



# Attitudes to the Energy Transition



October 2024  
[consumercouncil.org.uk](https://www.consumer council.org.uk)



# Contents

<b>Foreword</b> .....	<b>4</b>
<b>Executive summary</b> .....	<b>6</b>
<b>Methodology</b> .....	<b>12</b>
<b>Main findings</b> .....	<b>13</b>
<b>Changing attitudes to the energy transition</b> .....	<b>60</b>
<b>Conclusions</b> .....	<b>62</b>
<b>List of figures</b> .....	<b>64</b>

# Foreword

**In November 2023, the Consumer Council commissioned Cognisense to conduct a quantitative survey regarding consumer attitudes to energy transition issues. The purpose of which was to gather evidence of public opinion and sentiment in order to provide the Consumer Council, policy makers, and industry stakeholders with insights into the level of consumer support, education and protection required to meet the net zero goals.**

The second annual Consumer Council 'Attitudes to the Energy Transition' research study provides a contemporaneous picture of consumer experiences of one of the most important issues in our lifetime. The energy transition will mean significant changes to how people live, eat, travel, and heat their homes. As significant barriers to individuals' energy transition remain, it is crucial that the annual consumer insights we capture are used to inform decision making.

It is essential that we achieve a just and fair transition by ensuring affordability, security of energy supply and protection for all consumers, particularly our vulnerable citizens. Given the impact of heat and transport emissions to Northern Ireland's total carbon emissions, domestic consumers will play an essential role in helping us achieve our net zero targets. Empowering individuals, and mobilising communities, to actively embrace Northern Ireland's energy transition is critical.

This was the second annual survey in a series potentially running until 2050. This enables us to analyse two years' worth of data specifically from consumers in Northern Ireland. As experts in the field of consumer research, regularly carrying out research and face to face engagement with consumers, the Consumer Council is perfectly placed to undertake this work.

Regularly checking in with consumers on their attitudes to the energy transition is key in understanding how wider contexts can impact this. Both sets of results show that the ongoing effects of the cost of living crisis and costs of new energy saving technologies remain a barrier for many.

**Noyona Chundur, Chief Executive**

A handwritten signature in white ink, appearing to read 'Noyona Chundur', is positioned below the name. The signature is stylized and fluid.

# 1. Executive summary

## Growing knowledge of terminology

The Northern Ireland Executive's Energy Strategy provides a strong grounding to address the needs of consumers during the energy transition. The Strategy places consumer needs at the heart of the energy transition. However, without understanding consumer needs and addressing them we will not meet Northern Ireland's carbon reduction ambition.

The Consumer Council 'Attitudes to the Energy Transition 2024', demonstrates a welcome uplift in consumer understanding of key terminology. For example, more than seven in ten consumers report understanding of the terms; 'decarbonisation', 'net zero', and 'greenhouse gas emissions.'

## Warning signs: impact not understood

While consumer understanding of important terminology has increased, there has been no corresponding increase in consumer awareness of the technologies they may be asked to rely on to heat their homes in the future.

More worryingly, the survey shows a year-on-year decrease (down to 52% from 56%) in awareness of the need for households to switch from fossil fuels to zero carbon alternatives to achieve decarbonisation targets.

As consumers first need to understand what is being asked of them, this lack of awareness demonstrates the need for better public information regarding the energy transition.

## Warning signs: Lower support for renewables

Seven in ten consumers indicate they support the use of renewable energy. Such support will be invaluable in driving forward with the energy transition. However, consumer support must not be taken for granted. This is evidenced by the changes in findings since last year's Consumer Council survey. The survey, completed in 2023, indicates a decrease (down to 70% from 78%) in the number of consumers who support the use of renewable energy for providing our power, heat, and transport.

The number of consumers who would support the construction of new infrastructure in their local area to aid the increased use of renewable energy has also decreased from 2022 to 2023 (down to 50% from 58%).

### Consumer dislike of punitive measures

One way to negatively impact consumer support for the energy transition is to impose measures upon people that they deem to be punitive. Such measures should only come after providing adequate support to enable household's carbon reduction activities.

This dislike of punitive measures is shown by lack of support for a ban on peat, coal, or oil for home heating. Only 25% of consumers indicate they would support a policy of that nature to help Northern Ireland reduce greenhouse gas emissions.

### Affordability is key

Pleasingly, most consumers continue to support policies to reduce greenhouse gas emissions in Northern Ireland. However, the survey finds a reduction in consumer willingness to drive their car less, fly less, and use public transport more to reduce their own carbon emissions.

Consumers were also less concerned than a year previously about how much energy is used in their home (down to 49% from 62%). These factors could be due to an increase in environmental scepticism but are more likely to reflect a reduction in energy prices that were extremely high when the first survey was undertaken.

There was also a reduction in support for government grants for electric vehicles, to install cleaner more efficient domestic heating systems, and to increase investment in public transport. Without appropriate financial support we are unlikely to succeed in encouraging consumers to make the lifestyle changes the energy transition will demand of us all.

We will continue to regularly check in with consumers on their attitudes to the energy transition in a series of annual surveys, potentially running until 2050. This enables us to analyse yearly data sets specifically from consumers in Northern Ireland and understand how wider contexts can impact these attitudes. We will continue to share the trending analysis with policy makers and key stakeholders and feed the findings into wider tracking at a regional and national level.

# Key findings

## Understanding

A large majority (89%) of respondents had some understanding of the term greenhouse gas emissions, though there was no consensus as to the contributor of the largest amount of greenhouse gas emissions in Northern Ireland. A good number of respondents were familiar with the terms net zero (74%) and decarbonisation (71%). Significantly fewer were familiar with the term energy transition (57%).

## Awareness of policy change

Almost seven in ten (68%) of respondents were aware that from 2035 it will only be possible to buy new electric cars in the UK. Six in ten (60%) were aware that the NI government is aiming to reduce greenhouse gas emissions to net zero by 2050 and notably fewer (30%) knew that by 2030 Northern Ireland must deliver 20% energy savings from buildings and industry.

## Support for renewables

A significant majority (70%) of respondents supported the use of renewable energy for providing NI's power, heat and transport, but this is down from 78% in 2022.





### Affordability

There was considerable support for government grants to encourage residential and commercial building owners to install cleaner and more efficient heating systems (79%), government grants to make electric vehicles (69%) more affordable, and for increased government investment in public transport (63%) instead of motorways.

Those who said they were unlikely to make upgrades or installations in the home that would contribute to decarbonisation, or replacing petrol or diesel vehicles with electric or plug-in hybrid alternatives, cited cost as the main barrier.

### Making change

Bans on the burning of fossil fuels for home heating purposes and the implementation of higher taxes on cars that use petrol and diesel were much more likely to be opposed than supported.

Under half (49%) of respondents were concerned about how much energy is used in their home, which was a significant decrease from 62% in 2022.

A significant proportion of respondents stated that their household had already made changes or that they will do so regarding driving a car less (48%), active travelling (52%) and saving energy by improving their home's energy performance (67%).



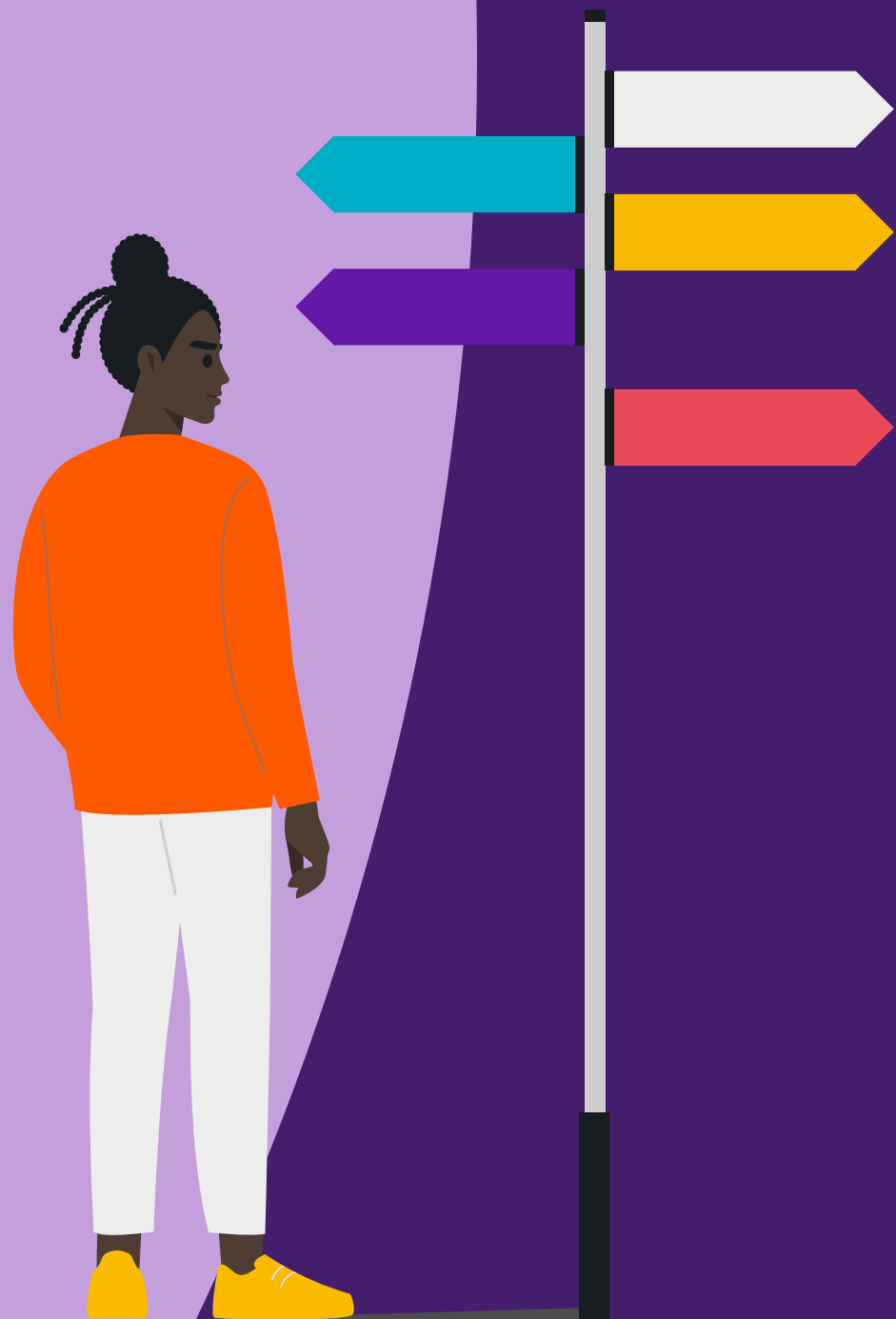
# Recommendations

To help Northern Ireland reach its net zero goals, further education of the population will likely be required regarding the following:

- The terminologies relating to decarbonisation and decarbonisation targets.
- Government schemes that are in place to support decarbonisation, including schemes required to support domestic consumers to decarbonise.
- The positive impact that household changes can make in relation to decarbonisation.
- Products and technologies that are available to contribute to decarbonisation.

Cost remains a barrier for many to make changes. Reducing this burden will be necessary before household alterations that contribute to decarbonisation could be implemented.

Incentives and grants will play a crucial role in addressing these concerns. The establishment of a 'one-stop shop' for energy advice and education could also serve an important function, with almost half (49%) of respondents having suggested that they would be likely to use such a resource.





## 2. Methodology

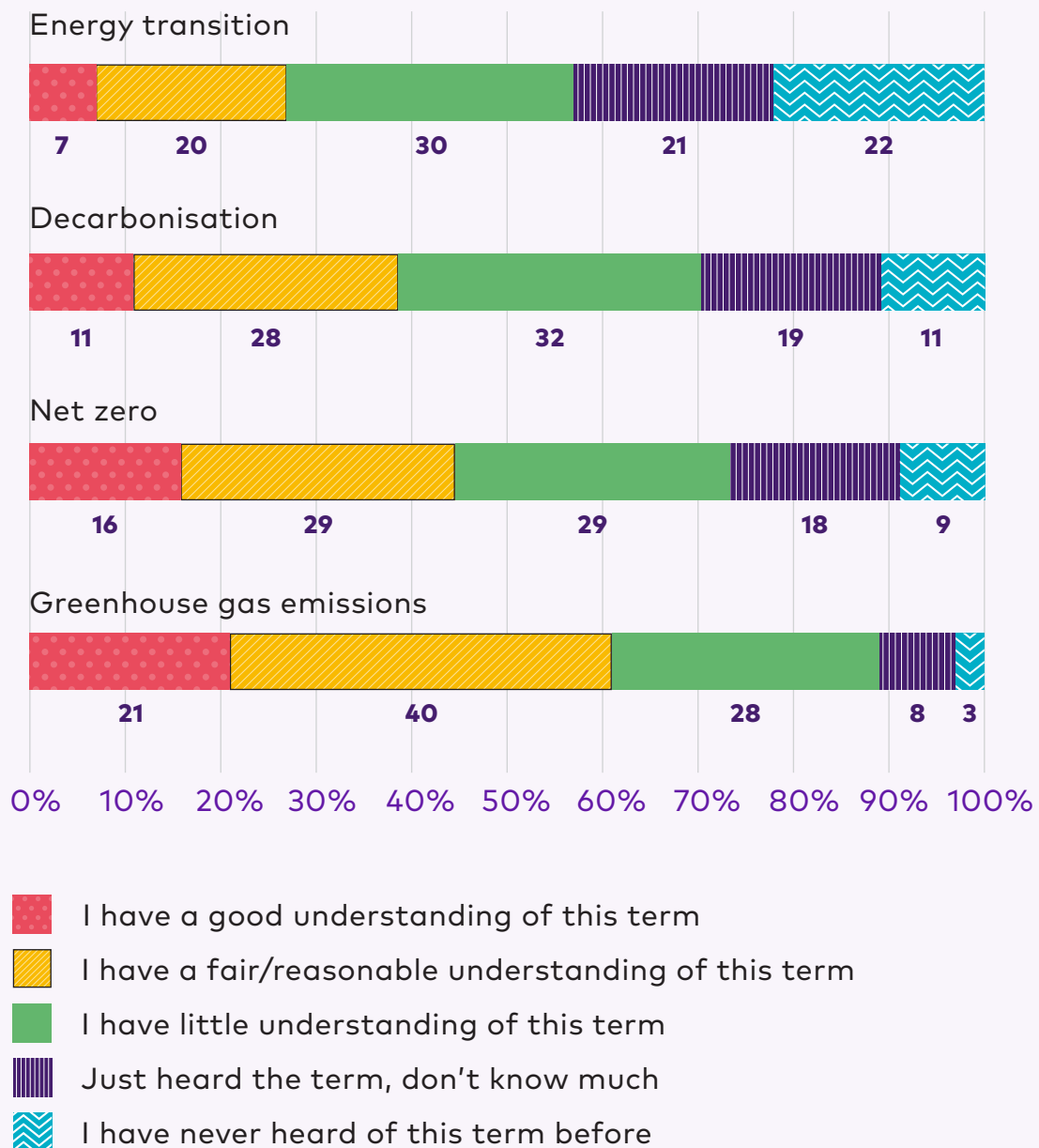
- To meet the research objective identified, an online quantitative survey of 1000 Northern Ireland (NI) residents was administered in November 2023.
- Quota controls based on official population estimates were employed throughout survey fieldwork and corrective rim weighting was applied during data analysis to ensure that the final sample was representative of the NI population in terms of age, sex, socio-economic group and area.
- The questionnaire that was used for the online survey was developed by the Consumer Council, with questions selected that were comparable to those asked in similar surveys in other UK jurisdictions and that would have relevance until at least 2030.
- Where possible, the results from this survey have been compared with those from the survey conducted in November 2022. Differences which have been commented on are statistically significant.
- As a result of the rounding of figures or the use of questions for which multiple answers could have been given, the sums on charts may not always total 100 per cent.

# 3. Main Findings

## 3.1. Understanding of terms relating to decarbonisation

Respondents were asked to rate their understanding of the terms greenhouse gas emissions, decarbonisation, and net zero. They were also asked on their understanding of the term energy transition, which was not asked in 2022.

Figure 1: Understanding of terms relating to decarbonisation



---

# 89%

More than four in five (89%) of respondents stated that they have some understanding of the term greenhouse gas emissions (Figure 1). This is a slight increase from 84% in 2022. However, of this number only one fifth (21%) said that they had a good understanding of this term, which is a small decrease from a quarter (25%) in 2022.

---

Similarly, there was a small increase in those who stated that they have some understanding of the term net zero, from 70% in 2022 to three quarters (74%) in 2023. The level of understanding was largely similar across the two years for the term net zero.

# 74%



The term decarbonisation had the largest increase in understanding, from 62% in 2022 to seven tenths (71%) in 2023. The difference can be seen most in the category of those who said they have a little understanding, which rose from 24% in 2022 to just below a third (32%) in 2023.

---

Understanding of the term energy transition was not assessed in 2022, but over half (57%) of respondents had some understanding. This was the lowest across the four terms questioned and only 7% stated that they had a good understanding of the term energy transition.

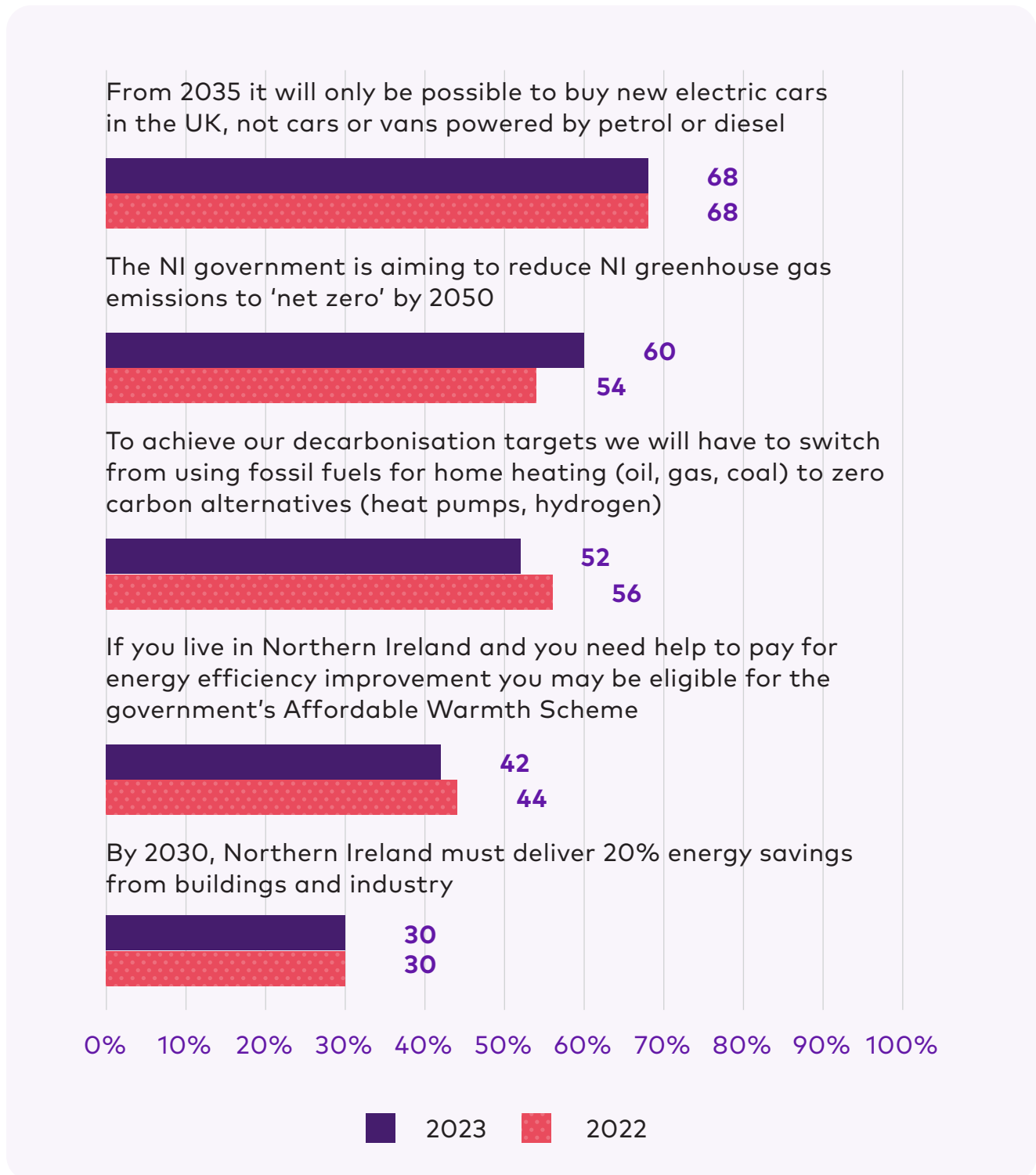


### 3.2 Awareness of schemes relating to decarbonisation

Respondents were asked if prior to the survey they had heard of the following schemes relating to decarbonisation.

