CHANGING ENERGY BEHAVIOUR

SURVEY CONDUCTED FOR THE STATES OF GUERNSEY

Island Global Research

20 MARCH 2020

CONTENTS

This report presents findings from a survey on changing energy behaviour completed by residents in the Bailiwick of Guernsey in January and February 2020.

Background and approach	3
Key Findings	4
Profile of respondents	6
Views on energy consumption	9
Attitudes to behaviour change	17
On-island travel	22
Transport emissions	30
Energy use at home	34
Heating and home improvements	38
Other ways to reduce carbon emissions	49
Policies and initiatives	52
Conclusions	57

About Island Global Research

Island Global Research is a market research and consultancy company with experience in both quantitative and qualitative research methods. We regularly conduct market research for clients in the Crown Dependencies.

Island Global Research is part of the BWCI Group, and a member of Abelica Global.

BACKGROUND AND APPROACH

Island Global Research conducted a survey on behalf of the States of Guernsey about **perceptions and barriers around making changes to reduce energy use and emissions**. Many of the questions asked about **on-island travel** and **energy use at home** as these areas are some of the largest contributors of greenhouse gases.[1]

Island Global Research designed the survey. The survey was finalised following a workshop held with stakeholders on 19 December 2019 to pilot the draft questionnaire and obtain feedback.

The survey was conducted online, and data were collected between 24 January 2020 and 16 February 2020. Members of the Island Global Research market research panel were invited to complete the survey. The survey was also advertised using social media to people living in the Bailiwick of Guernsey.

The survey was completed by a wide range of people. Survey weights were applied to adjust for any differences between the age and gender profile of the sample compared to the resident population. This is a standard statistical method that allows us to report results for the island as a whole.

The report presents results after survey weights have been applied. Numbers are rounded to the nearest whole number. Subgroup analysis has been undertaken to consider findings by demographic and household characteristics, and also with reference to selected survey questions, such as whether their primary motivation for saving energy is for environmental reasons or to save money.

The results are presented in eight sections, each focusing on a specific topic. At the start of each section, Island Global Research has included "Key Learnings" which offer reflections on the results in that section. They have also brought together the learnings from all sections in a conclusion. The views expressed are their own. This commentary is intended to help the reader engage with the results, though we appreciate readers may draw their own conclusions.

1 States of Guernsey: 'Guernsey Annual Greenhouse Gas Bulletin 2017' (issued 4 March 2019)

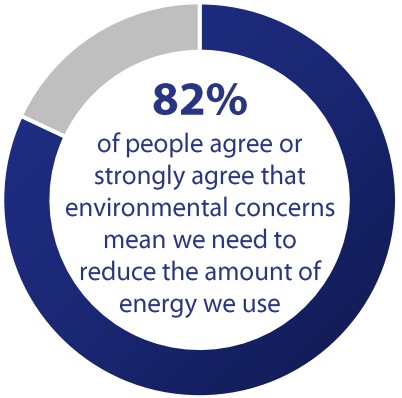
The survey results are based on responses from 1,012 residents of the Bailiwick of Guernsey.

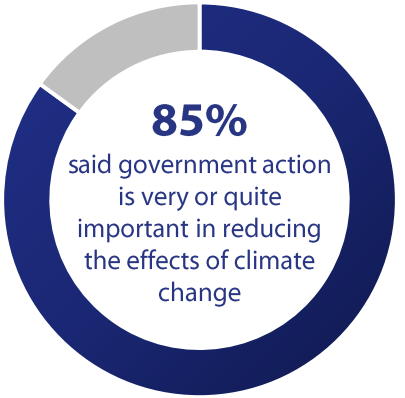
KEY FINDINGS

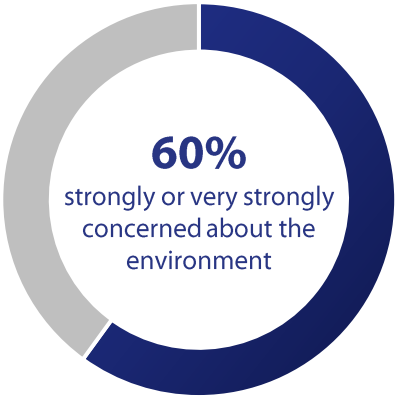
The survey on changing energy behaviour was completed by more than 1,000 people living in in the Bailiwick of Guernsey.

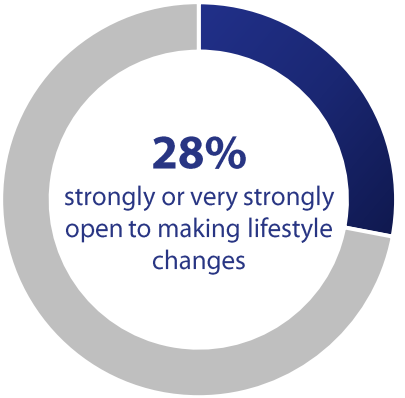
Views and attitudes towards the environment and behaviour change

- The majority of people agreed that we need to reduce the amount of energy we use due to environmental concerns. There was also widespread agreement that if each person makes a small change to their behaviour, as a community we can have a big impact on Guernsey's carbon footprint.
- When individuals were asked about their primary motivation for saving energy, views were divided 50:50 between environmental reasons and a desire to save money.
- Around 60% of people have an attitude that indicates they are 'strongly' or 'very strongly' concerned about the environment, while only 28% have an attitude that is 'strongly' or 'very strongly' open to making changes which would benefit the environment.
- There was widespread support for both government action and for individual and community action on climate change, with 85% of people saying government action is 'very' or 'quite' important in reducing the effects of climate change. Between a half and two-thirds of people expressed support for each of the policy initiatives asked about.









KEY FINDINGS (CONTINUED)

On-Island Travel

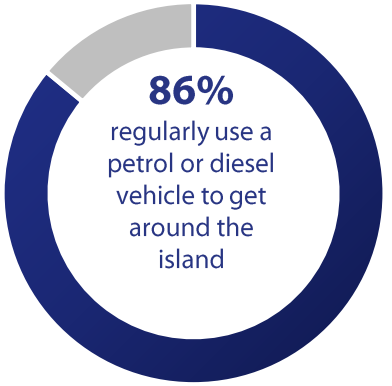
- Almost two-thirds (65%) of residents are either 'very' or 'somewhat' concerned about the environmental impact of motor vehicles on the island.
- Petrol and diesel vehicles are the most commonly used mode of transport, with 86% of people regularly using one to get around the island. More than a third of people said it would be possible for them to drive less and to walk, cycle or take the bus instead.
- People were interested in hybrid and electric vehicles: 62% of those who regularly drive a petrol/diesel vehicle said they may consider a hybrid or electric vehicle in the next 5 years.

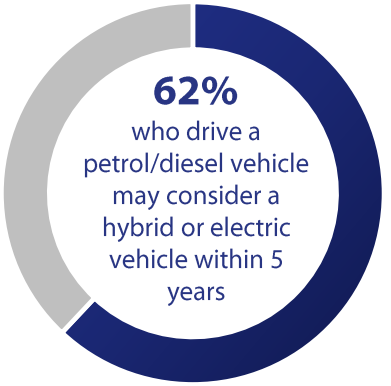
Energy use at home – Home improvements

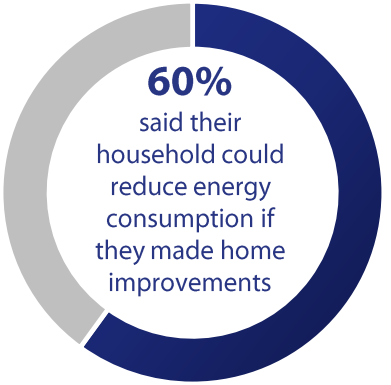
- Environmental reasons were often a motivation for making home improvements, though the cost of installation was often a barrier in determining whether people had, or would proceed, in making the change.
- 60% of people said their household could reduce energy consumption if they changed/upgraded their heating system or undertook home improvements. Most properties have double (or triple) glazing and loft/wall insulation, though other energy-saving home improvements (such as learning thermostats, solar panels and air-source heat pumps) were less prevalent. For example less than half (43%) of people who own their home have a learning thermostat or similar.

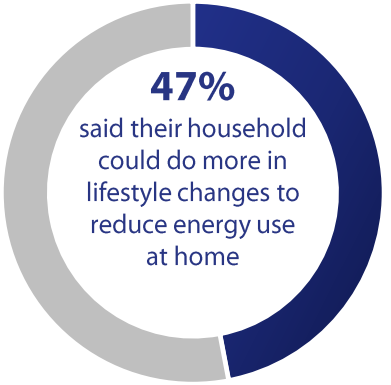
Energy use at home – Lifestyle changes

- Almost everyone could identify some measures they currently do that reduces the amount of energy they use at home (e.g. turning off lights or turning the heating down).
- However, almost half (47%) of people thought their household could do more in lifestyle changes to reduce energy consumption at home. 45% would be willing to consider using a smart meter.
- Most people are open to being more environmentally conscious consumers. For example, 83% say they already try, or would be willing to try, avoiding single use plastic.









PROFILE OF RESPONDENTS

PROFILE OF RESPONDENTS

The rationale for undertaking the survey was for the results and inferences drawn to be representative of the overall population.

The profile of those who completed the survey was compared to the latest available data on the population of the Guernsey. Survey responses were weighted in proportion to the age and gender profile of the adult population of Guernsey. All figures, tables and text presented in this report refer to weighted responses, unless otherwise specified.

Survey weights correct for age and gender differences between the sample and the population. Thus, they compensate for different patterns of non-response from different sub-groups of the population, such that survey results can be generalised from the sample back to the population from which they are drawn.

As was expected, fewer young people completed the survey. The survey was also completed by slightly more females than males. However, the survey was completed by a wide range of the people and the differences are relatively small. The largest weights are for females and males aged 16-24 and they were capped at 3.0.

All calculations were independently rounded so totals published in tables and graphs may not necessarily sum 100%.

The table shows the age and gender profile of the population, and the profile of the sample who completed the survey. It also shows the profile of the sample after weights have been applied.

	Population	Survey	
	%	% of sample	% after survey weight
Age group			
16-24	12%	2%	5%
25-29	8%	3%	8%
30-34	7%	5%	8%
35-39	7%	8%	8%
40-44	7%	7%	8%
45-49	9%	11%	10%
50-54	9%	13%	10%
55-59	9%	11%	10%
60-64	8%	13%	8%
65-69	7%	11%	7%
70-74	6%	9%	7%
75+	11%	6%	11%
Prefer not to say	-	<1%	<1%
Gender			
Female	51%	54%	51%
Male	49%	45%	48%
Other	*	<1%	<1%
Prefer not to say	-	1%	1%

* not available

PROFILE OF RESPONDENTS

The tables show the profile of respondents after survey weights have been applied.

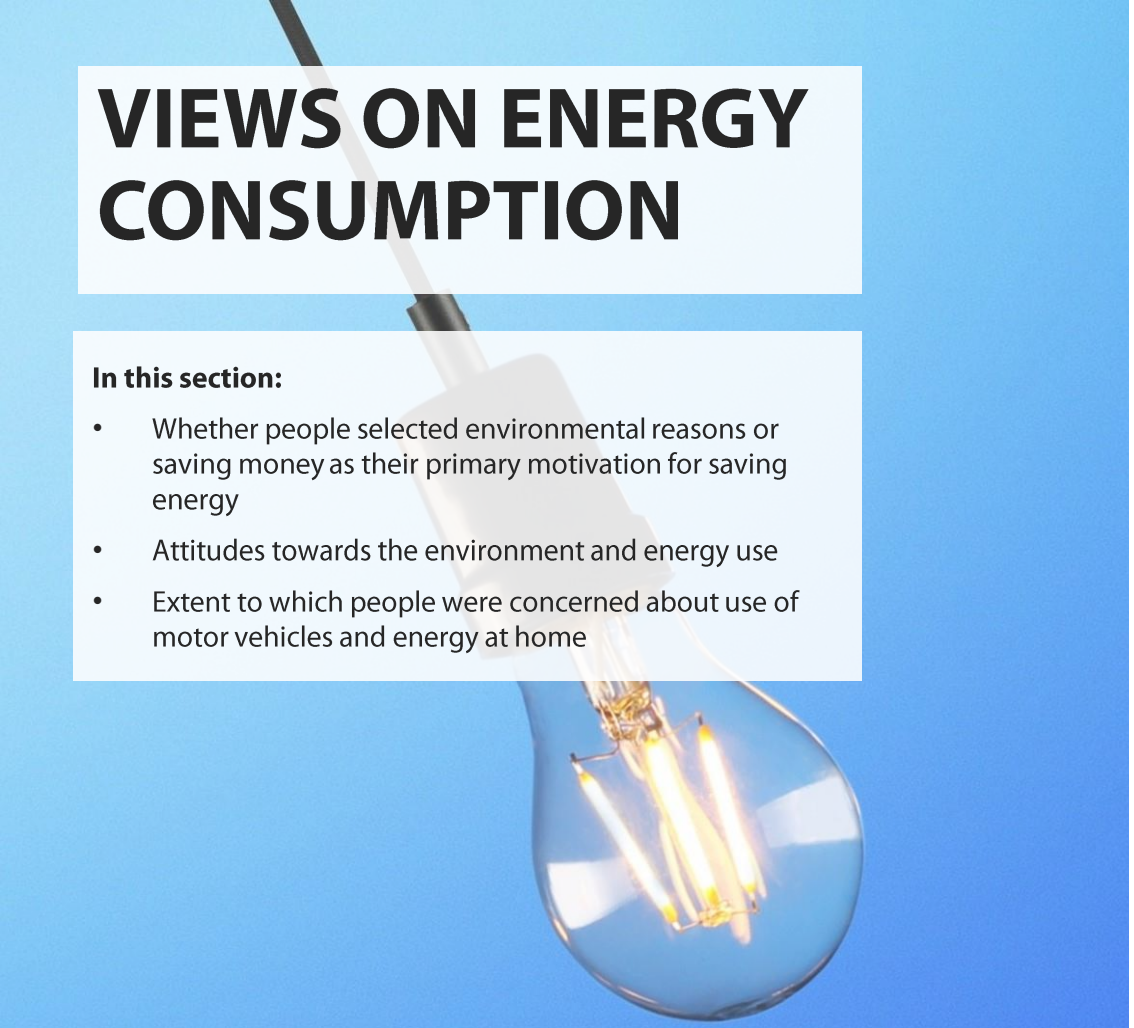
	% after weights have been applied
Employment status	
Full-time employed	53%
Part-time employed	11%
Self-employed	6%
In full-time education	1%
Retired	25%
Not working for other reasons	3%
Don't know/Prefer not to answer	1%

	Live	Work*
Parish / island		
Castel	13%	3%
Forest	3%	3%
St Andrew	5%	6%
St Martin	9%	7%
St Peter Port	28%	50%
St Pierre du Bois	4%	<1%
St Sampson	13%	10%
St Saviour	4%	1%
Torteval	2%	<1%
Vale	17%	9%
Alderney / Herm / Jethou	1%	1%
Sark	<1%	<1%
It varies/more than one location	-	10%

	% after weights have been applied
Household composition	
Working age adults only	40%
Working age adults with children under 16	25%
Pension age adults only	20%
Other composition	15%
Current housing status	
Own a property	78%
Rent a property (privately)	13%
Rent a property (through the States/GHA)	2%
Partial ownership (e.g. pay part mortgage and part rent)	1%
Living rent free or paying a small rent	5%
Staff accommodation	<1%
Other	<1%
Modes of transport use regularly	
Pedal bicycle	24%
Electric bicycle	9%
Scooter	4%
Motorbike	8%
Electric car/van	3%
Hybrid car/van	2%
Petrol car/van (up to 1.5 litre engine)	56%
Petrol car/van (1.5 litre engine or above)	28%
Petrol car/van - engine size unknown	4%
Diesel car/van (up to 1.5 litre engine)	4%
Diesel car/van (1.5 litre engine or above)	16%
Diesel car/van - engine size unknown	1%
Other	1%
None of the above	5%

* only asked if employed or self-employed

VIEWS ON ENERGY CONSUMPTION



In this section:

- Whether people selected environmental reasons or saving money as their primary motivation for saving energy
- Attitudes towards the environment and energy use
- Extent to which people were concerned about use of motor vehicles and energy at home

Key Learnings:

Attitudes expressing concern for the environment are prevalent, but a smaller proportion of people seem ready to change their lifestyle. Currently those whose attitude indicates that they care more about the environment are also more open to making lifestyle changes that would reduce energy use.

This is not surprising, as attitudes expressing concern would be expected to change first, with an openness to make lifestyle changes to follow as being environmentally conscious becomes more of the 'norm'. So although less than a third of people currently seem receptive to making behaviour changes, it is encouraging that almost half of people seem moderately open to change. With the right interventions, they may become more amenable to different lifestyle choices.

Half of people are primarily motivated to save energy due to wanting to save money, and half are motivated by environmental reasons. Different types of interventions are likely to be required to encourage these two groups to save energy, as those motivated by the environment are less concerned about the financial cost of using energy, while those motivated by saving money are less concerned about the environmental impact of energy use.

- Both groups could benefit from messaging/education to help increase concern for the environment.
- Interventions that focus on environmental benefits could help nudge the environmentally concerned to be more proactive about saving energy.
- Interventions focused on financial benefits could help to bring on board those who are more motivated by saving money.

PRIMARY MOTIVATION TO SAVE ENERGY

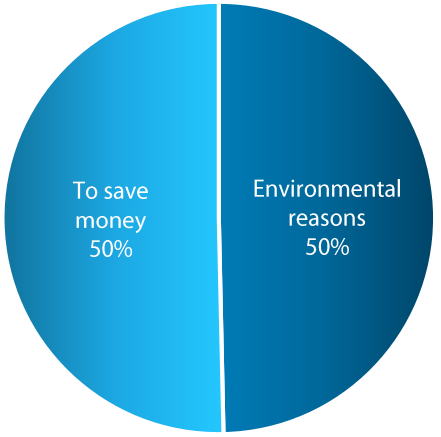
Respondents were asked whether their primary motivation for saving energy would be to save money or for environmental reasons. Views were split 50:50.

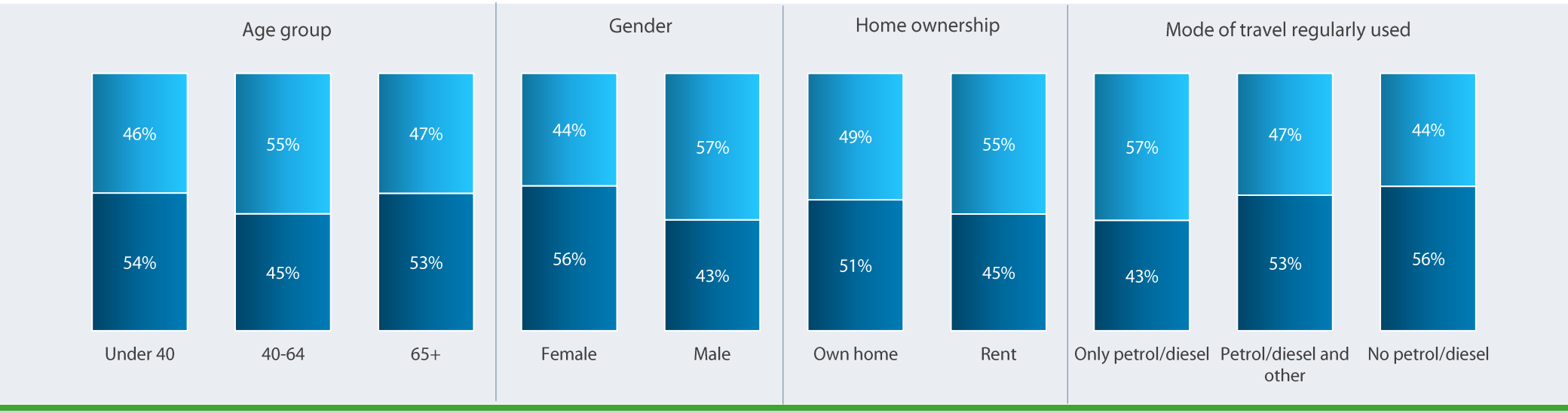
The graph below shows the results by age group, gender, home ownership (i.e. own or part-own vs rent) and modes of transport regularly used. The latter is categorised as: only regularly use petrol/diesel vehicle, regularly use a petrol/diesel vehicle plus other modes, or do not regularly use a petrol/diesel vehicle (i.e. only walk/cycle/bus/electric car).

