

CLIMATE CHANGE PULSE SURVEY 2023

SURVEY CONDUCTED FOR
THE ISLE OF MAN GOVERNMENT



Island Global Research

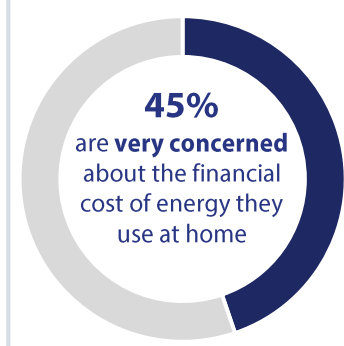
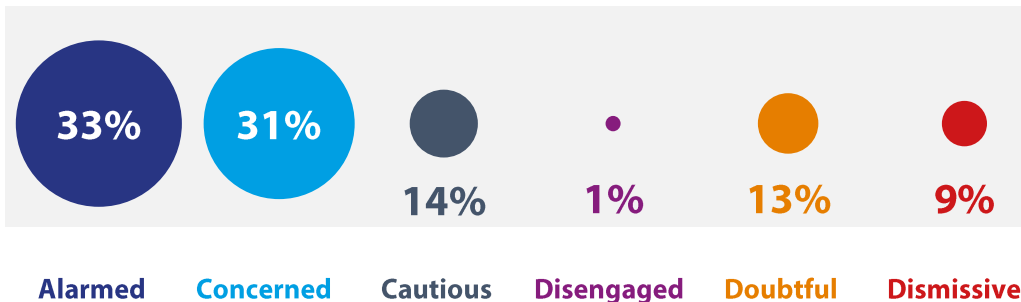
KEY FINDINGS

ABOUT THE SURVEY

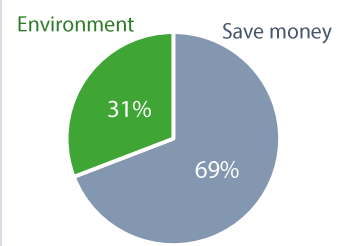
It was undertaken for the Isle of Man Government.

Survey was completed by 1219 residents in June / July 2023.

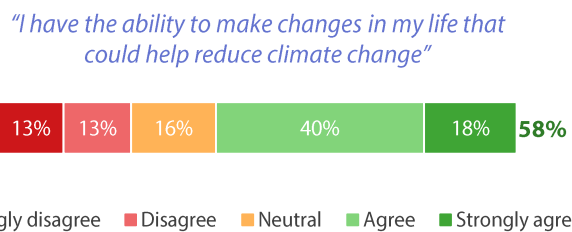
33% people are alarmed and 31% are concerned about the climate change



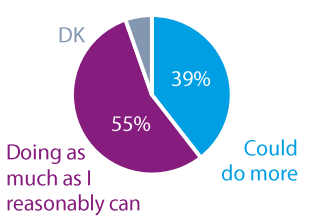
About 2 in 3 people said their primary motivation for saving energy is **to save money**



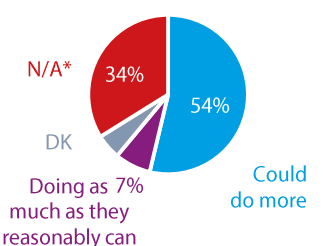
More than half of the people agree they have the ability to make changes in their life that could help reduce climate change



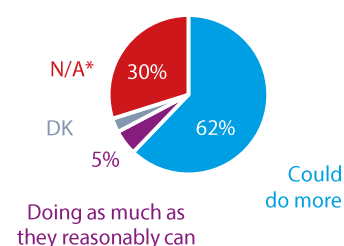
55% think **they personally** are doing as much as they can to help achieve Net Zero



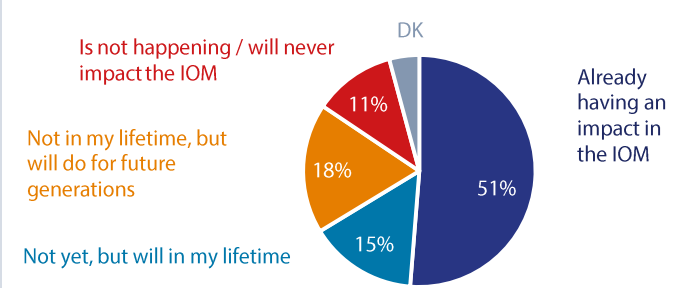
54% think **other people** in the IOM could be doing more to help achieve Net Zero



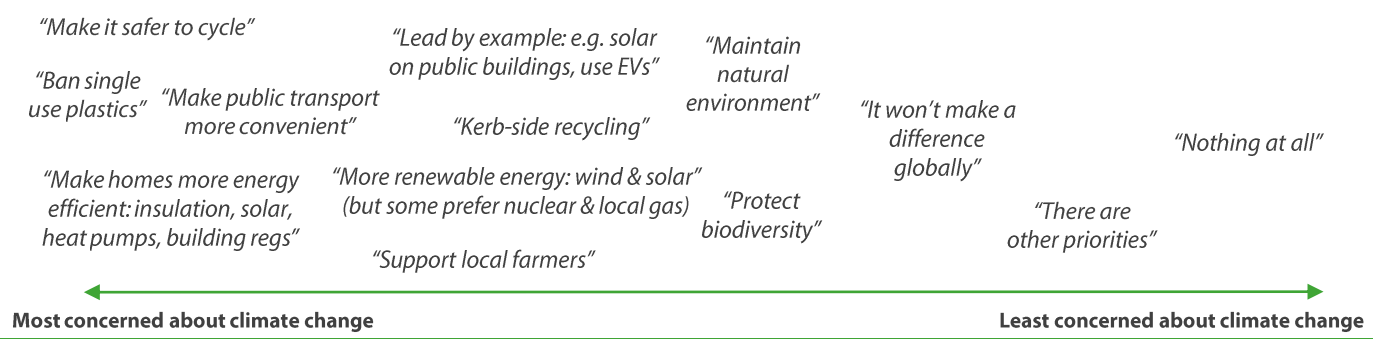
62% think the **IOM Government** could be doing more to help achieve Net Zero



51% people said climate change is already having an impact in the IOM



What (more) should the IOM Government be doing to tackle climate change?



DK = Don't know

N/A = they should not take any responsibility for tackling the effect of climate change in the IOM

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This report presents findings from a pulse survey on climate change completed by Isle of Man residents in June and July 2023.

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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.

INTRODUCTION

Island Global Research undertook a survey of Isle of Man residents on behalf of the Isle of Man Government.

The pulse survey was undertaken in June 2023. It was designed to elicit views on climate change and included questions on the following topics:

- Attitudes to climate change.
- Policies and targets to achieve Net Zero in the Isle of Man.
- Everyday behaviours that can help to limit climate change.
- Modes of transport for getting around the Isle of Man.
- Energy use at home, including low carbon heating systems.
- Profiling questions about the individual and their household.

A survey instrument used in December 2021 was the starting point for the 2023 survey. The original version was reviewed by both us and the Client and we worked together to agree the questionnaire. Some new questions were included to provide insights on the Isle of Man Government's Climate Change Plan and on low-carbon heating systems.

As in December 2021, the 2023 surveys were promoted to a wide audience using the following channels:

- Island Global Research contacted their market research panel and invited them to participate in the survey.
- Island Global Research promoted the survey using social media (Facebook and Instagram).

There was also an internal communication to government employees about the survey in June 2023.

The latest survey was launched on 9 June 2023 and the vast majority of responses were received within the first 10 days. The survey remained open until 4 July 2023. This allowed time for an internal government communication about the survey (sent on 26 June 2023), which yielded a further 741 eligible responses.

The survey conducted in June 2023 had a good response from residents, with 1219 eligible responses. This represents 1.7% of the eligible population, as there are around 70,000 adult (aged 16+) residents. The samples achieved give a maximum margin of error of 2.8% for June 2023 (95% confidence interval).

Responses from the internal government communication have been excluded from the main analysis in order to ensure the views reported are representative of the resident population. Responses achieved from the internal government communication are available in a separate report.

PROFILE OF RESPONDENTS



PROFILE OF RESPONDENTS

The profile of people who completed the survey was compared to the available data on the population of the Isle of Man.

Survey responses were weighted in proportion to the age and gender profile of the adult population. All figures, tables and text presented in this report refer to weighted responses, unless otherwise specified.

Please refer next page for the demographic and household profile of survey respondents after survey weights have been applied.

About survey weights

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.

Fewer young people completed the survey (see right, and Appendix A). However, the survey was completed by a wide range of the people and the differences were relatively small. The largest weights are for males aged 16-29 and females aged 16-24, and were capped at 3.0.

Results rounded to the nearest integer

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

The table shows the age and gender profile of the adult population living in the Isle of Man, and the profile of the sample who completed the surveys in June 2023. It also shows the profile of the sample for each sample after weights have been applied.