Figure 2: Awareness of schemes relating to decarbonisation

Before today, have you heard of the following schemes?  
 Base: all consumers (Nov-23: n=1000; Nov-22: n=1000)



---

# 68%

Almost seven in ten (68%) of respondents were aware that from 2035 it will only be possible to buy new electric cars in the UK, not cars or vans powered by petrol or diesel, making it the scheme that respondents were most likely to have heard of prior to the survey. This was the same percentage as 2022.

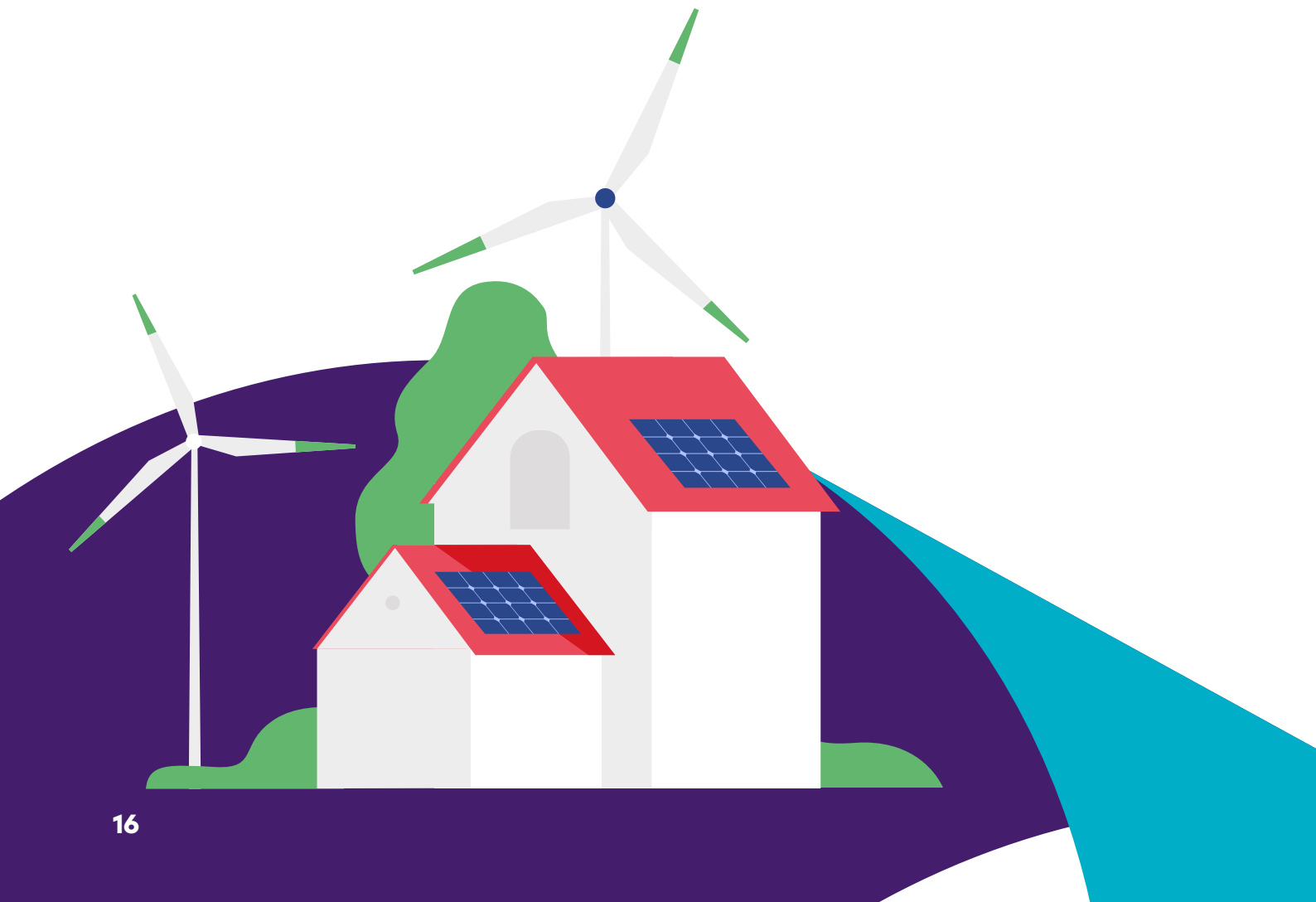
---

# 60%

Six in ten (60%) were aware that the NI government is aiming to reduce NI greenhouse gas emissions to 'net zero' by 2050. This was an increase from 54% in 2022, making it the second most likely scheme that respondents were aware of.

---

Respondents were least likely to have heard that by 2030, NI must deliver 20% energy savings from buildings and industry. Three in ten (30%) had still heard of these schemes and this percentage did not move from 2022.

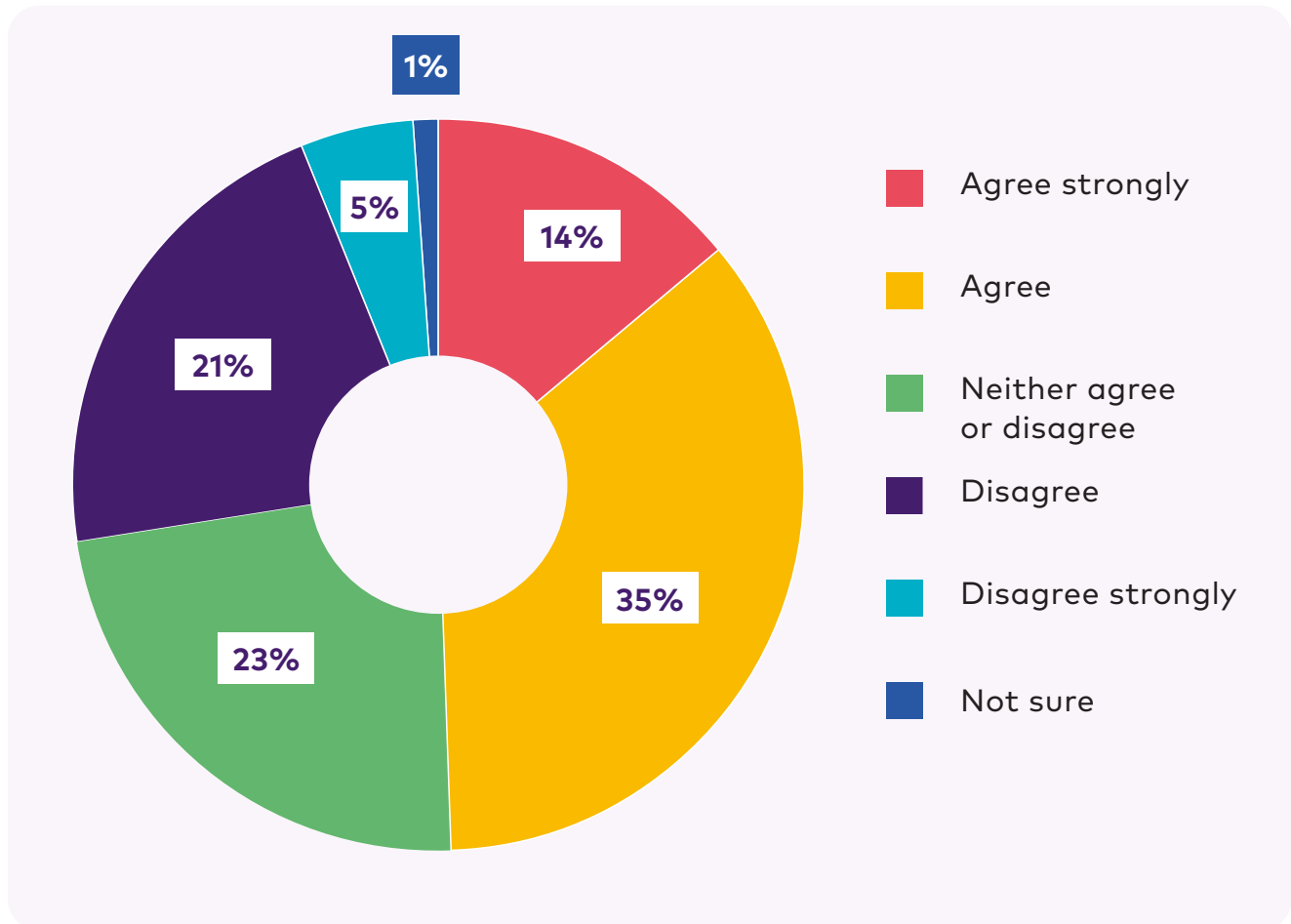




### 3.3 Concern about how much energy is used in the home

On a scale ranging from agree strongly to disagree strongly, respondents were asked to what extent they agree or disagree that they are concerned about how much energy is used in their home.

Figure 3: Concern about how much energy is used in the home



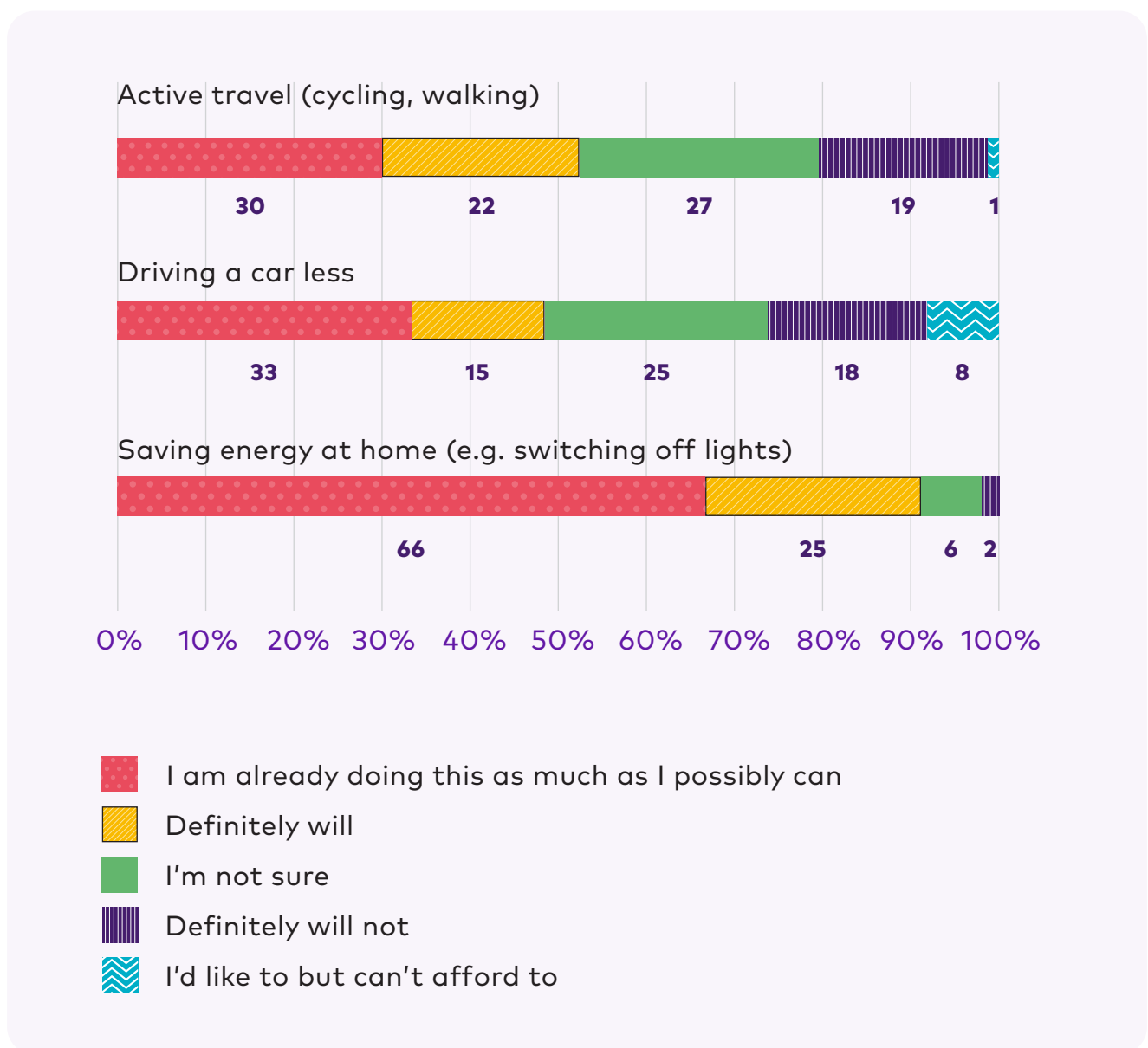
**49%**

Almost half (49%) of respondents agreed that they are concerned about how much energy is used in their home. This is a significant decrease from 62% in 2022, which may reflect falling energy prices. Around a fifth (21%) disagreed in 2023, and similarly 23% neither agreed nor disagreed (Figure 3).

### 3.4 Likelihood of household making changes within the next few years to contribute to decarbonisation

Respondents were asked how likely or unlikely their household would be to make the following changes within the next few years in order to contribute to decarbonisation. They were asked to indicate the likelihood of their household making each of these changes.

Figure 4: Likelihood of household making changes to contribute to decarbonisation



# 66%

Two thirds (66%) of respondents stated that their household was already saving energy at home (e.g., by switching off lights) as much as possible, which is down from 72% in 2022. A quarter (25%) stated that their household definitely will do this within the next few years. A very small number of respondents stated that they definitely will not save energy at home (2%) or that they were not sure (6%).

Three in ten (30%) of respondents stated that their household was already active travelling (cycling, walking) as much as possible, which is down from 37% in 2022.



# 22%

A further fifth (22%) indicated that their household definitely will make this change within the next few years. Nearly a fifth (19%) of respondents stated that their household definitely will not make this change, while over a quarter (27%) were not sure.

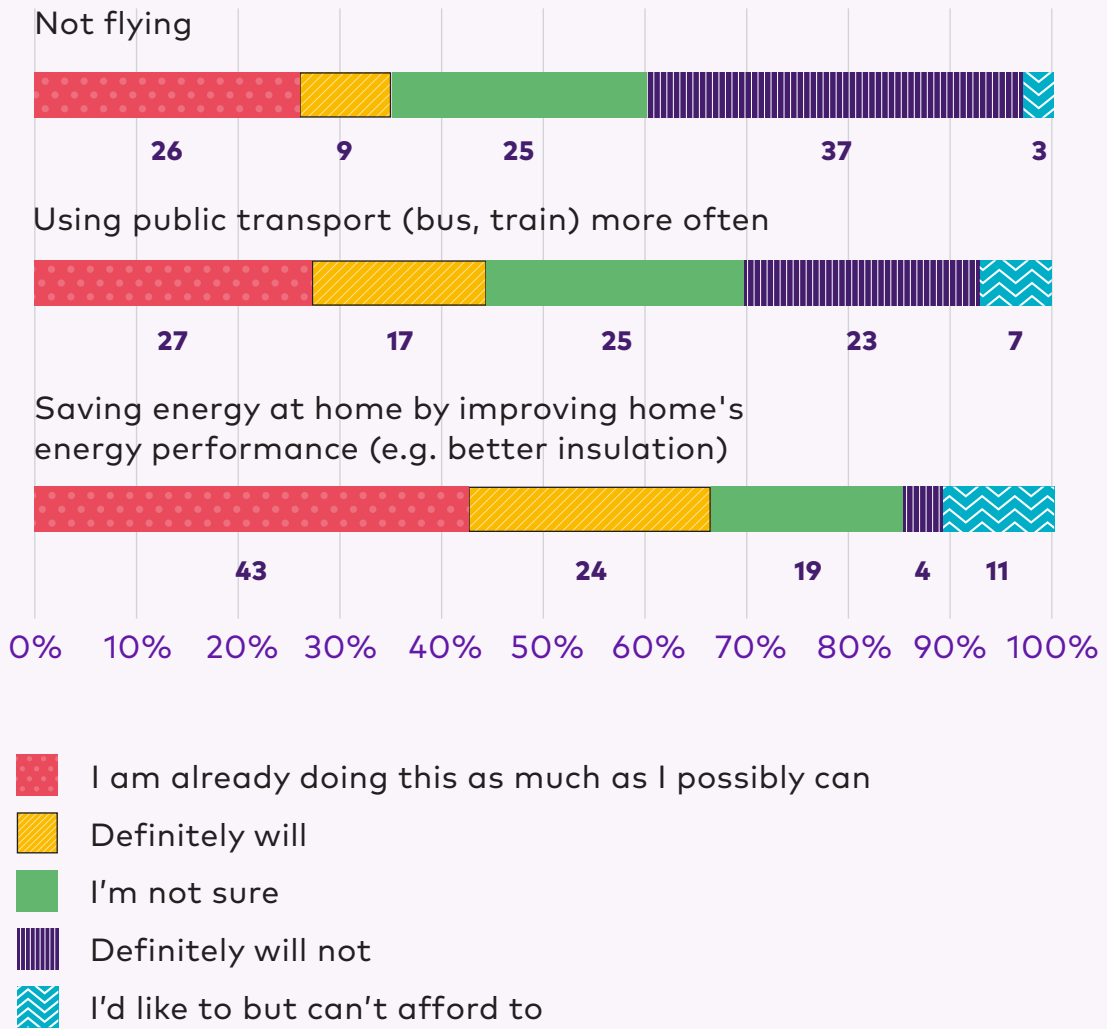
A third (33%) of respondents stated that their household was already driving a car less. This is another decrease from 40% in 2022. 15% stated that their household definitely will do so within the next few years.



# 18%

Around a fifth (18%) of respondents stated that their household definitely will not drive a car less within the next few years, which is practically the same response as 2022. A quarter (25%) of respondents were not sure whether or not their household will drive a car less within the next few years, whilst a small number (8%) stated that they would like to drive a car less but cannot afford to do so.

Figure 5: Likelihood of household making changes to contribute to decarbonisation



---

# 43%

Over four in ten (43%) of respondents stated that their household was already saving energy at home by improving the home's energy performance (e.g., better insulation), an increase compared to 37% in 2022.

---

About a quarter (24%) of respondents stated that their household definitely will make changes in this regard in the next few years. Nearly a fifth (19%) were not sure whether their household would make changes regarding their home's energy performance, whilst a small number (4%) stated that they definitely will not.



---

# 11%

About a tenth (11%) of respondents stated that they would like to make such changes, but they cannot afford to do so. This number is down from 24% selecting this option in 2022.

---

Almost three in ten (27%) of respondents stated that they were already using public transport as much as possible. Nearly a fifth (17%) of respondents stated that their household definitely will use public transport more often within the next few years.



---

# 23%

Almost a quarter (23%) of respondents stated that they definitely will not use public transport more often in the next few years, a quarter (25%) were unsure, whilst some (7%) stated they would like to but cannot afford to do so.

---

Just over a quarter (26%) of respondents stated that they were already not flying as much as possible, down from 31% in 2022. Approximately one in ten (9%) stated that their household definitely will make this change within the next few years.