There were some notable differences by gender, with females more likely to be motivated by environmental reasons (56% vs 43%) and males more likely to be motivated by saving money (57% vs 44%).

No other differences that were statistically significant when 95% confidence intervals are calculated.

Which of the following would be your primary motivation for saving energy?





Other, Not sure and N/A response were excluded – collectively these were selected by less than 2% of the sample.

ATTITUDES TOWARDS THE ENVIRONMENT AND ENERGY USE

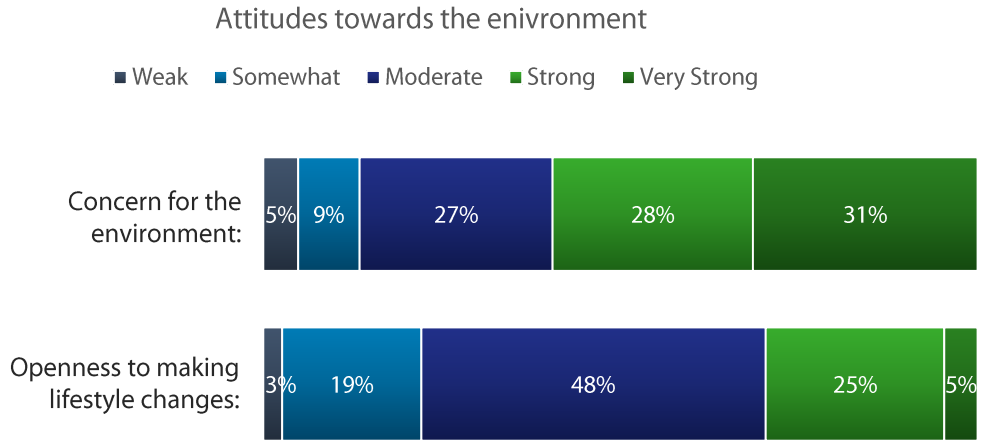
Twelve statements (see pages 12-13) were used to identify how strongly respondents were concerned about the environment, and how open they were to making lifestyle changes to reduce emissions/energy use.

From their responses it was possible to determine their attitudes* in terms of:

- concern for the environment
- openness to making lifestyle changes

Around 60% of people appear 'strongly' or 'very strongly' concerned about the environment, while half indicate that they are 'strongly' or 'very strongly' open to making lifestyle changes.

Almost half (48%) of people seem moderately open to making behaviour changes and with the right interventions may become more receptive to being 'nudged' into making lifestyle changes.



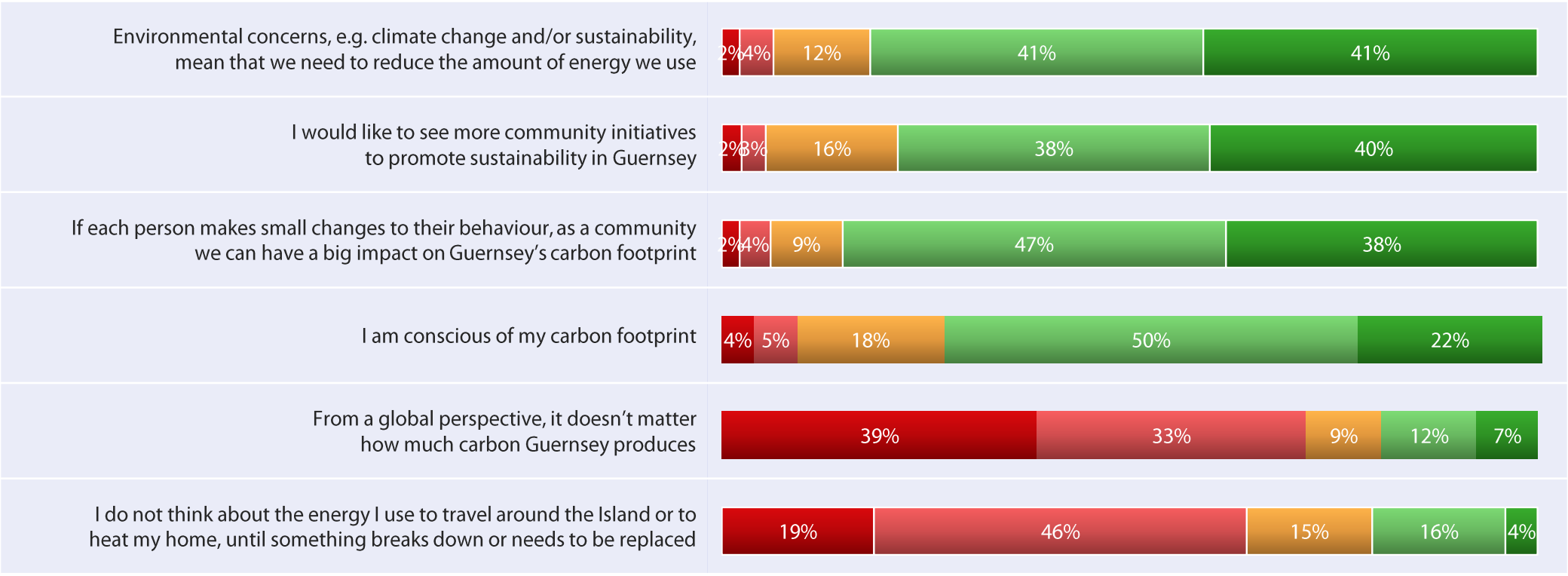
Concern for the environment		Weak	Somewhat	Moderate	Strong	Very Strong
Age	Under 40	3%	7%	28%	22%	40%
	40-64	5%	8%	25%	30%	32%
	65+	5%	11%	29%	33%	22%
Motivation to save energy	Environmental reasons	1%	2%	18%	30%	48%
	To save energy	8%	14%	36%	27%	15%
Openness to making lifestyle changes to reduce emissions/energy use		**Weak**	**Somewhat**	**Moderate**	**Strong**	**Very Strong**
Age	Under 40	5%	21%	42%	25%	7%
	40-64	2%	16%	49%	29%	5%
	65+	2%	25%	53%	18%	2%
Motivation to save energy	Environmental reasons	2%	10%	47%	35%	7%
	To save energy	4%	29%	49%	16%	2%

* see appendix for methodology (page 60)

ATTITUDES TOWARDS THE ENVIRONMENT AND ENERGY USE

Respondents were asked in indicate the extent to which they agreed or disagreed with each of the following statements.

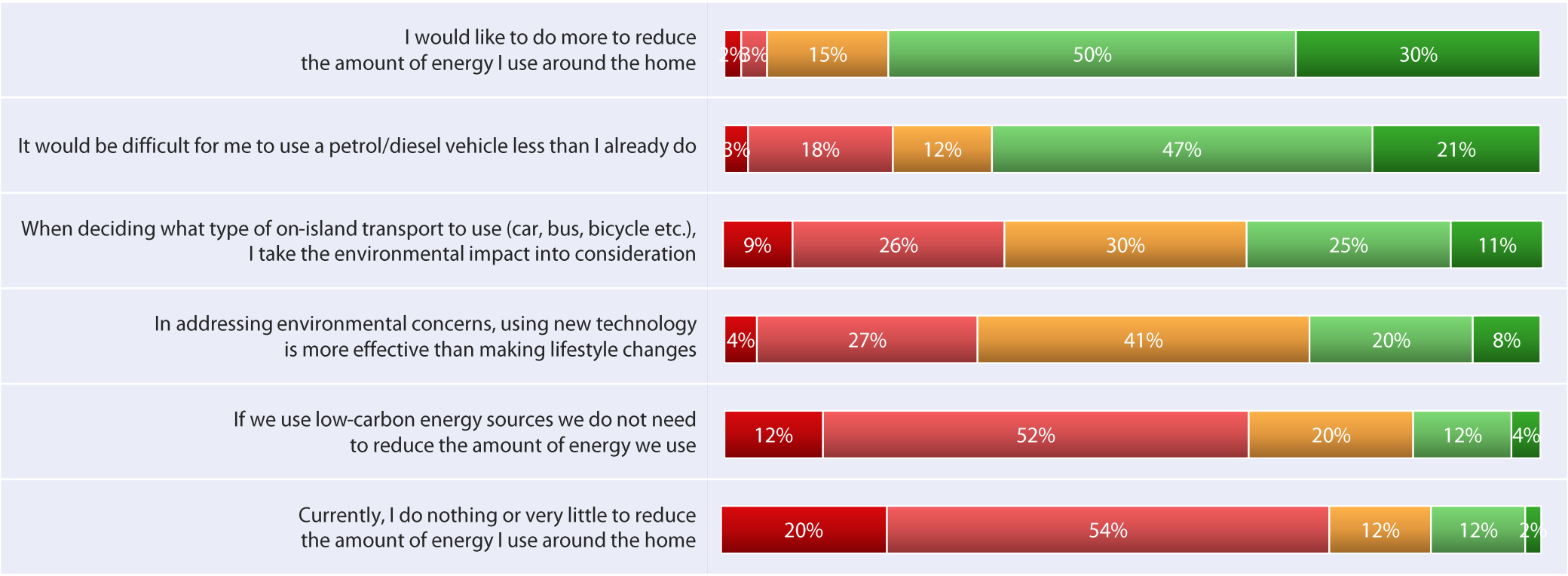
These statements were used to determine people's attitudes in relation to concern for the environment.



ATTITUDES TOWARDS THE ENVIRONMENT AND ENERGY USE (CONTINUED)

Respondents were asked in indicate the extent to which they agreed or disagreed with each of the following statements.

These statements were used to determine people's attitudes in relation to openness to making lifestyle changes.



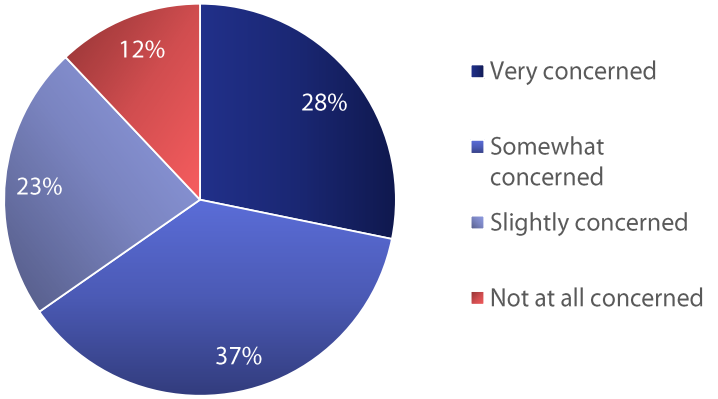
ENVIRONMENTAL IMPACT OF MOTOR VEHICLES

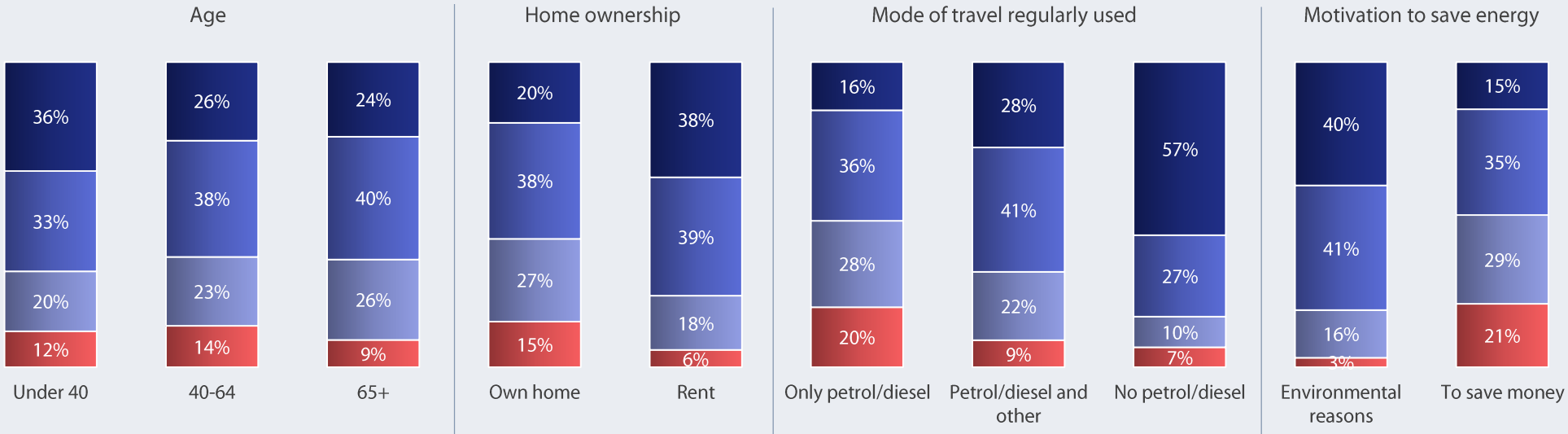
Respondents were asked "How concerned are you about the environmental impact of motor vehicles on your Island?"

Almost two-thirds (65%) of residents are either 'very concerned' or 'somewhat concerned' about the environmental impact of motor vehicles on their island. People who were more likely to be 'very concerned' include those:

- Aged under 40 (36% compared to 26% of those aged 40-64 and 24% of those aged 65+).
- Who do not regularly drive petrol/diesel vehicles (57% compared to 16% of those who only travel regularly by petrol/diesel vehicle and 28% of those who regularly use different modes of travel.)
- Who said their primary motivation for saving energy was for environmental reasons (40% compared to 15% of those who were primarily motivated by saving money, as one might expect).

How concerned are you about the environmental impact of motor vehicles on your Island?





ENVIRONMENTAL IMPACT OF ENERGY USE AT HOME

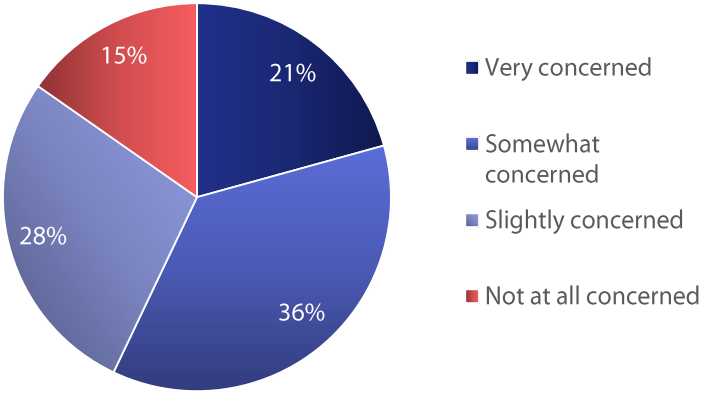
Respondents were asked "How concerned are you about the environment impact of the energy you use at home?"

More than half (57%) of residents are either 'very concerned' or 'somewhat concerned' about the environmental impact of the energy they use at home. People who were more likely to be concerned include those who:

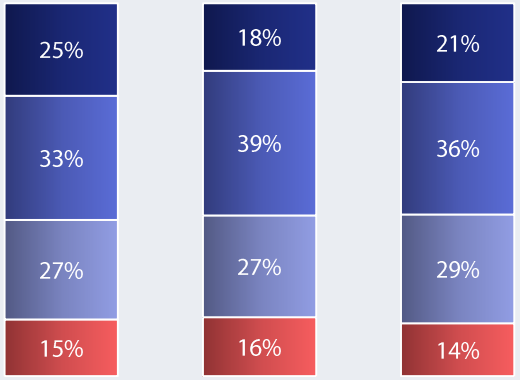
- Regularly walk, cycle, bus or use an electric vehicle, exclusively or alongside using a petrol/diesel vehicle (30% and 23% compared to 12% who only regularly use a petrol/diesel vehicle).
- Said their primary motivation for saving energy was for environmental reasons (31% compared to 10% who said their primary motivation was to save money).

There were no notable differences by age or home ownership.

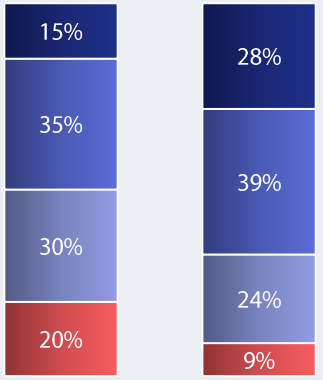
How concerned are you about the environmental impact of the energy you use at home?



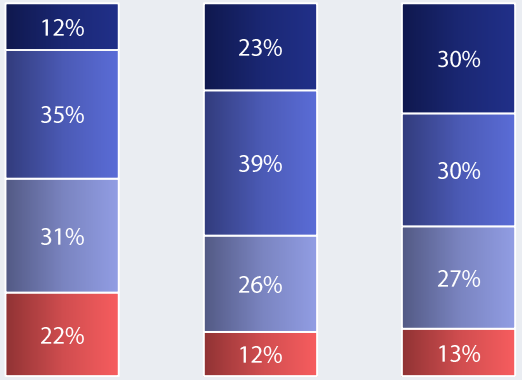
Age



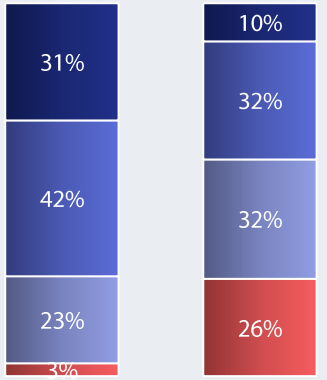
Home ownership



Mode of travel regularly used



Motivation to save energy



FINANCIAL COST OF ENERGY USE AT HOME

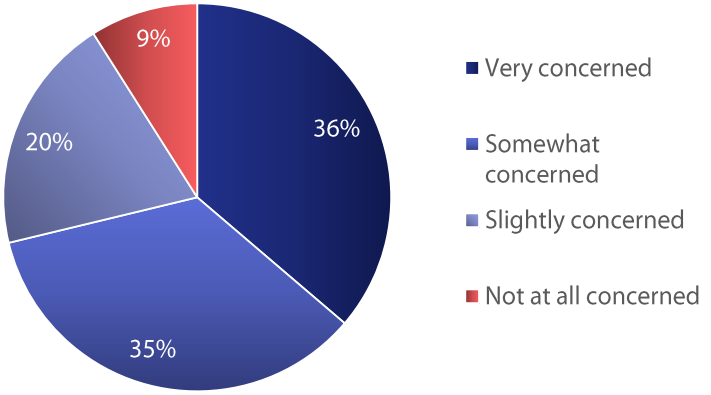
Respondents were asked "How concerned are you about the financial cost of the energy you use at home?"