	Isle of Man Population		June 2023	
		% of population	% of sample	% after survey weights
			N=1219	
Age group				
	16-24	12%	2%	6%
	25-29	6%	3%	5%
	30-34	7%	4%	7%
	35-39	7%	3%	8%
	40-44	8%	6%	8%
	45-49	9%	8%	9%
	50-54	10%	10%	10%
	55-59	9%	13%	10%
	60-64	7%	17%	8%
	65-69	8%	13%	7%
	70-74	6%	11%	8%
	75+	11%	11%	13%
	Prefer not to say	-	1%	1%
Gender				
	Female	51%	48%	51%
	Male	49%	50%	47%
	Prefer to self-describe	*	<1%	<1%
	Prefer not to say	-	1%	2%

* Gender is not available for the population, and biological sex has been used as a proxy for gender

PROFILE OF RESPONDENTS

CONTINUED

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

	June 2023
Household composition	
Working age adults only	45%
Working age adults with children under 16	21%
Pension age adults only	23%
Other composition	11%
Current housing status	
Own a property	72%
Rent a property (privately)	12%
Rent a property (public housing)	6%
Partial ownership (e.g. part mortgage & part rent)	<1%
Living rent free or paying a small rent	6%
Staff accommodation	<1%
Other	1%
Household income	
£20,000 or less	10%
£20,001-£40,000	19%
£40,001-£60,000	19%
£60,001-£80,000	17%
£80,001-£100,000	9%
£100,001-£150,000	7%
Over £150,000	4%
Prefer not to answer	2%
Don't know	12%

	June 2023
Parish	
Andreas	3%
Arbory	2%
Ballaugh	2%
Braddan	3%
Bride	1%
Castletown	4%
Douglas	25%
German	1%
Jurby	1%
Laxey	4%
Lezayre	2%
Lonan	2%
Malew	2%
Marown	2%
Maughold	2%
Michael	2%
Onchan	9%
Patrick	2%
Peel	7%
Port Erin	6%
Port St Mary	4%
Ramsey	11%
Rushen	2%
Santon	1%
Prefer not to answer	1%

ATTITUDES TO CLIMATE CHANGE



VIEWS ON CLIMATE CHANGE

All respondents were asked four questions about climate change:

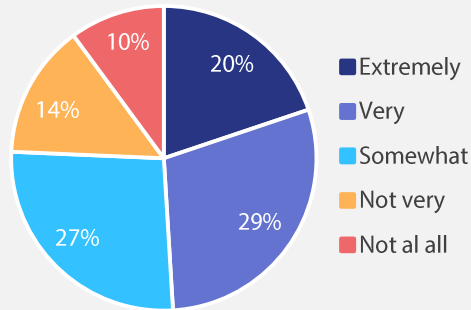
- Almost half (49%) of people indicated climate change is very or extremely important to them personally and;
- 29% were very worried about climate change.

The results also show that more people expect climate change to harm future generations than to harm themselves personally.

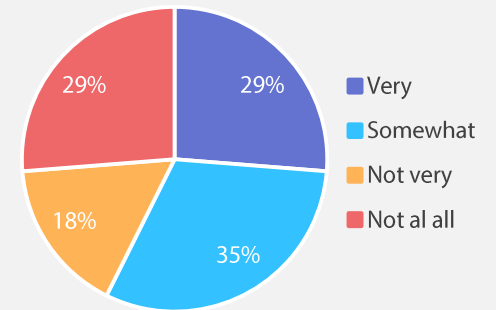
There were notable differences by age:

- 56% of people aged 16-39 indicated the issue of climate change is very or extremely important to them (vs 51% aged 40-64 and 41% aged 65+). Also, 57% of females selected very or extremely important (vs 41% of males).
- 40% of people aged 16-39 indicated they are very worried about climate change (vs 29% aged 40-64 and 20% aged 65+). Also 36% of females selected very worried (vs 22% of males)
- 27% of people aged 16-39 indicated they think climate change will harm them personally a great deal (vs 18% aged 40-64 and 8% aged 65+). Also 21% of females selected a great deal (vs 14% of males).
- 75% of people aged 16-39 indicated they think climate change will harm future generations a great deal (vs 63% aged 40-64 and 52% aged 65+). Also 73% of females selected a great deal (vs 52% of males).

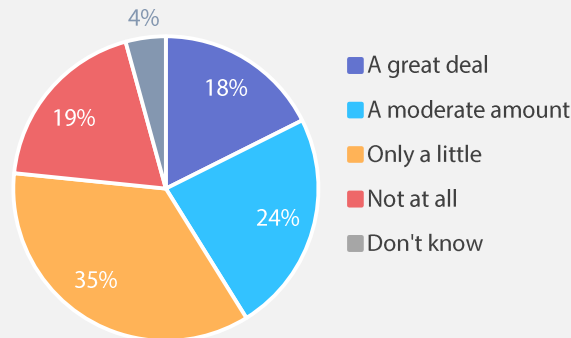
How important is the issue of climate change to you personally?



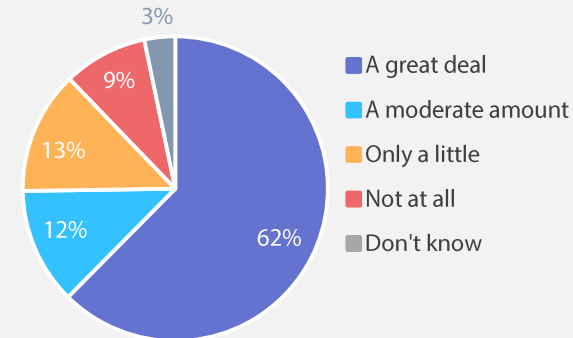
How worried, if at all, are you about climate change?



How much do you think climate change will harm you personally?



How much do you think climate change will harm future generations of people?

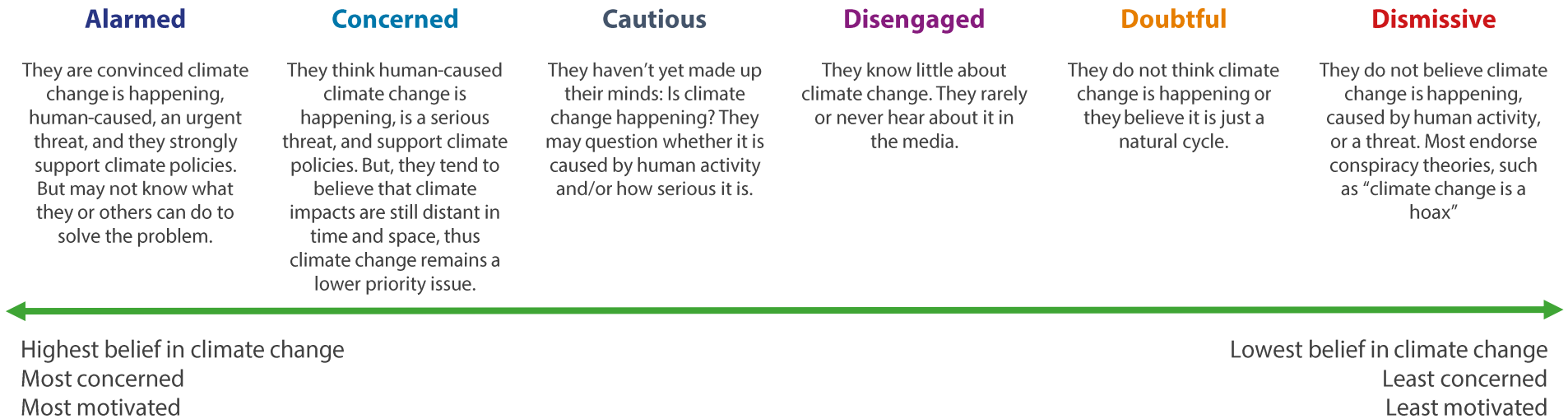


ATTITUDES TO CLIMATE CHANGE

SIX SEGMENTS

The Yale Program on Climate Change Communication conduct scientific research on public climate change knowledge, attitudes, policy preferences, and behaviour, and the underlying psychological, cultural, and political factors that influence them.

Their work included the development of an audience segmentation tool which was designed to help people better understand their views on the climate and global warming. The original questionnaire contained 36 items, but this has been refined to four questions. Respondents are allocated to one of six segments, based on their answers to the four questions.