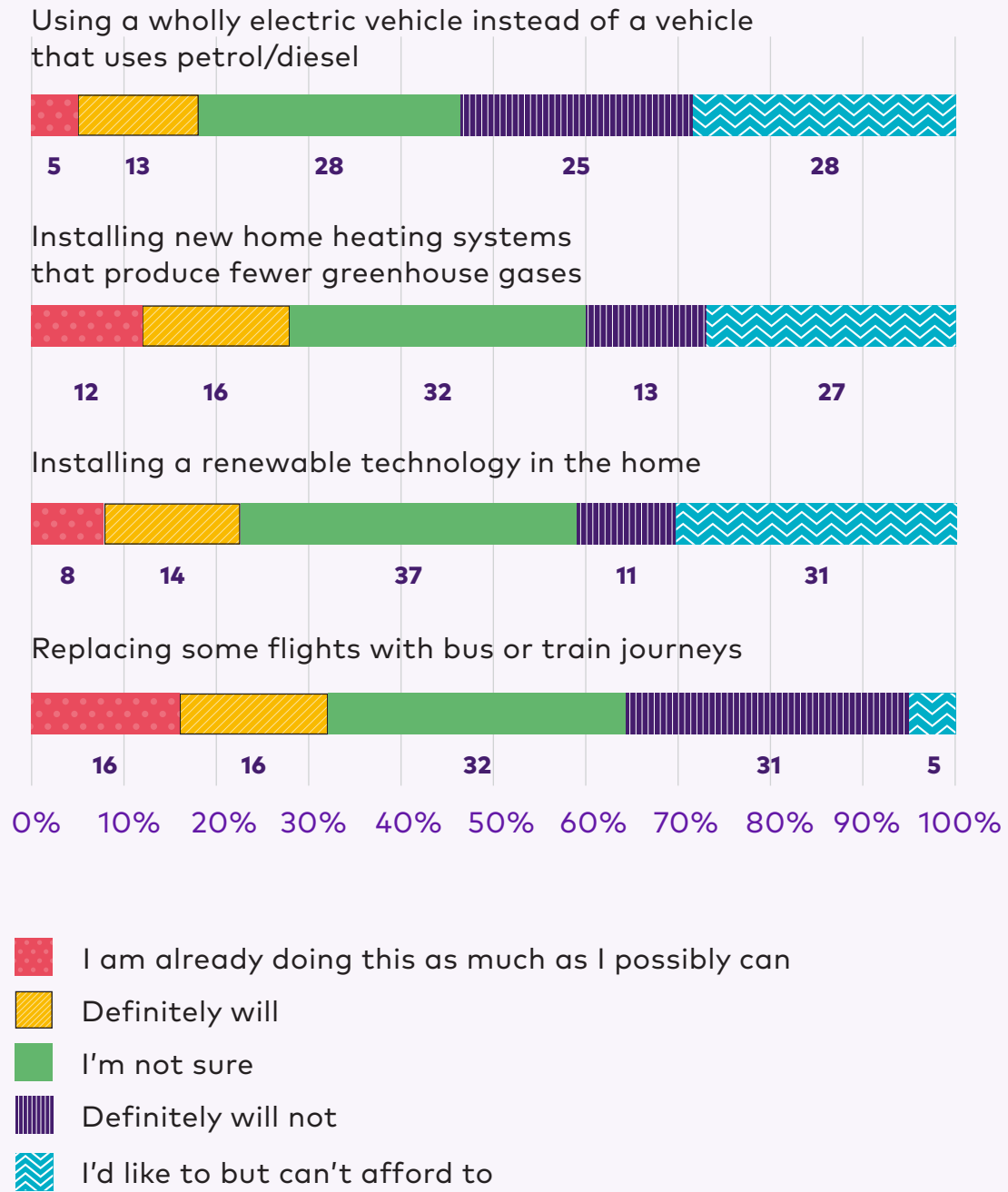
---

# 37%

37% of respondents stated that they definitely will not stop flying, which is up from 32% in the last survey. A quarter (25%) were not sure, whilst a small number (3%) stated that they would like to but cannot afford to do so.

---

Figure 6: Likelihood of household making changes to contribute to decarbonisation



---

**16%**

16% of respondents stated that they were already replacing some flights with bus or train journeys, with another one in six (16%) stating that they definitely will do so within the next few years. This is down from 2022, when 23% were already replacing some flights. Almost a third (31%) of respondents stated that they definitely will not replace some flights with bus or train journeys, which is up from 23% in 2022. Around a third (32%) of respondents were not sure whether or not they would make this change, whilst a small number (5%) would like to but cannot afford to do so.

---

Some respondents (8%) stated that they were already installing renewable technology in their home. This is up very slightly from 6% in 2022. However, 14% stated that they definitely will in the next few years, which is a slight decrease from 17% in 2022.



---

About one in ten (11%) of respondents stated that their household definitely will not make this change, whilst almost two in five (37%) were not sure. Almost a third (31%) of respondents would like to install renewable technology in the home but cannot afford to do so.

---

**12%**

Around one in ten (12%) of respondents stated that they were already installing new home heating systems that produce fewer greenhouse gases, which is an increase from 8% in 2022. About one in seven (16%) stated that they definitely will in the next few years. Just over one in ten (13%) of respondents stated that they definitely will not make this change, whilst around three in ten (32%) were not sure. Over a quarter (27%) would like to install new home systems that produce fewer greenhouse gases but cannot afford to do so.

---

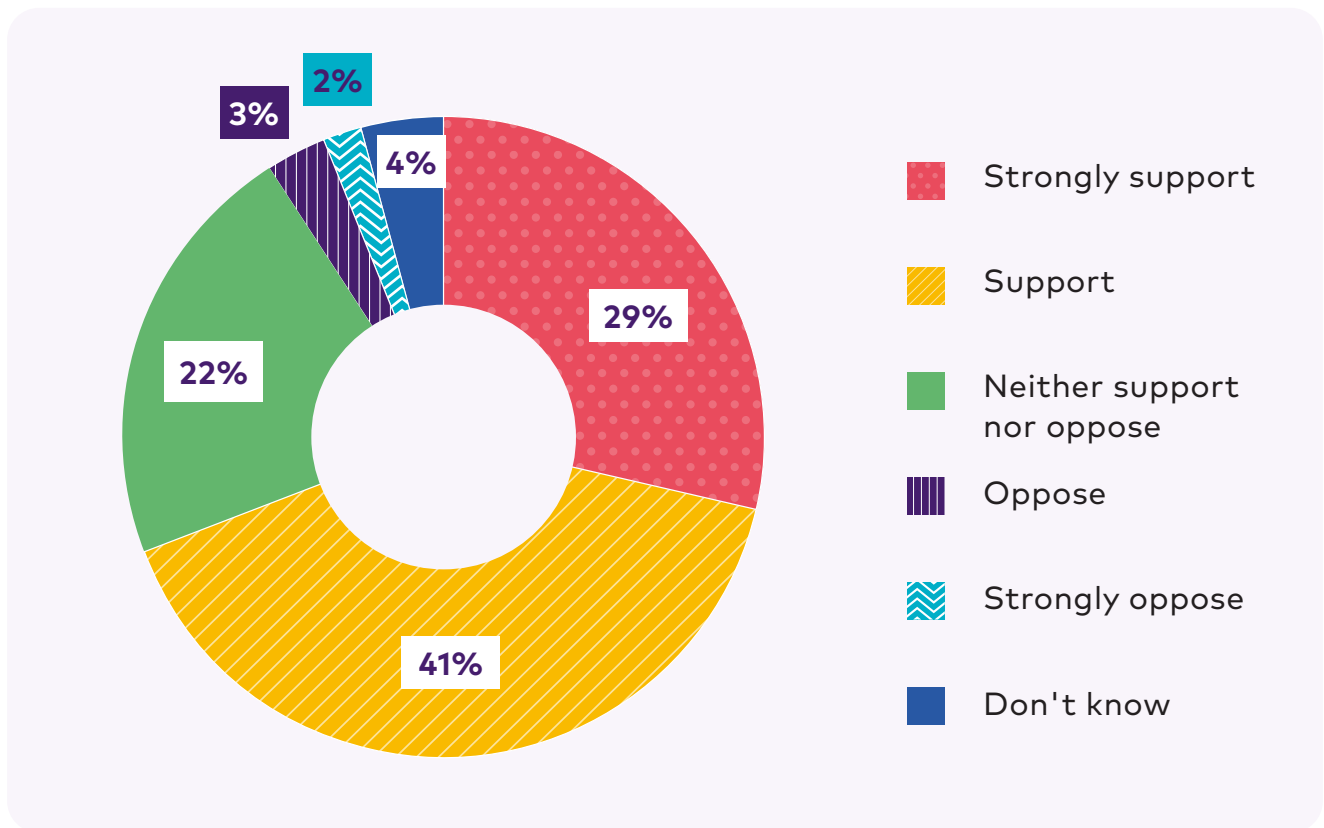
Some respondents (5%) stated that they were already using a wholly electric vehicle instead of one that uses petrol/diesel, which has remained the same since 2022. Just over a tenth (13%) have stated that they definitely will in the next few years, which is a small decrease from 17% in 2022. A quarter (25%) stated that they definitely will not use a wholly electric vehicle, which is an increase from 17% in 2022. Almost three in ten (28%) of respondents were not sure whether they would make this change, whilst a further 28% would like to but cannot afford to do so.

### 3.5 Consumer support for the use of renewable energy for providing our power, heat and transport

On a scale ranging from strongly support to strongly oppose, respondents were asked if they support or oppose the use of renewable energy for providing our power, heat and transport.

Figure 7: Consumer support for the use of renewable energy for providing our power, heat and transport

Do you support or oppose the use of renewable energy for providing our power, heat and transport? Base: all respondents (n=1000)



**70%**

Seven tenths (70%) of respondents support the use of renewable energy. This has dropped from 78% in 2022. The largest difference was in the strongly support category which fell from 41% in 2022 to 29% in 2023.

There was an increase in 2023 of consumers not taking a position on the question, going from 14% neither supporting nor opposing in 2022 to 22% in 2023. The percentage of respondents that oppose was the same in both years, at 5% in total.

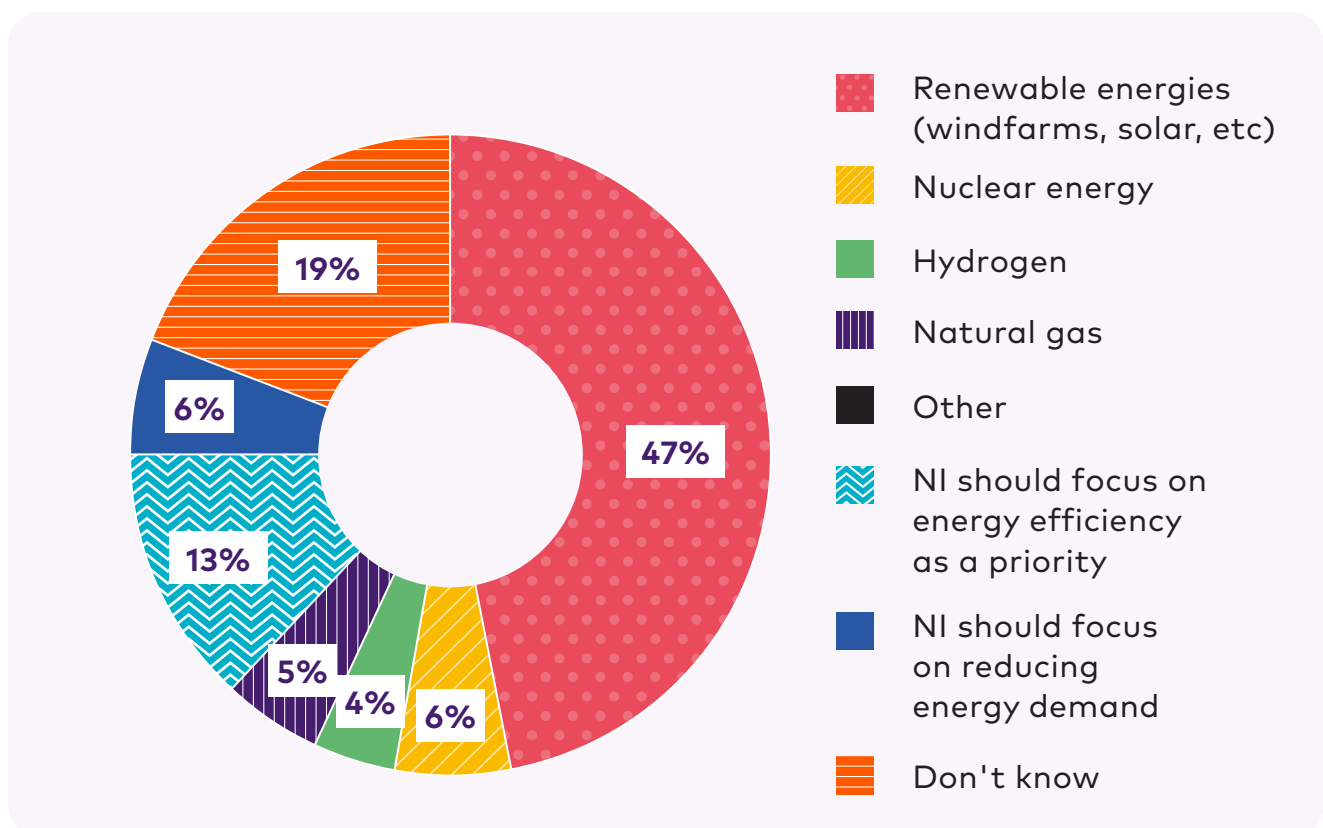


### 3.6 The source of energy consumers believe Northern Ireland should rely on most to aid decarbonisation

From a list provided, respondents were asked which source of energy they believe Northern Ireland should rely on most to aid decarbonisation.

Figure 8: The source of energy consumers believe Northern Ireland should rely on most to aid decarbonisation

To aid decarbonisation, which source of energy do you believe Northern Ireland should rely on most? Base: all respondents (n=1000)



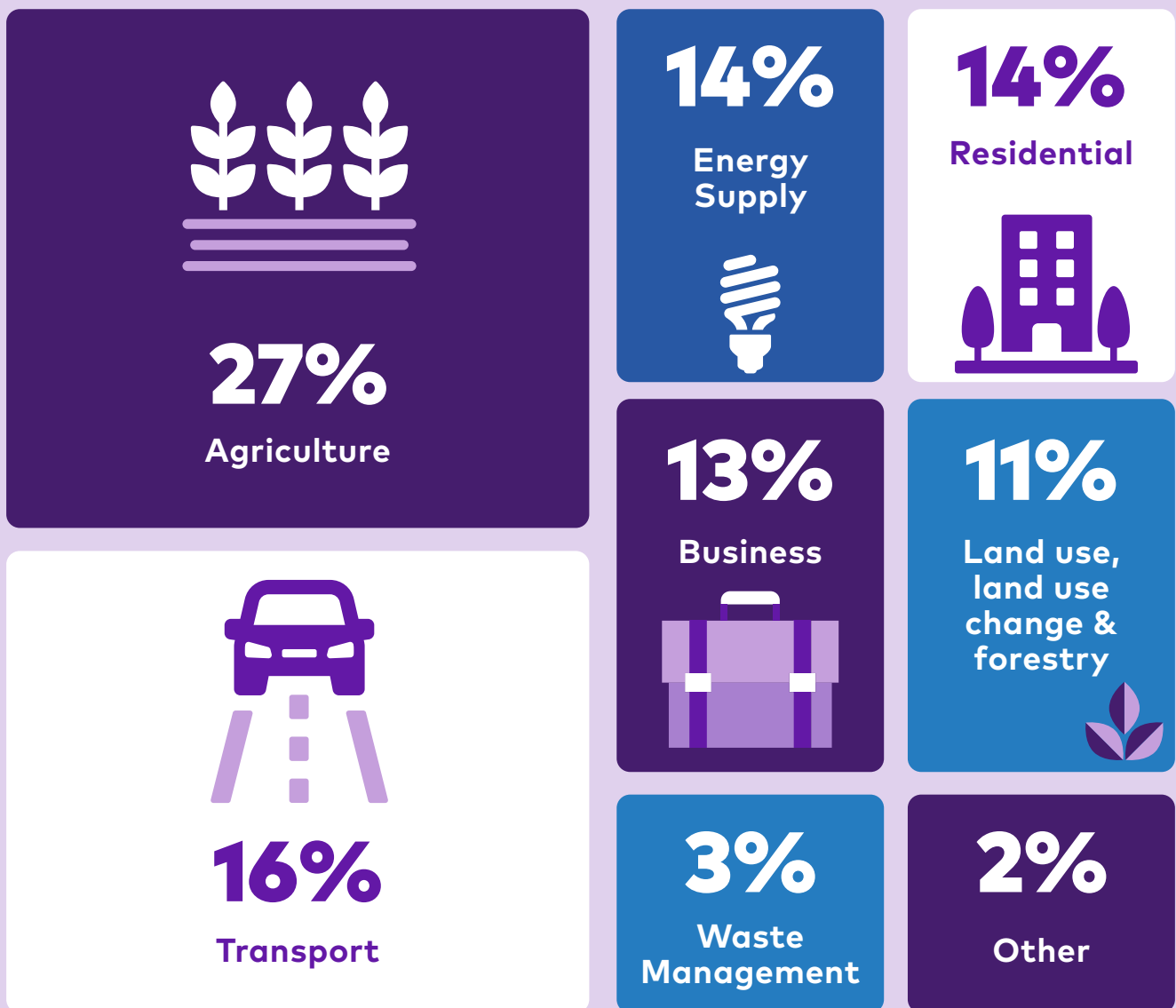
Renewable energy (47%) was by a considerable distance the most likely source of energy to have been selected, with almost half picking this option. This was similar in 2022 at 49%. Fewer than one in ten respondents selected nuclear energy (6%) or 5% natural gas and 4% chose hydrogen.

# 13%

Almost a fifth (13%) of respondents believed that Northern Ireland should focus on energy efficiency as a priority, whilst a smaller number (6%) believed that Northern Ireland should focus on reducing energy demand. About a fifth (19%) of respondents did not know which source of energy Northern Ireland ought to rely on most to aid decarbonisation. The figures are almost identical to the results in 2022.

### 3.7 Consumers' perception of the largest contributor of greenhouse gas emissions in Northern Ireland

Respondents were shown a list of options and asked which one, to the best of their knowledge, contributes the largest amount of greenhouse gas emissions in Northern Ireland. The below graphic illustrates what options do contribute to Northern Ireland's greenhouse gas emissions, with agriculture at the top at 27%<sup>1</sup>.

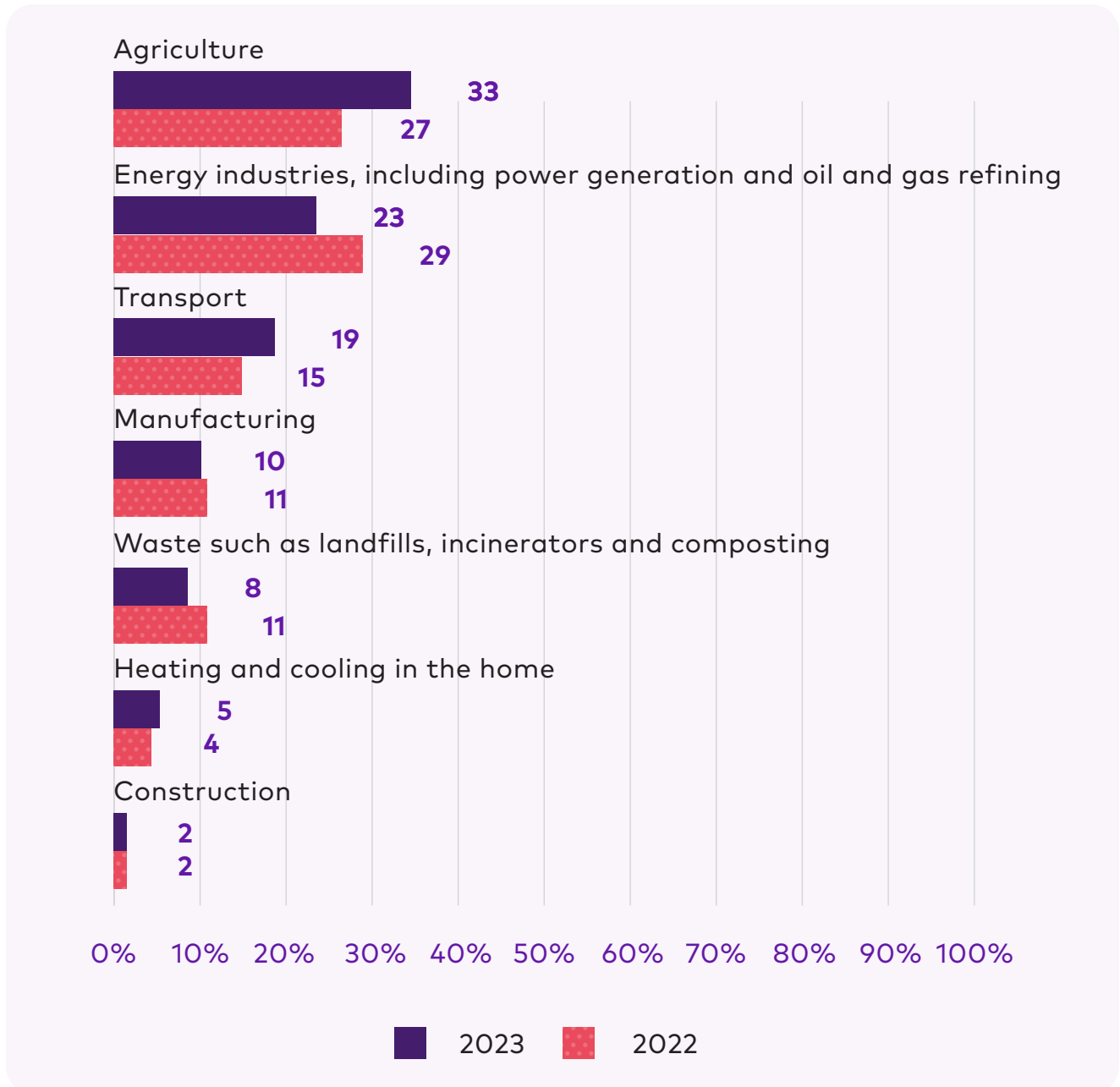


2020 NI Greenhouse Gas emissions 20.9 MtCO<sub>2</sub>e

1. [Northern Ireland Environmental Statistics Report](#), May 2023.

