

Summary Report: Climate change mitigation and energy

This report contains summary findings from the public consultation on the draft London Environment Strategy, with a focus on climate change mitigation and energy. It draws together data from both quantitative and qualitative research. Detailed reports supporting this summary are available from the Greater London Authority Opinion Research and Statistics team.

1. Methodology

Climate change mitigation and energy public consultation methodology		
Quantitative Research: Surveys on energy and water policy were conducted with a representative sample of Londoners and were posted on the Talk London consultation page.		
<u>Representative polling</u>	<u>Talk London Community</u>	
<ul style="list-style-type: none">• Surveys carried out with a representative sample of the London population aged 18+ on the following dates:<ul style="list-style-type: none">○ 12th-15th June, with response of 1,047○ 24th-27th July, with response of 1,000○ 21st-24th August, with response of 1,014	<ul style="list-style-type: none">• Surveys with parallel content to those conducted with a representative sample, ran from 11th August to 17th November 2017 on Talk London• The sample has not been weighted and is therefore not representative of the London population• The findings from these surveys have been compared against the findings from representative polling, and key differences have been highlighted in the consultation reports	
Qualitative Research: A programme of qualitative research was designed to explore general attitudes to energy amongst Londoners. All qualitative research was conducted with Talk London members. This resulted in a more engaged sample than would be the case in the general population.		
<u>Offline qualitative research (focus groups + interviews)</u>	<u>Online qualitative research (discussion threads)</u>	<u>Correspondence</u>
<ul style="list-style-type: none">• Four focus groups were conducted on 4th and 6th September in City Hall, each lasting 90 minutes• Participants were recruited from the Talk London community, and were paid £40 to attend• The groups were split by housing tenure as this was	<ul style="list-style-type: none">• 3 discussion threads on energy ran from 11th August to 17th November on the Talk London community:<ul style="list-style-type: none">○ Improving energy efficiency (25 comments)○ Switching energy supplier (7 comments)	<ul style="list-style-type: none">• The GLA received a total of 1,345 emails from members of the public either writing in as individuals or as part of a campaign• Emails from

Climate change mitigation and energy public consultation methodology		
<p>identified as a key driver of attitudes towards energy efficiency</p> <ul style="list-style-type: none"> A total of 27 participants attended the session: <ul style="list-style-type: none"> Gender: 13 women/ 14 men Age: Wide range of ages Ethnicity: 23 x white participants/ 4 x BAME participants Housing tenure: 15 x homeowners/ 11 x private renters/ 1 x social renters 	<ul style="list-style-type: none"> Analysis of the discussion threads, supported by key quotes, has been included in this report 	<p>individuals have been included in the analysis for this report</p>

2. Energy policies

Summary of quantitative findings (representative polling):

- Policies to increase clean energy and energy efficiency are strongly supported by Londoners. There is between 66-79 per cent net support for these measures.
 - The most strongly supported measures 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 per cent support.
- The policy that Londoners would most like to see implemented is the setting up of a London energy company to offer fairer energy tariffs for Londoners, and reinvest profits in supporting more energy efficiency and clean energy in London – 29 per cent of Londoners selected this as their top option.
 - This is followed by funding and support to make London's homes better insulated and more energy efficient (17 per cent).
- 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.

“The survey suggests a non-profit London energy company, I think this would be a brilliant idea if it is run like TfL as it would provide real competition to the big six who usually raise their prices together, collectively acting as a monopoly.”

Talk London Member, 23 years old, male, Lambeth

Talk London members more likely to support energy policies in London, for example 89 per cent strongly support 'requiring new buildings to be energy efficient and low carbon', compared to 46 per cent of Londoners

3. Energy efficiency behaviours

Summary of views based on qualitative research:

- Participants felt that everyone knows how to be energy efficient
 - It is behaviour that is common sense and so doesn't require much thought / research.
 - It resonates with wider values around not being wasteful / being a responsible person.
- Participants saw energy efficiency as being about small, mundane actions that are easy to do
 - But the motivation to do them is often quite small.
- Whilst stated motivation for being energy efficient is primarily financial, there is little expectation that actions will result in any real financial savings
 - Participants also found it difficult to quantify how big or small the environmental impact of an action might be.
- Participants felt that commercial buildings should set an example by reducing the amount of artificial light and heating they use.