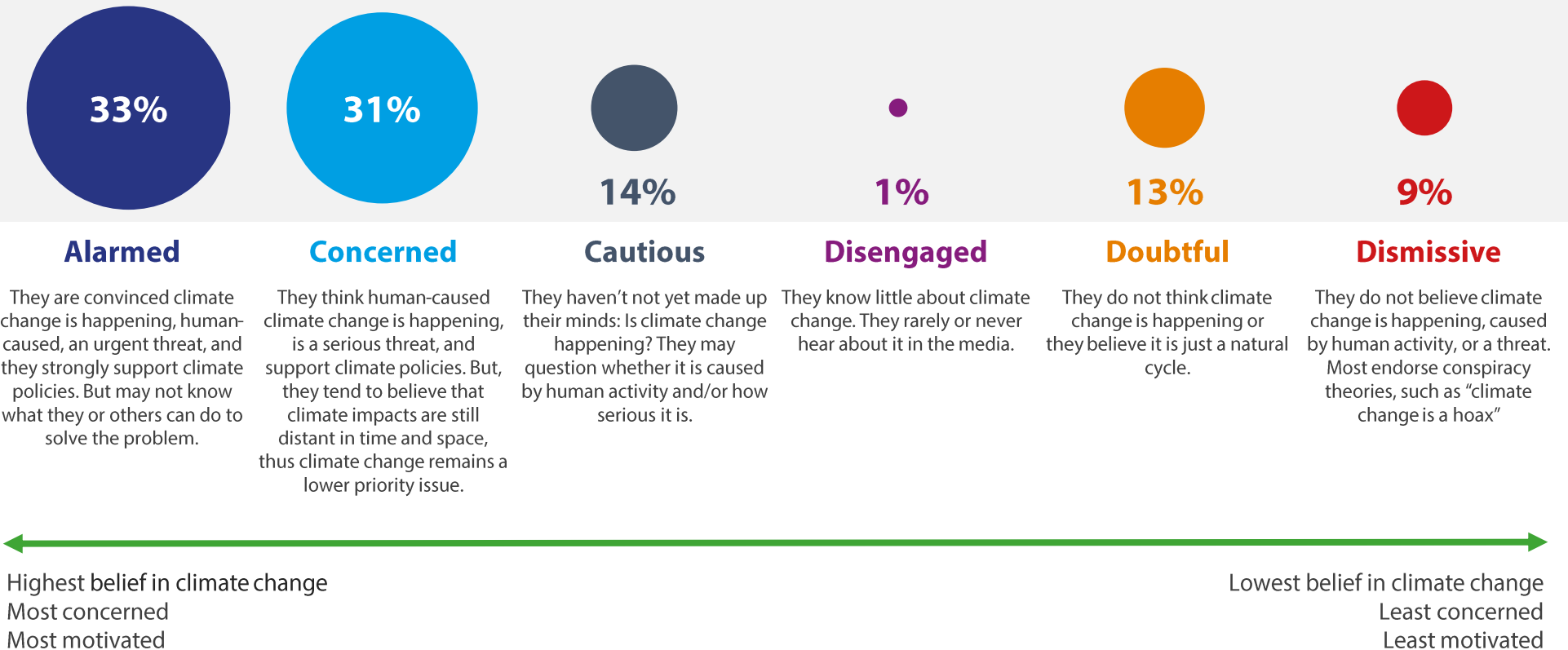


ATTITUDES TO CLIMATE CHANGE

SIX SEGMENTS

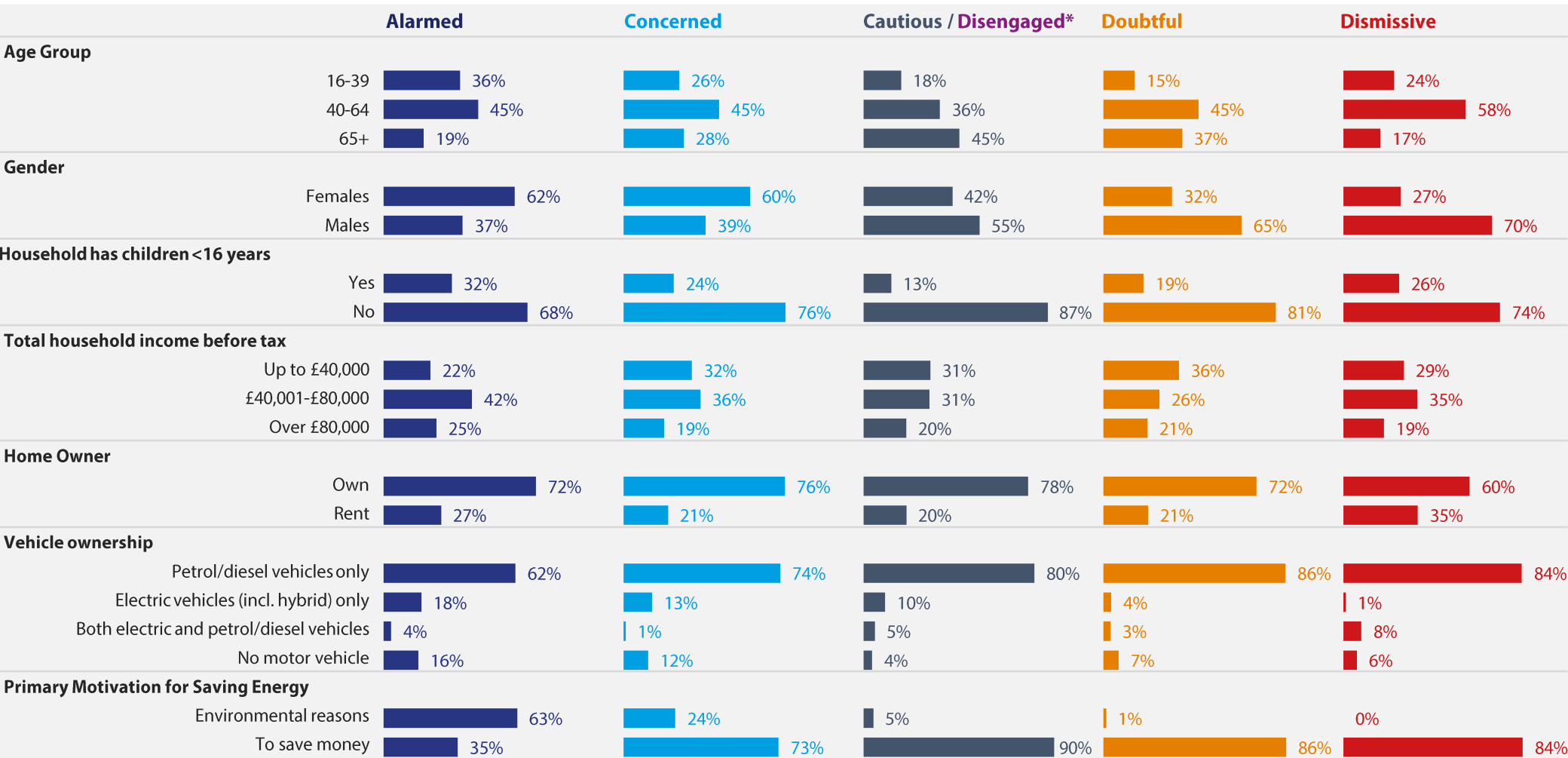
Responses to the four questions on the previous page have been used to assign respondents into one of six segments, (see previous page for further information about the audience segmentation).

33% of people were categorised as “Alarmed” in June 2023. Of the six segments, those who are “Alarmed” are the most concerned about climate change and the most motivated to take action to mitigate its impact. 31% were “Concerned”, while 14% were “Cautious”. There were 9% who are “Dismissive” and do not believe climate change is happening.



DEMOGRAPHIC PROFILE OF CLIMATE CHANGE SEGMENTS

The profile of people in the climate change audience segments is shown below. For instance, it can be seen that people who are “Alarmed” tend to have a younger age profile, identify as female, and are less likely to be in the lowest income segment.



* Majority of this group are “cautious”. There are a small number who are “disengaged”.

VIEWS ON CAUSES OF CLIMATE CHANGE

Respondents were shown four statements about climate change and asked which one comes closest to their view.

- The majority (93%) believe the climate is changing and 84% think human activity is mainly or partly responsible.
- 9% think climate is changing and human activity is not at all responsible.

There were notable differences by age, with 63% of people under 40 selecting “the climate is changing and human activity is mainly responsible” compared to 46% of those aged 40-64 and 30% of those aged 65+.

Respondents who indicated they believe human activity is mainly or partly responsible for climate change were asked: “How much do you understand the ways in which human activity is responsible for climate change?”

The responses from this group indicated that the vast majority believe they have a good understanding of how human activity is responsible for climate change: 41% selected “a great deal” and 54% selected “a moderate amount”.

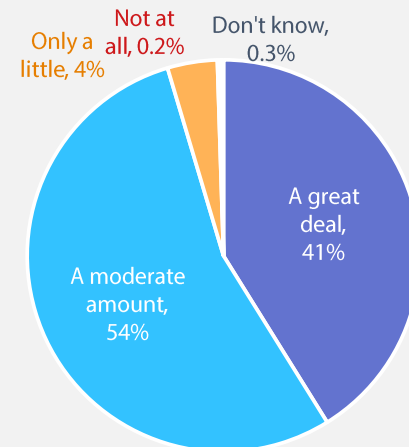
Respondents who were categorised as “Alarmed” were the most likely to select “a great deal” (55% compared to 30% who are “Concerned” and 29% who are “Cautious”). Though there was no notable difference between those who were “Alarmed” and “Doubtful” (as 43% of those who are “Doubtful” about climate selected “a great deal”).

There were no notable differences by age group, though males were more likely than females to say they understand “a great deal” (47% of males compared to 36% of females).

Thinking about the causes of climate change, which, if any, of the following statements best describes your opinion?

	All	Aged 16-39	Aged 40-64	Aged 65+
The climate is changing and human activity is <u>mainly</u> responsible	46%	63%	46%	30%
The climate is changing and human activity is <u>partly</u> responsible, together with other factors	39%	25%	37%	55%
The climate is changing but human activity is <u>not at all</u> responsible	9%	7%	10%	9%
I don't think the climate is changing	6%	4%	6%	6%
Don't know	1%	1%	0%	1%

How much do you understand the ways in which human activity is responsible for climate change?



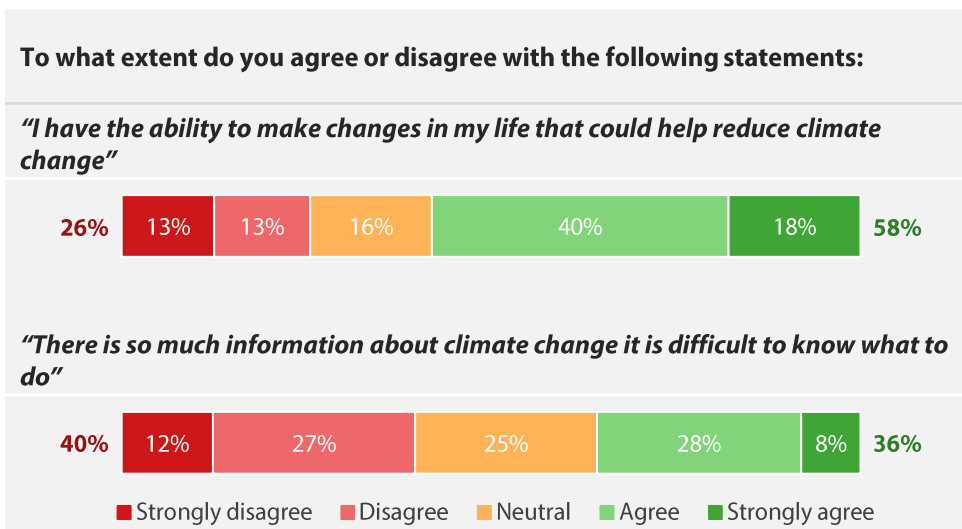
VIEWS ON CLIMATE CHANGE

Respondents were asked the extent to which they agreed or disagreed with two statements about climate change.