Figure 9: Consumers' perception of the largest contributor of greenhouse gas emissions in Northern Ireland

To the best of your knowledge, which one of the following contributes the largest amount of greenhouse gas emissions in Northern Ireland? If you're not sure, please provide your best guess. Base: all respondents (n=1000)

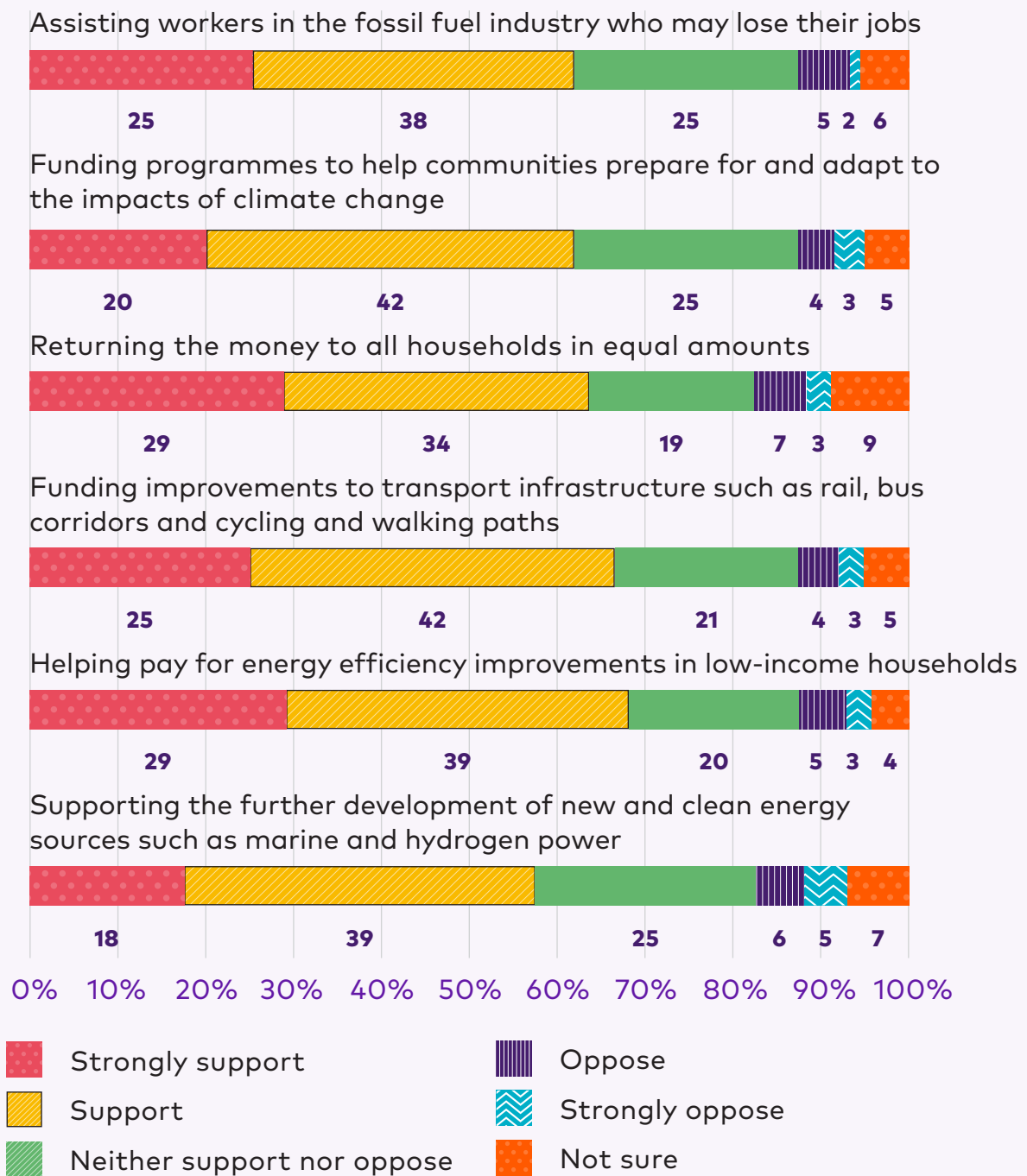


In 2023, a third (33%) of respondents stated that agriculture was the largest contributor of greenhouse gas emissions, with energy industries coming in second at 23%. However, in 2022 these two contributors were switched with 29% and 27% selecting energy companies and agriculture respectively. In both years transport was the third, in perception of largest contributor, at 19% in 2023 and 15% in 2022. In 2023 10% selected manufacturing and 8% selected waste, while 5% said that heating and cooling in the home was the largest contributor and only 2% picked construction. These four categories had similar results in 2022.

### 3.8 Consumer support for policies to help Northern Ireland reduce its greenhouse gas emissions

Respondents were informed that to aid decarbonisation, taxes on fossil fuels will rise in Northern Ireland over the next ten years. Respondents were then asked to use a scale ranging from strongly support to strongly oppose to indicate to what extent they support or oppose possible uses for the money collected from these tax rises.

Figure 10: Consumer support for the use of increased taxes to be used to help decarbonisation



---

# 68%

Over two thirds (68%) supported helping pay for energy efficiency improvements in low-income households, funding improvements to transport infrastructure (67%), and returning the money to all households in equal amounts (63%).

---

# 63%

63% supported assisting workers in the fossil fuel industry who may lose their jobs, whilst slightly fewer (62%) of respondents supported funding programmes to help communities prepare for and adapt to the impacts of climate change.

---

# 57%

Over half (57%) of respondents supported the use of money from tax rises on fossil fuels to support the further development of new and clean energy sources, such as marine and hydrogen power. Interestingly this option had the highest levels of support in 2022 at 75%. Each proposed use was only opposed by a minority of respondents, with the number in opposition never exceeding eleven per cent.

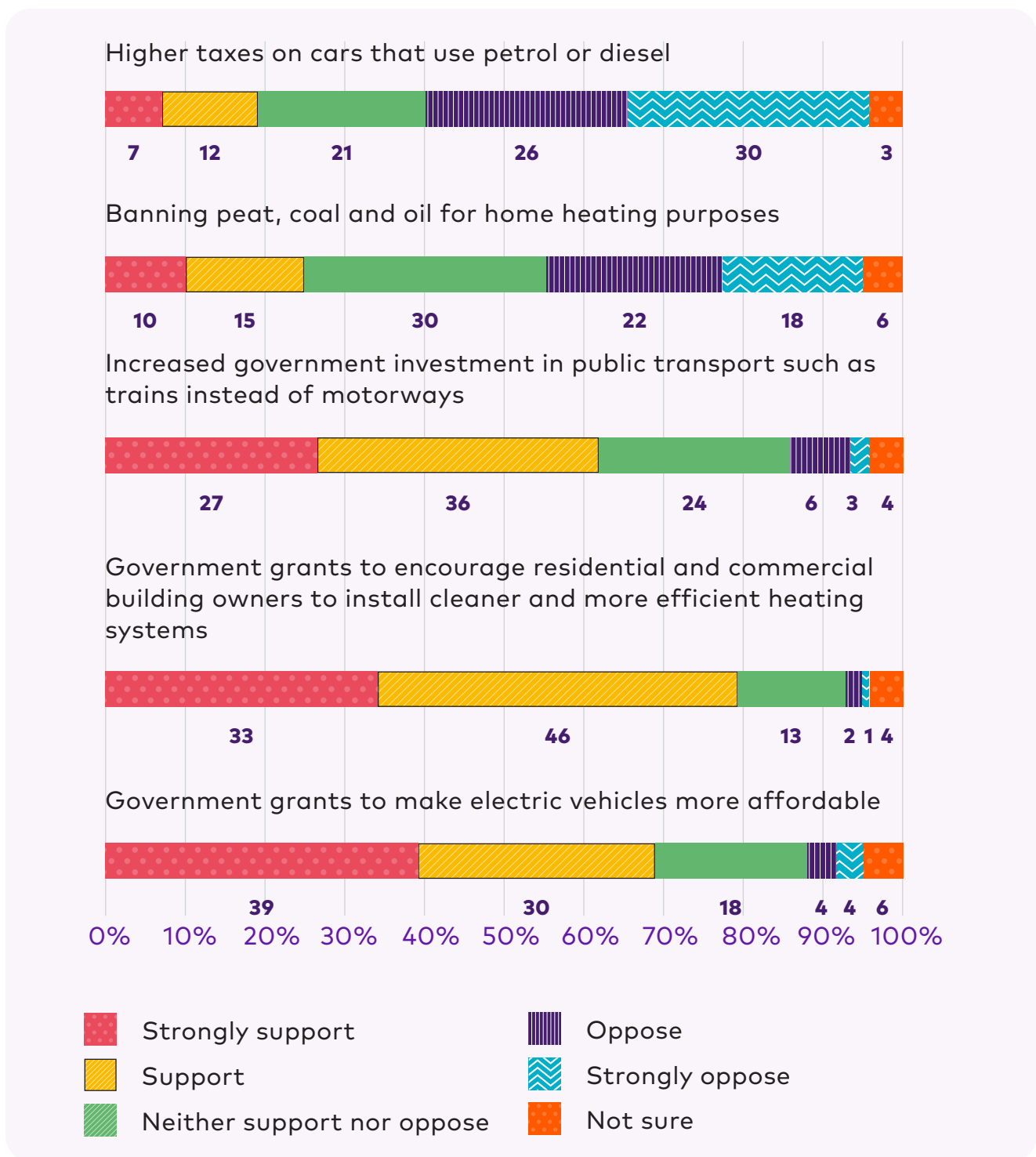
---



### 3.9 Consumer support for policies to help Northern Ireland reduce its greenhouse gas emissions

Using a scale ranging from strongly support to strongly oppose, respondents were asked to what extent they support or oppose various policies to help Northern Ireland reduce its greenhouse gas emissions.

Figure 11: Consumer support for policies to help Northern Ireland reduce its greenhouse gas emissions



---

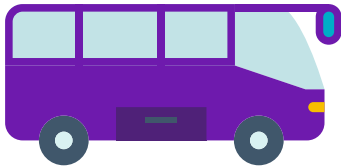
About four in five (79%) supported government grants to encourage residential and commercial building owners to install cleaner and more efficient heating systems.



---

**69%**

Almost seven in ten (69%) of consumers supported government grants to make electric vehicles more affordable, but this dropped from 78% in 2022.



Around three in five (63%) supported increased government investment in public transport, which was a slight decrease from 2022 (67%).

---

**63%**

Almost two thirds (63%) also supported increased government investment in public transport, which had the same decrease when compared to 2022 (67%).

---

Two in five (40%) of consumers opposed the banning of peat, coal and oil for home heating purposes and a quarter (25%) support this move. These rates of support are largely the same as 2022.



---

**56%**

Over half (56%) opposed higher taxes on cars that use petrol or diesel, with 30% strongly opposing. 19% support this option, which is a decrease from a quarter (26%) in 2022.

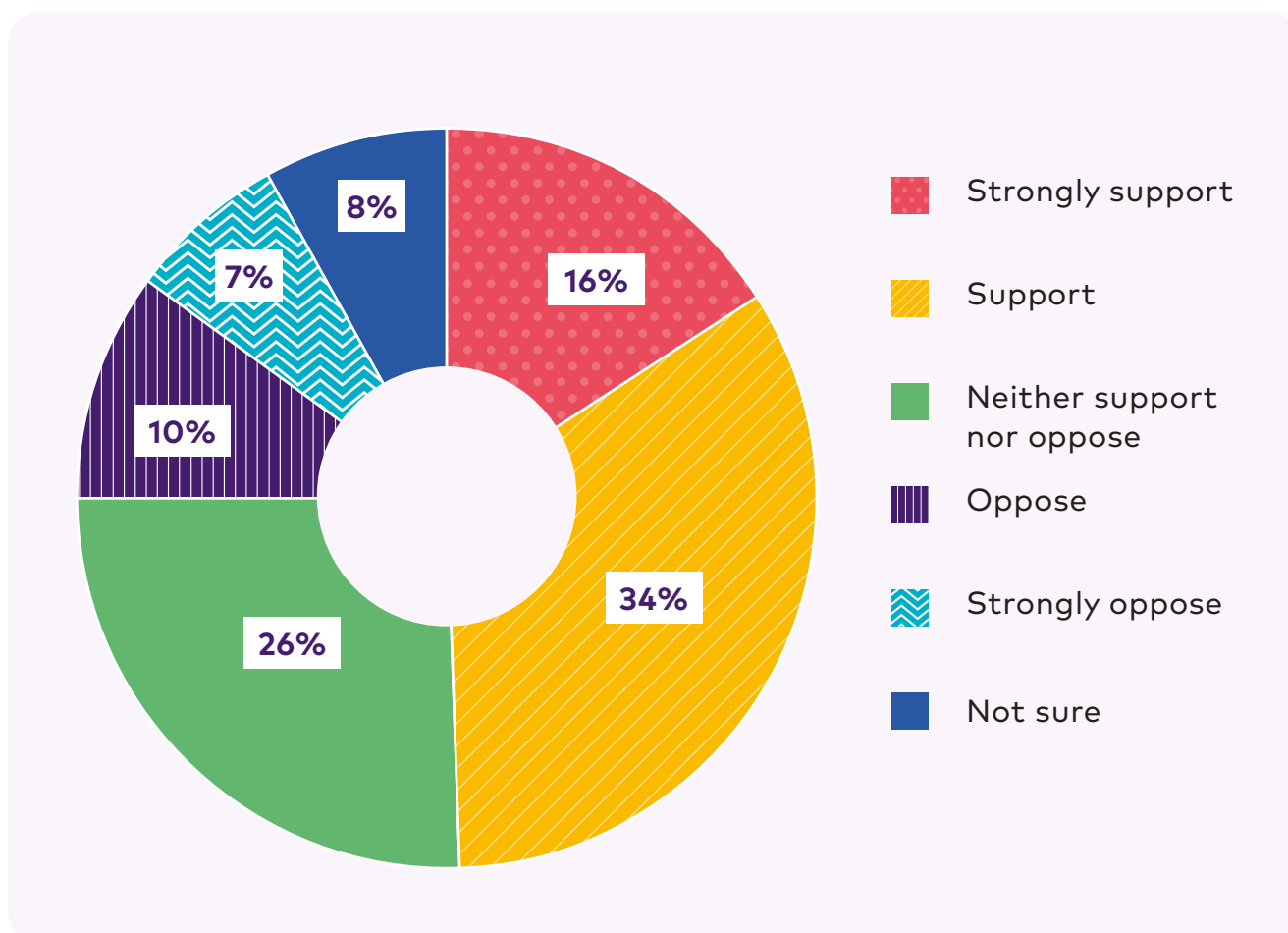
---

### 3.10 Consumer support for the building of new infrastructure in local area to support increased use of renewable energy

Respondents were informed that the Northern Ireland Government has set a renewable electricity target of 70% by 2030 and that new infrastructure such as pylons and substations are needed to meet these targets. Respondents were then asked to use a scale ranging from strongly support to strongly oppose to rate to what extent they would support or oppose the building of such infrastructure in their local area in order to support the increased use of renewable energy.

Figure 12: Consumer support for the building of new infrastructure in local area to support the increased use of renewable energy.

The Northern Ireland Government has set a renewable electricity target of 70% by 2030. New infrastructure such as pylons and substations are needed to meet these targets. To what extent would you support or oppose building new infrastructure such as pylon

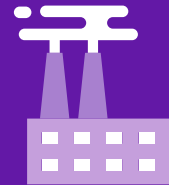




# 50%

Half (50%) of respondents supported the building of new infrastructure in their local area to support the increased use of renewable energy, which is down from 58% in 2022. Around a quarter (26%) neither supported nor opposed the idea.

However, 17% of respondents opposed the building of new infrastructure in their local area, with 7% of those strongly opposing. In 2022 around a tenth (12%) opposed the idea.

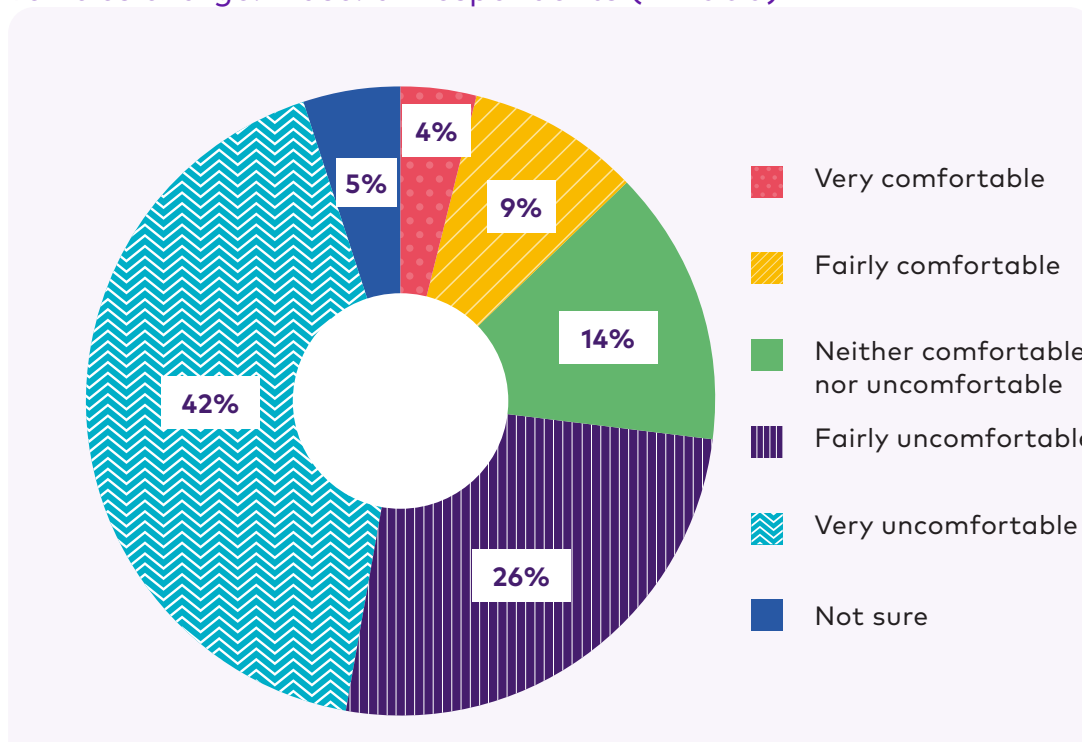


### 3.11 Comfort with an external company controlling when appliances and heating run or when plug-in electric vehicles are charged

Respondents were asked to use a scale ranging from very comfortable to very uncomfortable to indicate their level of comfort with an external company controlling when their appliances and heating run or when their plug-in electric vehicles are charged.