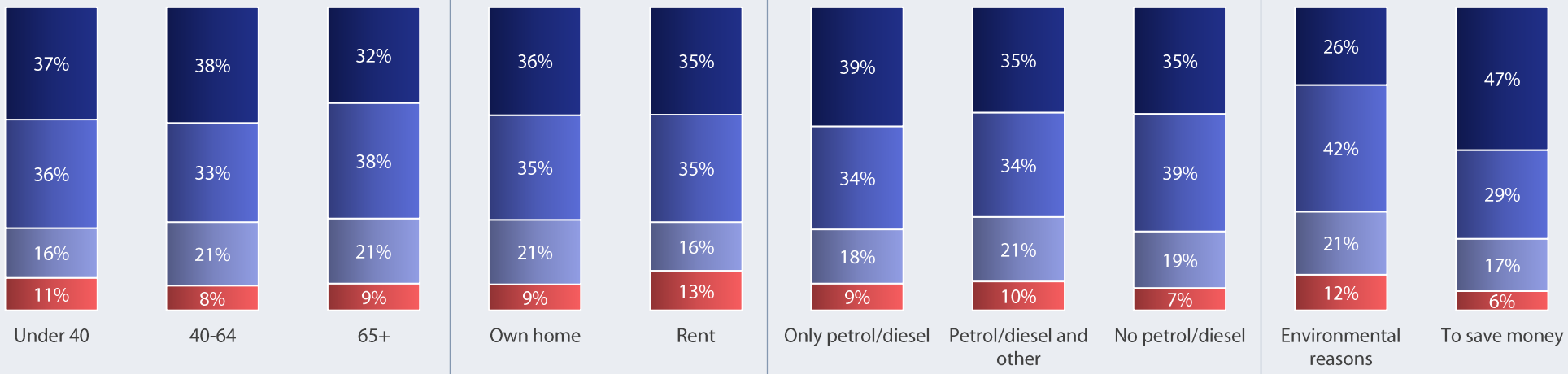
Almost 3 out of 4 (71%) of residents are either 'very concerned' or 'somewhat concerned' about the financial cost of the energy use at home. Those more likely to be 'very concerned' include those who:

- Rent (44% compared 34% of home owners)
- Said their primary motivation for saving energy was to save money (47% compared to 26% of those whose primary motivation is environmental reasons).

There were no notable differences by age or mode of travel.

How concerned are you about the financial cost of the energy you use at home?

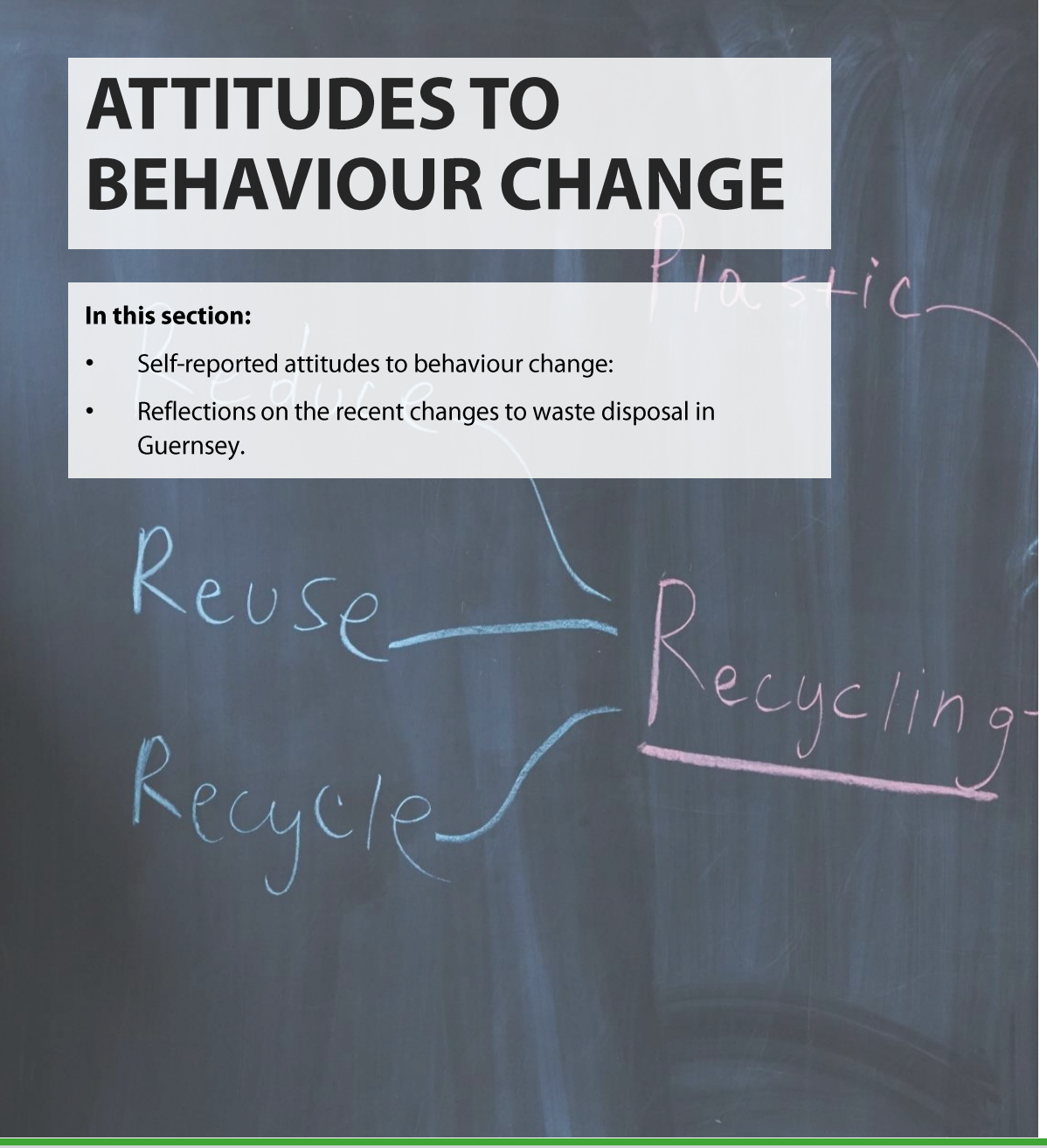




ATTITUDES TO BEHAVIOUR CHANGE

In this section:

- Self-reported attitudes to behaviour change:
- Reflections on the recent changes to waste disposal in Guernsey.



Key Learnings:

The findings suggest that being open to making lifestyle choices that reduce carbon emissions is still very much the attitude of the 'innovators' and 'early adopters' of change. However, it is beginning to penetrate the majority and become more mainstream. Government and community interventions may help bridge 'the chasm' between innovators/early adopters and the mainstream market, in order to bring about wider change.

The results reaffirm that people who are more open to change are more likely to be motivated by environmental reasons, and be concerned by the environmental impact of motor vehicles and energy use. Financial concerns, on the other hand, are less related to whether an individual is open to early change. This continues to suggests that:

- Focusing on environmental motivations could be effective in convincing the innovators/early adopters to pro-actively make further changes.
- Finding new ways to encourage the mainstream to be environmentally motivated, alongside reducing barriers and implementing financial motivators, are likely to be important for bridging 'the chasm' between innovators/early adopters and the mainstream market.

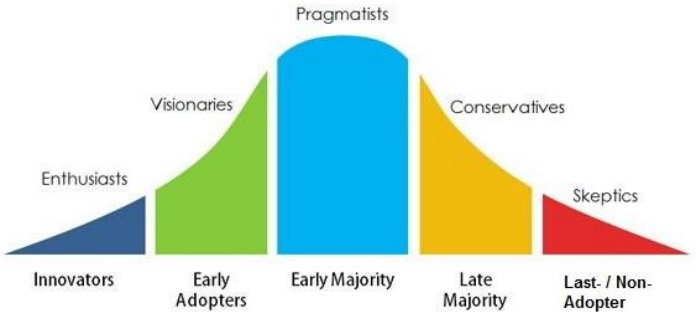
Reflections about recent changes to waste disposal in Guernsey indicate that three-quarters of people either have more positive views about the changes than when they were first announced or always felt supportive of the changes. This suggests that more people have had more positive experiences of this change than one might assume.

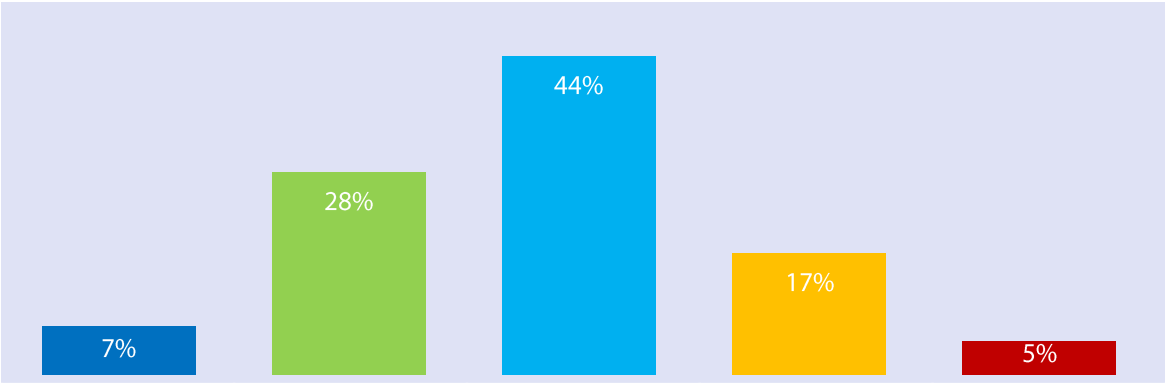
ADOPTION CURVE

Respondents were asked how they would best describe their attitude towards behaviour change, with reference to the diagram on the right.

The percentage of people who consider themselves to be in each category is shown in the graph, with 7% saying they are innovators, 28% as early adopters, 44% in the early majority, 17% in the late majority, and the remaining 5% as last- or non-adopters.

Results disaggregated by age and gender are shown below. There is some indication that males are more likely to consider themselves to be innovators and early adopters than females. There were no statistically significant differences by age.





		Innovator	Early adopter	Early majority	Late majority	Last or Non-adopter
Age	Under 40	7%	33%	46%	12%	3%
	40-64	6%	28%	43%	19%	5%
	65+	8%	23%	43%	19%	7%
Gender	Females	5%	24%	50%	17%	3%
	Males	9%	32%	37%	16%	6%

OPENNESS TO MAKING LIFESTYLE CHANGES THAT REDUCE EMISSIONS

The diagram on the right illustrates how there is often a 'chasm' between the 'early market' (i.e. innovators and early adopters) where behaviours are taken up, and the 'mainstream market' (i.e. early majority, late majority and last-non-adopters) where the majority of people begin to take up the desired behaviour.

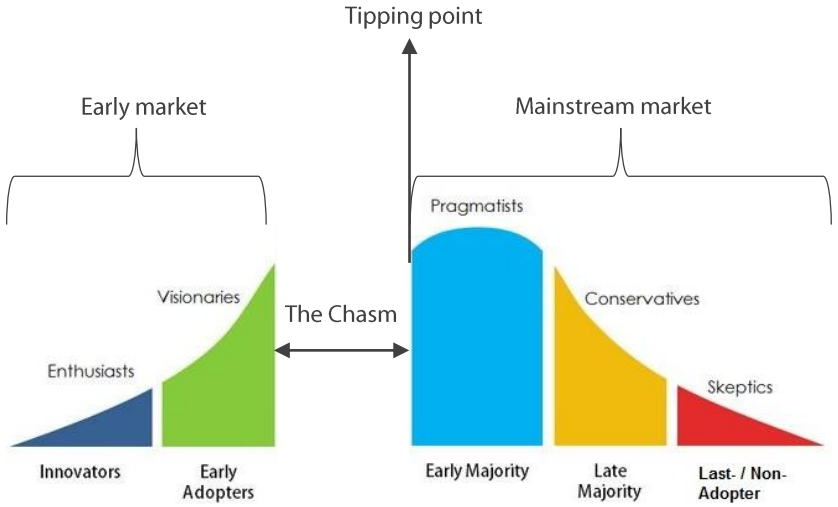
The graph below shows:

- 61% of innovators and 48% of early adopters have attitudes that suggest they are strongly or very strongly open to making lifestyle changes to reduce emissions / energy use.
- In comparison this is 26% of the early majority, 11% of the late majority and just 4% of the last-/non- adopters.

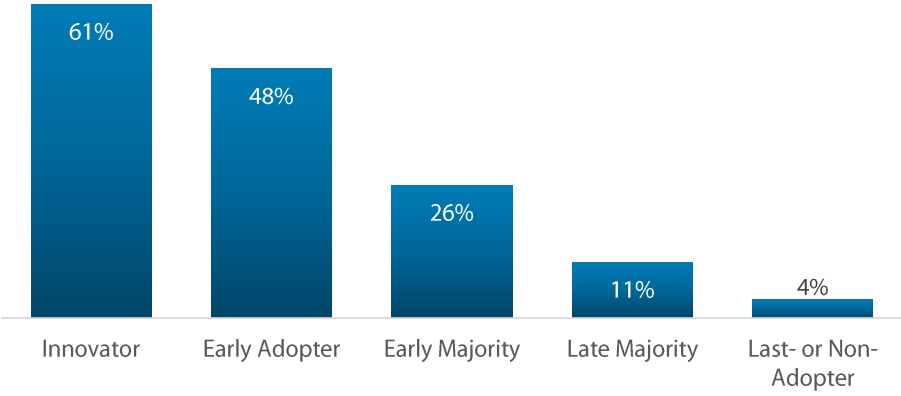
These findings suggest:

- the early market (i.e. innovators and early adopters) have an attitude that is open to making lifestyle choices, and it is these groups that are currently most likely to be proactive in making more environmentally friendly choices. However, there remains room for this attitude of behaviour change to grow.
- An attitude that is open to making lifestyle changes may be beginning to penetrate the mainstream market.

It could be argued that government and community action now, with engagement and intervention, could help bridge 'the chasm' in order to bring about a change in attitudes and behaviour.



Strongly or very strongly open to making lifestyle changes that reduce emissions/energy use



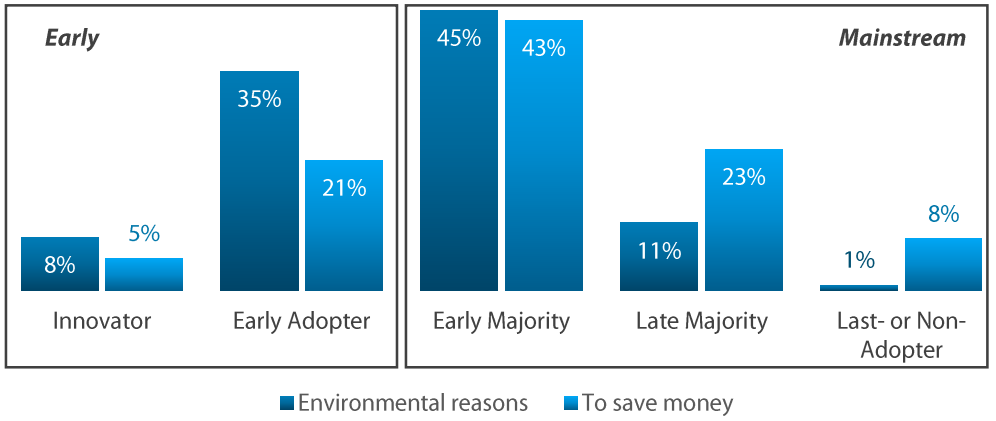
MOTIVATIONS OF EARLY AND MAINSTREAM ADOPTERS

We also looked to see if people who consider themselves to be earlier adopters said their motivation would be 'for environmental reasons' or 'to save money'.

People who were more open to change were more likely to be motivated by environmental reasons:

- 43% of people who said they were motivated by environmental reasons were an 'innovator' or 'early adopter'. This compares to 26% of those motivated by saving money.

% of people who selected each attitude to behaviour change, by their motivation for saving energy



It was also interesting to look at attitudes to behaviour based on how concerned people said they were about the environmental impact of motor vehicles, the environmental impact of energy use at home, and the financial cost of energy use at home.

- People who said they were more concerned about the environmental impact were also more likely to see themselves as an innovator or an early adopter.
- In contrast, there were no differences between attitudes to behaviour change among those who were concerned about the financial cost of the energy use at home.

How concerned are you about the environmental impact of motor vehicles on your island?				
	Very	Somewhat	Slightly	Not at all
% who said were innovator or early adopter	58%	30%	23%	19%
How concerned are you about the environmental impact of the energy you use at home?				
	Very	Somewhat	Slightly	Not at all
% who said were innovator or early adopter	61%	34%	25%	18%
How concerned are you about the financial cost of the energy you use at home?				
	Very	Somewhat	Slightly	Not at all
% who said were innovator or early adopter	36%	35%	33%	34%

CHANGING BEHAVIOUR AND HABITS

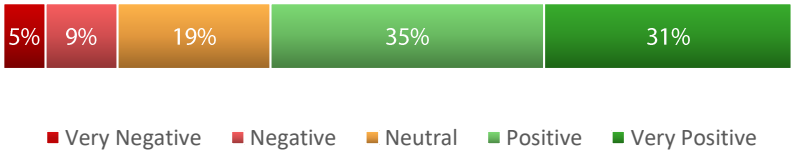
Attitudes to behaviour change were explored by asking people to reflect on the recent changes to waste disposal in Guernsey that aimed to increase recycling and reduce waste.

- Two thirds of people said as of now they feel positive or very positive about the recent changes.
- 60% said that their household recycles more since the changes were introduced.
- When asked to think back to when the changes were announced, only 54% of people said they were somewhat or strongly supportive.

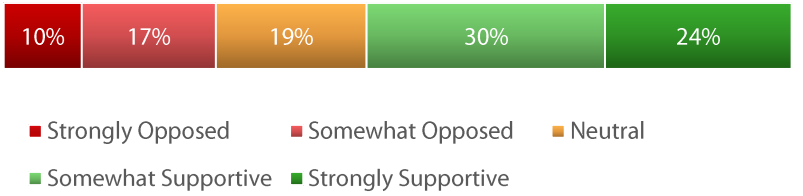
The table shows:

- Half (50%) of people said they were supportive when it was announced and still feel positive about the change (bottom right cell in orange).
- A quarter (25%) now feel more favourably about the change than they did initially (i.e. were opposed and now neutral or positive, or were neutral and now positive. Highlighted in green).
- A small proportion (18%) continue to feel negatively or feel less positively than when the changes were announced (i.e. 13% plus cells highlighted in red).

As of now, how do you feel about the changes (e.g. "Pay as you Throw")?



Think back to when the changes were announced. How supportive were you of the proposed approach then (e.g. "Pay as you Throw)"?



Comparing views:
NOW

THEN	Negative*	Neutral	Positive*	
Opposed*	13%	9%	5%	**27%**
Neutral	1%	7%	11%	**19%**
Supportive*	1%	3%	50%	**54%**
	14%	**19%**	**66%**	

** includes those who selected the 'very' option*

ON-ISLAND TRAVEL

In this section:

- Modes of transport for getting around the island when traveling to/from work or for work, and for other reasons.
- Views on whether it would be possible to drive less and to walk, cycle or take the bus instead.
- Reasons that people say make it difficult for them to drive less than currently do.

Key Learnings:

The majority of people (86%) regularly drive a petrol or diesel vehicle. Cycling currently has less appeal amongst the mainstream than walking and taking the bus, which suggests the appeal of all alternative modes of transport needs to be increased.

Currently, the people who are more likely to walk, cycle or take the bus regularly and less likely to regularly use a petrol or diesel vehicle often tend to be environmentally motivated and more open to behaviour change.

Around a third of people said it would be possible for them to drive less. Those who walk, cycle or use the bus as well as drive a petrol/diesel vehicle were more open to this than those who only drive a petrol/diesel vehicle.

Thus, it may be more effective to focus on people who regularly use mixed modes of transport to drive less frequently than those who only use a petrol/diesel vehicle for travelling around the island.

The most common reason given for driving is the need to visit more than one place in a journey – how to tackle this practically and in attitude needs careful consideration. Routes and times of buses are also an area which people consider to be a barrier to them changing their behaviour.