- 58% of people believe they have the ability to make changes to their life that would help reduce the impact of climate change. Though there were 26% who indicated they would be unable to make lifestyle changes.
- Over a third of people (36%) agreed that “there is so much information it is difficult to know what to do”, though there were 40% of people who disagreed with this statement.

The results in the table show the views for selected sub-groups: climate change segment, age group, and gender.

- The result show the extent to which people who are “Alarmed” about climate change were more likely to agree that they have the ability to make changes in their life that could help climate change. They were also the most likely to disagree with statement that says it is difficult to know what to do.
- Residents aged 16-39 and 40-64 were notably more likely to agree than those aged 65+. In addition, females were more likely to agree than males.
- For the second statement, people who are “Alarmed” about climate change were notably more likely to disagree with the statement that it is difficult to know what to do. There were no notable differences by age or gender.



Segment	“I have the ability to make changes in my life that could help reduce climate change”		“There is so much information about climate change it is difficult to know what to do”	
	Disagree	Agree	Disagree	Agree
Segment				
Alarmed	8%	88%	57%	27%
Concerned	16%	68%	29%	46%
Cautious**	32%	38%	23%	46%
Doubtful	57%	16%	29%	31%
Dismissive	72%	4%	57%	20%
Age Group				
16-39	24%	64%	45%	30%
40-64	24%	60%	40%	34%
65+	28%	51%	34%	43%
Gender				
Female	15%	67%	34%	41%
Male	36%	49%	46%	30%

CLIMATE CHANGE IN THE ISLE OF MAN

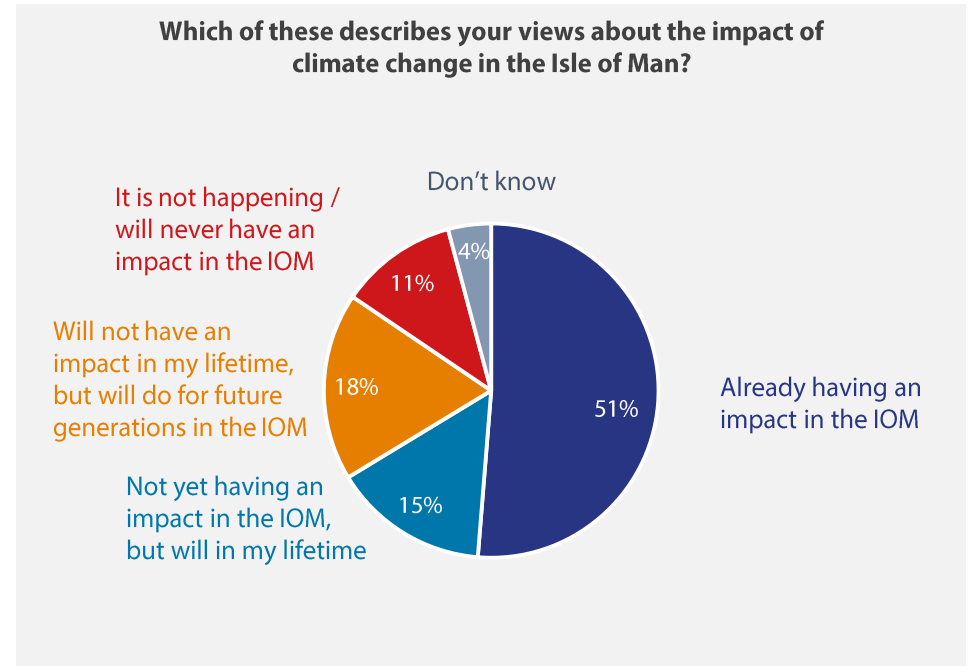


IMPACT OF CLIMATE CHANGE IN THE ISLE OF MAN

Respondents were asked about the impact of climate change in the Isle of Man.

- Just over half of people (51%) indicated they thought climate change was already having an impact.
- A further 15% selected “it is not yet having an impact, but it will in my lifetime”; and 18% selected “it will not impact in my lifetime, but will do for future generations”.
- 11% of respondents selected “Climate change is not happening / will never have an impact in the IOM”.

As one might expect, people who are “Alarmed” about climate change were much more likely to indicate they believe climate change is already having an impact (86% compared to 62% who are “Concerned”, 23% who are “Cautious” and less than 10% in the other segments.

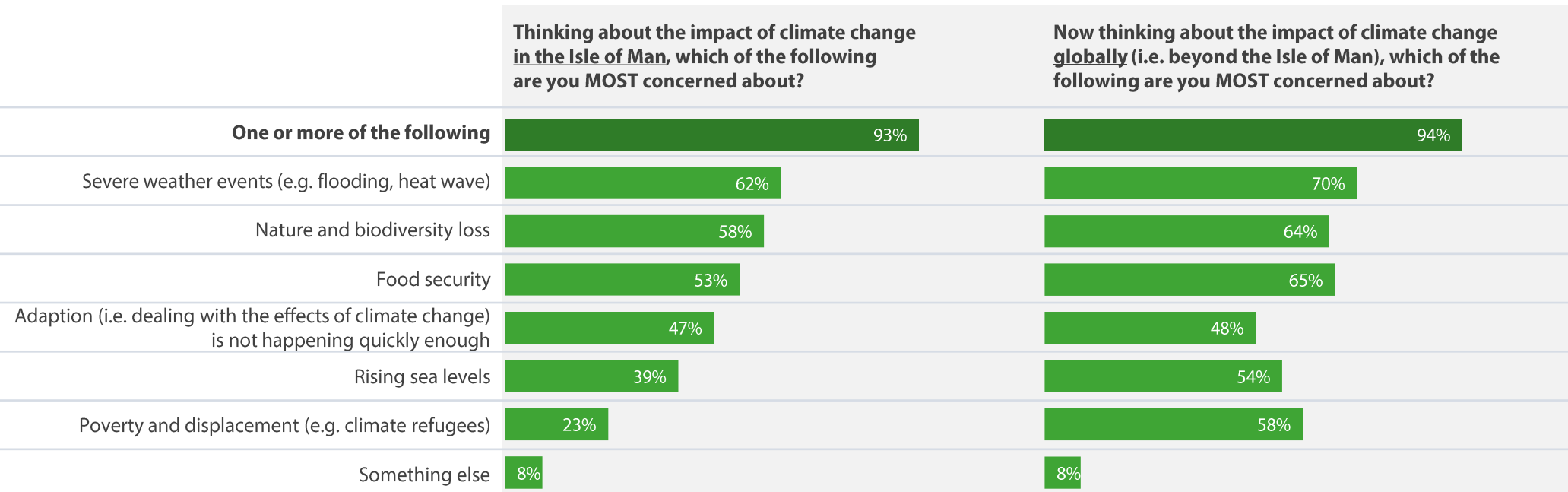


CONCERNS ABOUT THE IMPACT OF CLIMATE CHANGE

Respondents who indicated they believe climate change will have an impact in the Isle of Man (if not now then at some point in the future) were asked two follow up questions and were asked to select all options that apply.

- Thinking about the impact of climate change in the Isle of Man, which of the following are you MOST concerned about?
- Now thinking about the impact of climate change globally (i.e. beyond the Isle of Man), which of the following are you MOST concerned about?

Within the local context, more of respondents were concerned about severe weather events, nature and biodiversity loss and food security. These were also the most frequently selected options when asked about the impact of climate change globally. Rising sea levels and poverty/displacement were more of a concern when thinking about the impact of climate change globally.



CONCERNS ABOUT THE IMPACT OF CLIMATE CHANGE

Respondents who indicated they believe climate change will have a impact in the Isle of Man (if not now then at some point in the future) were asked: “Who do you think should take responsibility for tackling the effects of climate change?”

The results show

- 66% of this group believe the general public should take responsibility by making changes to their lifestyle, and
- 70% said the government should take responsibility by introducing more policies to reduce the level of carbon emissions.

It also shows that people were more likely to expect large business than small/medium sized business to take responsibility (72% and 54% respectively).

Who do you think should take responsibility for tackling the effects of climate change in the Isle of Man?

The general public, by making changes to their lifestyle

66%

Government, by introducing more policies to reduce the level of carbon emissions

70%

Large businesses, by doing more to reduce their impact on the environment

72%

Small and medium businesses, by doing more to reduce their impact on the environment

54%

TAKING ACTION TO TACKLE THE EFFECTS OF CLIMATE CHANGE IN THE ISLE OF MAN

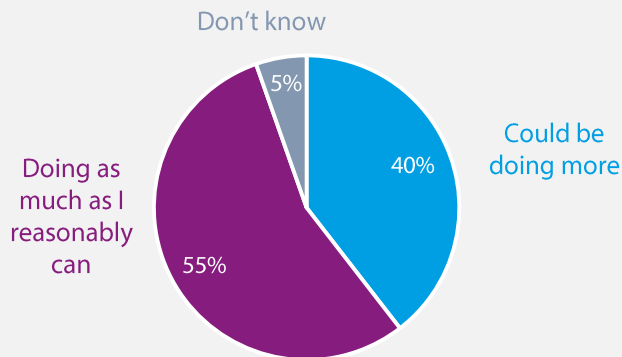
All respondents who indicated they believe climate change will have an impact in the Isle of Man (if not now then at some point in the future) were asked whether different actors could be doing more or were they already doing as much as they can.

- 40% of people who believe climate change will have an impact in the Isle of Man say they could be doing more to help the Isle of Man achieve Net Zero.