Figure 13: Comfort with an external company controlling when appliances and heating run or when plug-in electric vehicles are charged

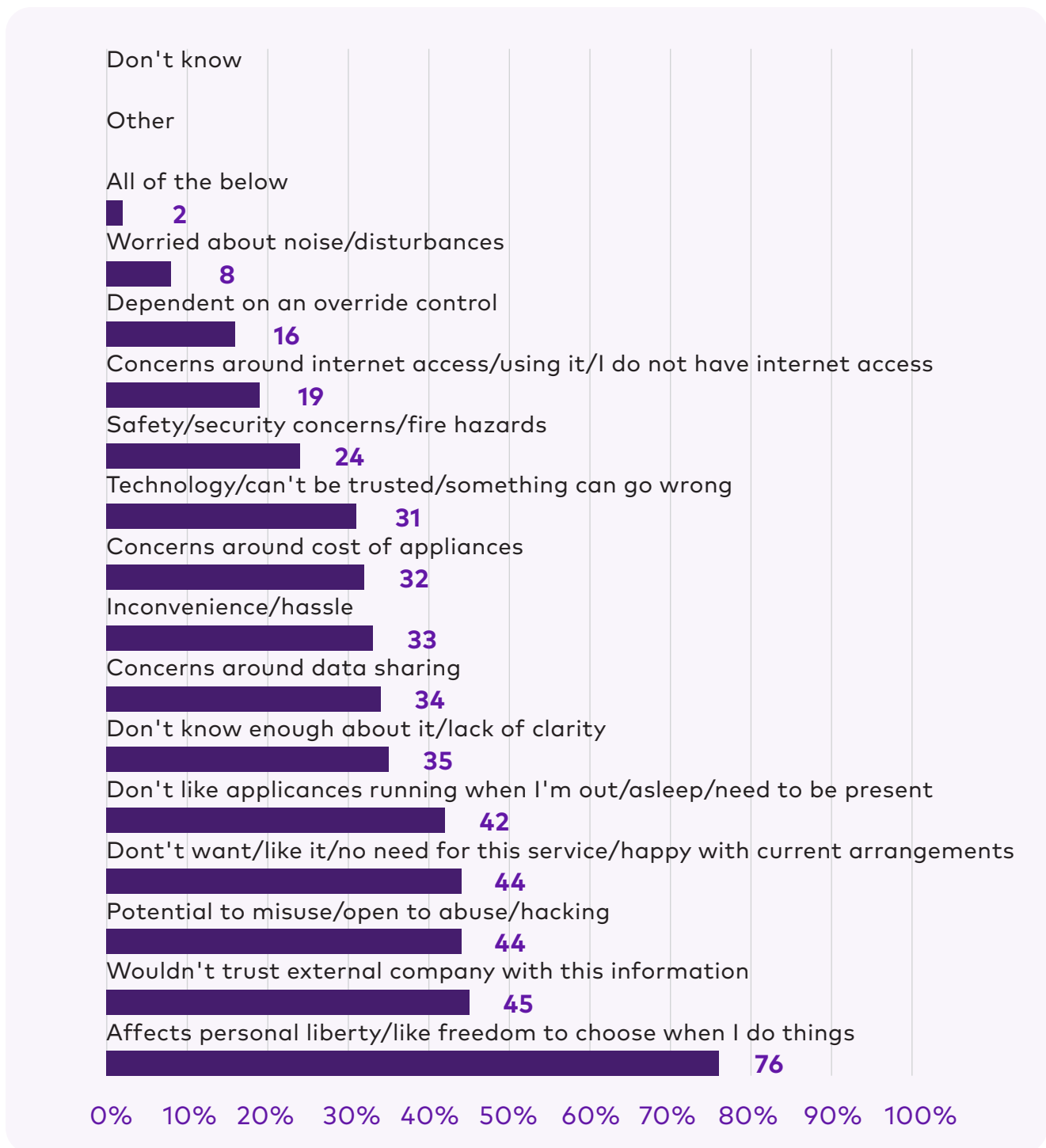
How comfortable or uncomfortable would you feel about an external company controlling when your appliances and heating run or when your plug-in electric vehicles charge? Base: all respondents (n=1000)



Only 13% of respondents were comfortable with this idea, compared to approximately two-thirds (68%), who were uncomfortable. This is up very slightly from 66% uncomfortable in 2022. About one in ten (14%) were neither comfortable nor uncomfortable, whilst a smaller number (5%) were not sure.

A follow up question was asked on whether consumers would change their mind if this would reduce bills. The research showed overall, 21% of consumers said that they would be likely to agree to an external company controlling when their appliances and heating run and when their EVs charge if it meant a reduction in the cost of their household energy bills. However, this figure rises to 53% amongst those who said that they would be comfortable or neutral with an external company having this control. Only 8% of those who would be uncomfortable with an external company controlling when their appliances and heating run and when their EVs charge would be likely to agree to this if it meant a reduction in the cost of their household energy bills.

Figure 14: Reasons for discomfort with an external company controlling when appliances and heating run or when plug-in electric vehicles are charged



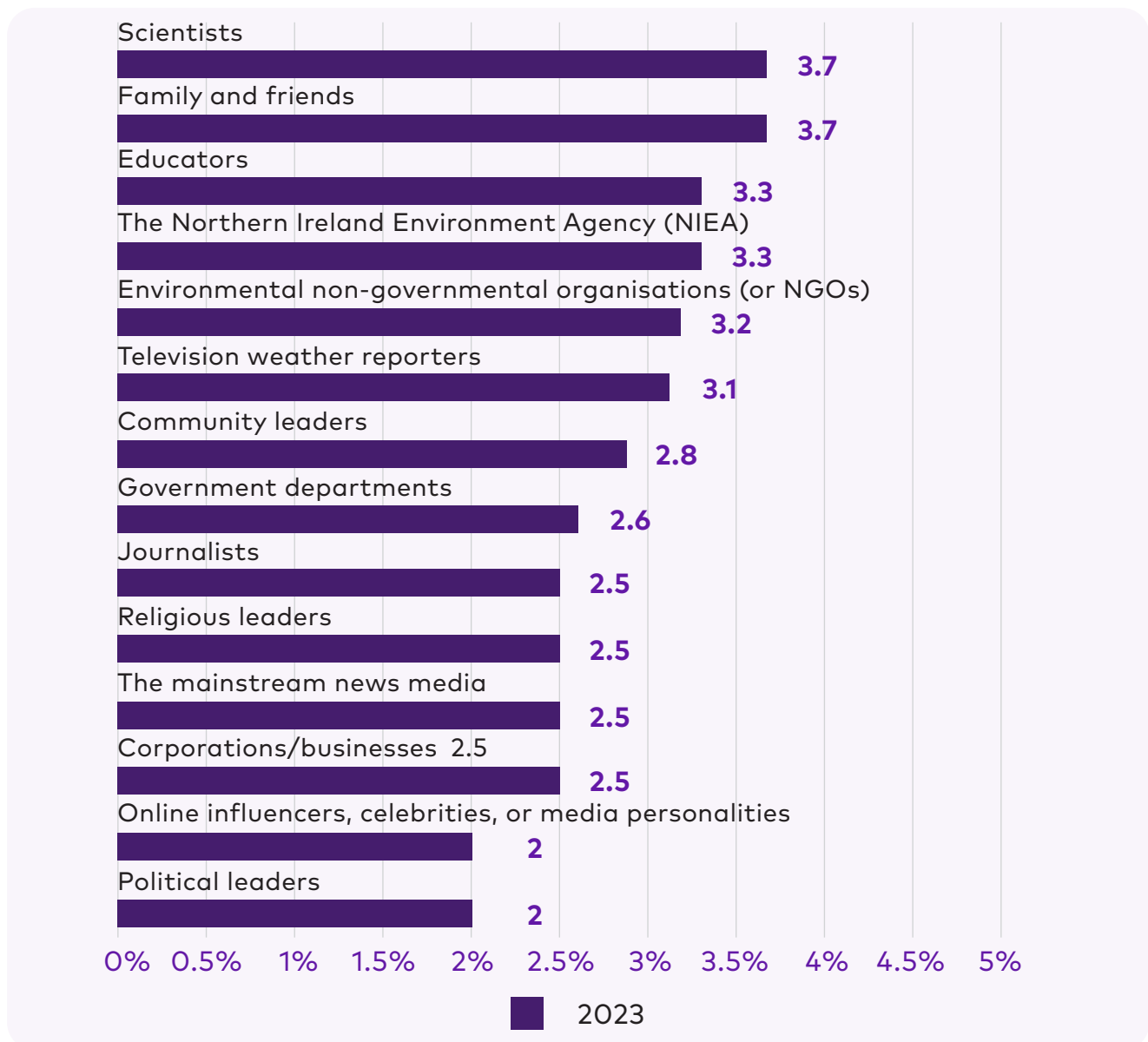
The most popular reason by a significant margin was that it would affect personal liberty/like freedom to choose when I do things, with three quarters (76%) saying this. This is an increase from two thirds (67%) in 2022.

Just under half (45%) of those who would be uncomfortable stated that they would not trust an external company with this information, whilst a similar number (44%) were concerned about the potential for misuse and did not feel like they needed or wanted this service.

### 3.12 Extent of trust in sources of information about climate change

Respondents were shown various sources of information and asked to rate on a scale of one to five, where five represented completely trust and one completely distrust, to what extent they trusted each regarding climate change. A mean score was calculated for each source of information based on respondents' ratings, where the maximum possible score was five.

Figure 15: Extent of trust in source of information about climate change - mean score (max = 5)



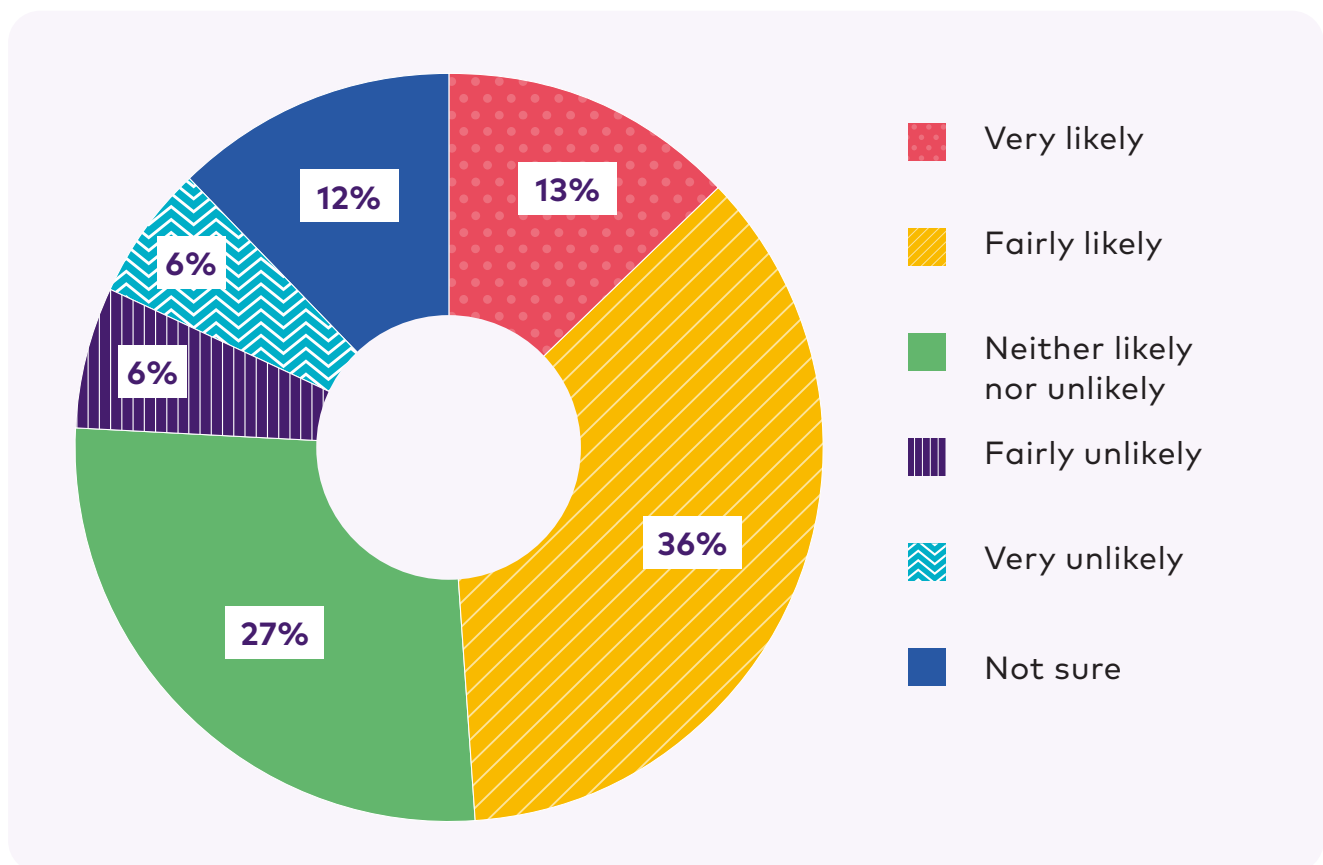
Scientists and family and friends (both mean score: 3.7) were the source of information most likely to have been trusted by respondents. This was followed by educators and the NIEA (both mean score: 3.3). Political leaders and online influencers, celebrities or media personalities (both mean score: 2) were the least likely sources of information to be trusted regarding climate change. These scores are very similar to 2022, with the same groups at the top and bottom of who is a likely source of trusted information.

### 3.13 Likelihood of using a 'one-stop-shop' for energy advice and education

Respondents were asked to use a scale ranging from very likely to very unlikely to indicate how inclined they would be to use a 'one-stop-shop' for energy advice and education to assist them with their bills, retrofitting, etc. as the energy market continues to change.

Figure 16: Likelihood of using a 'one-stop-shop' for energy advice and education

As the energy market continues to change how inclined (likely or unlikely) would you be to use a 'one-stop-shop' for energy advice and education to assist you with your bills, retrofitting, etc? Base: all respondents (n=1000)



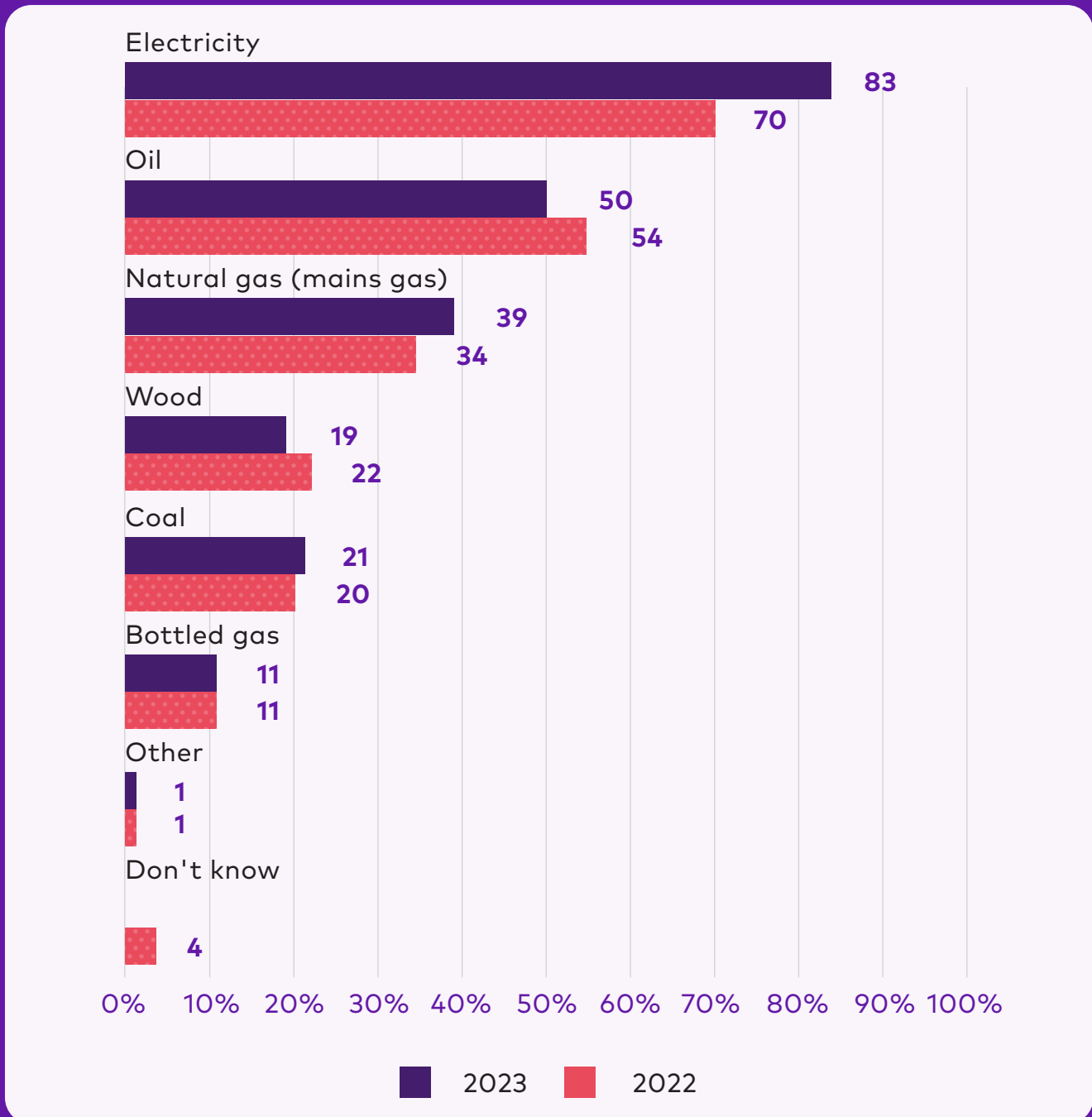
# 49%

Almost half (49%) of consumers were likely to use a 'one-stop-shop' for energy advice and education, similar to 48% in 2022. Notably a significant amount of respondents (27%) stated that they were neither likely nor unlikely, with a further 12% saying that they were not sure.

### 3.14 Consumer knowledge of energy sources used in their home

From a list of energy sources provided, respondents were asked to select, to the best of their knowledge, those used in their home.

Figure 17: Consumer knowledge of energy sources used in their home



**83%**

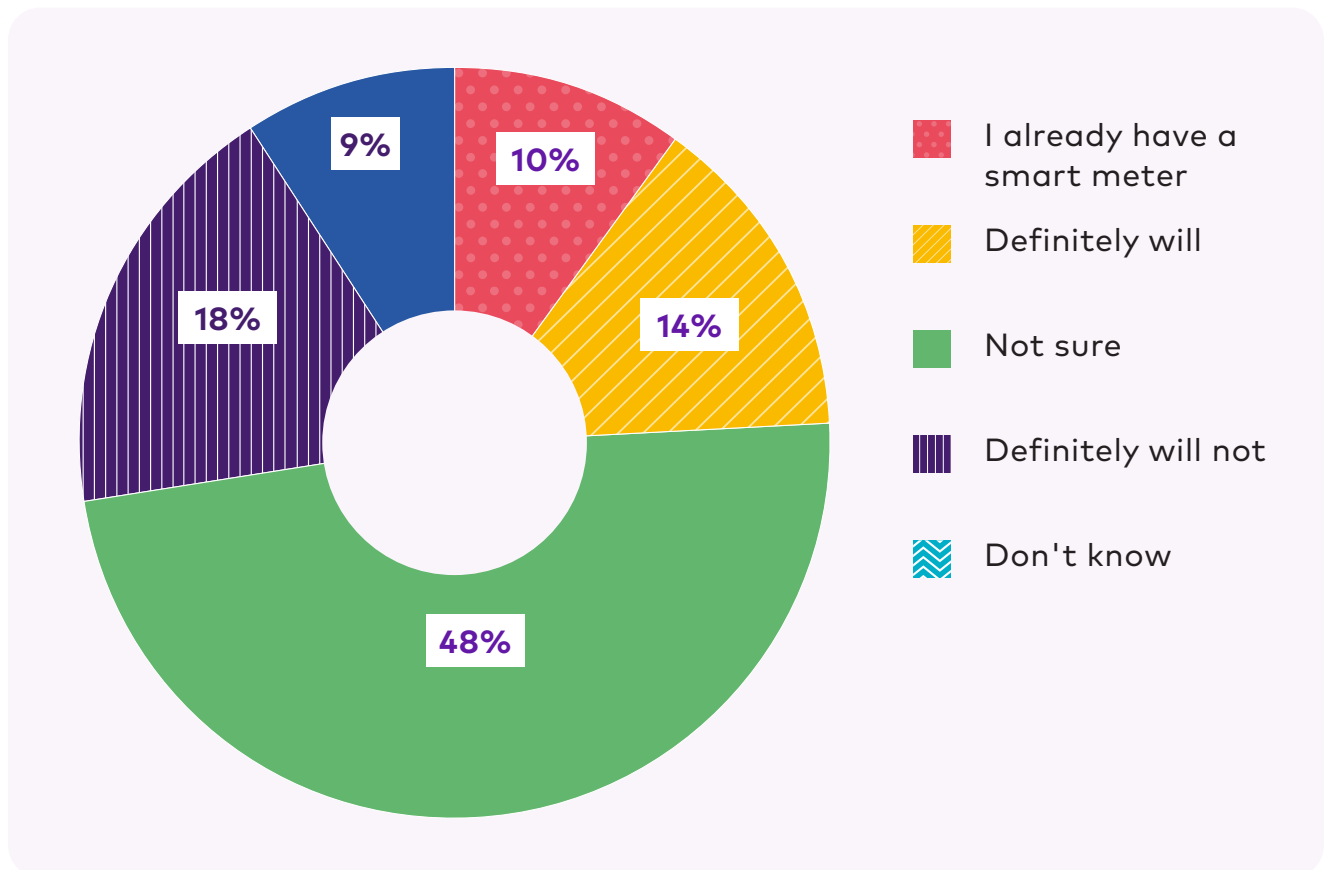
About four in five (83%) of consumers stated that they use electricity as an energy source in their home, which was a significant increase on the number who stated that this was so in 2022 (70%). Half (50%) of consumers stated that they use oil (down from 54% in 2022), whilst about two in five (39%) stated that they use natural gas as an energy source (up from 34%).

### 3.15 Likelihood of installing a smart meter in home in the next two years

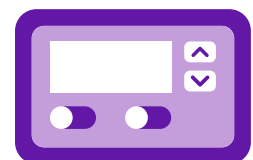
Respondents were asked to indicate the likelihood of installing a smart meter in their home in the next two years.