"Time to get good at delivering and time for the story of the benefits to be told and to filter out to more people, building a virtuous circle of sustained effort, good results and positive community led promotion."

Talk London Member, 44 years old, male, Hackney

Summary of quantitative findings (representative polling):

- When asked about energy saving behaviours in the house, the most common behaviour was turning off lights when not in the room (57 per cent say they always do this).
 - This is followed by programming heating to only come on when needed (48 per cent always), and only using the dishwasher and washing machine when they are full (44 per cent always).
- Infrequent behaviours include checking energy use by submitting regular meter readings (44 per cent rarely or never), using a washing up bowl (44 per cent rarely or never), taking shorter showers (40 per cent rarely or never), and only heating areas of the house that need heating (33 per cent).

Talk London members are more likely to do actions at home to reduce energy consumption, such as 69 per cent of Talk London members programme heating so that it only comes on when needed, compared to 48 per cent of Londoners

4. Retrofitting

Summary of views based on qualitative research:

- Participants saw an energy efficient home as bringing significant personal benefits, in terms of personal comfort and financial savings
- Nearly all homeowners had taken action to improve their property's energy efficiency
 - But homeowners said they did not expect energy efficient retrofitting to make a significant difference to the value of their home
- Renters said they feel powerless to do anything to improve the energy efficiency of their homes
 - Participants felt that landlords currently have no incentive to invest in energy efficiency retrofitting
- Cost, planning restrictions, rogue contractors, aesthetics and disruption to the home all raised as barriers to installing energy efficiency measures
 - Low awareness of government/ local authority schemes to support Londoners install home efficiency measures
 - Haringey Home Energy Action Plan raised by one participant as an example of a successful government scheme
- There was a high degree of interest in solar energy, primarily for financial reasons, but upfront cost and concerns over technology key barriers to take up
 - Participants estimated you could save between 20 per cent and 50 per cent on your bills, but that installation costs would mean a very long buy back period
 - Perception that government has withdrawn all support for solar
 - Expectation that technology will continue to improve and that therefore it is better to wait for next generation of panels
- Awareness of and interest in heat pumps was much lower
 - Cost and lack of space seen as significant barriers to installation

"There needs to be some kind of benchmark to understand present energy use and how much will be saved by installing the various measures."

Talk London Member, 44 years old, male, Hackney

Summary of quantitative findings (representative polling):

- 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 per cent) and installed double glazing (53 per cent).
 - The next most common actions are upgrading the boiler (37 per cent) and improving loft insulation (24 per cent).
- Londoners think that installing double glazing does the most to improve energy efficiency in their homes (52 per cent say it is one of the top 3 most effective actions).

- This is followed by upgrading the boiler (38 per cent).
- Improving insulation in the home is seen as the next most effective, with loft insulation at 33 per cent and wall insulation at 28 per cent.
- 32 per cent of Londoners say they are likely to install low energy lightbulbs and 26 per cent 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 per cent of Londoners say they are likely to do this.
- 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 per cent) to double glazing (40 per cent).
 - 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.

Talk London members are more likely to have done most energy saving actions in the house (90 per cent installed low energy light bulbs, compared to 47 per cent of Londoners, 54 per cent have upgraded their boiler, compared to 34 per cent of all Londoners)

5. Smart meters

Summary of views based on qualitative findings:

- There was high awareness of smart meters, but not all were convinced of the benefits.
 - A number of participants in each group who had had smart meters installed said they liked that it gave them more accurate bills and gave them more knowledge about how they were using energy.
 - Many said they had made small changes to their behaviour as a result.
 - Many participants were unconvinced by these benefits:
 - Checking the meter was seen as an easy task to do and one that they are used to.
 - Many felt that they were already engaging in energy efficient behaviour and so thought it unlikely that anything would change as a result of getting a smart meter.
- Participants also had a number of concerns about smart meters:
 - Many thought that installation would be a hassle / might not be possible if you live in a certain type of property.
 - Some thought you might have to pay to have a smart meter installed
 - Concerns that you have to change smart meter every time you change energy company.
 - Some felt that the technology was still in early days and that it was therefore best to wait until it had been better tested.