MODES OF TRANSPORT REGULARLY USED

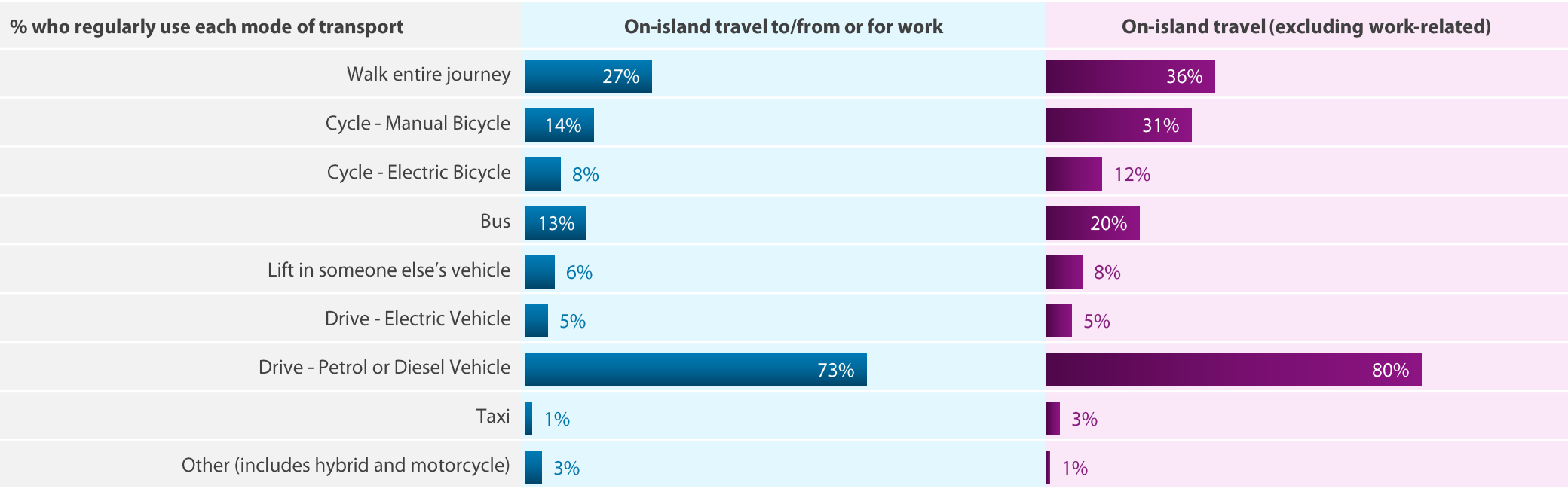
Respondents were asked about the mode(s) of transport they regularly use for travelling around the island.

Respondents who were employed or self-employed were asked about their travel to/from or for work and separately for other reasons. Other respondents were asked a single questions about how they get around the island. More than one option could be selected.

The most frequently selected option was to drive a petrol or diesel vehicle, and this was selected by 73% of people for work-related on-island travel and by 80% of people for other types of journeys.

Looking at the results further, it is possible to conclude that across all reasons for travel (work and/or other journeys):

- 31% of people only drive a petrol or diesel vehicle as a regular mode of travel,
- 55% regularly use a petrol/diesel vehicle as well as other modes,
- 14% do not regularly drive a petrol/diesel vehicle (i.e. only walk/cycle/bus/electric vehicle).



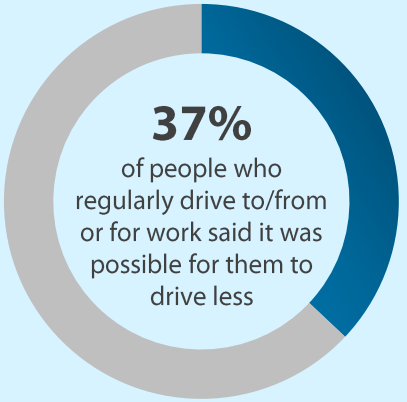
WOULD IT BE POSSIBLE FOR YOU TO DRIVE LESS?

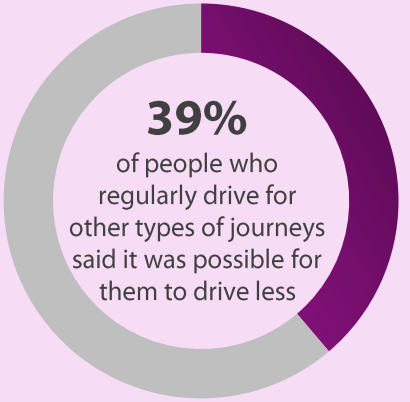
Respondents were asked "Taking into account your circumstances, would it be possible for you to drive less and instead to walk, cycle or take the bus?".

This question was asked both in relation to on-island work-related travel and for on-island travel for non-work reasons.

For both, just over a third of people yes it would be possible to drive less (37% for work-related travel and 39% for other types of journeys).

People who are primarily motivated to save energy for environmental reasons were more likely to say yes, while people aged over 65 years were more likely to say it would not be possible.





		On-island travel to/from or for work	On-island travel (excluding work-related)
		% who said it would be possible to drive less	% who said it would be possible to drive less
Age	Under 40	43%	49%
	40-64	36%	39%
	65+	*	29%
Motivation for saving energy	Environmental reasons	43%	47%
	To save money	34%	33%
Attitudes to behaviour change	Innovator	67%	36%
	Early adopter	43%	49%
	Early majority	34%	41%
	Late majority	36%	33%
	Last- / non-adopter	10%	14%

* not shown as small base size

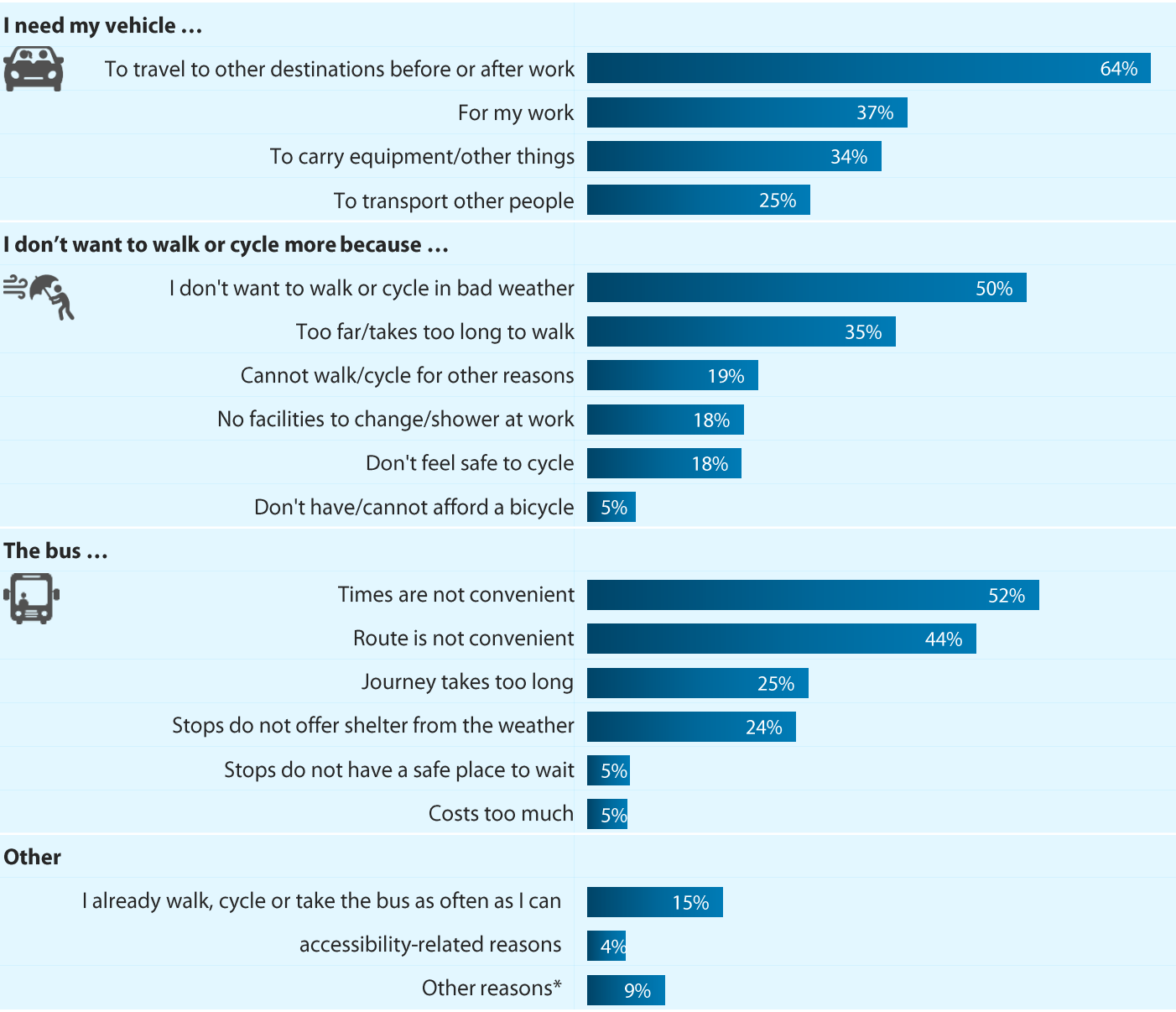
TRAVEL TO/FROM OR FOR WORK

Respondents who regularly drive to/from or for work were then asked about reasons why they were unable to drive less than they currently do.

The most frequently cited reason was that people need their vehicle to travel to other destinations before or after work, and this was selected by 64% of people who regularly drive to work.

Other frequently selected reasons were: not wanting to walk or cycle in bad weather, and that the bus times and bus routes were not convenient.

37% said they need their vehicle for work.



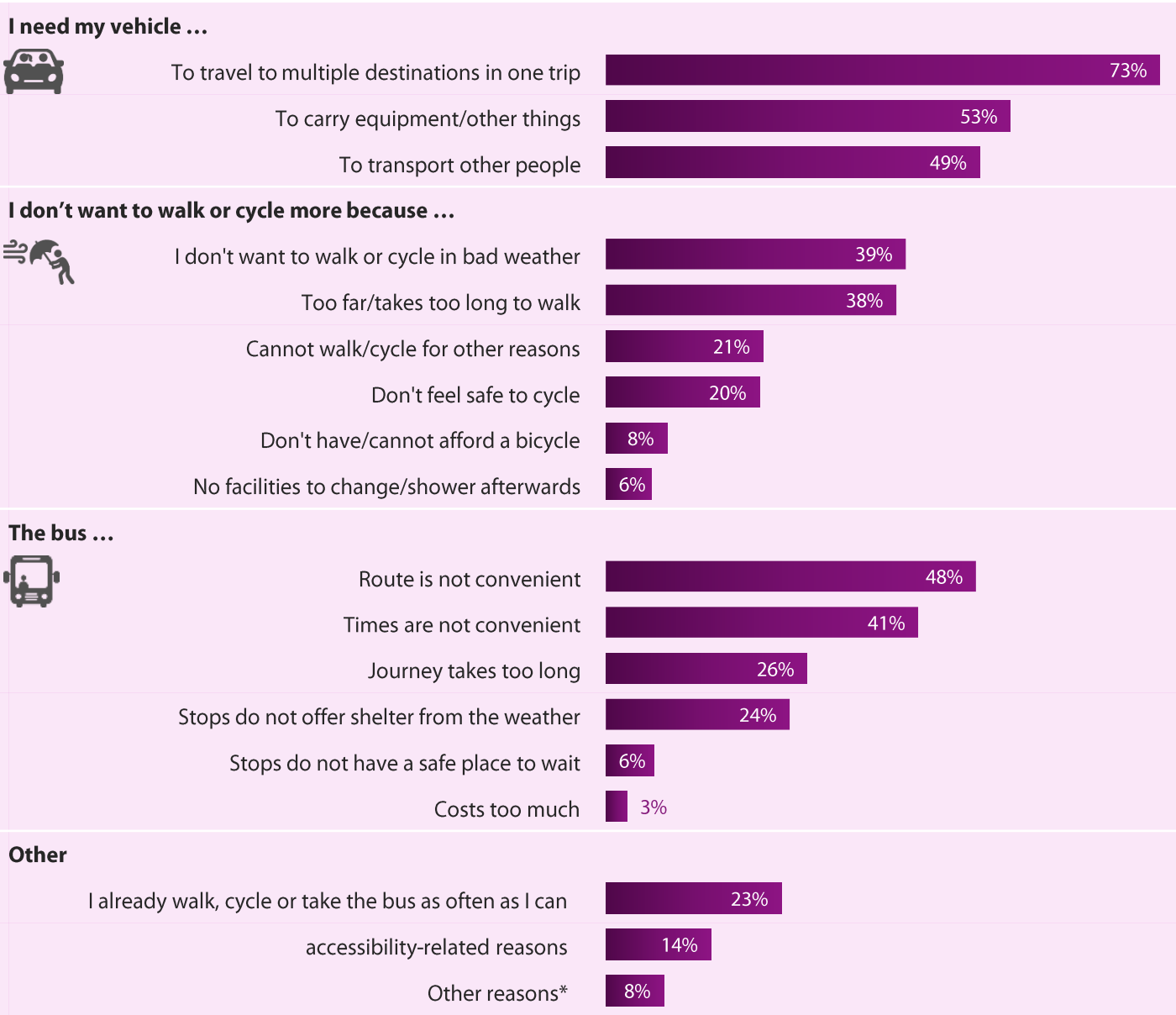
* Other reasons given included:
- too lazy
- need to do school run
- nowhere to lock my bike at work,
- work late / night shifts
- need to travel between destinations
- bus stop is too far to walk
- buses do not run in the late evening

TRAVEL FOR OTHER REASONS

Respondents were then asked about reasons why they were unable to drive less than they currently do.

The most frequently cited reasons were:

- need their vehicle to travel to multiple destinations in one trip
- to carry equipment / other things
- to transport people
- bus routes were not convenient
- bus times were not convenient
- not wanting to walk or cycle in bad weather
- too far/takes too long to walk.



* Other reasons given included:
- too lazy
- need to transport dogs
- time between activities is tight
- would be difficult to carry my groceries
- would need to take multiple buses
- bus stop is too far to walk

TRAVEL TO/FROM OR FOR WORK: ST PETER PORT

As St Peter Port is the main place where people work and is also the hub for the bus network we looked at the responses based on whether they work in St Peter Port or elsewhere.

In both cases driving to work is the mode of transport used by most people, although those who work in St Peter Port were:

- slightly less likely to drive a petrol/diesel vehicle to/from or for work than people who work elsewhere (69% vs 77%), and
- more likely to walk (36% vs 18%) or take the bus (16% vs 9%).

The most frequently cited reason for driving by both groups was that they need their vehicle to travel to other destinations before or after work.

People working in St Peter Port were less likely to:

- Need a vehicle for work (27% who work in St Peter Port vs 45% who work elsewhere)
- Need to carry equipment/other things (27% vs 40%)
- Say the bus routes were not convenient (38% vs 50%)

Otherwise, most of the reasons given for driving were similar between the two groups.

Which mode(s) of transport do you regularly use to travel to/from or for work?	Work in St Peter Port	Work elsewhere
Walk entire journey	36%	18%
Cycle - Manual Bicycle	12%	17%
Cycle - Electric Bicycle	6%	9%
Bus	16%	9%
Lift in someone else's vehicle	9%	3%
Drive - Electric Vehicle	6%	4%
Drive - Petrol or Diesel Vehicle	69%	77%
Taxi	1%	1%
Other (e.g. hybrid and motorcycle)	3%	4%

Taking into account your circumstances, would it be possible for you to drive less to/from/for work and instead to walk, cycle or take the bus?	Work in St Peter Port	Work elsewhere
Yes	44%	31%
No	56%	69%

MODES OF TRANSPORT REGULARLY USED

The table below presents the profile of people who regularly walk, cycle, take the bus, drive an electric vehicle and drive a petrol or diesel vehicle in order to travel around the island (for work-related travel and/or other reasons).

- People more likely to walk, cycle or take the bus and less likely to regularly use a petrol or diesel vehicle include those who are: primarily motivated to save energy for environmental reasons, more open to behaviour change, and more concerned about the environmental impact of motor vehicles.
- People aged over 65 years were less likely to walk or cycle than people in other age groups. Also males were more likely to cycle than females (34% vs 21%, result not shown).
- The results also suggest that cycling and driving an electric vehicle currently have less appeal amongst the mainstream than walking and taking the bus.

		43% regularly walk	**28%** regularly cycle (manual or electric)	**34%** regularly take the bus	**6%** regularly drive an electric vehicle	**86%** regularly drive a petrol/diesel vehicle
		Walk	**Cycle**	**Take the bus**	**Electric vehicle**	**Petrol/diesel vehicle**
Age	Under 40	54%	32%	34%	7%	80%
	40-64	47%	32%	35%	6%	89%
	65+	25%	16%	33%	3%	88%
Motivation for saving energy	Environmental reasons	50%	32%	34%	6%	84%
	To save money	38%	24%	34%	5%	88%
Attitudes to behaviour change	Innovator	56%	36%	39%	15%	70%
	Early adopter	54%	32%	35%	10%	79%
	Early majority	42%	28%	36%	3%	92%
	Late majority	34%	17%	31%	2%	91%
	Last- / non-adopter	21%	17%	17%	6%	79%
Concern about the environmental impact of motor vehicles	Very concerned	57%	36%	39%	8%	72%
	Somewhat concerned	43%	28%	39%	6%	90%
	Slightly concerned	34%	19%	28%	3%	94%
	Not at all concerned	33%	23%	16%	7%	93%

MORE ON MODES OF TRAVEL

As previously reported 86% of people regularly drive a petrol or diesel vehicle. This includes 31% who indicated that this is the only mode of transport that they regularly use for getting around the island, and 55% of people who not only drive a petrol/diesel vehicle but also regularly walk, cycle or take the bus.

People who only drive a petrol/diesel vehicle were more likely to be:

- aged 65 or older
- less motivated by environmental reasons,
- less open to changing their behaviour, and
- less concerned about the environmental impact of motor vehicles.

There is greater potential to reduce on-island travel emissions by focusing on those who drive a petrol/diesel vehicle and use other modes: almost half of people who use mixed modes said they could drive less.

Among those who use mixed modes, frequently cited reasons for why it would be difficult to drive less were:

- need their vehicle to travel to multiple destinations in one trip (73%)
- to carry equipment / other things (56%)
- to transport other people (52%)
- bus routes were not convenient (46%)
- bus times that were not convenient (41%)
- did not want to walk or cycle in bad weather (41%).