Figure 18: Likelihood of installing a smart meter in home in the next two years

Which of the following best describes how likely you will be to install a smart meter in your home in the next two years? Base: all respondents (n=1000)



Around a quarter (24%) of consumers stated that they already have a smart meter or that they will install one in the next two years. This is a slight decrease from 26% in 2022.



**18%**

18% of respondents said they would definitely not be installing a smart meter, which is similar to 17% in 2022. It is worth noting that almost half (48%) are not decided on this issue, with a further 9% saying they do not know. This indicates there is a lack of public understanding on smart meters.

### 3.16 Ease of using appliances between 4pm - 8pm each day

Using a scale ranging from very easy to very difficult, respondents were asked how easy or difficult it would be for them to manage if they were unable to do specific household activities between 4pm-8pm each day.

Figure 19: Ease or difficulty of managing if unable to use appliances between 4pm - 8pm each day

\*All consumers that own an electric/hybrid vehicle (Nov-23: n=62; Nov-22: n=36\*)  
 – note the small sample size

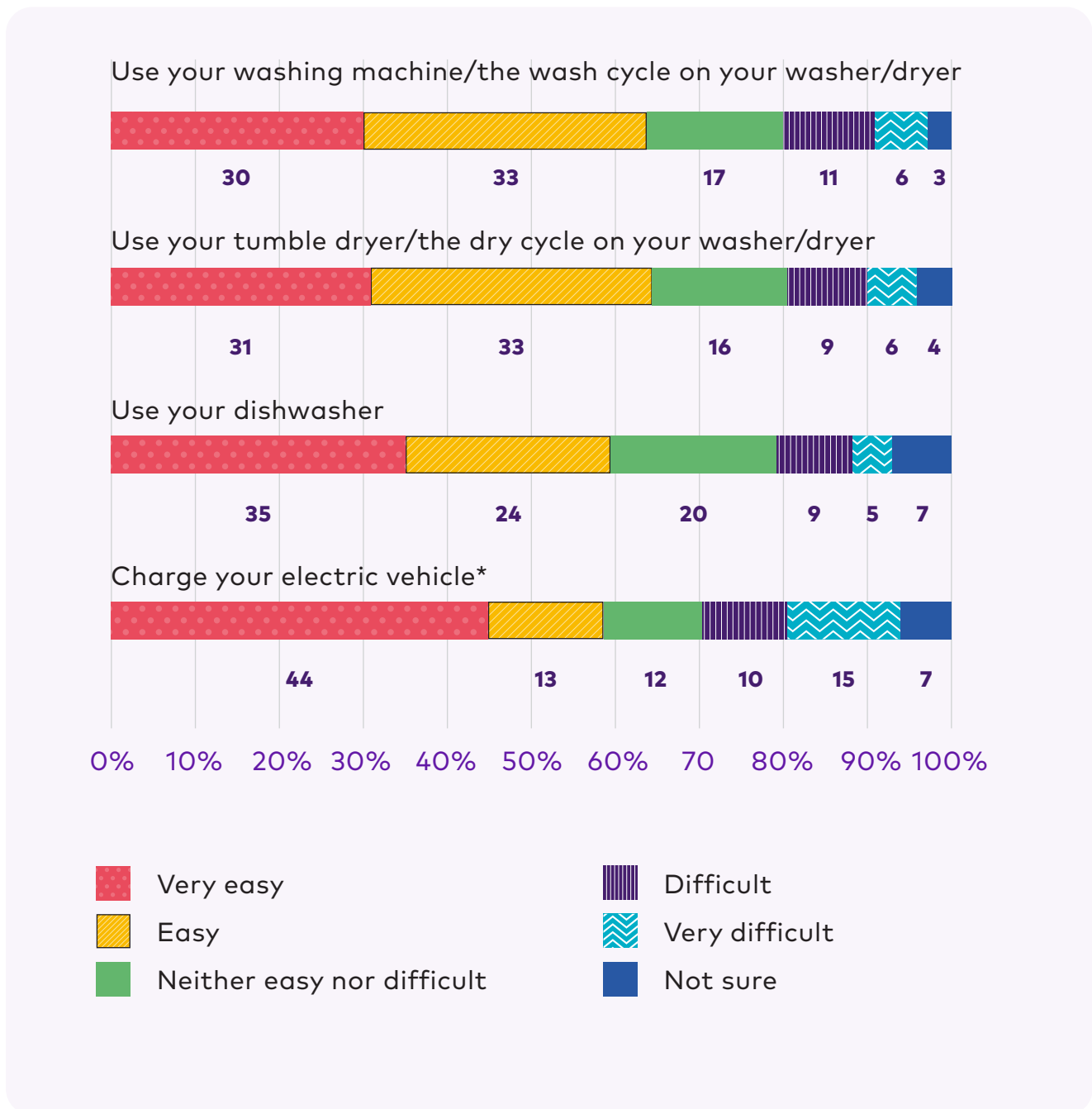
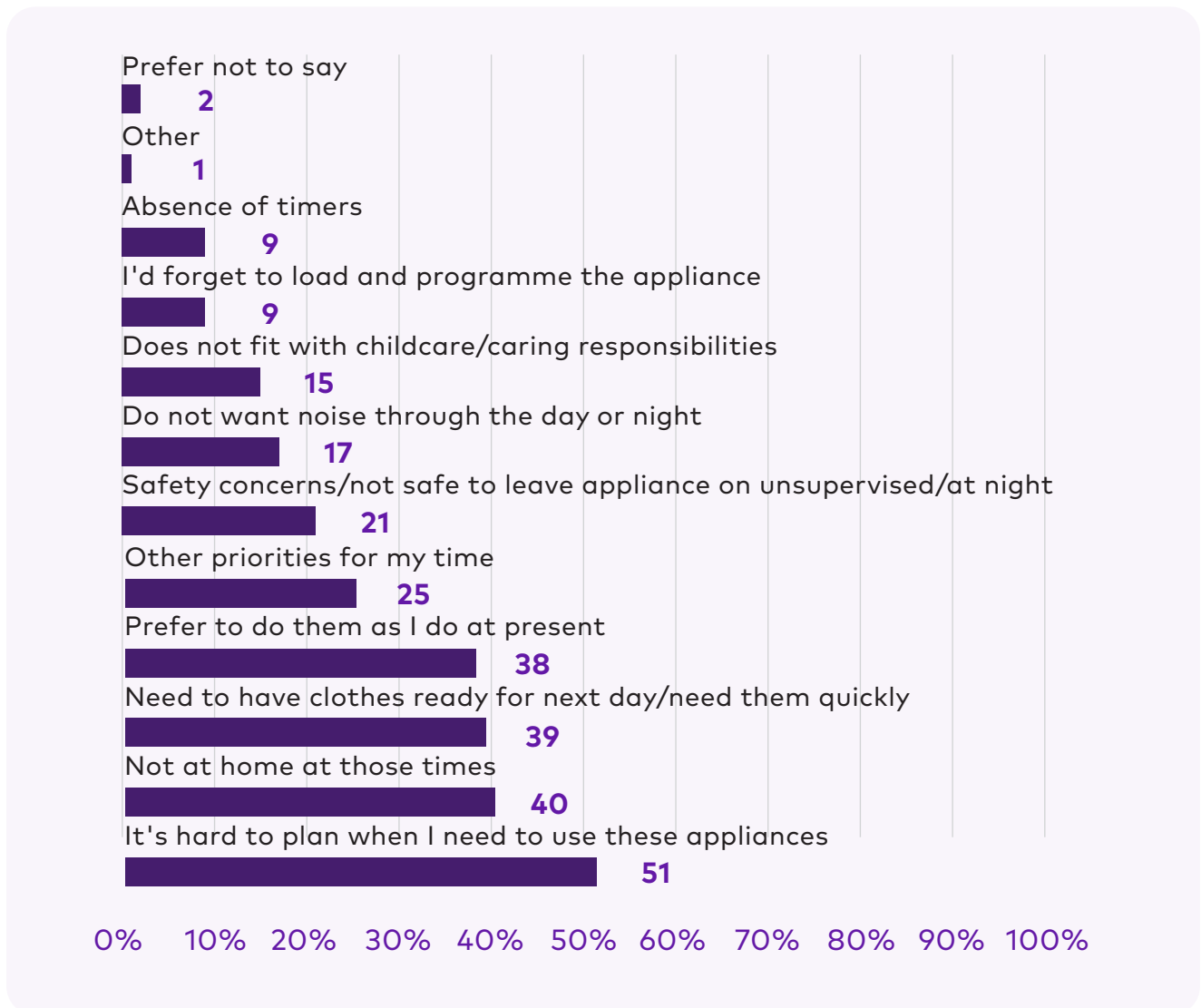




Figure 20: Reasons that prevent household from using appliances outside 4pm - 8pm



Amongst the small number (n=62) of respondents who owned an electric vehicle/ plug-in hybrid, four in five (57%) stated that they would find it easy to manage if they were unable to charge their vehicle between 4pm - 8pm each day. This was down from 80% in 2022.

Around two-thirds (59%) of respondents stated that they would find it easy to manage if they were unable to use their dishwasher during this time. Almost two thirds 64% of respondents stated that they would find it easy to manage if they were unable to use their tumble dryer between 4pm - 8pm, whilst (63%) would find it easy to manage if they were unable to use their washing machine during this time. These figures are largely similar to those in 2022.

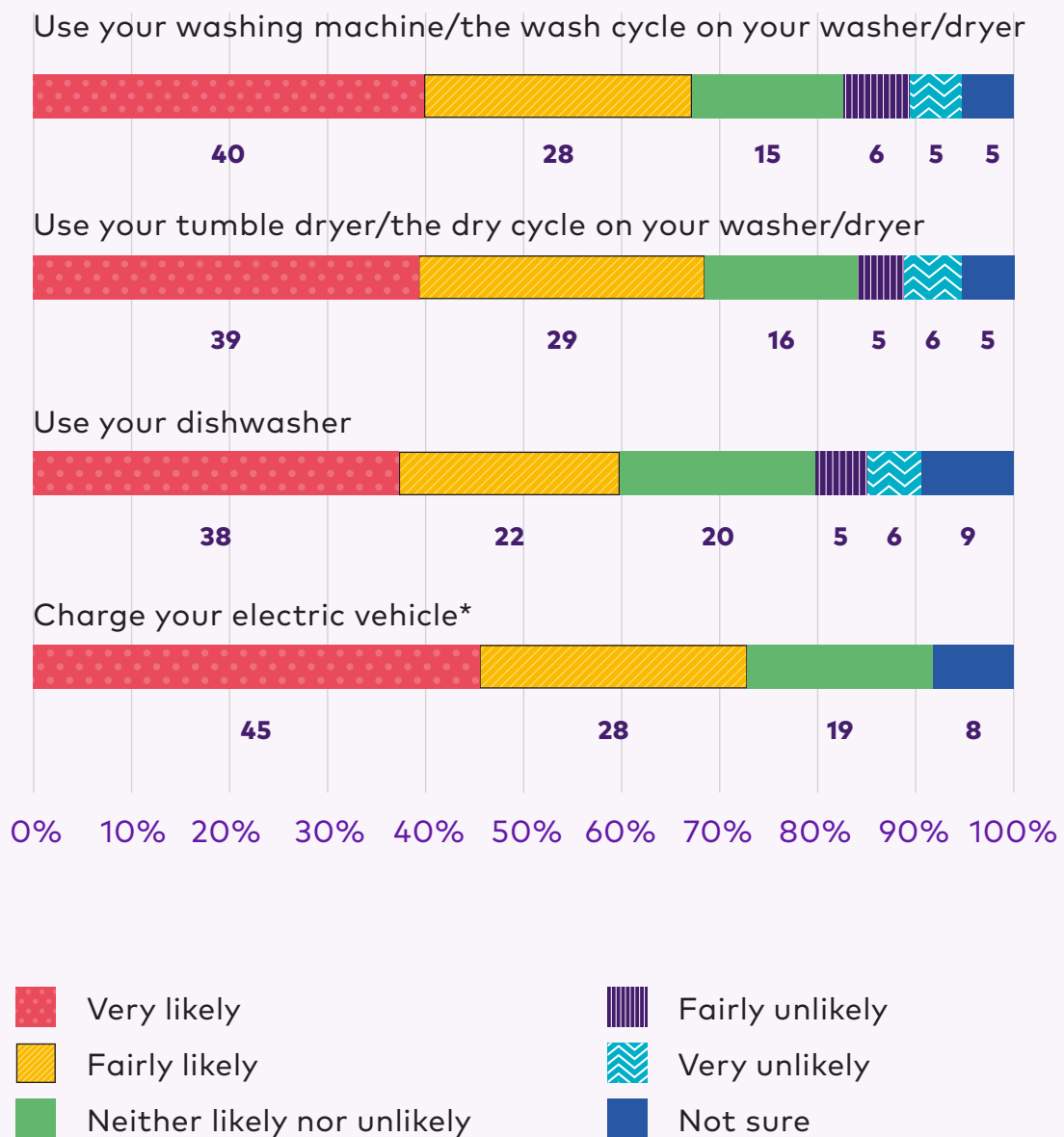
Over half (51%) of these respondents stated that they find it hard to plan when they need to use these appliances, whilst four in ten (40%) stated that they are not at home at the times outside of the 4pm - 8pm window. A similar number (39%) stated that they need to have clothes ready for the next day or need them quickly.

### 3.17 Likelihood of using appliances outside 4pm - 8pm if it meant a reduction in the cost of household energy bills

Using a scale ranging from very likely to very unlikely, respondents were asked how likely or unlikely they would be to do specific household activities outside 4pm - 8pm if it meant a reduction in the cost of household energy bills.

Figure 21: Likelihood of using appliances outside 4pm - 8pm if it meant a reduction in the cost of household energy bills

\*All consumers that own an electric/hybrid vehicle (Nov-23: n=62; Nov-22: n=36\*) – note the small sample size



Of the small number (n=62) of respondents who owned an electric vehicle/plug-in hybrid, almost three quarters (73%) would be likely to charge their vehicle outside 4pm - 8pm if it meant a reduction in the cost of their household energy bills, which is down from 81% in 2022.



# 68%

About seven in ten (68%) of respondents would be likely to use their washing machine outside these hours to reduce household energy bills, with the same number being likely to do the same regarding their tumble dryer.

Three in five (60%) of respondents stated that they would be likely to use their dishwasher outside 4pm - 8pm if it meant a reduction in household energy bills.



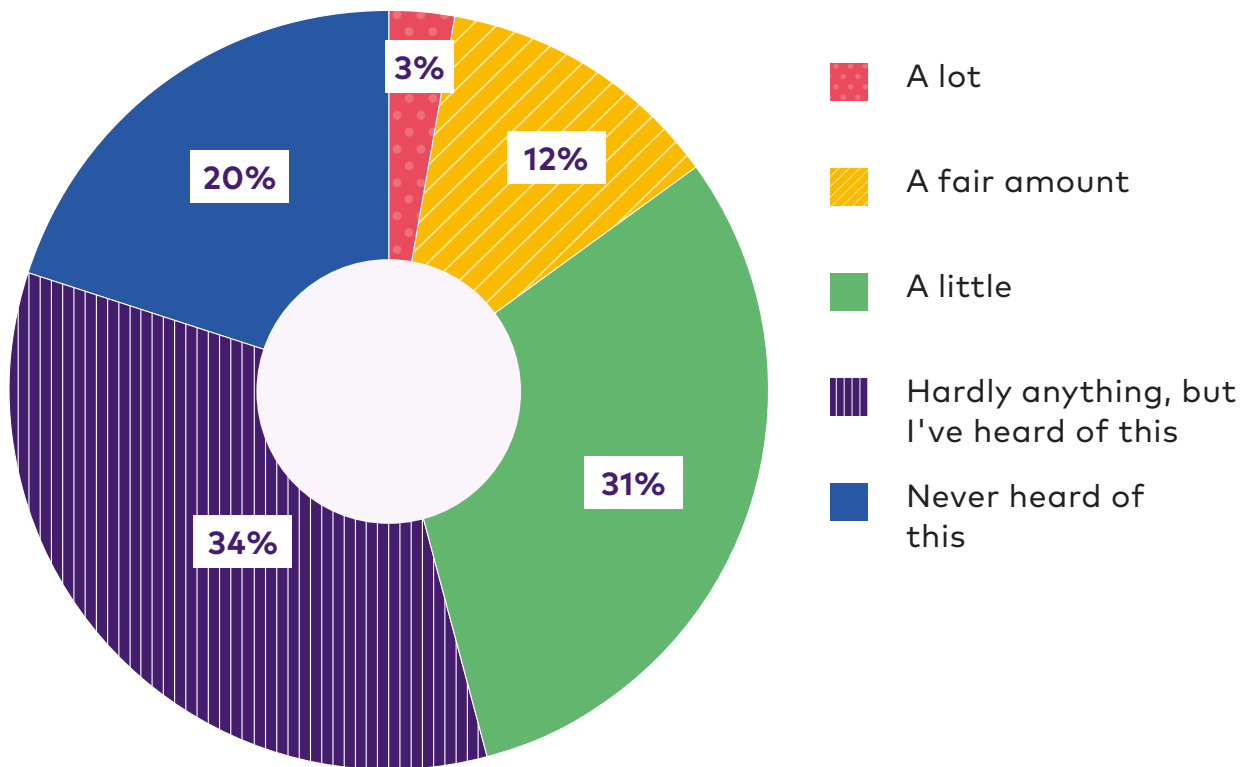
### 3.18 Consumer knowledge about low-carbon heating systems

Using a scale ranging from a lot to never heard of this, respondents were asked to rate how much, if anything, they knew about low-carbon heating systems prior to the survey.

Respondents were informed that low-carbon heating systems referred to environmentally friendly heating systems which no longer rely on conventional gas central heating but instead use energy from low-carbon alternatives (such as hydrogen, the sun, and heat pumps which draw heat from the ground) to heat homes.

Figure 22: Consumer knowledge about low-carbon heating systems

Before today, how much, if anything did you know about low-carbon heating systems? Base: all respondents (n=1000)



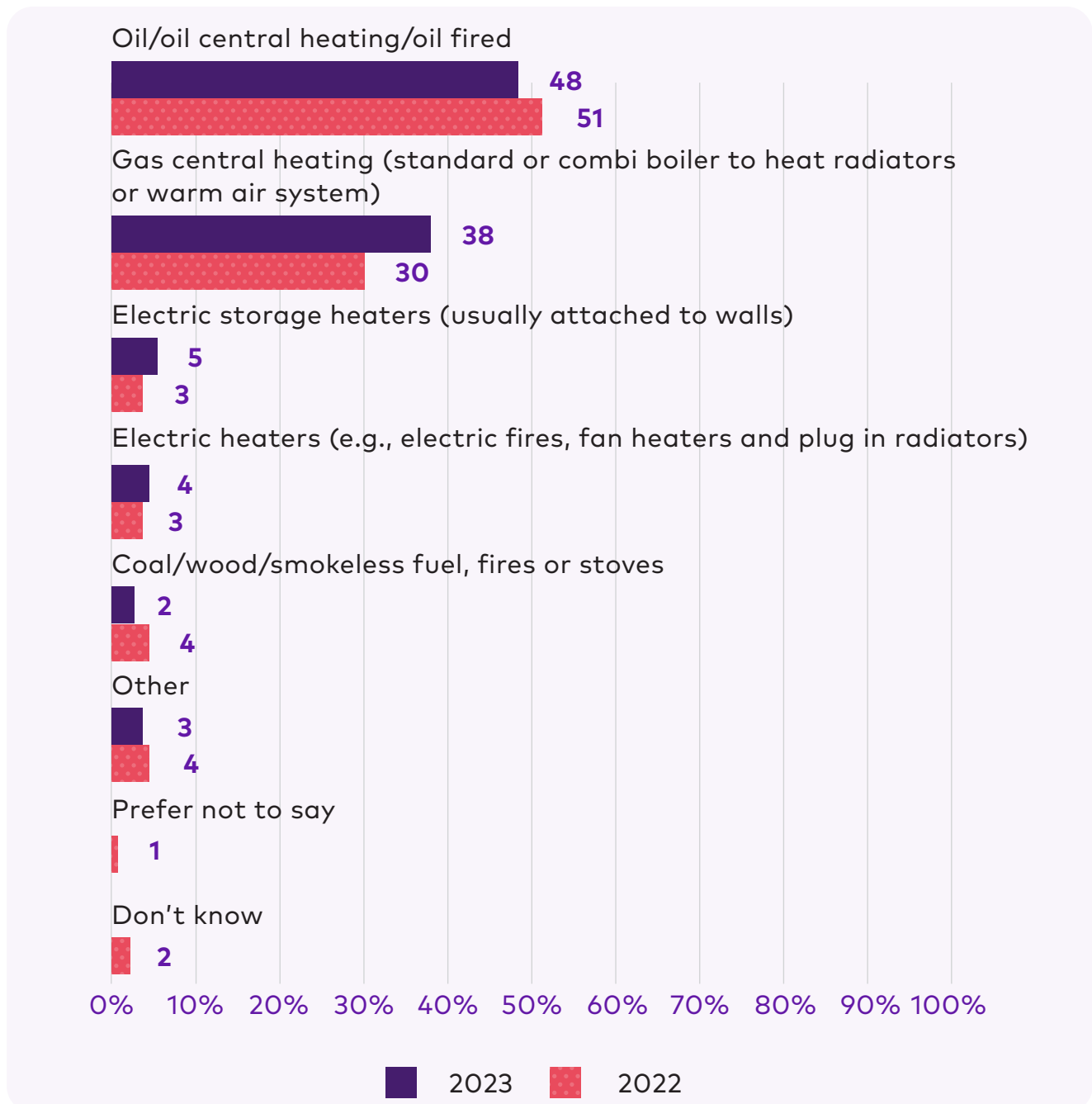
**46%**

Nearly half (46%) of respondents stated that they knew at least a little about low-carbon heating systems prior to the research, whilst a third (34%) stated that they had heard of low carbon heating systems but knew hardly anything about them. A fifth (20%) of respondents stated that they had never heard of low-carbon heating systems. Awareness levels are almost exactly the same as in 2022 across the options available.