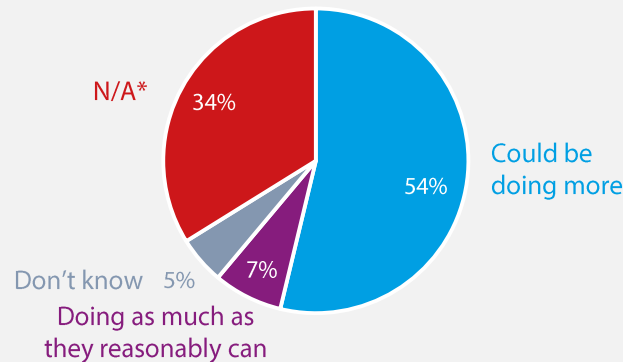
The survey also sought views on whether others could be doing more to help the Isle of Man achieve Net Zero:

- 54% believe other people living in the Isle of Man could be doing more and
- 62% believe the Isle of Man Government could be doing more.

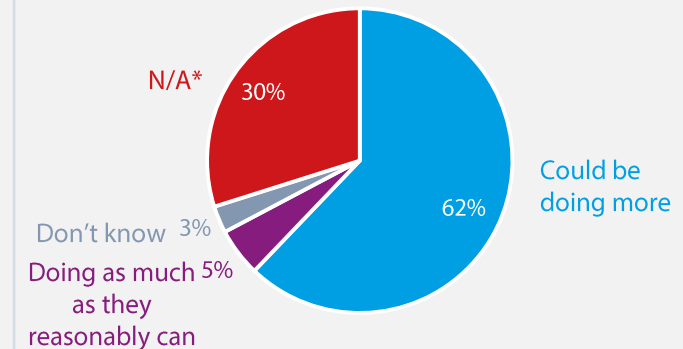
Do you think that **you personally** could be doing more to help the Isle of Man achieve Net Zero, or are you already doing as much as you reasonably can?



Do you think that **other people living in the Isle of Man** could be doing more to help the Isle of Man achieve Net Zero, or are they already doing as much as they reasonably can?



Do you think that **the Isle of Man Government** could be doing more to help the Isle of Man achieve Net Zero, or are they already doing as much as they reasonably can?



* i.e. this actor should not take any responsibility for tackling the effect of climate change in the IOM

ACTIONS FOR THE ISLE OF MAN GOVERNMENT

All respondents who indicated they believe climate change will have an impact in the Isle of Man (if not now then at some point in the future) were asked: **“In your opinion, what, or what more, should the Isle of Man Government be doing to tackle climate change? This could include policies and actions that enables others to do more.”**

A large number of respondents provided comments and the range of views expressed have been illustrated by including a selection of the quotes over the next four pages. Quotes have been grouped by climate change segment which helps to illustrate the different perspectives. In summary, people who are ‘Alarmed’ about climate change tended to offer a wide range of suggestions and argue more needed to be done. Those who are ‘Concerned’ also offered suggestions, though they tended to focus more on the generation of renewable energy, recycling and actions that the Government could be taking, but there were still some suggestions related to support for initiatives to support low-carbon home energy. Comments from people are ‘Cautious’ included some suggestions related to energy generation and recycling, but also noted that any actions taken in the Isle of Man are unlikely to change the global situation. While the comments from those who are ‘Doubtful’ and ‘Dismissive’ were more likely to argue against taking action, or would only see a case for taking action if there are wider benefits for the economy or energy security.

Key themes:

Renewable energy (wind and solar), but there were also some in favour of nuclear and local gas

Kerb-side recycling

Lead by example: e.g. Solar panels on public buildings, e-vehicles (e-buses were more controversial)

Make homes more energy efficient – insulation, solar, heat pumps

Low-carbon building regulations, especially for new builds

Improve public transport – more about routes than cost of travel

Make it safer to cycle

Maintain natural habitat / protect biodiversity

Support for local farmers

Ban single use plastics / Drinking water refill points

Motorsport (both inconsistent with Net Zero / potential to promote e-motorbikes)



SELECTED COMMENTS: ACTIONS FOR GOVERNMENT

ALARMED

Alarmed

Car sharing schemes, kerbside recycling & alternative energy supplies like tidal and wind, plus subsidised solar panels

Bring in planning legislation that all new build houses and other buildings must incorporate solar panels on roofs. Reduce use of imported fossil fuel generated electricity. Install alternative, renewable electricity generation.

Electric cars ARE NOT the answer. Give grants to insulate houses.

IoM Government should take prompt and serious action to mitigate the effects and help people respond proactively to climate change such as subsidising installation of solar hot water systems, accelerating the introduction of EVs through appropriate steps such as on street charging systems, fiscal measure and subsidies. Any sensible steps to reduce fossil fuel import and use should be introduced. Also having a clear energy policy to phase out fossil fuel power generation. Co-ordination of response efforts with the UK Government as appropriate.

Punitive private vehicle tax - say up to £5,000 a year for SUVs based on 3 criteria: weight, vehicle footprint, and emissions. Revenue to go into electric buses and active travel infrastructure.

Much more recycling via bin collections, introduce ways to ensure less packaging use & less plastic use, grants to help sustainability

Isle of Man is perfect for wind / solar power, but the government seems to reluctant to do anything

Much more use of solar panels on all government buildings. Financial support for individuals to enhance their homes in terms of insulation and solar panels

- 1. Not licence any fossil fuel extraction in territorial waters.*
- 2. Accelerate renewable energy developments.*
- 3. Subsidise and otherwise encourage local food production. This may require a strategic approach to land use.*
- 4. Make all buses free and increase services to isolated areas.*
- 5. Increase road tax*
- 6. Promote e-bike (motorbike) racing in TT and MGP.*
- 7. Ensure all government funded services (schools, health and social services) develop nutritious vegan options.*
- 8. Buy and run Ramsey bakery ...*
- 9. Reinstate local timber production at least for fence posts and outdoor furniture. This will require restricting import of cheap timber from elsewhere.*
- 10. Support insulation of our very inefficient housing. We need some demonstrator sites for e.g. Victorian terraced housing.*
- 11. New housing stock to be built to near passivhaus standards. ... I could go on ...*

Schemes to support businesses to change their practice. Support to change heating systems; solar, air source etc. Currently very expensive and prohibitive. More visible action from government: actively making changes in their departments to support climate and environment.

The green grant system is not sufficient; grants should be greater for home solar and not just for those with older houses. Big incentives to buying EVs, like Norway. Electrifying government car and van fleets. Updating the islands emission regulations to best practice and apply them to the power stations

Using wind power, even subsidies for small wind power on private properties

Change planning laws now to build homes for the future, introduce car mot checks and noise and emission standards, stop spraying and cutting hedgerows during bird nesting and wildflower season .

Clean renewable power, new builds to have solar panels, clean transport system, help with purchase of electric vehicles, better electric charging system, no more motor sport, encourage eco holidays, make idling engines an offence including the buses, get rid of the coal burning steam trains

Encouraging the installation of land-based wind turbines Encouraging a switch from oil to gas-fired central heating Stop subsidising electric vehicles and heat exchange pumps and use the money to expand low carbon energy production

SELECTED COMMENTS: ACTIONS FOR GOVERNMENT CONCERNED

Insulate all houses. Free public transport to lessen car use. All buses electric. Ban single use plastics. More cycle paths. More cycle to work schemes. Change all government vehicles and fleet cars from diesel to electric.

There are measures that could be taken to reduce waste and excessive use of resources, but considering the size of population on Island we need to be careful not to introduce rules that reduce the economy in a discriminatory way for residents.

Better recycling facilities, i.e. kerb collections but not an additional cost to households.

Mandatory PV solar panel systems on ALL new builds (domestic and commercial), rain water harvesting systems on ALL new builds (domestic and commercial), retrofitting on all domestic and commercial properties where possible, reducing restrictions on conservation zone properties to install better insulation e.g. triple glazing.

*Clear, concise information .
More schemes to recycle.
Encourage alternate power sources for households.
Subsidise green vehicles.
Encourage and support more food production on island.*

Boost help for green initiatives and planning. Heat pumps. Solar heating. Electric cars.

Help with the cost of solar panels. Legislate that all new building should have solar and heat pumps. Help with electric chargers.

Adding windfarms to the island and offshore. Solar energy should be financially encouraged by our government. Introduce small nuclear reactors. In the interim, accelerate our own gas field production to assist the transition.

Government need to be self sufficient in power whether through renewable or nuclear energy

Stop any more loss of green spaces and habitat including a ban on all building on green spaces and encouraging brownfield sites only Use these preserved green spaces to plant trees/wild spaces Island wide recycling Make the boat the more accessible option - price and frequency of sailings so people choose it over flying More grants (but less complicated and difficult to access grants) for households to encourage other forms of energy generation e.g. solar panels, electric vehicles Set up renewable energy sources for the whole island's electricity educate about how to do home growing of food Introduce repair shops and also sewing classes to reduce fashion waste

While I live in a seniors housing complex, we do not have "recycling" capabilities. Neither do the regular homes. Recycling is done by "driving items" to the centres. Not enough outlets for electric cars.

Investment in alternative energy supplies Reducing size of government management structures Provide no parking to civil servants

Make more government functions paperless

The Government need to have renewable energy with the aim to sell electricity to UK and Ireland, all Government vehicles electric, all Government buildings using solar etc. Due to the lack of interest in climate change on the island and the lack of desire to change. I think the Government should force the change onto people. i.e. considerably higher road tax for petrol/diesel cars, a higher tax (maybe higher VAT) for those using fossil fuels i.e. gas, electricity (until 100% renewable), petrol/diesel, make electric vehicles cheaper to buy by taxing other vehicle sales to make them less desirable.

SELECTED COMMENTS: ACTIONS FOR GOVERNMENT CAUTIOUS AND DISENGAGED

Subsidies to help people and companies make relevant changes

Making recycling compulsory

Hold fire as much as possible until alternative energy sources are proven to be effective. We really can't afford to lead the world.

The government cannot tackle climate change, it is the population that needs to do as much as possible.

Forget government policies that put onus on individuals and businesses as this just passes the cost and responsibility to others. Government should be making big plans for energy security. A government funded solar farm, wind farm etc. They should get behind Colas who are trying to bring cheap gas here.