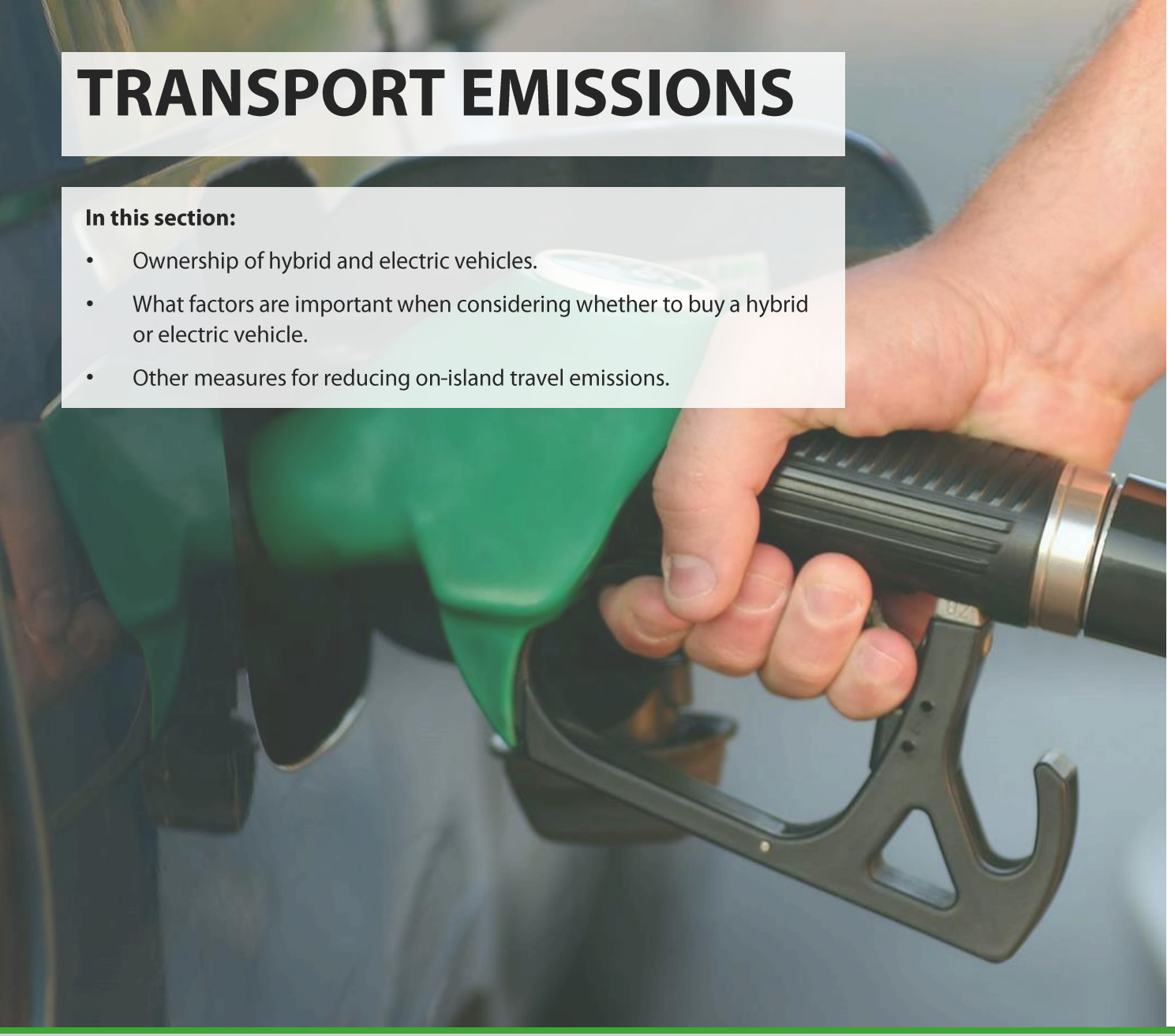
It was also noteworthy that those who only drive a petrol/diesel vehicle were more likely to indicate it was because of 'accessibility-related reasons' and that they 'cannot walk for other reasons'.

		Only drive a petrol/ diesel vehicle	Drive a petrol/diesel vehicle and use other modes	Do not regularly drive a petrol/diesel vehicle
All		31%	55%	14%
Age group	Under 40	24%	56%	20%
	40-64	29%	60%	11%
	65+	45%	43%	12%
Motivation for saving energy	Environmental	26%	58%	16%
	To save money	37%	51%	12%
Attitudes to behaviour change	Innovator	19%	52%	30%
	Early adopter	22%	57%	21%
	Early majority	32%	60%	8%
	Late majority	44%	47%	9%
	Last- / non-adopter	51%	28%	21%
Concern about environmental impact of motor vehicles	Very	18%	55%	28%
	Somewhat	30%	60%	10%
	Slightly	39%	55%	6%
	Not at all	52%	41%	7%
Said it would be possible to drive less	To/from or for work	25%	44%	n/a
	Other journeys	23%	49%	n/a

TRANSPORT EMISSIONS

In this section:

- Ownership of hybrid and electric vehicles.
- What factors are important when considering whether to buy a hybrid or electric vehicle.
- Other measures for reducing on-island travel emissions.



Key Learnings:

When looking for new ways to reduce transport emissions, the findings suggest that some people who regularly drive a petrol/diesel vehicle, would be willingness to try:

- electric/hybrid vehicles,
- electric bicycles, and
- using the bus more.

There is considerable interest in electric and hybrid vehicles, including 7% of people who live in a household that owns one. A further 58% of people who say they are currently considering or may consider buying one in the next 5 years.

Environmental reasons are an important motivator, but financial considerations are the main barrier/enabler of actually going ahead with the purchase of an electric/hybrid vehicle.

HYBRID AND ELECTRIC VEHICLES

Respondents were asked "Does your household own a hybrid vehicle or an electric vehicle?"

- 7% of people said their household has a hybrid or electric vehicle,
- 12% are currently considering one
- 46% may consider one in the next 5 years.
- 6% had considered buying one but did not proceed
- 20% are unlikely to consider one
- 9% didn't know or had never thought about it

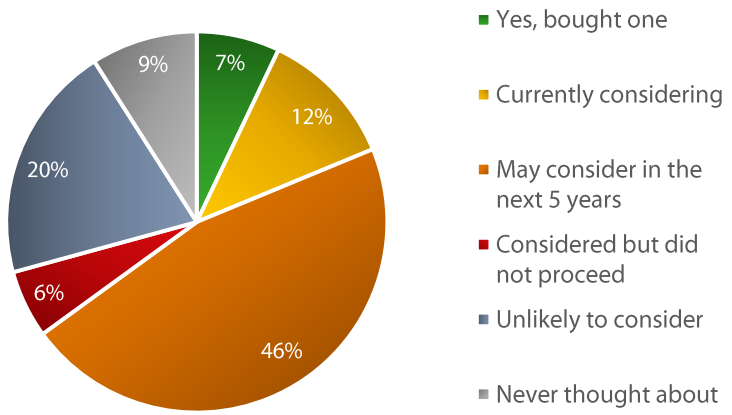
Respondents were then asked a follow up question about what factors were important, or would be important, when deciding whether to buy a hybrid or electric vehicle. Responses are given in the graph below to the right, and on the following page.

- 65% of people who own a hybrid or electric vehicle said environmental reasons were an important consideration. Also relatively important were the cost of the vehicle (59%) and running costs (58%).
- 92% of people who own a hybrid or electric vehicle said they would recommend one to other people on their island. 1% said 'no' and a further 6% were 'not sure'.

Some of the reasons given for why they would recommend one were:

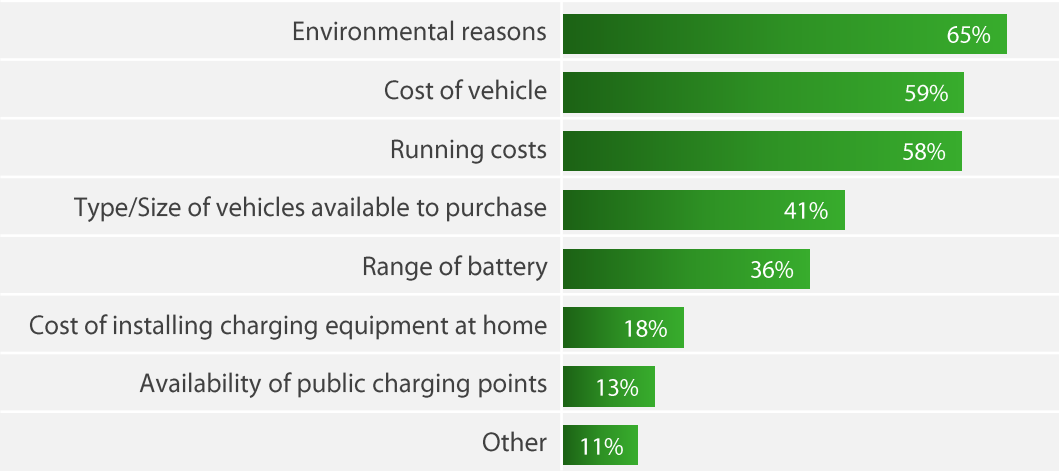
- Lovely to drive / nimble / quiet
- Environment friendly / lower emissions
- Energy efficient / lower running costs than petrol or diesel vehicles
- Well suited for Guernsey roads
- Ideal for a second car

Does your household own a hybrid vehicle or an electric vehicle?



What factors were important when deciding whether to buy a hybrid vehicle or an electric vehicle? (Select all that apply)

N=72

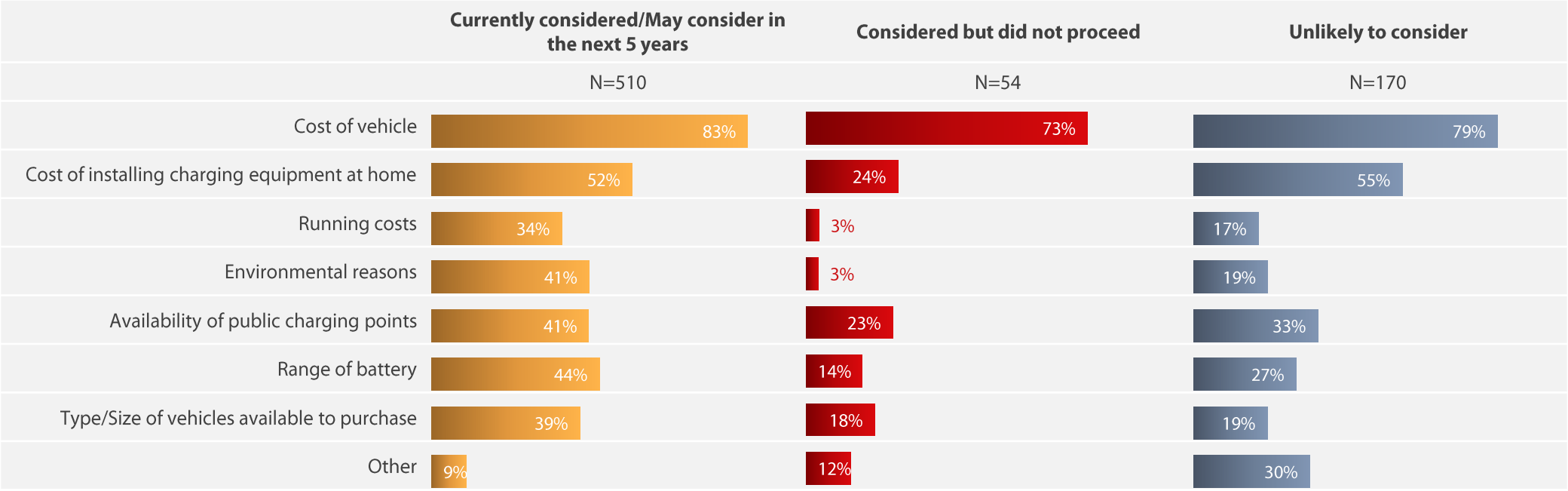


REASONS FOR DETERMINING THE PURCHASE OF A HYBRID VEHICLE OR AN ELECTRIC VEHICLE

Respondents were asked what factors were or would be important, when deciding whether to buy a hybrid or electric vehicle. The table below shows which factors respondents selected as important for:

- those considering whether to buy a hybrid or electric vehicle (now or in the next 5 years),
- those who considered whether to buy one and decided not to proceed, and
- those who said they would be unlikely to consider one.

The cost of the vehicle was the most important factor for all. The cost of installing charging equipment at home was also relatively important.



MEASURES TO REDUCE ON-ISLAND TRAVEL EMISSIONS

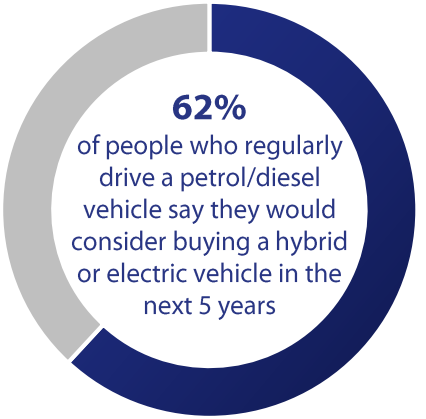
62% of people who regularly drive a petrol/diesel vehicle say they would consider buying a hybrid or electric vehicle in the next 5 years

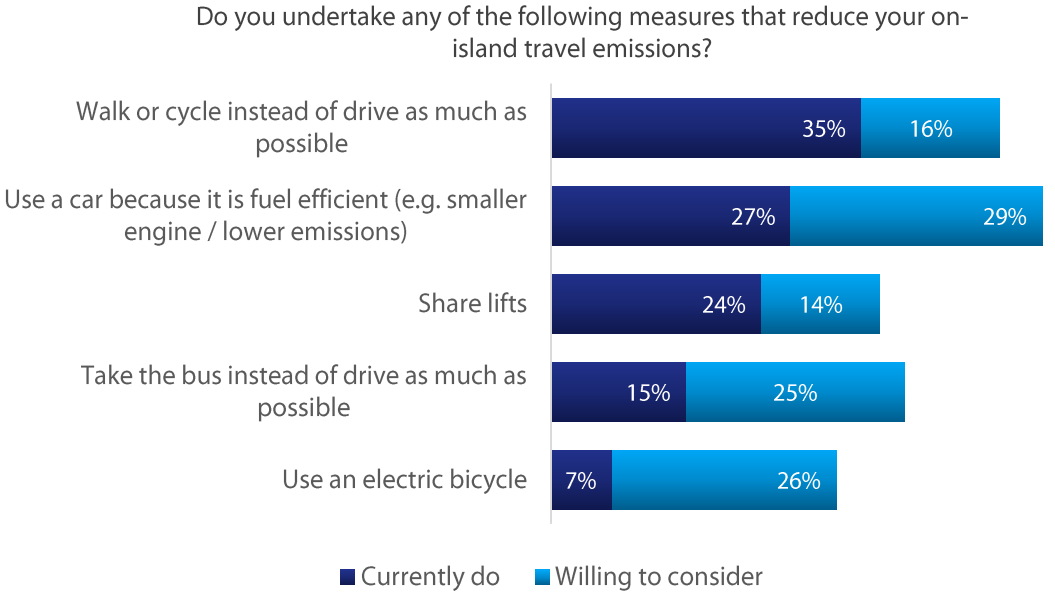
Respondents who regularly drive a petrol or diesel vehicle were also asked "Do you undertake any of the following measures that reduce your on-island travel emissions? (Please select all that apply)", followed by whether they would be willing to consider any of the ideas they do not currently do.

The results show the extent to which people who regularly drive a petrol or diesel car say they currently undertake measures, and their willingness to try other ideas. For example, 35% of people indicated that they already walk or cycle as much as possible, however there were a further 16% of people who said they would be willing to consider walking or cycling more.

The results indicate the potential to extend uptake of different measures. Notably, 29% of people would be willing to consider using a more fuel efficient car, 26% would be willing to consider using an electric bicycle, and 25% would be willing to use the bus more.

Other suggestions from respondents included reducing the number of single destination journeys made, and using a motorbike instead of a car or larger vehicle.





ENERGY USE AT HOME

In this section:

- Whether people could do more to reduce energy use at home
- Support for different measures that reduce energy use at home

Key Learnings:

The results suggest that most people have already adopted a range of measures to reduce the energy they use at home, and indeed over half of people believe they are doing as much as they can to reduce energy use at home. However, it is still possible that many of this group could be doing even more if enabled or encouraged to do so, especially if they are more concerned by the environmental impact of energy use at home.

Meanwhile, 47% of people recognise they could be doing more, which is the first part of the journey to taking further action. Going forwards, the two measures with the greatest potential to increase prevalence of were:

- Smart meters to analyse electricity usage, which are used by relatively few people, but there was a large amount of interest in trying them.
- Energy efficient home appliances, which are currently used by around two-thirds of the innovators/early adopters but far fewer in the mainstream market.

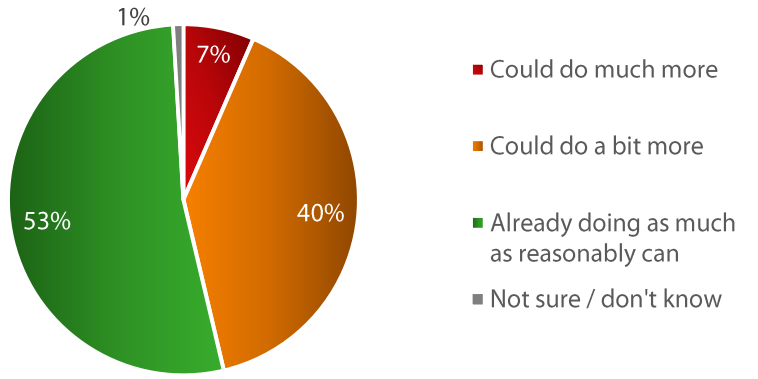
LIFESTYLE CHANGES TO REDUCE ENERGY USE AT HOME

Respondents were asked "Do you think your household could make lifestyle changes to reduce your energy consumption at home (e.g. turn off lights)? Or are you already doing as much as you reasonably can without undertaking structural alterations to your home (e.g. change heating system)?".

Just over half (53%) of people said they believe they are already doing as much as they can, 40% said they could do a bit more and 7% said they could do much more.

People over 65 years were more likely to say they are already doing as much as they can, while those under 40 years said they could do a bit more.

Do you think your household could make lifestyle changes to reduce your energy consumption at home or are you already doing as much as you reasonably can



		Already doing as much as can	Could do a bit more	Could do much more
Age	Under 40	42%	50%	8%
	40-64	50%	41%	8%
	65+	69%	27%	3%
Home ownership	Own or part-own	53%	40%	6%
	Rent	52%	39%	8%
Motivation for saving energy	Environmental reasons	48%	43%	8%
	To save money	57%	37%	5%
Attitudes to behaviour change	Innovator	72%	25%	3%
	Early adopter	59%	34%	7%
	Early majority	46%	49%	4%
	Late majority	50%	41%	9%
	Last- / non-adopter	61%	13%	16%

MEASURES TO REDUCE ENERGY USE AT HOME

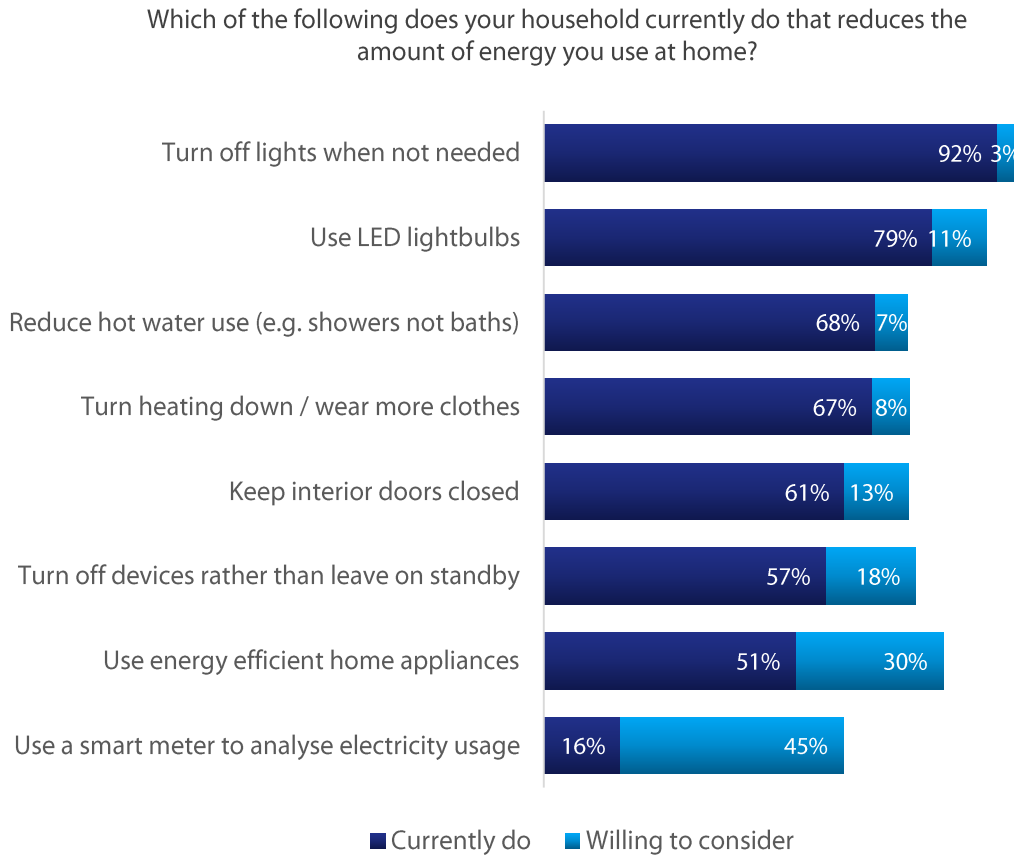
Respondents were asked "Which of the following does your household currently do that reduces the amount of energy you use at home? (Please select all that apply)", followed by whether they would be willing to consider any of the ideas they do not currently do.