### 3.19 Main heating system used by household to heat majority of home in winter

Respondents were asked to indicate the main heating system that their household uses to heat the majority of their home in the winter.

Figure 23: Main heating system used to heat home in winter

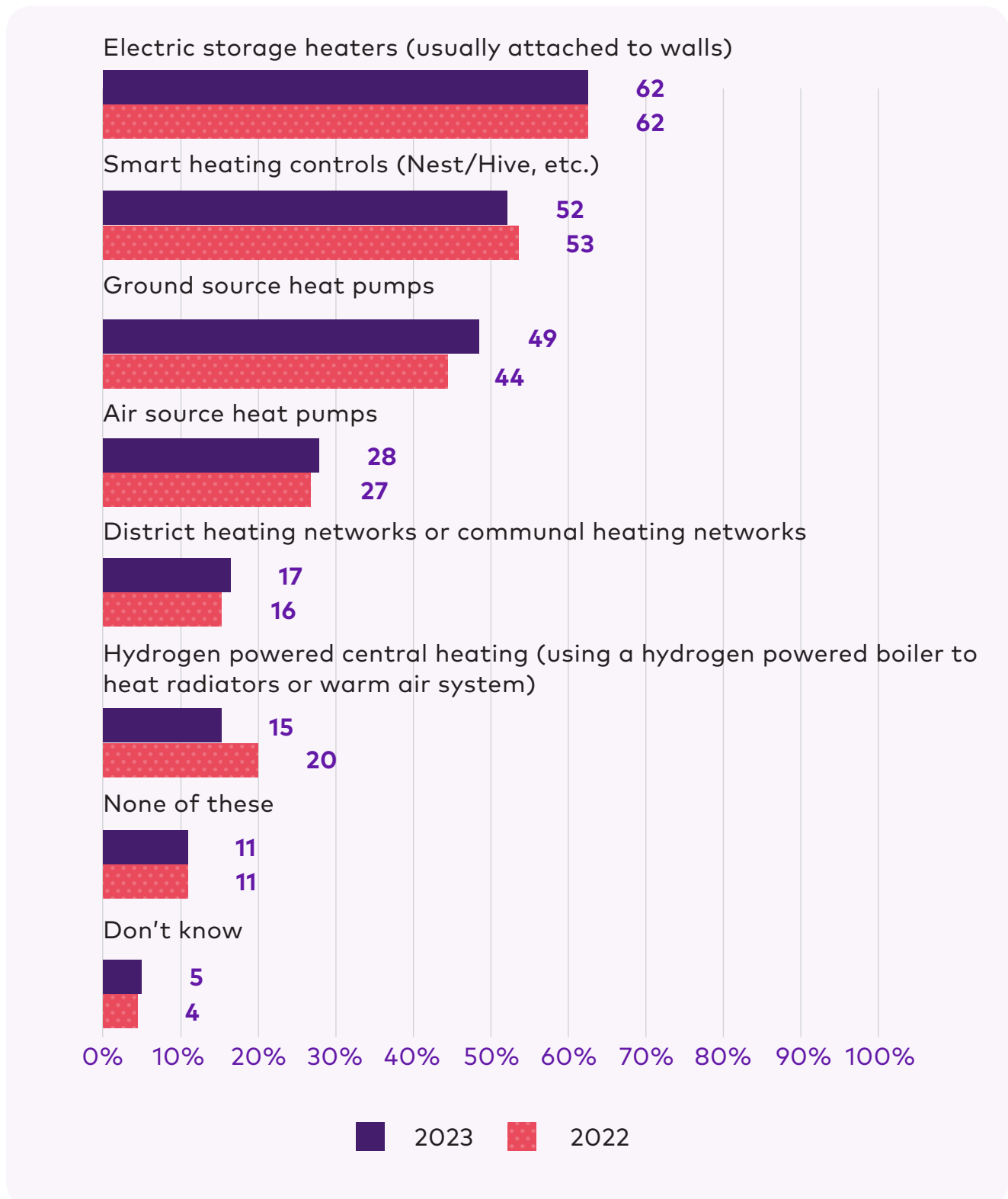


In both years oil was the main heating system used to heat water in the winter, with approximately half of consumers using this option (51% in 2022 and 48% in 2023). Notably, there has been an increase in the use of gas central heating (standard or combi) from 30% in 2022 to 38% in 2023. All other options listed fall below 6% in both years.

### 3.20 Awareness of household heating systems

From a list of heating systems provided, respondents were asked to identify which, if any, they had heard of prior to the research.

Figure 24: Awareness of household heating systems



Electric storage heaters are the system which most respondents had heard of (62%). Around half stated that they had heard of smart heating controls and ground source heat pumps, at 52% and 49% respectively. There is then a significant drop in awareness of air source heat pumps (28%), which falls even lower for communal heating networks (17%) and hydrogen powered central heating (15%). It is also worth noting that a tenth (11%) of respondents had not heard of any of these heating systems with a further 5%, selecting the option 'don't know'.

Levels of awareness of different heating systems remained largely consistent with 2022. However, there was an increase in awareness of ground source heat pumps (up to 49% from 44%) and a decrease in awareness of hydrogen powered central heating (down to 15% from 20%).

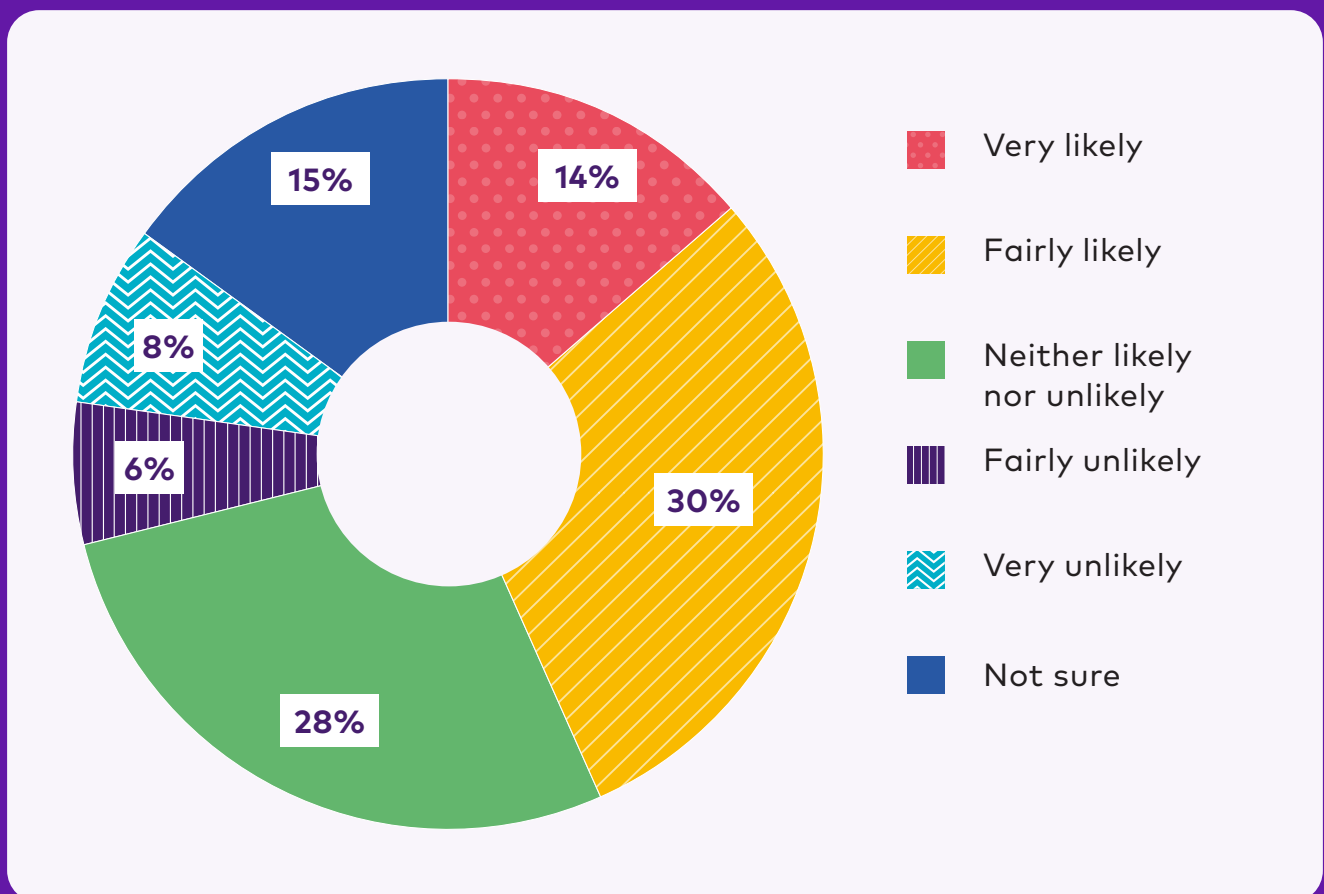


### 3.21 Likelihood of using a heating system listed in Question 3.20 to reduce household energy bills

Using a scale ranging from very likely to very unlikely, respondents were asked how likely or unlikely they would be to use one of the home heating systems detailed in Question 3.20 to reduce the cost of their household's energy bills.

Figure 25: Likelihood of using a heating system listed in Question 3.20 to reduce household energy bills

How likely or unlikely would you be to use one of the home heating systems listed in the previous question to reduce the cost of your household's energy bills?  
Base: all respondents (n=1000)



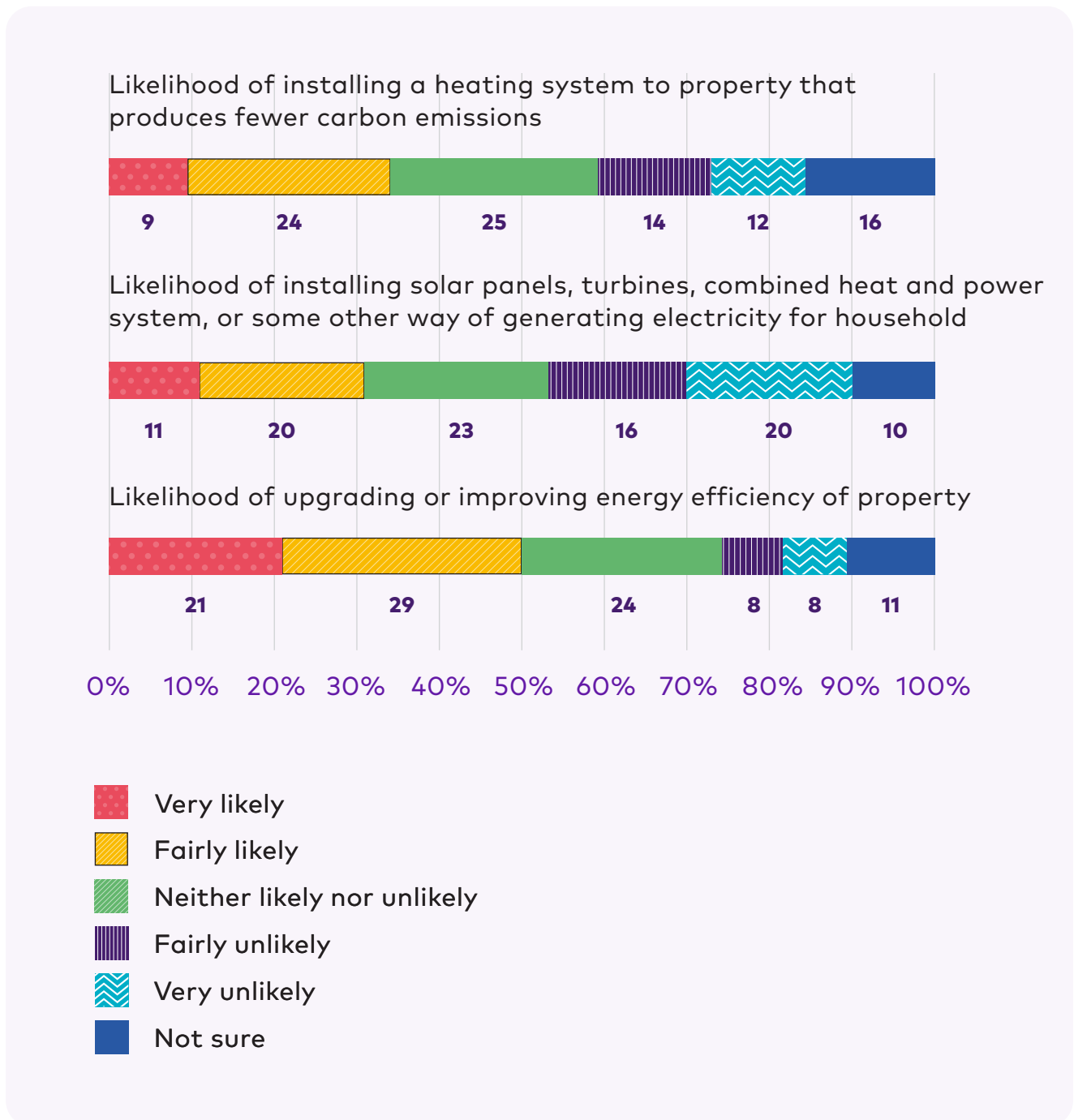
Around two in five (44%) of consumers were likely to use one of the aforementioned heating systems to reduce the cost of their household energy bills. This is a very slight decrease from 46% in 2022. Of this only 14% were very likely, compared to three in ten (30%) being fairly likely to use one of the heating systems. 14% were unlikely to use aforementioned heating systems to reduce the cost of their household energy bills, which was the same percentage in 2022. Almost three in ten (28%) were neither likely nor unlikely and a further 15% were unsure, making this significant proportion of respondents.



### 3.22 Likelihood of upgrading home with energy efficiency measures

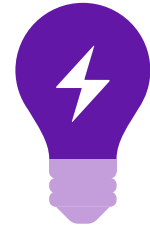
Using a scale ranging from very likely to very unlikely, respondents were asked how likely or unlikely they or their household would be to upgrade or install different energy efficiency measures.

Figure 26: Likelihood of upgrading home with energy efficiency measures



---

Half (50%) of respondents stated that they or their household would be likely to upgrade or improve how energy efficient their property is, whilst about one in six (16%) stated it was unlikely that they or their household would do it.



---

**24%**

Almost a quarter (24%) of respondents stated that they or their household were neither likely nor unlikely to take this action, whilst about one in ten (11%) were not sure.

---

Three in ten (31%) of respondents stated that they or their household would be likely to install solar panels, turbines or some other way of generating electricity for their household, whilst just over a third (36%) stated it was unlikely.



---

**23%**

Almost a quarter (23%) of respondents stated that they or their household were neither likely nor unlikely to take these measures, whilst one in ten (10%) were not sure.

---

A third (33%) stated that it was likely that they or their household would install a heating system in their property that produced fewer carbon emissions, compared to just over a quarter (26%), who stated that they were unlikely to do so.



---

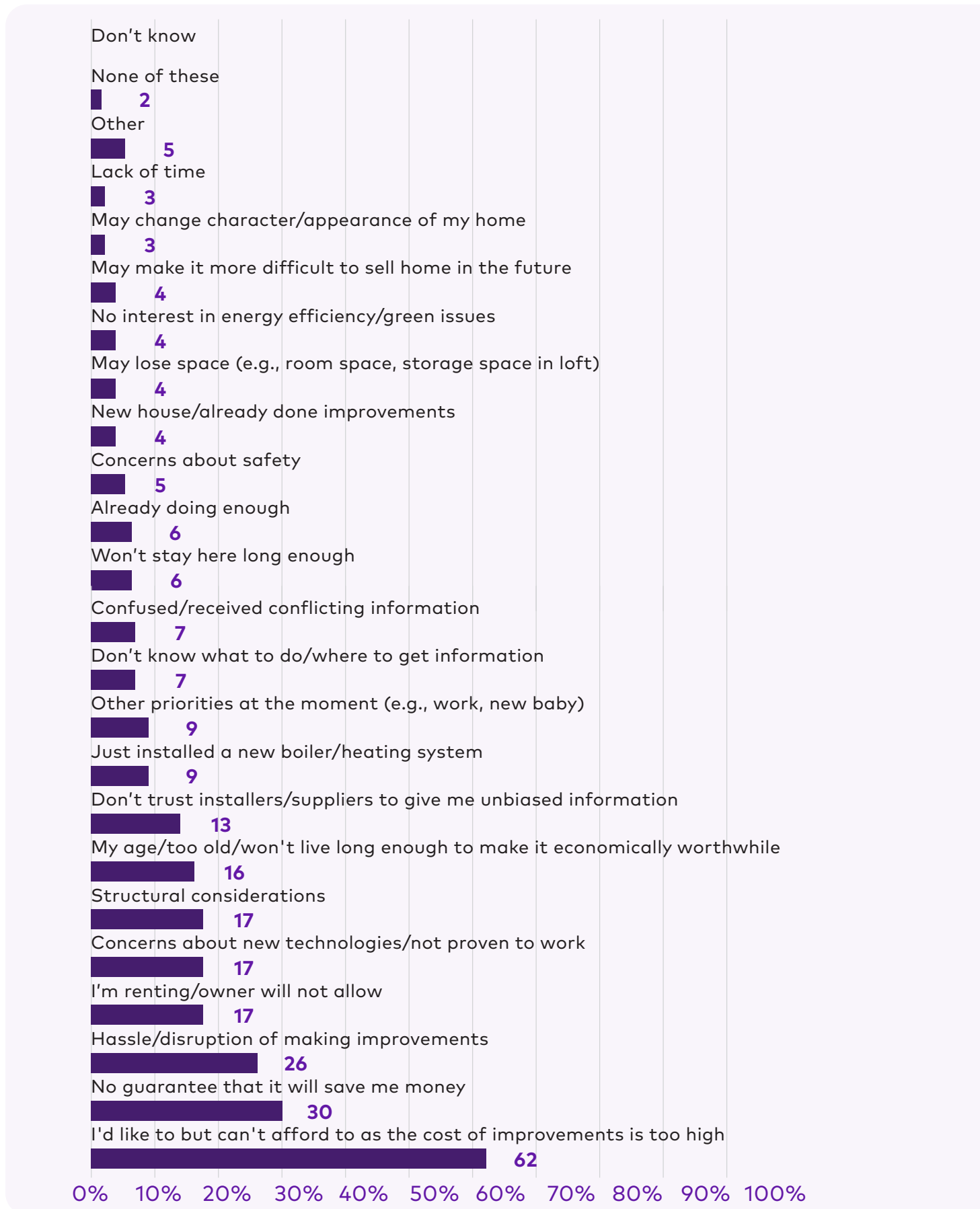
**25%**

A further quarter (25%) of respondents stated that they or their household were neither likely nor unlikely to take this action, and another 16% were not sure.

---



Figure 27: Reasons for household being likely or unlikely to make upgrades or installations



Respondents who stated that they or their household were either unlikely or neither likely nor unlikely to make upgrades or installations were asked a follow-up question asking them to describe in a bit more detail the reasons that this was the case.

Cost was considerably the most cited reason given by these respondents, with around six in ten (62%) having stated that they would like to make such upgrades and installations, but they could not afford to do so. This is a significant increase from 52% in 2022. Three in ten (30%) stated that there was no guarantee that such measures would save them money. Over a quarter (26%) stated that they did not want the hassle of making such improvements to their households.

### 3.23 Likelihood of changing household's car or van in the next five years to an electric vehicle/plug-in hybrid

Respondents were asked how likely they would be to change their household's car or van in the next five years to an electric vehicle. Respondents were also asked the same question regarding a plug-in hybrid.

