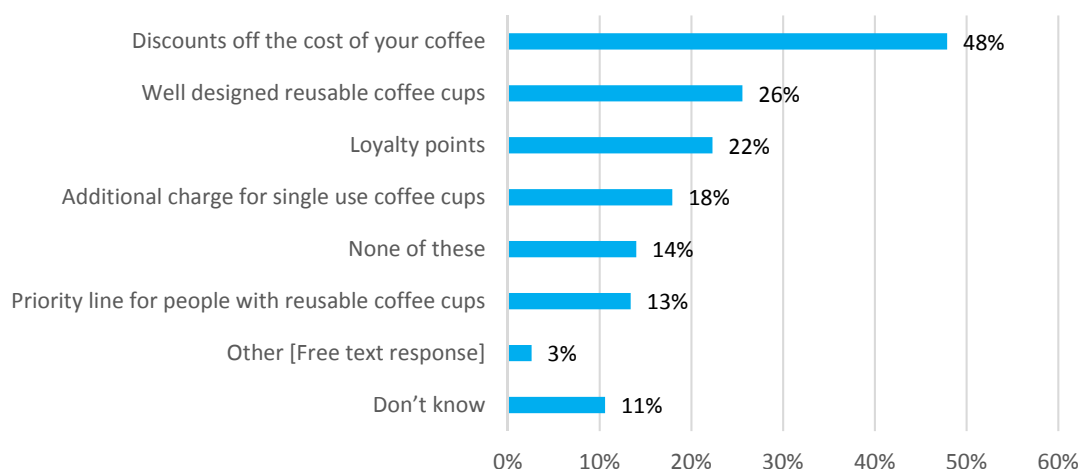
Between £2 and £3 is the (mean) average response for the maximum a Londoner would be willing to pay for a reusable water bottle. (Median average: £2)



Discounts off the cost of coffee would do the most to encourage people to use a reusable coffee cup (48%), followed by **well-designed reusable coffee cups (26%)** and loyalty points (22%).

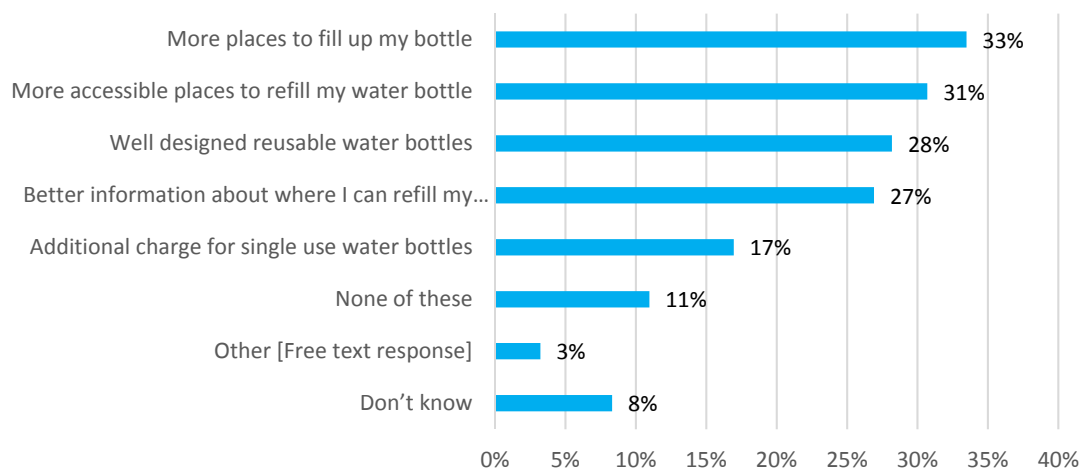
C2DE Londoners are most likely to say that none of the options given would encourage them to use a reusable coffee cup (20%, compared to 9% for ABC1 Londoners). Younger ABC1 Londoners would be more encouraged by discounts and loyalty points.

Which of the following would most encourage you to use
a reusable coffee cup?



More places to fill up water bottles, and **more accessible places** are what would convince most Londoners to use a re-usable water bottle (33% and 31% respectively). Well-designed reusable bottles is the third choice, and more information about where they can be refilled is the fourth choice.

Which of the following would most encourage you to use
a reusable water bottle?



Re-use and recycling activities (September 2017)

73% of Londoners have donated items to be re-used in the last few years (e.g. to charity shops). Older and ABC1 Londoners are more likely to do this, and women are 20% more likely than men to do so.

Of those (23%) who said have not donated items to be re-used in the last few years, over half (58%) said they would consider doing so in the future and just 18% said they wouldn't. So this is to say that 86% of Londoners are either already doing this action, or would consider doing so.

Fewer Londoners (34%) have sold items to be re-used in the last few years. Under 50s are much more likely to have done this. However, of those who haven't done this, 56% would consider doing so.

46% of Londoners have bought a ‘re-used’ or second-hand item, compared to 48% who haven’t.

Just 18% of Londoners say they have bought repaired items, younger Londoners being much more likely to do so.

46% of Londoners say they have got their items repaired in the last few years. There is little difference by age, but ABC1 Londoners are more likely to do so than C2DE. No doubt repairing mobile phones and laptops features highly for younger Londoners, whilst clothes and footwear may feature higher for older Londoners.

12% of Londoners have rented or leased items. For those who said they haven’t rented or leased items in the last few years, just 32% said they would consider doing so. 51% said they wouldn’t.

Those who say they would consider renting or leasing an item, 21% said they would rent a white good or small electrical item. 19% said they would rent an audio-visual device and just 10% said they would rent clothing. 40% said they don’t know.

Adapting to climate change

Ambient noise