Government is doing too little to introduce and support the introduction of non fossil fuel energy

Nothing the Isle of Man does will impact global climate change. However, the introduction of various policies will raise costs and effect the lifestyles of Manx residents negatively.

Using natural resources (e.g tidal) to generate electricity. A small nuclear reactor would provide everything but probably politically impossible. Consider using gas network, eventually, for hydrogen. Also continue with policy of including solar panels etc. on new government housing (and make it a requirement for private builds?)

Firstly the loM government cannot directly affect anything., however what it does need to do is ensure that the negative effects of climate change are mitigated to the greatest degree. Of particular concern should be the security of food supply (including greater self-sufficiency), perimeter infrastructure, internal infrastructure and the economy. Without an economy you cannot afford the above nor can you afford "green energy".

The island infrastructure lacks any wind, solar or wave (renewables) policy or impending policy. It is a disgrace really and we should be ashamed as we have these resources in abundance. Regretfully we are still struggling with sewage, in the 21st century!

Putting pressure on other governments and coordinating proper information on the real impacts of things. There is little point us harming our economy and prosperity by having green initiatives when China is still building coal fired power stations and the west continues to import from them. We need to invest in tidal (not wave) power. It is the only green source guaranteed to produce energy 24 hours a day. We should also look at hydrogen. Lithium batteries are bad for the environment and the lithium is mined in sweatshop environments so batteries are not the future.

The government should give people support to make changes if they want to, but should not force people change their behaviour as this only makes them resistant to making changes.

The Isle of Man doesn't need to do anything we are to small a country to make any difference, what the rest of the world does about it will come here anyway.

SELECTED COMMENTS: ACTIONS FOR GOVERNMENT

DOUBTFUL

Encourage residents to recycle. Encourage farmers to grow our food. Reduce products that have travelled many miles.

Stop following the narrative of climate change. Look at proper data from experts in the correct fields of science. Climate change occurs naturally. It we reduce waste, in all aspects of our lives and keep promoting that change, whilst encouraging people positively to do their bit, rather than with scaremonger propaganda, especially with our young population, that will, in my opinion, work wonders. Honesty is the best policy. Bringing people together off the back of true and meaningful information.

For the small contributions this little island could make is very little difference in the great scheme of things. To achieve these "net zero emissions etc" every country in the world would need to be doing their bit and sorry that will never happen .

Instead of wasting money on vanity projects such as electric buses money would be better spent on REAL problems such as crumbling water infrastructure to stop leaks and traffic plan to reduce congestion. I am against electric vehicles as a solution give the harmful extraction and manufacture requirements and the unknown problem of future battery recycling.

This survey is loaded to imply climate change is manmade only. It's cyclical and pollution is the real issue, not carbon emissions. Co2 is between 0.03 and 0.04% of the atmosphere and plants and fungi needs Co2 to flourish which then means our food chain flourishes. Pollution is the real issue. Runaway deregulated capitalism is the issue here, not breathing, farting or burning fossil fuels.

Be a centre of excellence for renewable project start-ups with our wind an tides also training our young people within these start-ups to go out into the world on a larger scale to implement . If it cant be done here it cant be done anywhere else.

Create a commercial environment to attract entrepreneurs and businesses which work towards encouraging changes which can have a global impact on climate change. At present, attempts for the Island to lead the way in becoming genuinely net zero are too expensive and ultimately futile. We have no spare money and the last £10m in the budget would be better spent on health care, social care, education or infrastructure than trying to prevent climate change.

Give decent grants for the likes of renewable energy and stop the concept of taxing and saying its for environmental reasons when it's not . The earth is just in a constant cycle of warming and cooling . We are now in a period of warming

There is no scientific evidence e.g IoM Ronaldsway Met Office, that the modest climate change over the last 70 years with 0.8c warming, some more rain and sunshine hours, an extended growing season and unchanged sea-level rise of 2mm/year has been anything but beneficial in the IoM

SELECTED COMMENTS: ACTIONS FOR GOVERNMENT

DISMISSIVE

Nothing. It has always changed and man made climate change is based on inaccurate information and lies. Co2 is essential to life. Too little and plant and animal life dies.

It's not climate change that's the problem here, it's pollution and poor maintenance of things like the groins that have just been left to rot. There is no money being spent on maintenance of buildings or keeping the place clean and tidy

Reduce the push for electric vehicles. We need to look at the whole life environmental costs of electric vehicles and the detrimental social impacts of in particular battery production overseas

It is a natural phenomenon and should be understood NOT tackled

Net Zero is the biggest hoax in the world at the moment. The sooner our government wakes up to this and stops this lunacy the better it will be for the island. The island is already bankrupt and this will make the financial situation even worse. We will all be colder poorer and unhappy. It's time for a referendum on net zero!!!

The carbon costs of transportation of food and fuel are so often overlooked and I think we need to be more self sufficient to reduce that. I personally don't think humans are contributing as significantly to climate change as other factors - the earth goes through cycles and all evidence would suggest we're in one of those cycles. Energy security is a higher priority for me before we look at reducing carbon.

Start by being honest to the people of the island that attempting to go net zero will impoverish us all with those on less income suffering the most. We need to stop this nonsense before it's too late

Plan for the predicted sea level rise

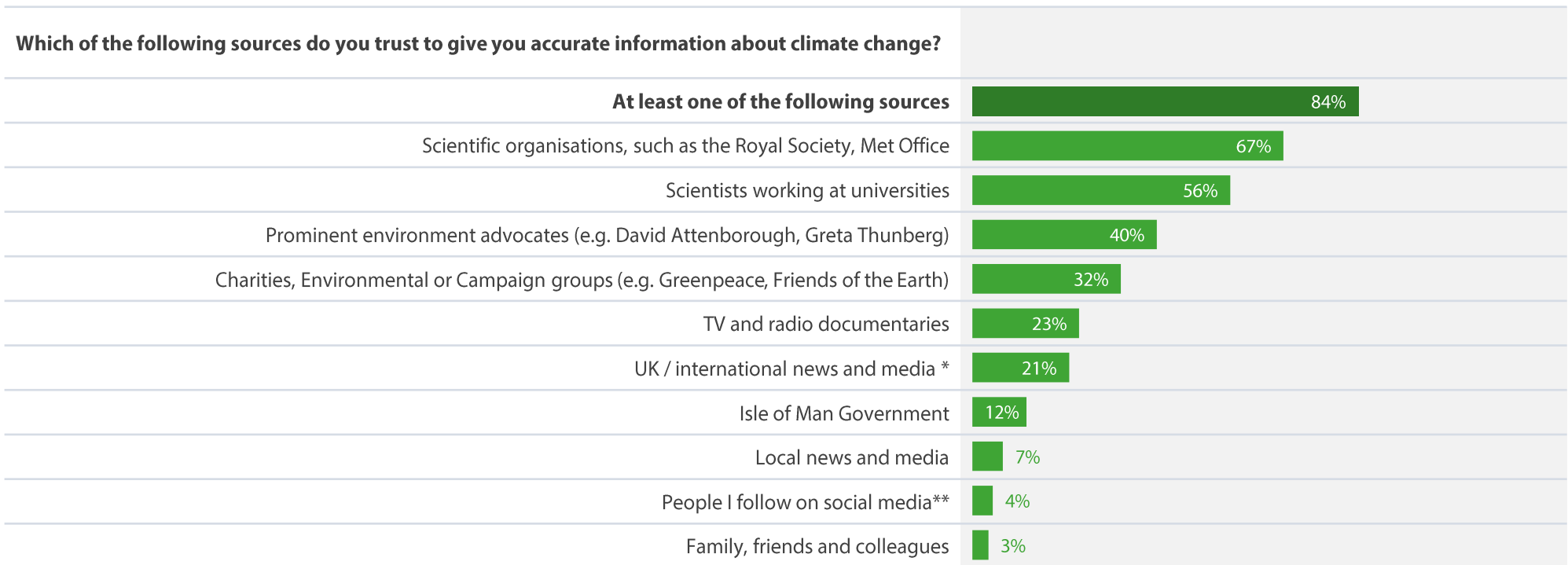
Nothing at all. Look at the science. It is a lie and a hoax. The climate has always changed. Concentrate on protecting our island and our liberty. Green energy is a lie as demonstrated by the electric bus being charged from a diesel generator. Seriously somebody in government with integrity needs to speak out against this nonsense.

Hydroelectric power could likely be effective for this island; we have reservoirs at high level sitting empty. Taxes should not be spent to encourage inefficient, more fashionable technologies. Effective renewable energy sources, or nuclear fusion, can be adopted when they are developed and become cost effective.

TRUSTED SOURCES OF INFORMATION ON CLIMATE CHANGE

All respondents were asked which sources of information they would trust to provide accurate information on climate change, and were asked to select all that apply.

- Over 80% of people said they would trust one or more of the sources asked about.
- Scientific organisations were the most trusted source, followed by 56% of people who selected scientists at working at universities.
- Less than 2 in 10 people said they would trust the Isle of Man Government to provide accurate information on climate change.



GETTING INVOLVED

All respondents were asked if they would like to get more involved in climate action within the Isle of Man.

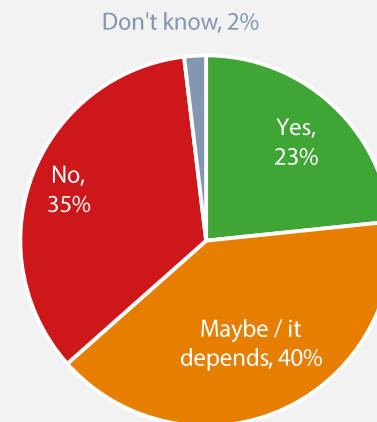
- 23% of people indicated they would, and a further 40% selected “maybe / it depends”.