The results suggest that most people have already adopted a range of measures to reduce the energy they use at home. For example:

- 92% of people say they turn off lights when not needed.
- More than two-thirds currently use LED lightbulbs, reduce their hot water consumption, and have turned their heating down.

The two measures with the greatest potential were using smart meters to analyse electricity usage and using energy efficient home appliances.

Other measures suggested by respondents included: using economical settings on the washing machines and dishwashers, line drying clothes instead of using a tumble dryer, filling the kettle only with the amount of water needed, and ensuring devices are not left on to charge longer than necessary.



MEASURES TAKEN TO REDUCE ENERGY USE AT HOME

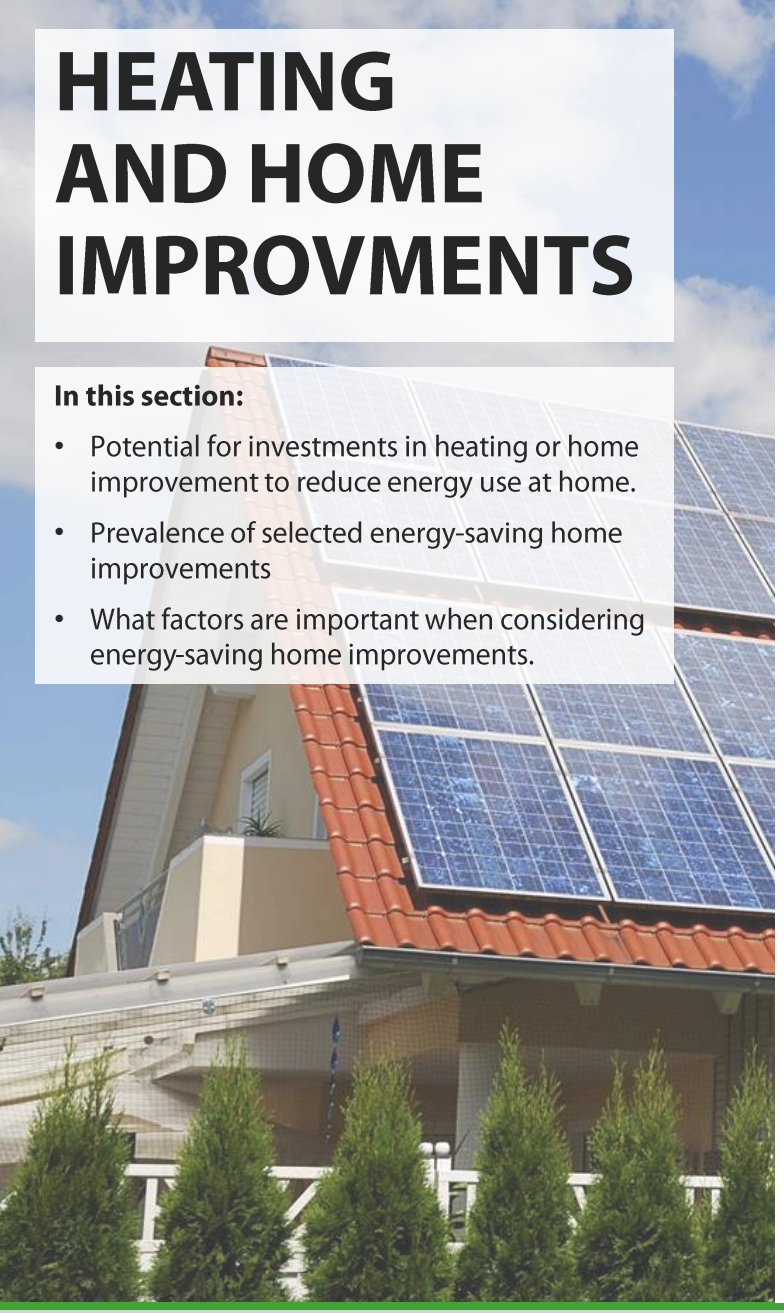
There were relatively few notable differences by age, home ownership and primary motivation for saving energy, though the results do suggest that people who said they were more open to changing behaviour where more likely to already undertake the measures asked about.

Turning off lights and using LED lightbulbs are fairly mainstream behaviours, but for some of the other measures it is possible to see that uptake is less prevalent amongst the majority than the innovators/early adopters.

There is also some indication that concern about the environmental impact of energy use at home may impact uptake: those who were 'not at all concerned' were less likely do the following than those who were 'very concerned': use LED lightbulbs, reduce hot water use, turn heating down, turn off devices, use energy efficient appliances. However, there are no significant differences based on their primary motivation for saving energy.

		Turn off lights when not needed	Use LED lightbulbs	Reduce hot water use (e.g. shower instead of baths)	Turn heating down / wear more clothes	Keep interior doors closed	Turn off devices rather than leave on standby	Use energy efficient home appliances	Use a smart meter to analyse electricity usage
Age	Under 40	88%	71%	60%	67%	61%	60%	50%	17%
	40-64	94%	83%	72%	70%	63%	58%	55%	16%
	65+	94%	82%	69%	61%	60%	55%	46%	15%
Home ownership	Own or part-own	92%	82%	70%	68%	61%	57%	55%	17%
	Rent	94%	70%	60%	63%	62%	61%	38%	11%
Motivation	Environmental	94%	80%	69%	69%	59%	63%	53%	14%
	To save money	90%	78%	66%	65%	63%	53%	49%	17%
Attitudes to behaviour change	Innovator	97%	85%	81%	82%	70%	70%	71%	22%
	Early adopter	93%	81%	70%	74%	58%	69%	63%	18%
	Early majority	94%	83%	67%	65%	63%	56%	50%	16%
	Late majority	89%	68%	62%	59%	57%	47%	38%	10%
	Last- / non-adopter	78%	58%	52%	47%	61%	30%	28%	13%
Concern about environmental impact of energy use at home	Very	94%	86%	79%	80%	65%	74%	66%	23%
	Somewhat	94%	82%	66%	71%	60%	61%	54%	13%
	Slightly	92%	76%	67%	58%	61%	51%	44%	16%
	Not at all	87%	70%	60%	58%	61%	43%	41%	13%

HEATING AND HOME IMPROVMENTS



In this section:

- Potential for investments in heating or home improvement to reduce energy use at home.
- Prevalence of selected energy-saving home improvements
- What factors are important when considering energy-saving home improvements.

Key Learnings:

60% of people are open to the idea that they could reduce energy consumption if they made heating or home improvements. However, the cost of installation is an important barrier for all types of improvements. Also a quarter of people found that planning/building control requirements were one of the factors that had caused them not to proceed with a home improvement.

- **Heating:** Electric heating is becoming more popular, but 62% of people are using energy sources (e.g. oil) that have higher carbon emissions. Those who decided to switch to electric heating would recommend it, noting both environmental and financial benefits.
- **Double/triple glazing and insulation:** Most people said their home has these, though a small number were considering them and others indicated the potential to upgrade.
- **Learning thermostat or similar:** 43% of homeowners said they already have one, 19% may consider one and a further 19% who hadn't thought about it. This suggests potential to raise awareness and extend uptake. Uptake was reportedly low in rented properties, also suggesting the potential to do more. Wanting the property to be more efficient was a main driver for installation, and this brings both environmental and financial benefits. Cost of installation is an important factor for two-thirds of those considering it, but most of those who have installed this type of product have not found this to be a barrier and people would recommend them as they are relatively inexpensive and easy to install.
- **Air-source heat pumps and solar panels:** There is low uptake among both homeowners and those in rented properties. In each group, just over a third of people say they would be unlikely to consider them or they are not applicable at their property. However, 37% of homeowners may consider installing solar panels within the next 5 years. Fewer people are considering air-source heat pumps, though 31% of homeowners have never thought about it or don't know what it is. This suggests awareness of the product could be raised.

  Those considering air-source heat pumps and solar panels tend to be environmentally motivated. However, finances are still important and lower bills was a key reason why people would recommend them. Also, cost of installation is an important factor in whether people will go ahead, and cost was the biggest barrier to uptake (in terms of being able to afford the outlay, but also in terms of how long it would take to re-coup the outlay). Related to this, the Guernsey Electricity tariff /ability to sell back to the grid was also an important consideration amongst those that had considered solar panels but not proceed.

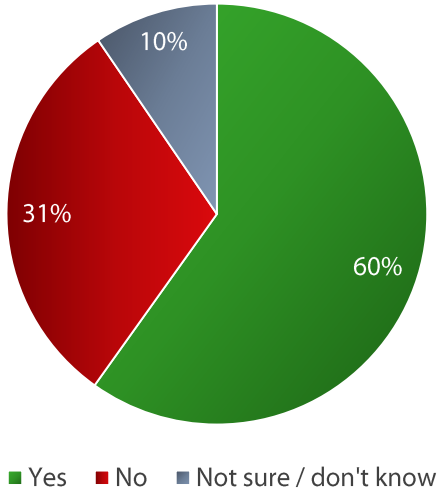
INVESTMENTS TO REDUCE AMOUNT OF ENERGY USE AT HOME

Respondents who own or part-own their home were asked: "Do you think your household could reduce your energy consumption if you changed/upgraded your heating system or undertook home improvements?"

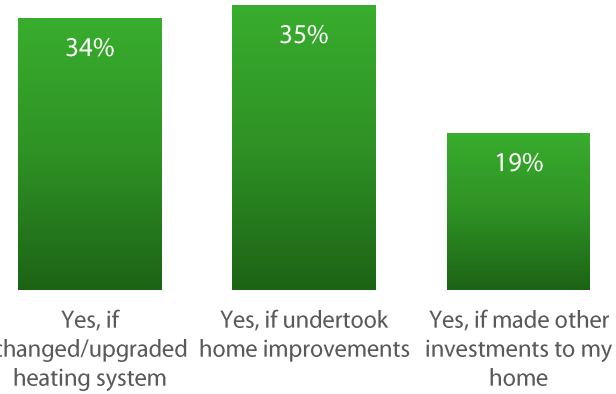
60% of homeowners said they think it would be possible to reduce their energy consumption if they changed/upgraded your heating system or undertook home improvements.

Respondents were able to select up to three 'yes' options. 34% of homeowners said 'yes if they changed/upgraded their heading system', 35% said 'yes if they undertook home improvements' and 19% said 'yes, if made other investments to my home'. On the latter, respondents were able to provide more detail – solar panels were a popular response. There were also some comments about the barriers to reducing energy consumption, as people mentioned the costs involved, or the barriers to making changes due to planning restrictions.

Could your household reduce energy consumption if you changed/upgraded your heating system or undertook home improvements?



If yes, respondents could select from three options:



ENERGY SOURCE AT HOME

Respondents were asked "Which form of energy supply do you primarily use at home for heating?"

The most popular response was oil (42%), closely followed by electric (38%).

Respondents were also asked "Has your energy source for heating changed in the past 5 years?"

20% of people said their energy source for heating had changed in the past 5 years. This included 12% of people who said it was their household's decision to change, 8% said it was for other reasons (e.g. moved house). Less than 1% said it had been their landlord's decision.

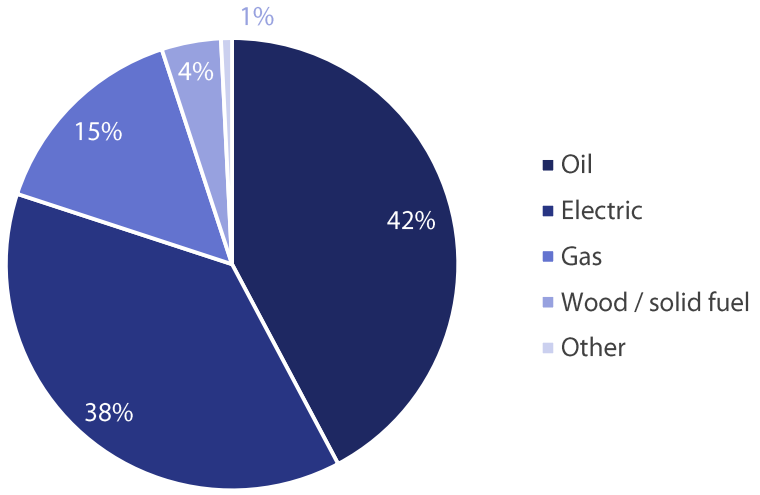
More than two-thirds (70%) of people whose energy source for heating had changed had moved from oil or gas to electric heating.

Respondents who said it had been their decision to change their energy source for heating were asked what factors were important when deciding to change the energy source, and whether they would recommend their new energy source for heating to other people on their island.

The factors which people mentioned were important included: concerns about climate change and the environment; installation, maintenance and running costs; and ease of use / convenience.

86% of people who had decided to switch to electric heating said they would recommend it to other people on their island (4% said 'no', and the remaining 10% were 'not sure'). The main reasons to recommend electric heating that respondents mentioned were that it is: environmentally friendly, convenient, cheaper than other available energy sources, easy to maintain, easy to use, efficient, quiet and clean.

Which form of energy supply do you primarily use at home for heating?



	Own Property	Rent Property
Oil	44%	36%
Electric	35%	47%
Gas	15%	13%
Wood / solid fuel	5%	3%
Other	1%	1%

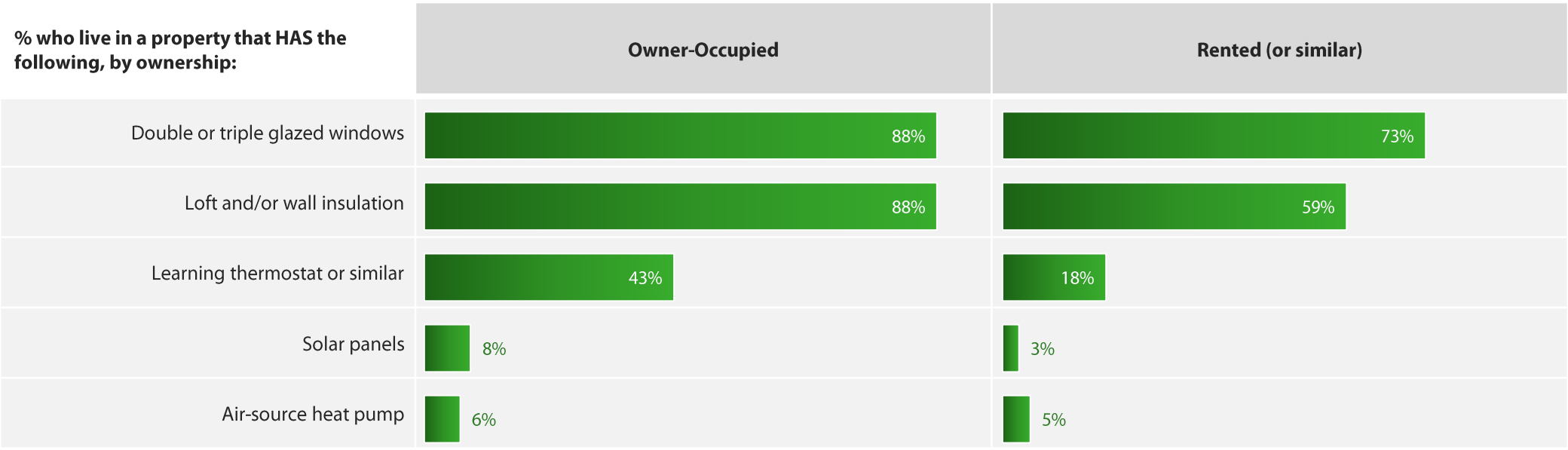
HOME IMPROVEMENTS

Respondents were asked about whether their home has five types of energy-saving home improvements (see below).

People living in owner-occupied properties were more likely to report that their property has the energy-saving home improvements. For example, 88% of people who own or part-own their home said it has double or triple glazed windows, compared to 73% of people who do not own their home.

However, it should also be noted that people who do not own their home were less informed about their property and more likely to select 'don't know'. For example, 21% of people in rented (or similar) properties did not know if their home had loft or wall insulation and 18% did not know if it had a learning thermostat or thermostatic radiator valves.

On a related note, respondents living in private rentals were asked whether their landlord had made changes or improvements to their home in the past 5 years that reduce energy consumption: 7% of people in private rentals selected 'yes', 67% selected 'no' and 26% selected 'don't know'.



HOME IMPROVEMENTS: OWNER-OCCUPIED PROPERTIES

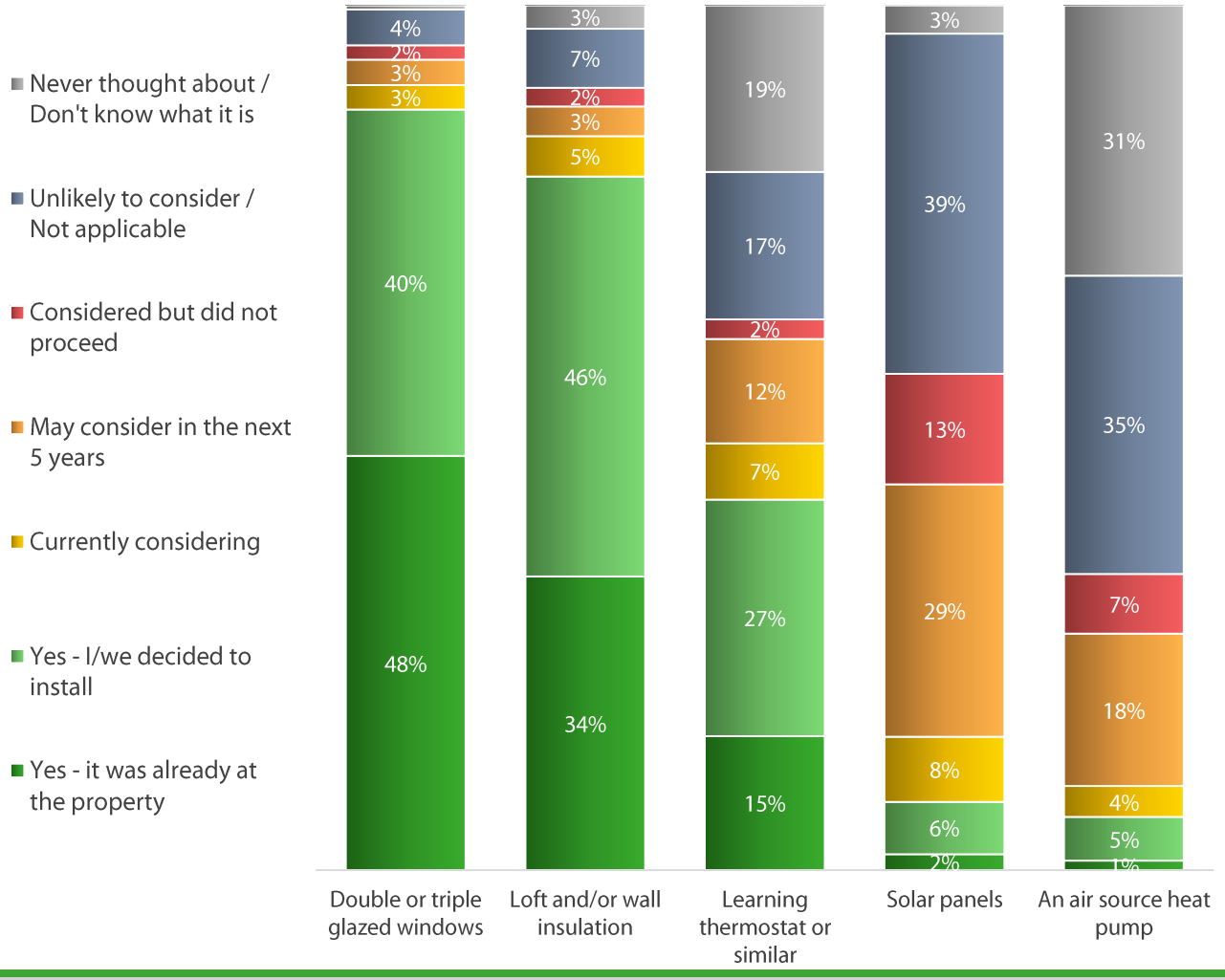
As previously mentioned, respondents were asked whether their home had selected energy-saving home improvements. Those who owned or part-owned their properties could select from the seven options. The responses are shown in the graph on the right.