Figure 28: Likelihood of changing household's car or van in the next five years to an electric vehicle/a plug-in hybrid

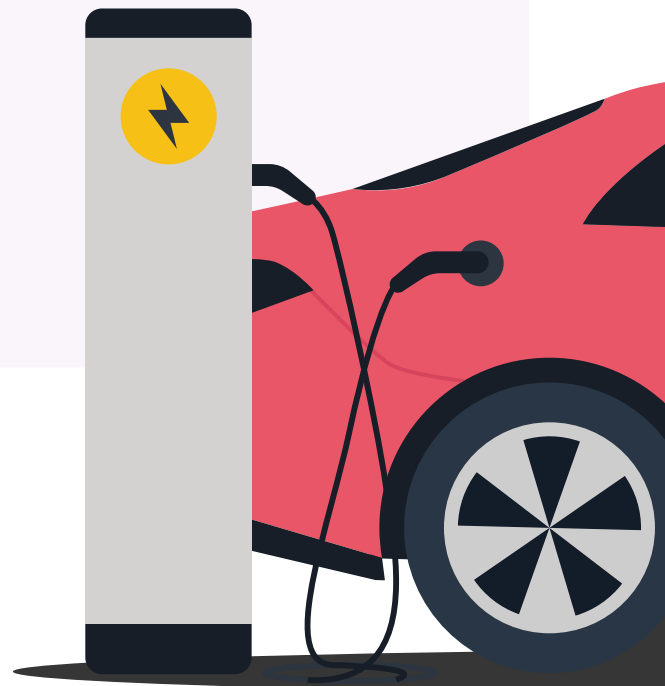
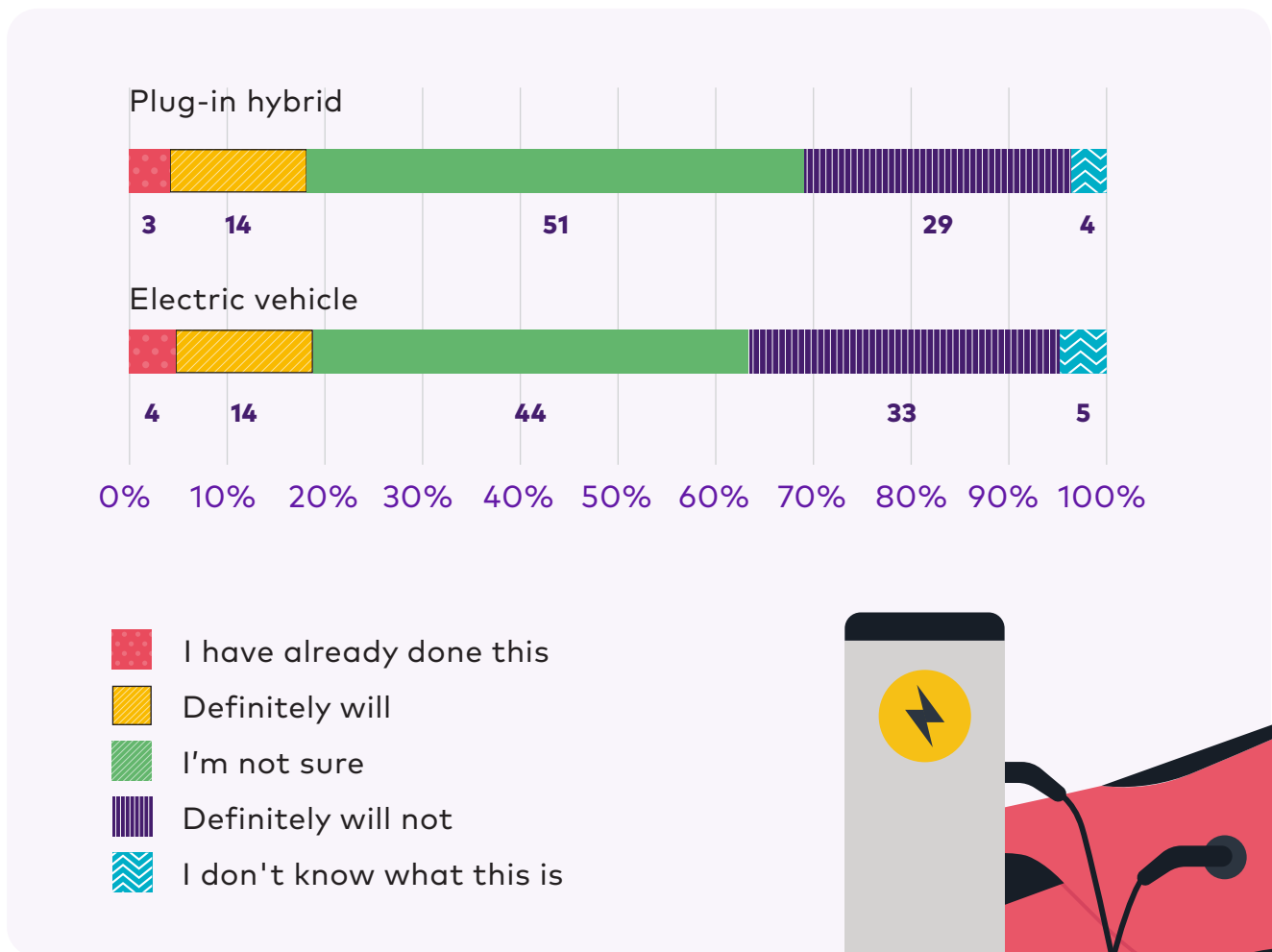
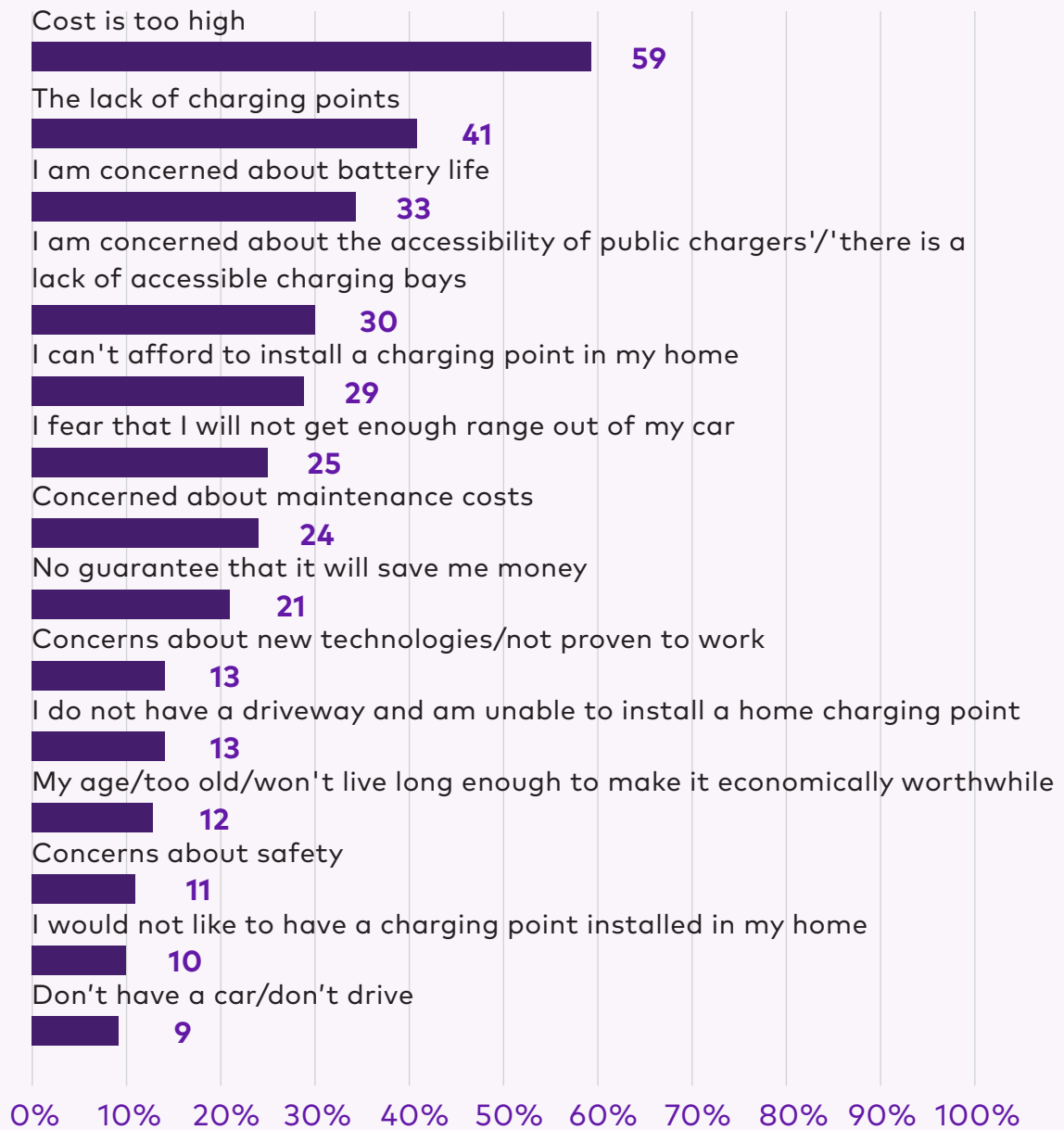
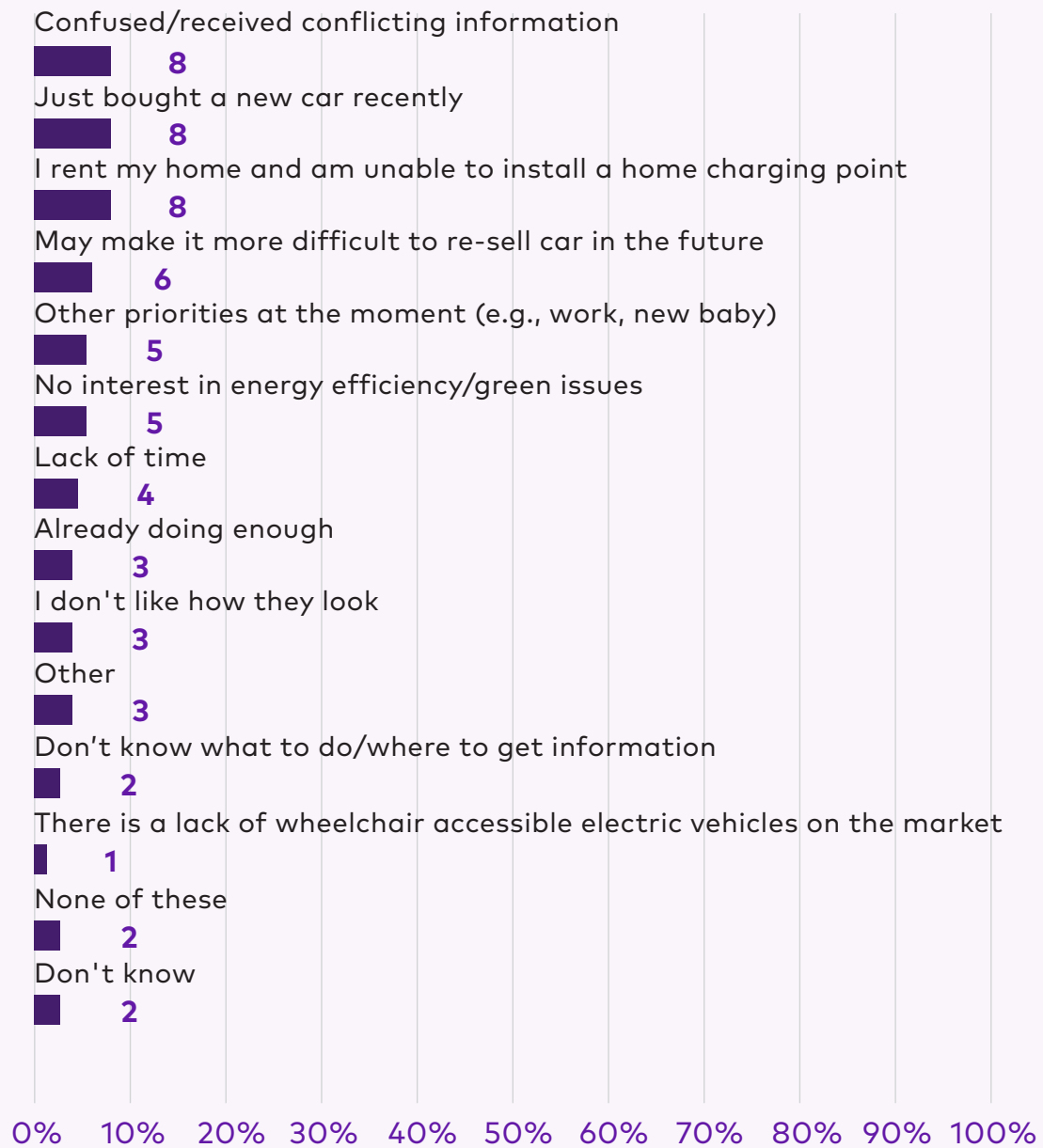




Figure 29: Reasons stopping household from purchasing a hybrid or electric car







Only a very small number of respondents had already changed their household's car or van to an electric vehicle (4%) or a plug-in hybrid (3%). 14% of respondents stated that they definitely will change to an electric vehicle in the next five years, whilst the same number (14%) stated that they definitely will change to a plug-in hybrid. This is a decrease from a fifth (20%) for electric vehicles and 17% for a plug-in hybrid in 2022.

A third (33%) of respondents stated that they definitely will not change to an electric vehicle in the next five years, which is a significant increase from a quarter (25%) in 2022. About three in ten (29%) felt this way about a plug-in hybrid, which is a smaller increase from 24% in 2022.

Almost half (44%) of respondents were not sure if they would change to an electric vehicle, whilst 51% felt this way regarding a plug-in hybrid. A number of respondents did not know what an electric vehicle (5%) or a plug-in hybrid (4%) was.

All respondents who stated that they definitely will not change their household's car or van to an electric vehicle and/or a plug-in hybrid or who stated that they were unsure if they will do so were asked a follow-up question asking if there is anything in particular stopping them or their household from purchasing a vehicle of this type.

Amongst these respondents, cost (59%) was the reason most likely to have been given, followed by the lack of charging points (41%). These were also the top two reasons in 2022.



# Changing attitudes to the energy transition

**Fulfilling our commitment to address climate change will significantly impact consumers in the coming decades. Just how the ambitious targets within the 2022 Northern Ireland Climate Change Act will affect society and consumers is yet to be fully understood.**

To address this knowledge gap, the Consumer Council has established an annual tracker survey. It is intended to provide policy makers and industry experts insights into consumers' experience of the energy transition. Comparing the results from, 2022 and 2023 illustrates the evolving consumer position.



## Consumer understanding

As was the case in 2022, this survey demonstrates that more education relating to decarbonisation is required to help Northern Ireland reach its net zero goals.

It is promising that a large majority of the consumers we surveyed had some understanding of the terms; greenhouse gas emissions, net zero and decarbonisation. However, there was also no consensus on the contributor of the largest amount of greenhouse gas emissions in Northern Ireland. This lack of awareness demonstrates the need for better public information regarding the energy transition. Presenting consumers with simple information is necessary so that they can begin to embrace what the energy transition means for them.



### Consumer support for the energy transition

A significant majority (70%) of respondents supported the use of renewable energy for providing our power, heat and transport, but this is still down from 78% in 2023. Half (50%) supported the building of new infrastructure in their local area to support the increased use of renewable energy, also down from 58% in 2022.

There was substantial support (79%), for government grants to encourage residential and commercial building owners to install cleaner and more efficient heating systems. As the energy transition will necessitate significant infrastructure investment and potential in-home disruption, it is important that work is undertaken by Government and industry to engender consumer support for the energy transition.

This is important as our survey finds a year-on-year decrease in support for the use of carbon taxes to further develop new and clean energy sources, help pay for energy efficiency improvements in low-income households, fund improvements to transport infrastructure and to fund programmes to help communities prepare for and adapt to the impacts of climate change.



### Affordability and empowerment

We asked consumers about making household changes in the next few years that would contribute to decarbonisation. We found that a significant proportion of respondents felt their household had already made changes.

However, when it comes to making upgrades or installations in the home that would contribute to decarbonisation, cost remains the main barrier for many of the respondents in both 2022 and 2023. Similarly, consumers stated that they are unlikely to take actions like replacing petrol or diesel vehicles with electric or plug-in hybrid alternatives without financial support or incentives.

In 2022 just under two thirds of respondents were concerned about the amount of energy being used in the home, but this has fallen to under half in 2023. The cost of living challenges facing consumers may also be a reason for a reduction in consumer support for increased taxes on fossil fuels to advance carbon reduction initiatives.

# Conclusions

**It is promising that a large majority of the consumers we surveyed had some understanding of the terms greenhouse gas emissions, net zero and decarbonisation.**

However, there was also no consensus on the contributor of the largest amount of greenhouse gas emissions in Northern Ireland. This lack of awareness demonstrates the need for better public information regarding the energy transition. Presenting consumers with simple information is necessary so that they can begin to embrace what the energy transition means for them. Further education for the public is necessary. It should cover technologies, targets, government schemes and key terminologies.

Cost has repeatedly been cited across both years as the main reason consumers have not or cannot make changes. Therefore, reducing the financial burden will be necessary before household alterations that contribute to decarbonisation will be widely adopted.

The Consumer Council believes that incentives and grants will play a crucial role in addressing cost barriers. Creating a 'one-stop shop' for energy advice and education could also serve an important function, as approximately half of respondents suggested that they would be likely to use this resource.

Consumers will play an essential role in the energy transition as most will be required to make major lifestyle changes to how they heat their homes, travel and perhaps even to their diet.

To gain consumer acceptance of these changes we must ensure a just and fair transition by enabling affordability, security of energy supply and protection for all consumers, particularly those who are vulnerable. Empowering individuals and mobilising communities, to actively support and embrace Northern Ireland's energy transition is key for a successful and fair transition.



# List of figures

Figure 1: Understanding of terms relating to decarbonisation	13
Figure 2: Awareness of schemes relating to decarbonisation	15
Figure 3: Concern about how much energy is used in the home	17
Figure 4: Likelihood of household making changes to contribute to decarbonisation	18
Figure 5: Likelihood of household making changes to contribute to decarbonisation	20
Figure 6: Likelihood of household making changes to contribute to decarbonisation	22
Figure 7: Consumer support for the use of renewable energy for providing our power, heat and transport	24
Figure 8: The source of energy consumers believe Northern Ireland should rely on most to aid decarbonisation	25
Figure 9: Consumers' perception of the largest contributor of greenhouse gas emissions in Northern Ireland	27
Figure 10: Consumer support for the use of increased taxes to be used to help decarbonisation	28
Figure 11: Consumer support for policies to help Northern Ireland reduce its greenhouse gas emissions	30
Figure 12: Consumer support for the building of new infrastructure in local area to support the increased use of renewable energy	32
Figure 13: Comfort with an external company controlling when appliances and heating run or when plug-in electric vehicles are charged	34
Figure 14: Reasons for discomfort with an external company controlling when appliances and heating run or when plug-in electric vehicles are charged	35



Figure 15: Extent of trust in source of information about climate change - mean score (max = 5)	36
Figure 16: Likelihood of using a 'one-stop-shop' for energy advice and education	37
Figure 17: Consumer knowledge of energy sources used in their home	38
Figure 18: Likelihood of installing a smart meter in home in the next two years	39
Figure 19: Ease or difficulty of managing if unable to use appliances between 4pm - 8pm each day	40
Figure 20: Reasons that prevent household from using appliances outside 4pm - 8pm	41
Figure 21: Likelihood of using appliances outside 4pm - 8pm if it meant a reduction in the cost of household energy bills	42
Figure 22: Consumer knowledge about low-carbon heating systems	44
Figure 23: Main heating system used to heat home in winter	45
Figure 24: Awareness of household heating systems	46
Figure 25: Likelihood of using a heating system listed in Question 3.20 to reduce household energy bills	48
Figure 26: Likelihood of upgrading home with energy efficiency measures	49
Figure 27: Reasons for household being likely or unlikely to make upgrades or installations	52
Figure 28: Likelihood of changing household's car or van in the next five years to an electric vehicle/a plug-in hybrid	54
Figure 29: Reasons stopping household from purchasing a hybrid or electric car	56



Floor 3, Seatem House, 28-32 Alfred Street,  
Belfast, BT2 8EN

Textphone: 028 9025 1600

Email: [info@consumercouncil.org.uk](mailto:info@consumercouncil.org.uk)

Web: [www.consumercouncil.org.uk](http://www.consumercouncil.org.uk)