Respondents who were more interested in getting involved were more likely to be:

- “Alarmed” about climate change (54% compared to 15% who were “Concerned” and less than 5% of the other groups).
- Aged 16-39 or 40-64 (33% and 25% respectively, compared to 12% aged 65+)

Those who selected “maybe / it depends” were more likely to be “Concerned” about climate change and female rather than male.

Would you, personally, like to be more involved in climate action within the Isle of Man?



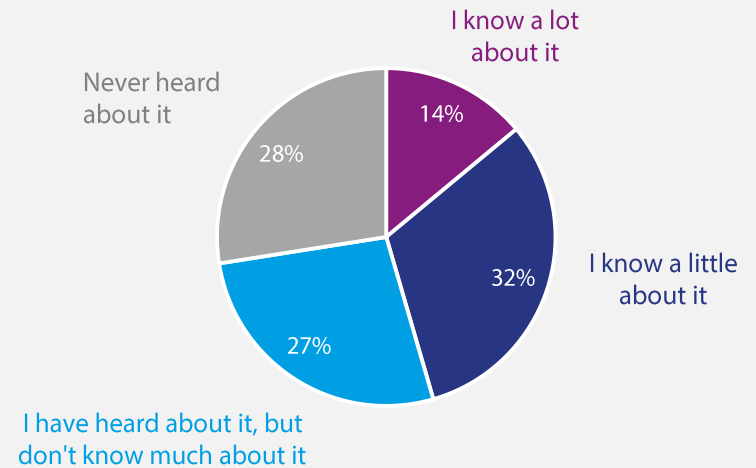
ISLE OF MAN CLIMATE CHANGE PLAN 2022-2027

All respondents were told: “The Isle of Man Government published a Climate Change Plan 2022-2027 in July 2022. It sets out the actions Government must take to cut emissions over the next five years so the Island remains on track to be net zero by 2050.” and then asked if they had seen, read or heard about the Climate Change Plan.

Almost three-quarters (72%) indicated they were aware of the plan, though only 14% know a lot about it. Of the remainder, 32% said they know a little about it, and 27% said they had heard about it but don't know much about it.

People who were “Dismissive” about climate change were the most likely to say they know a lot about it (36% compared with less than 20% in the other segments).

Have you seen, read or heard about the Isle of Man Government's Climate Change Plan 2022-2027?

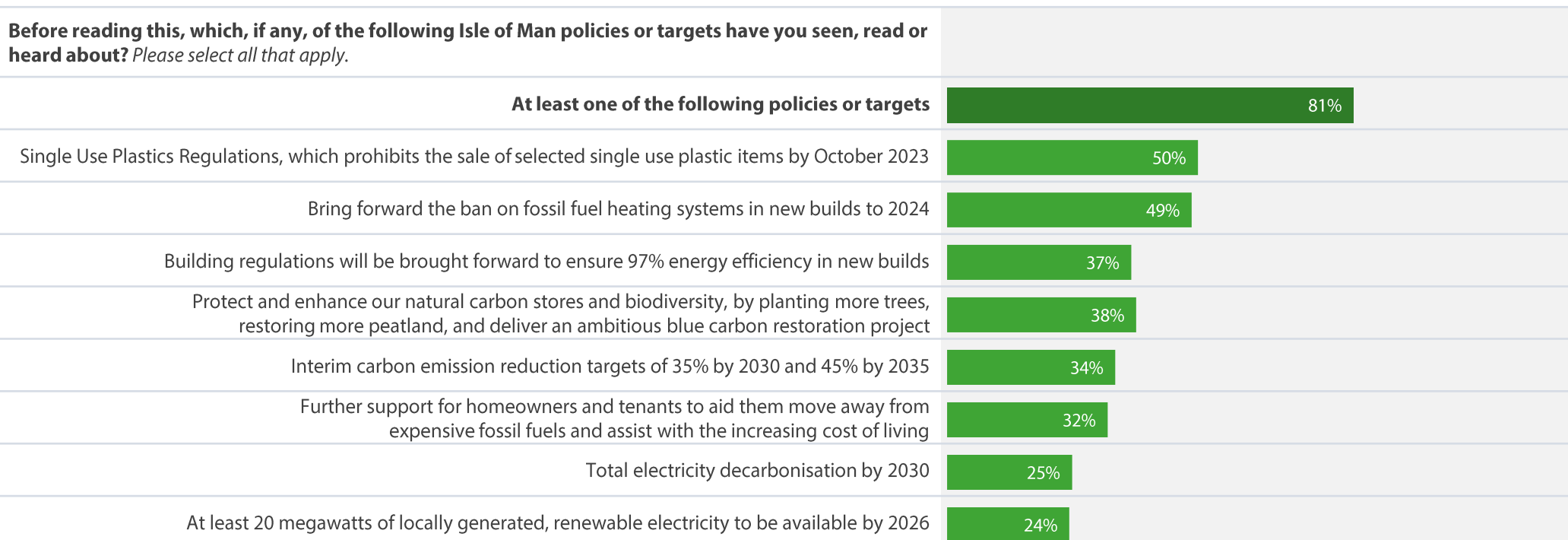


ISLE OF MAN CLIMATE CHANGE POLICIES AND TARGETS

All respondents were shown a list of eight Isle of Man policies or targets and asked to select which ones they had seen, read or heard about.

81% of people were aware of at least one of the policies/targets they were shown. Around a half were aware of the Single Use Plastics Regulation and the ban on fossil fuel heating systems in new builds was brought forward to 2024.

There were no notable differences in awareness by climate change segment.



EVERYDAY BEHAVIOURS



BEHAVIOURS IN EVERYDAY LIFE

Respondents were asked to indicate which, if any, of the behaviours they do and whether climate change is a motivation for the behaviour.

The graphs below show the percentage of people in the population who selected each of the options.

	Thinking now about your everyday life, do you do any of these things?	Which, if any, of these behaviours do you do primarily because it helps to limit the impact of climate change?
One or more of the following	96%	75%
Donate unwanted items to charity	82%	40%
Minimise the amount of energy you use at home	76%	48%
Avoid / minimise throwing away food	76%	37%
Recycle items	75%	51%
Reuse items / upcycling	62%	35%
Consider energy efficiency of products/appliances*	55%	38%
Buy pre-loved / second-hand items	56%	29%
Buy fewer items / reduce my consumption	52%	32%
Choose to walk, cycle or use public transport more**	42%	24%
Avoid / minimise air travel	40%	24%
Home composting of garden and/or kitchen waste	34%	9%
Avoid / eat less meat	33%	16%
Only eat, or mostly eat, a plant-based diet	19%	17%
Avoid / eat less dairy produce	15%	7%
Drive an electric or hybrid car	14%	12%

CHANGING BEHAVIOUR

Respondents were encouraged to think about the behaviours that they don't currently do, or don't do as much as they'd like and asked: "What, if anything, would encourage you to change your lifestyle? For example, how could your employer, your local authority or the Isle of Man Government support you in this change?"

The range of views expressed have been illustrated by including a selection of the quotes. These are presented on the following two pages, and demonstrate differences by climate change segment.

People who are 'Alarmed' about climate change were more likely to focus on changes they could make which would reduce the carbon emissions for getting around the island, with suggestions relating to improved public transport, incentives for electric vehicles, and also safer roads for cyclists. People who are 'Concerned' also suggested improvements to the bus network or introducing cycle lanes could help. They were also supportive of initiatives to improve recycling. This segment were also the most likely to indicate economic incentives would be a nudge and that they would be more likely to make the change if there is a financial benefit for doing so. Examples cited home improvement grants.

Respondents who are 'Cautious', and 'Doubtful' had some suggestions about what could be done, including initiatives that would make recycling easier. There were also some respondents who would welcome a financial incentive or reward for changing their behaviour, however, there were others who argue that support for 'green' initiatives would be a waste of tax payers money. While the views expressed by those who are 'Dismissive' about climate change were more likely to reiterate their view that any changes to the climate are not the man-made and/or that they do not see a role for the Isle of Man Government in trying to change people's behaviour.



SELECTED COMMENTS: CHANGING BEHAVIOUR ALARMED & CONCERNED

Make it easier to get planning for carbon neutral changes to homes .

I'm retired and I ration use of my car but would use my bus pass more if there was a better service between Glen Maye and Peel, and more regular return from Peel.

I don't have a compost bin. Kerbside recycling would prevent me using my car to go to the civic amenity site. The government should ban plastic cutlery in food outlets.

Provide/incentivise energy generators, to supply electricity from renewables. Simple non means tested grants for heat pump and solar panel installation. More public transport, including banning cars from centre Douglas.

lower the cost of organic products/ produce. free public transport. better recycling of items made from plastic.

Have more options on the island to reduce the need for packaging. In shops it's still difficult to buy produce, locally, without included packaging (plastic in most cases).

Drive a petrol car, can't afford to buy an electric car at the moment. At work I drive a government car, it uses diesel. Government changing all vehicles to electric would help although expensive to begin with.

I don't cycle largely because I don't feel safe on the roads Live in an old house with oil-fired heating which is too expensive to change radically without substantial financial support Lack of local bus services make it difficult to use the car less

Money is increasingly tight; while people are focused on personal survival they will not focus on long term issues like climate change. Either take money out of the equation. Make the isle of man a cash free country. Or incentivise/ remunerate ethically.