- Most participants were comfortable with the idea of sharing data from their smart meter with energy companies, as they did not consider this to be sensitive information.

Summary of quantitative findings (representative polling):

- 56 per cent of Londoners who have a smart meter installed say it is useful for managing energy use. 36 per cent say it isn't useful.
 - Younger Londoners are much more likely to say this is useful, 78 per cent of under 25s and 60 per cent of 25-49 year olds.
 - Over 50s are more likely to find them un-useful than useful, net -2 per cent for 50-64 year olds and net -22 per cent for 65+ year olds.
- 13 per cent of Londoners say they have encountered problems with their smart meters, and these issues are mainly around technical problems, such as 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 per cent).

Findings from Talk London polling are broadly in line with representative polling, except that Talk London members are less likely to find smart meters useful (43 per cent compared to 56 per cent of Londoners)

6. Energy suppliers

Summary of views based on qualitative findings:

- There was high awareness of the benefits of switching energy supplier, but many assumed that the amount that you could save by doing so would be relatively small (£100-£200):
 - Many were surprised to hear that potential savings could be much higher.
- Most participants said they did not feel sufficiently motivated by the financial savings to warrant the time/ hassle of switching:
 - Those who did switch tended to do so on a regular basis, and were frustrated that they had to keep switching in order to get the best deal.
- All said that price is the main factor they consider when choosing an energy supplier:
 - Most said that this was the only consideration.
 - Some were interested in switching to a 'green' energy company, but felt that the current trade-off on cost was too high
- Participants were interested in the idea of a 'not for profit' energy company:
 - All assumed that this would have to be government run, and this sparked heated debate about nationalisation, with younger participants tending to be in favour and older participants tending to associate this with unreliable supply and poor customer service.
 - A government company competing against private companies was seen as a new and interesting idea, and went some way to reassuring those with

concerns that this would not result in a fall in standards of reliability / customer service.

Summary of quantitative findings (representative polling):

- 35 per cent of Londoners have chosen to switch energy supplier in the last three years. 23 per cent have never chosen to switch and 18 per cent switched over three years ago:
 - Under 25s are much less likely to have chosen to switch in the three years, mostly because 45 per cent of this age group are not responsible for household bills.
 - ABC1 Londoners are slightly more likely to have switched in the last three years (37 per cent of ABC1 Londoners compared to 32 per cent 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 per cent):
 - 12 per cent say they find the process for switching confusing and 7 per cent say that it's too hard to get information about who to switch to.
 - The other reasons given were finding the process confusing (14 per cent), taking too much time (10 per cent) and not being interested in switching to save money (5 per cent).
- Cost is by far the most important consideration when deciding on a new energy supplier; 74 per cent 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.

Talk London members were more likely to have switched energy supplier (75 per cent compared to 52 per cent of Londoners). Talk London members' views on what they want from an energy company was in line with representative polling, with price coming out as the number one factor.

7. Water saving measures in the home

- 26 per cent of Londoners say they are on a water meter, 57 per cent pay a flat rate and 17 per cent don't know. For those who are on a flat rate, 18 per cent say they are likely to install a water meter in the future, compared to 57 per cent who say they are unlikely:
 - 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.
- The top reasons for not installing a water meter are the perception that it will increase bills (43 per cent), followed by Londoners saying that it is not their decision (30 per cent):

- This latter option is particularly true for renters, 55 per cent of whom 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 per cent), whilst home owners are most worried about bills increasing (62 per cent).
- Tap diffusers and water butts are the water saving measures most likely to be installed at home, 41 per cent of Londoners say they would consider these:
 - 36 per cent of Londoners say they would consider installing a toilet hippo.
 - The measure least likely to be considered is a shower timer; 49 per cent would not consider this, and just 10 per cent say they already have one.

Talk London survey data is in line with findings from representative polling.