It can be seen that:

- 40% of people who own/part-own their property had decided to have double or triple glazed windows installed,
- 46% had decided to install loft and/or wall insulation, and
- 27% had decided to install a learning thermostat or similar.

In terms of home improvements that are currently being considered, or may be considered in the next 5 years then:

- 8% of homeowners said they are currently considering solar panels, and a further 29% said they may consider them in the next 5 years,
- 7% are currently considering a learning thermostat (or similar) and a further 12% said they may consider one in the next 5 years, and
- 4% are currently considering an air-source heat pump and a further 18% said they may consider one in the next 5 years.



HOME IMPROVEMENTS: OWNER-OCCUPIED PROPERTIES

Homeowners were then asked to give reasons for their responses to selected home improvements, and were asked about …

- one of the home improvements they had decided to install (as applicable),
- one of the home improvements they were currently considering or may consider in the next 5 years (as applicable),
- one of the home improvements they had considered but did not proceed (as applicable), and
- one of the home improvements they are unlikely to consider (as applicable).

For instance, a respondent who said they had already had insulation, had installed a learning thermostat, may consider solar panels and an air-source heat pump and were unlikely to consider double or triple glazing, could be asked what factors where important when they decided to install the learning thermostat, what factors were likely to be important when determining whether they would go ahead with an air-source heat pump, and why they would be unlikely to consider double or triple glazing.

Findings from these questions are shown on the following pages, with responses presented for each type of home improvement where the base size exceeds 50 responses. Responses have also been aggregated across the different types of home improvement to help draw out the most important factors.

For example, in learning about the factors that were important when deciding to install a new home improvement, we can provide detail on double or triple glazing, loft/wall insulation, and learning thermostat or similar, but the base sizes were too small to learn about the factors underpinning decisions for install solar panels or an air-source heat pump. In addition, responses to all types have been aggregated.

The final question in this section asked all respondents "Are you currently considering any other home improvements that would reduce your energy consumption?". 19% of people said they were. From the addition detail respondents gave we learnt that the other home improvements included upgrades to existing insulation, upgrading to triple glazing, exterior cladding, extending use of LEDs, and underfloor heating. A few people also expressed their desire or intention to rebuild their property with a new eco-home or undertake extensive renovations.

DECIDED TO INSTALL

457 respondents answered a question about what factors where important when they decided to install a home improvement. Most responses were with reference to double/triple glazing (n=162) or loft/wall insulation (n=183). In addition, 84 answered in relation to a learning thermostat (or similar), 14 in relation to solar panels and 14 in relation to an air-source heat pump.

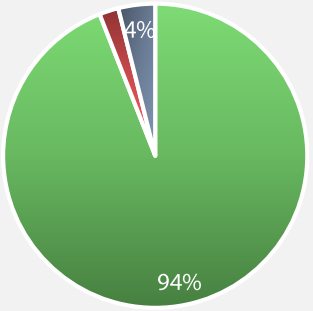
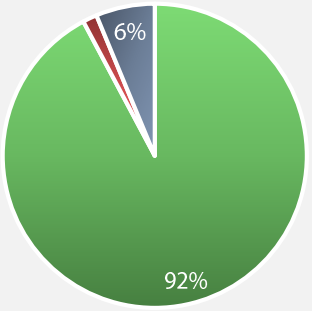
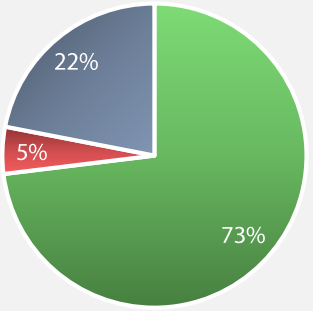
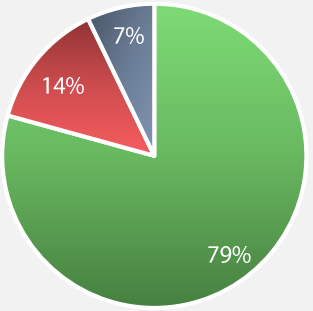
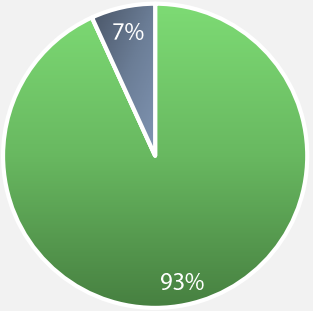
The most popular responses were about wanting the property to be more energy efficient and wanting the property to be warmer, though the factors selected vary by type of improvement. For example, part of a larger home improvement project/build was more frequently selected for wall/loft insulation than for double/triple glazing or a learning thermostat.

	Across all types of improvement	Double or triple glazing	Loft / wall insulation	Learning thermostat or similar
	N=457	N=162	N=183	N=84
Wanted the property to be more energy efficient	75%	74%	85%	50%
Wanted the property to be warmer	74%	89%	91%	26%
Environmental reasons	34%	24%	43%	23%
Could afford/fund the financial outlay	32%	32%	35%	19%
Part of larger home improvement project/build	31%	28%	41%	13%
Need to repair or replace	20%	46%	-	13%
Cost of installation	19%	14%	22%	12%
Maintenance costs	16%	22%	-	31%
Quality of installation	15%	15%	19%	3%
Want to refresh or update	13%	26%	-	14%
Planning/building control requirements	6%	5%	8%	2%
Hassle/disruption installation would cause	3%	3%	5%	0%
Other reason	3%	3%	2%	1%

DECIDED TO INSTALL

Yes
No
Not Sure

Respondents were asked if they would recommend the home improvement they had decided installed to other people in the Bailiwick of Guernsey, and given the opportunity to explain their answer.

	Double or triple glazing	Loft / wall insulation	Learning thermostat or similar	Solar panels	Air-source heat pump
	N=160	N=181	N=82	N=13*	N=14*
Would you recommend installing … to other people like you?	 **94%** (2% said no, 4% not sure)	 **92%** (2% said no, 6% not sure)	 **73%** (5% said no, 22% not sure)	 **79%** (14% said no, 7% not sure)	 **93%** (0% said no, 7% not sure)
Yes, because it is …	Energy efficient Blocks out noise Lasts longer Saves money Improves insulation Draught proof	Easier way to keep house warm Retains heat for long Cheap & easy to install Cost saving Energy efficient Environment friendly Saves money	Inexpensive Gives control on temperature (can set temperature for each room) Saves money Cost effective Environment friendly Easy to install Saves energy	Energy efficient Environment friendly Reduces electricity costs & Saves money	Energy efficient Cuts down energy bills Great for heating pool

* please note small base size

CONSIDERING – NOW OR WITHIN 5 YEARS

344 respondents answered a question about what factors would be important when deciding whether to go ahead with a home improvement they are currently considering or may consider in the next five years. Most responses were with reference to solar panels (n=182), air-source heat pumps (n=77) and a learning thermostat or similar (n=71).

The most important factors were the cost of installation and wanting the property to be more energy efficient. Being able to afford / fund the financial outlay, environmental reasons and maintenance costs were also relatively important considerations.

	Across all types of improvement	Solar Panels	Air source heat pump	Learning thermostat or similar
	N=344	N=182	N=77	N=71
Wanted the property to be more energy efficient	71%	70%	75%	83%
Wanted the property to be warmer	32%	22%	40%	37%
Environmental reasons	58%	64%	62%	54%
Could afford/fund the financial outlay	61%	71%	59%	47%
Part of larger home improvement project/build	16%	16%	15%	14%
Need to repair or replace	20%	12%	36%	30%
Cost of installation	75%	82%	77%	65%
Maintenance costs	45%	48%	54%	48%
Quality of installation	25%	26%	37%	19%
Want to refresh or update	14%	8%	27%	33%
Planning/building control requirements	25%	31%	24%	8%
Hassle/disruption installation would cause	19%	16%	30%	14%
Other reason	4%	4%	2%	4%

DID NOT PROCEED

124 respondents answered a question about the reasons they did not proceed with a home improvement. Just over half of the responses were with reference to solar panels (n=69). In addition, 27 answered in relation to an air-source heat pump, 11 in relation to a learning thermostat (or similar), 9 in relation to loft/wall insulation and 8 in relation to double/triple glazing.

Installation costs were the most popular factor, closely followed by not being able to afford/fund the financial outlay. Planning/building control requirements was also a factor for 25% of people who did not proceed with a home improvement. In addition, it can be noted that 24% of people who had considered solar panels but not proceeded indicated that Guernsey Electricity tariff / ability to sell back to the grid was an important consideration.

	Across all types of improvement	Solar Panels
	N=124	N=69
The property is already energy efficient	11%	7%
The property is already warm enough	4%	3%
Could not afford/fund the financial outlay	46%	60%
Too expensive to install	59%	68%
Too expensive to maintain	8%	7%
Concerned about the quality of installation	8%	7%
Planning/building control requirements	25%	30%
Installation would cause too much hassle/disruption	12%	5%
Was not convinced of the benefits	12%	14%
Decided was not a priority for us	8%	7%
Was not appropriate for my home for other reasons	7%	4%
Didn't know how to do this/where to go for information	4%	4%
Other	11%	13%
Guernsey Electricity tariff / ability to sell back to the grid	*	24%

* was only asked in relation to solar panels

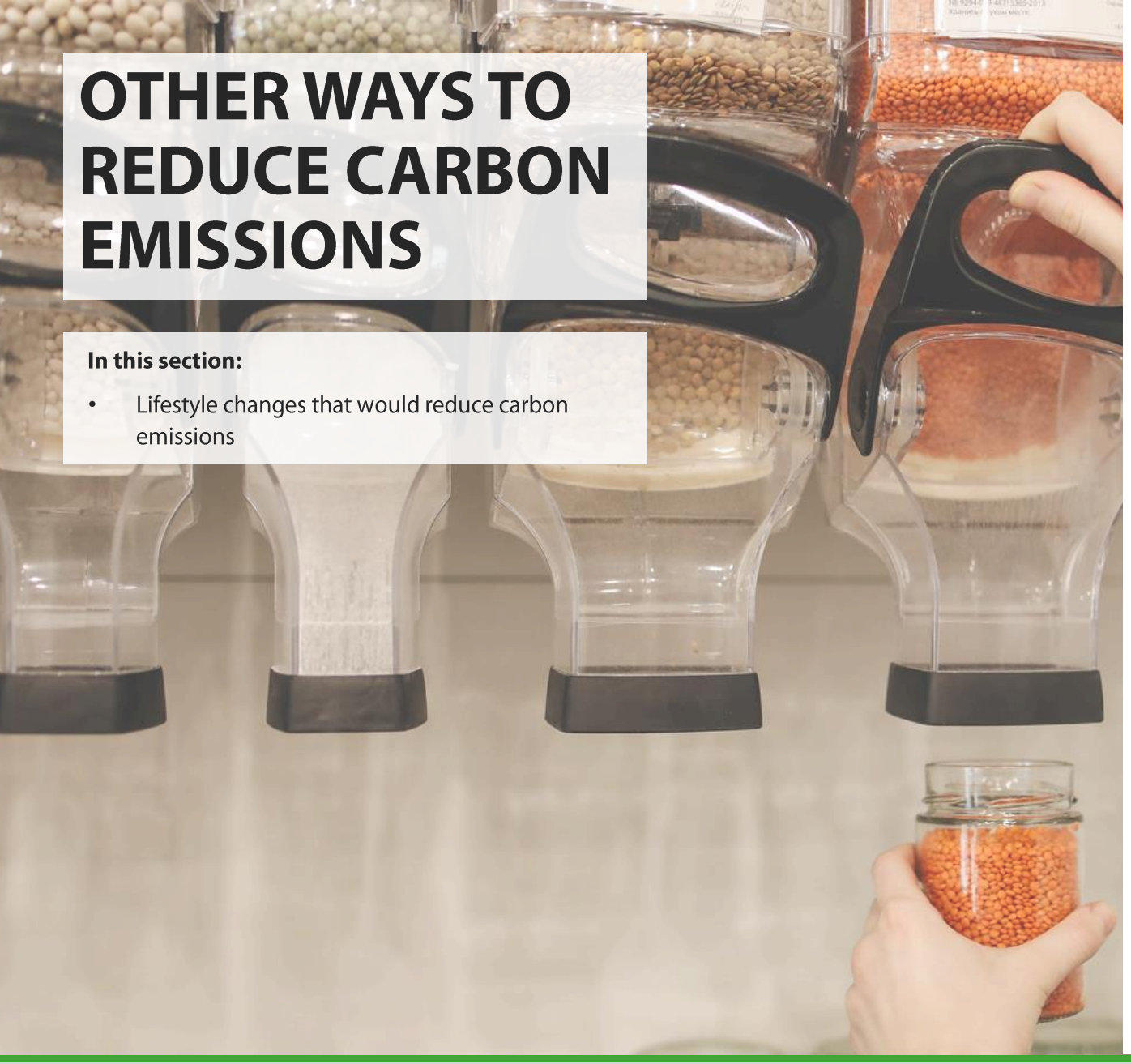
UNLIKELY TO CONSIDER

342 respondents answered a question about the reasons they would be unlikely to consider a home improvement. Most responses were with reference to solar panels (n=166) and air-source heat pumps (n=108). In addition, 36 answered in relation to a learning thermostat (or similar), 20 in relation to loft/wall insulation and 12 in relation to double/triple glazing.

Installation costs were the most popular factor, followed by not being able to afford/fund the financial outlay.

	Across all types of improvement	Solar Panels	Air source heat pump
	N=342	N=166	N=108
The property is already energy efficient	14%	8%	18%
The property is already warm enough	10%	9%	13%
Could not afford/fund the financial outlay	33%	45%	31%
Too expensive to install	50%	63%	45%
Too expensive to maintain	13%	17%	16%
Concerned about the quality of installation	7%	9%	8%
Planning/building control requirements	24%	32%	16%
Installation would cause too much hassle/disruption	22%	24%	26%
Was not convinced of the benefits	26%	34%	25%
Decided was not a priority for us	26%	25%	31%
Was not appropriate for my home for other reasons	22%	14%	24%
Didn't know how to do this/where to go for information	10%	9%	14%
Other	12%	13%	11%
Guernsey Electricity tariff / ability to sell back to the grid	*	14%	*

* was only asked in relation to solar panels



OTHER WAYS TO REDUCE CARBON EMISSIONS

In this section:

- Lifestyle changes that would reduce carbon emissions

Key Learnings:

Almost everyone said they try to reduce waste and recycle more, and it is encouraging how many people are open to being more environmentally conscious consumers.

In some cases, there may still be a gap between aspirations and what is consistently achieved in practice, but the responses to both parts of the questions suggest many people have a positive attitude to trying each of the environmentally friendly lifestyle changes asked about.

Those who said their primary motivation for saving energy is environmental reasons were more likely to say they were taking these actions, but it was also encouraging:

- How many of the 'early majority' said they were taking each action.
- That people who had begun to make changes in how they travel around the island were also more likely to have made these other lifestyle changes.

The findings suggests there may now be an opportunity to harness a momentum within society to make lifestyle changes that benefit the environment.

LIFESTYLE CHANGES TO REDUCE CARBON EMISSIONS

Respondents were asked: "Which, if any, of the following actions do you currently undertake?", followed by whether they would be willing to consider any of the ideas they do not currently do.

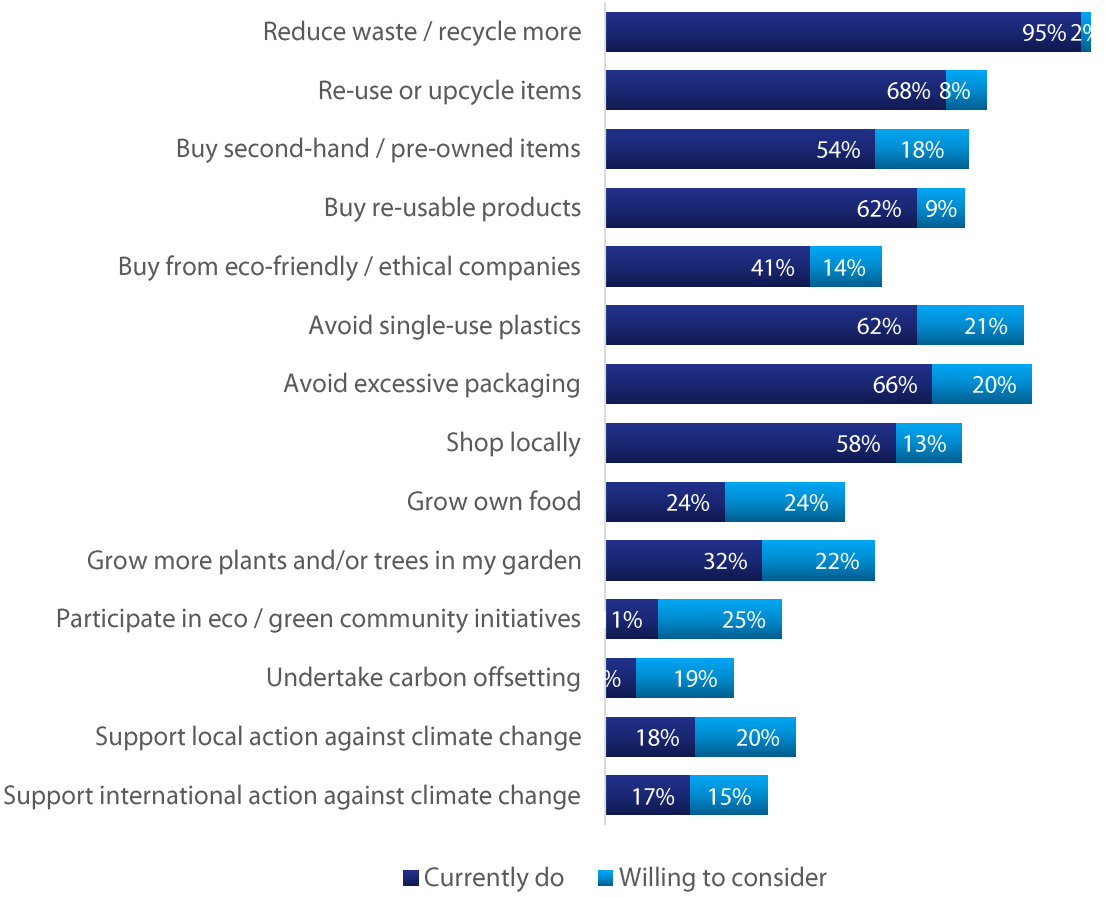
95% selected the action 'reduce waste and recycle more'.

Approximately two-thirds of people said they currently do the following:

- re-use or upcycle items
- buy re-useable products
- avoid excessive packaging
- avoid single-use plastics.

Buying second hand / pre-owned items and buying from eco-friendly / ethical companies were also reasonably popular actions that people are currently doing.

There was some willingness to consider doing more. For example, 18% of people indicated they would be willing to consider buying second-hand / pre-owned items.



LIFESTYLE ACTIONS TAKEN TO REDUCE EMISSIONS

We looked at the responses to what actions people are currently doing that reduce carbon emissions. The more popular actions are presented below.

Across a wide range of actions, those more likely to undertake the actions were: females, those who said their primary motivation for saving energy is for environment reasons, and those who said they were more open to changing their behaviour,

Responses by age seem to depend on the action. For example, younger age groups were more likely to buy second-hand / pre-owned items and buy from eco-friendly / ethical companies, but for other actions there were no significant differences (e.g. avoiding single-use plastics or shopping locally).

It is also encouraging how many of the early majority said they were taking each action; that reducing waste/recycling more is performed by almost all of the late majority; and that those who regularly use other modes of transport alongside or instead of using a petrol/diesel car are more likely to also undertake other lifestyle actions that reduce emissions.

		Reduce waste / recycle more	Re-use or upcycle items	Buy second-hand / pre-owned items	Buy re-usable products	Buy from eco-friendly / ethical companies	Avoid single-use plastics	Avoid excessive packaging	Shop locally
Age	Under 40	94%	65%	64%	64%	55%	57%	62%	52%
	40-64	97%	69%	55%	66%	42%	65%	68%	61%
	65+	95%	71%	42%	55%	24%	64%	67%	61%
Home ownership	Own or part-own	96%	69%	51%	63%	40%	65%	67%	60%
	Rent	93%	67%	64%	60%	46%	54%	62%	51%
Mode of travel	Only petrol /diesel	92%	58%	40%	47%	25%	51%	53%	46%
	Petrol /diesel + other	98%	72%	60%	72%	47%	68%	72%	63%
	No petrol /diesel	95%	77%	65%	63%	55%	69%	71%	69%
Motivation to save energy	Environmental	97%	75%	58%	71%	56%	74%	74%	68%
	To save money	95%	61%	51%	54%	27%	52%	58%	49%
Attitudes to behaviour change	Innovator	99%	84%	69%	81%	64%	71%	83%	74%
	Early adopter	96%	75%	61%	75%	59%	73%	74%	65%
	Early majority	97%	71%	57%	63%	38%	64%	66%	59%
	Late majority	92%	52%	38%	46%	20%	54%	54%	47%
	Last- / non-adopter	81%	52%	36%	25%	9%	14%	30%	30%

POLICIES AND INITIATIVES

In this section:

- Support for government action against climate change.
- Support for individual and community action against climate change.
- Support for selected initiatives, and additional suggestions.

Key Learnings:

There was widespread support for co-ordinated action on climate change, with 85% of people saying government action is very or quite important in reducing the effects of climate change. Individual and community action was deemed similarly important with 86% of people saying it is very or quite important.

This suggests that government actions that would help enable individuals and communities to make changes would be very welcome, and 89% of people supported one or more of the initiatives asked about.

Those with more open attitudes to change were more likely to say they support action and the initiatives asked about, as you might expect, though it is positive that there was also a fair amount of support amongst the 'late majority'. It was also encouraging that 46% of those who only regularly drive a petrol/diesel vehicle supported 'Incentivise low carbon, low emission travel and transport', as did 62% who regularly drive one alongside other modes of transport.

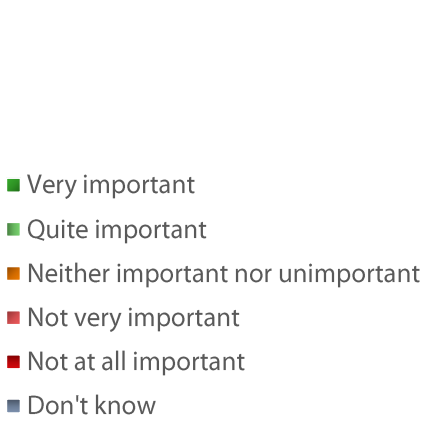
Environmental concerns were clearly a key motivator for support, however it was notable that around half of those who say they are primarily motivated by saving money also think action is important and would support the four initiatives that could bring financial benefits to individuals.

ACTION TO REDUCE THE EFFECTS OF CLIMATE CHANGE

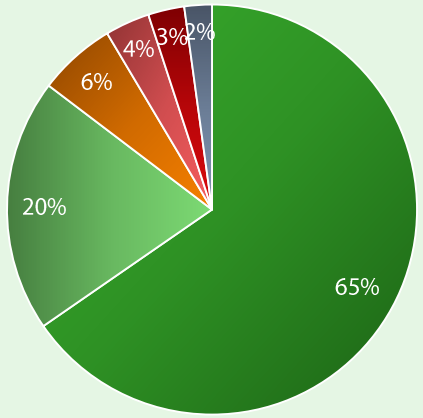
Respondents were asked: "Do you think that government action is important to reduce the effects of climate change?" and "Do you think that individual and community action is important to reduce the effects of climate change?"

There was considerable support for both government action and also individual/community action:

- 65% of people said government action is very important, and a further 20% said it was quite important
- 59% of people said individual and community action is very important, and a further 27% said it was quite important.

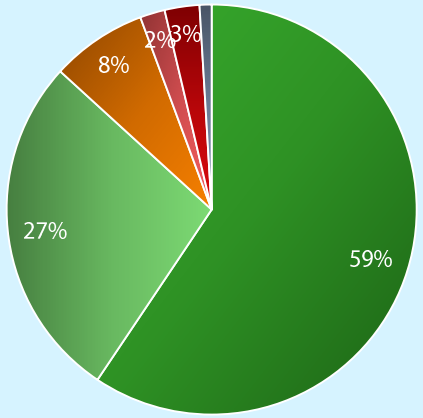


Government Action



Very important	Quite important	Neutral / Not or Don't know
65%	20%	15%

Individual and Community Action



Very important	Quite important	Neutral / Not or Don't know
59%	27%	13%

ACTION TO REDUCE THE EFFECTS OF CLIMATE CHANGE

We looked at the responses to these questions in relation to the respondent's age, gender, home ownership, mode of travel regularly used, their motivation for saving energy and their attitude to behaviour change. Those more likely to say government action and individual / community action is very important include:

- People whose primary motivation for saving energy is environmental reasons.
- Those who said they were innovators, early adopters or early majority rather than late majority or last- / non-adopters.
- Those who do *not* regularly drive a petrol or diesel vehicle tended to be more supportive of government action than those whose *only* regular means of transport is a petrol/diesel vehicle. While those who regularly use other methods of transport alongside or instead of a petrol/diesel vehicle were more supportive of individual/community action than those who do not.
- Younger people and females.

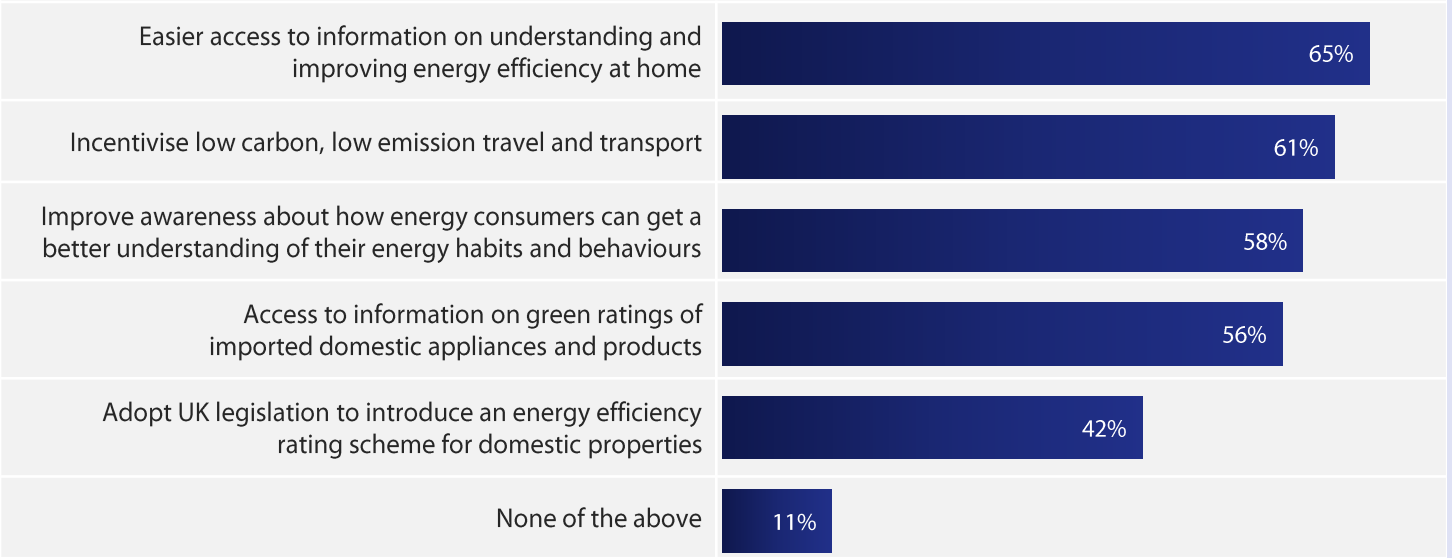
		Government Action			Individual and Community Action		
		Very important	Quite important	Neutral / Not or Don't know	Very important	Quite important	Neutral / Not or Don't know
Age	Under 40	75%	14%	11%	61%	28%	11%
	40-64	63%	20%	17%	61%	24%	15%
	65+	59%	26%	15%	55%	31%	13%
Gender	Females	70%	19%	10%	70%	22%	8%
	Males	60%	21%	19%	49%	33%	18%
Home ownership	Own or part-own	65%	21%	14%	59%	28%	13%
	Rent	67%	16%	17%	60%	27%	13%
Mode of travel	Only petrol /diesel vehicle	56%	21%	23%	47%	32%	20%
	Petrol /diesel vehicle + other	68%	20%	12%	63%	27%	10%
	No petrol /diesel vehicle	78%	16%	6%	73%	18%	9%
Motivation to save energy	Environmental reasons	81%	15%	4%	74%	21%	6%
	To save money	51%	24%	25%	46%	34%	20%
Attitudes to behaviour change	Innovator	88%	8%	5%	83%	17%	0%
	Early adopter	74%	17%	10%	72%	18%	10%
	Early majority	69%	21%	10%	60%	32%	8%
	Late majority	50%	28%	22%	41%	37%	22%
	Last- / non-adopter	6%	23%	72%	14%	22%	64%

SUPPORT FOR INITIATIVES

Respondents were asked: "Would you support any of the following initiatives?"

89% of people supported one or more of the initiatives suggested. Almost two-thirds (65%) of people indicated they would support "Easier access to information on understanding and improving energy efficiency at home", and over 60% of people would support initiatives to "Incentivise low carbon, low emission travel and transport".

Would you support any of the following initiatives?



In addition, 7% of people suggested other initiatives, which included the following:

More bicycle routes and bike racks

Subsidies for electric bikes

Promote / subsidise electric vehicles

Introduce paid parking

Ban or restrict use of large / high emission vehicles

Higher taxes on high emission vehicles

Reduce number of flights

Carbon tax on air travel

Low-cost loans for home improvements

Government support for energy-efficient home improvements

Subsidise green technologies (e.g. solar / air-source heat pumps (ASHPs))

Change planning / building regulations in relation to energy-saving home improvements (e.g. solar panels, ASHPs, wind turbines, etc)

Relax planning requirements for listed properties

Restrict / tax on single-use plastics

Produce renewable energy: wind turbines, solar or tidal

For the States of Guernsey to lead by example

SUPPORT FOR INITIATIVES

Across the range of initiatives, people who were more likely to be supportive were:

- those who said their primary motivation for saving energy was for environment reasons and those who said they were more open to change.

In addition:

- 'Improve awareness about how energy consumers can get a better understanding of their energy habits and behaviours' and 'adopting UK legislation to introduce energy efficient rating scheme for domestic properties' both had more support among those who rent than who own their property. Other differences by ownership were not significant.
- It is interesting to note that 46% of those who only regularly drive a petrol/diesel vehicle did actually support 'Incentivise low carbon, low emission travel and transport', as did 62% who regularly drive one alongside other modes of transport.
- Responses by age varied, but there is some evidence that those in younger age groups were more likely to support the initiatives.

		Easier access to information on understanding and improving energy efficiency at home	Incentivise low carbon, low emission travel and transport	Improve awareness about how energy consumers can get a better understanding of their energy habits and behaviours	Access to information on green ratings of imported domestic appliances and products	Adopt UK legislation to introduce an energy efficiency rating scheme for domestic properties	None of these
Age	Under 40	71%	74%	72%	65%	60%	7%
	40-64	68%	63%	60%	54%	39%	10%
	65+	52%	44%	41%	52%	28%	17%
Home ownership	Own or part-own	63%	61%	55%	55%	39%	11%
	Rent	73%	62%	69%	60%	51%	10%
Mode of travel	Only petrol /diesel vehicle	54%	46%	49%	42%	29%	21%
	Petrol /diesel vehicle + other	68%	67%	62%	63%	45%	7%
	No petrol /diesel vehicle	74%	72%	65%	63%	58%	3%
Motivation to save energy	Environmental	74%	71%	66%	65%	52%	6%
	To save money	57%	53%	51%	49%	33%	15%
Attitudes to behaviour change	Innovator	62%	71%	58%	67%	47%	13%
	Early adopter	74%	74%	68%	71%	57%	5%
	Early majority	69%	65%	61%	59%	43%	7%
	Late majority	51%	46%	48%	34%	25%	19%
	Last- / non-adopter	32%	6%	10%	11%	10%	50%

CONCLUSIONS

CONCLUSIONS

The majority of people would support both government action and individual/community action to tackle climate change and reduce carbon emissions. Many people are concerned about the environment, though saving money is also a really important motivator.

Most people could identify some behaviours they already undertake which reduce the energy they use when getting around the island or at home. However, petrol and diesel vehicles are the primary mode of transport, and uptake of some energy-saving home improvements and electric heating (which has lower carbon emissions than alternatives) is relatively low.

People who have already made changes to their behaviour were often motivated by a concern for the environment. However, attitudes to changing behaviour often lag behind attitudes of concern for the environment. Also while there appears to an openness to making smaller sustainable lifestyle choices, people tend to feel less willing or able to make more substantial changes that would reduce energy use and carbon emissions.

The research provides valuable insights into the attitudes, motivation and barriers to change. For example:

- Many people have made small lifestyle and less expensive home improvements to reduce energy use at home (e.g. turn light switches off, use LED lighting, learning thermostats). Concern for the environment encourages people to take these actions, though for many people, saving money is their primary motivation.
- Many barriers to change were identified when people were asked if they would consider energy-saving home improvements. Those who have already made these changes tend to be motivated by the environment. However for others to make these changes, the change must also make financial sense.
- Convenience was also be a major barrier. The need to visit multiple locations was a key reason why people said they were unable to drive less and to walk, cycle or use the bus instead. Similarly, more substantial home improvements were more likely to be considered as part of a renovation project.

Just over a third of people said it would be possible to drive less and just under half recognise they could be doing more to reduce energy use around the home.

The challenge will be to find ways to nudge them to do so. Potential opportunities include:

- Electric bicycles and electric vehicles. There were also a number of people who said they would be willing to consider driving a more fuel efficient vehicle.
- Getting the 55% of people who regularly use mixed modes of transport to drive less frequently.
- Smart meters and learning thermostats, which require minimum outlay
- Electric heating, and to some extent air-source heat pumps and solar panels.
- Exploring the scope for making improvements to rented properties, and/or whether those in rented accommodation need greater awareness of any energy saving features of their home.

CONCLUSIONS
(CONTINUED)

There appears to be a window of opportunity for the States of Guernsey to initiate change, by doing more to harness societal concern for the environment.

- Overall, individuals who indicated they have already adopted lifestyle changes that limit their energy consumption were more likely to identify themselves as open to behaviour change and more likely to say they are motivated by the environment.
- There was, however, often scope to further increase uptake of energy-saving behaviours among people who are 'innovators' and 'early adopters', and those who are motivated by environmental reasons.
- There are likely to be more challenges associated with encouraging the 'early' and 'late majority' to change their behaviour. These groups identify a range of barriers. Reaching these groups will be important if the States of Guernsey is to affect enough change to have the desired impact on carbon emissions.

Looking ahead, it will be important to engage people on the environmental rationale for change and build consensus on energy-saving initiatives. However, it should also be recognised that financial motivators will need to be used alongside environmental ones, in order to engage people who tend to be more concerned about the financial cost of energy use, and are motivated by saving money. Measures to overcome other barriers identified by respondents would also be helpful.

Finally, the response to the survey suggests that many people feel passionate about these issues and welcome the opportunity to share their views. More than 400 respondents indicated they would be willing to participate in follow up research on these issues and it would be good to find ways to engage them in the policy process.

APPENDIX 1: METHODOLOGY

ATTITUDES TOWARDS THE ENVIRONMENT METHODOLOGY

Respondents were asked the extent to which they agreed or disagreed with 12 statements about the environment, and in relation to using less energy.

Responses consistent with each of the two attitudes measured were scored either a 1 or 2, as shown on the right. Neutral and opposite scores were scored 0 as they are not consistent with the desired attitude.

For each attitude there is a possible total score of 12 and respondents were categorised as follows:

Weak	Somewhat	Moderate	Strong	Very Strong
0	1-2	3-5	6-8	9-12

Note: this is not a validated tool, but does give a robust indication of how consistent respondents' are in the views, based upon the aspects included in the statements.

Concern for the environment	**Score = 1**	**Score = 2**
Environmental concerns, e.g. climate change and/or sustainability, mean that we need to reduce the amount of energy we use	Agree	Strongly Agree
I would like to see more community initiatives to promote sustainability in Guernsey	Agree	Strongly Agree
If each person makes small changes to their behaviour, as a community we can have a big impact on Guernsey's carbon footprint	Agree	Strongly Agree
I am conscious of my carbon footprint	Agree	Strongly Agree
From a global perspective, it doesn't matter how much carbon Guernsey produces	Disagree	Strongly Disagree
I do not think about the energy I use to travel around the Island or to heat my home, until something breaks down or needs to be replaced	Disagree	Strongly Disagree
Openness to making lifestyle changes to reduce emissions/energy use.	**Score = 1**	**Score = 2**
I would like to do more to reduce the amount of energy I use around the home	Agree*	Strongly Agree
It would be difficult for me to use a petrol/diesel vehicle less than I already do	Disagree	Strongly Disagree**
When deciding what type of on-island transport to use (car, bus, bicycle etc.), I take the environmental impact into consideration	Agree	Strongly Agree
In addressing environmental concerns, using new technology is more effective than making lifestyle changes	Disagree	Strongly Disagree
If we use low-carbon energy sources we do not need to reduce the amount of energy we use	Disagree	Strongly Disagree
Currently, I do nothing or very little to reduce the amount of energy I use around the home	Disagree	Strongly Disagree

** Or Strongly Agree + Disagree with "Currently, I do nothing or very little to reduce the amount of energy I use around the home"*
*** or Strongly Agree + car is not most frequent way of travelling to work and/or car is not used regularly for other types of journeys*

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