Support bus travel, reduce fares to £1 everywhere

Less packaging on food products and other purchases, more recycling if bin collections would take it

Better Local authority to offer curb side recycling to collect items for recycling as can not always get to the amenity sites or recycling bins are full. Tax relief on house improvements

Proper recycling on the Island

Higher tax on oil or coal-based products Switch to a road-usage tax Better cycle tracks

Solar panels if it was easier to achieve. Electric car - more electric points Recycle more clothes if they collected (used to years ago) Recycle more furniture if it was collected

My biggest challenges are around food (supermarkets are well known for causing many climate-negative problems, such as deforestation, decimating diversity, destroying habitats and soil degradation amongst many other issues as part of the global industrialised food chain) and car usage. I would like to reduce my dependency on my car, but although some steps have been made to encourage active travel, the IOM is strongly geared towards motor vehicles and I don't feel safe cycling, or even walking on many roads. While ordinary people can make changes that will help, all governments, the IOM included need to stop putting the onus on the public and start looking at and acting on the structural, systemic societal changes that are needed to make any real and lasting impact

Assist in making my home more energy efficient

I would ride my bike more if I felt safer on the roads.

Boiler upgrade scheme so that I could afford to remove my gas boiler and install a heat pump instead.

SELECTED COMMENTS: CHANGING BEHAVIOUR CAUTIOUS, DOUBTFUL & DISMISSIVE

Already have a minimalistic life style. Government/local councils should lead by example and abandon vanity projects

Make the grants process simpler. I applied for a grant to improve energy efficiency in my home and was approved, but the red tape surroundings actually seeing some support was so confusing I gave up.

If bus fares were subsidised I would use them more.

Encourage more working from home to eliminate unnecessary travel

The harder an individual tries to limit the effect of climate change the more expensive and less efficient it becomes. Electric cars and heat pumps are not as efficient and more expensive yet there are very limited subsidies to support such ventures. To my mind even the IOM Climate Action Plan sets unrealistic and unachievable targets which will cost the consumer dear and is set up to fail particularly given the current cost of living crisis.

Better recycling programs

Pay me directly to change and I might consider it. Not money in the form of subsidies. Direct rewards.

Issuing free compost bins would encourage me to do home composting and grow more of my own food.

Actually collect recycling and not use it as an excuse to reduce bin collections.

Money saving or earning from recycling.

I would love to use public transport more but the frequency and routes are not extensive enough.

Nothing my actions are all to save money and my own personal resources.

Honesty from IOM Government and the mainstream media. We can't change for the better unless the pathway is clear of lies and gas lighting. This survey is loaded to imply climate change is manmade only. It's cyclical and pollution is the real issue, not carbon emissions.

Less interference from government in our lives, leave us to make our own decisions.

Offer free recycling collection island wide. Stop promoting buying new 'green vehicles' and repair / maintain what we already have. Both private and public.

Less fuel duty , reduce cost off boat fares, stop pay increases for parking in public owned airport, stop this expensive net zero nonsense!

Climate change caused by man is a complete lie. There is absolutely no scientific evidence for it whatsoever. Carbon is not a poison. It is completely necessary for the growth of all living things. It's not the governments place to change my behaviour.

ON-ISLAND TRAVEL



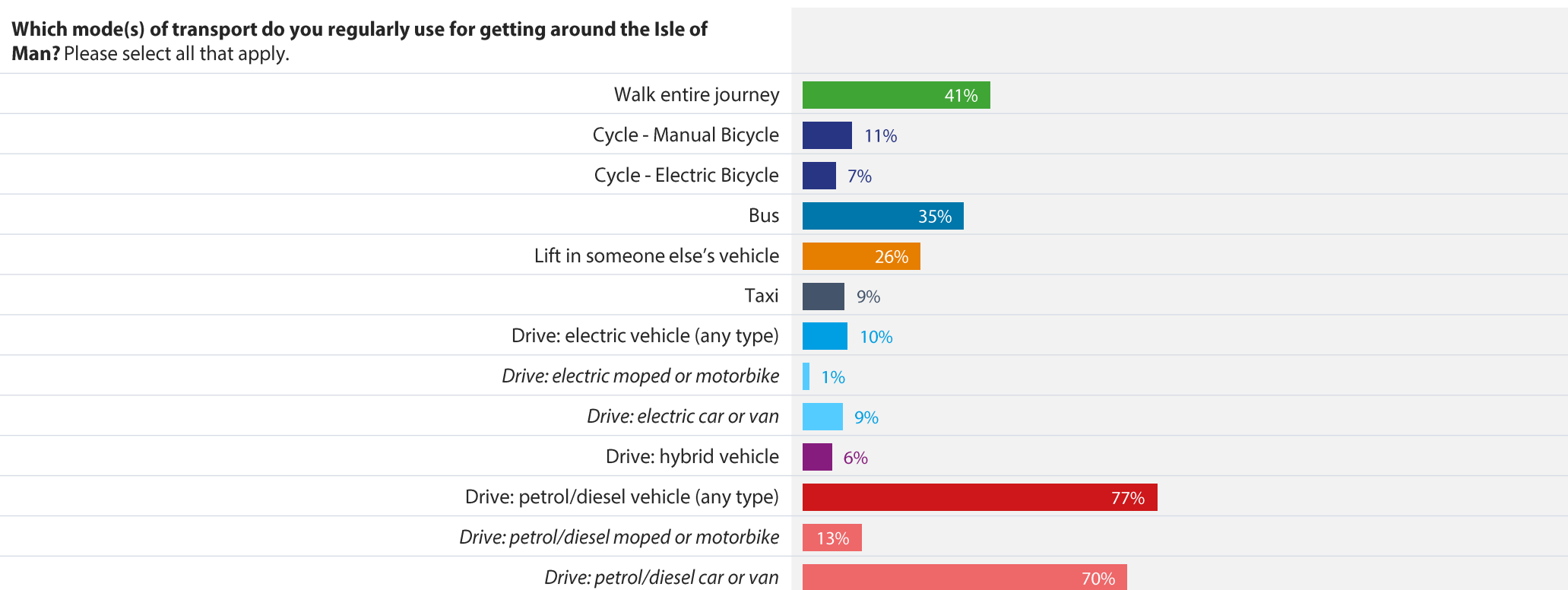
MODES OF TRANSPORT REGULARLY USED

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

The most frequently selected mode of transport was to drive a petrol or diesel vehicle. Survey respondents were able to indicate whether they use a moped/motorbike or a car/van.

The percentage of people who indicated they walk the entire journey was 41%, followed by 35% who said they use the bus and 26% who have lift in someone else's vehicle.

Which mode(s) of transport do you regularly use for getting around the Isle of Man? Please select all that apply.



WOULD IT BE POSSIBLE FOR YOU TO DRIVE LESS?

Respondents who indicated they regularly drive (any type of vehicle) were asked “Taking into account your circumstances, how easy or difficult would it be for you to drive less often than you currently do? This might mean walking, cycling or taking the bus instead.”

Most respondents indicated it would be very or quite difficult to drive less often than they currently do. Only 10% of people indicated it would be quite or very easy to drive less.

Respondents were able to explain their answer. Some people who explained that they already try to limit their use of the car, but the majority of the comments highlighted the limitations of the public transport for the journeys they take (e.g. routes and/or timetable are not convenient). Some people noted they have health reasons which would make it more difficult for them to use other modes of transport. There were also a few comments who noted practical considerations involved in transporting young children or elderly relatives.

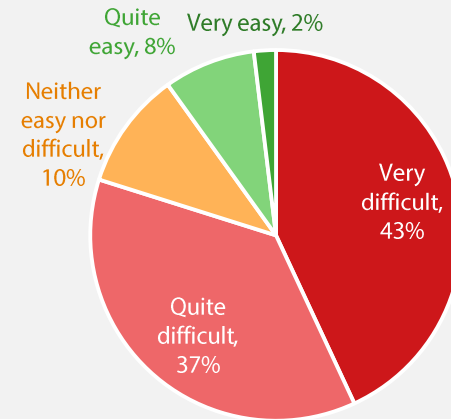
All respondents were asked: “What, if anything, should the Isle of Man Government do to encourage people in the Isle of Man to drive less often than they currently do (and potentially walk, cycle or take the bus instead)?”.

Written comments highlighted wide ranging views, which have been illustrated using quotes that have been grouped by climate change segment (see next two pages).

People who are ‘Alarmed’ and ‘Concerned’ about climate change tended to suggest improvements to public transport – extending the routes, improving the frequency and reducing the cost of travel (including those who suggested free bus travel). There was some demand for changes that would make cycling or walking safer. There were also suggestions that would increase the cost of using a car – either by increasing parking charges or fuel taxes.

People who are ‘Cautious’ and ‘Doubtful’ offered some suggestions, though they were more likely to highlight reasons why people need to drive or would find it difficult to drive less. While those who are ‘Dismissive’ tended to emphasise individual choice and personal freedom.

Taking into account your circumstances, how easy or difficult would it be for you to drive less often than you currently do?



SELECTED COMMENTS: DRIVING LESS ALARMED & CONCERNED

Make public transport free to everyone

Bus station in Douglas with wifi, heat and shelter, free bus travel

Work from home when possible More cycle paths Maintain all walking paths

Public transport should be cheaper Improve the bus service. Create a financial incentive for doing less mileage in your car.

Put prices up in car parks. Enforce parking restrictions in all towns not just Douglas.

Most bus users are on free passes, maybe all bus trips could be free for everyone. Buses are only useful if you can make all the journey on a single bus (ie no changing buses).

Higher fuel tax on petrol and electric vehicles. A better app for planning bus and train routes; plus a road usage tax

Limit petrol car ownership per household Offer an easy ride on circuit bus service Create easy walking routes with solar lighting into and out of Douglas

Build up a widespread efficient island wide transport system that's affordable to everyone. For example shuttle bus to airport, as it's impossible to get there at 0500 without using a car for a flight, so reliance on taxi or car, same nightmare for late evening flights

Stop promoting motorsport and the cultural attitude here that it's not possible to have leisure / fun without burning fossil fuels!! ... If Government want to take climate change seriously, then they've got to stop TT and discourage motorsport generally!!

Loads more safe cycling routes Bus services that don't just serve town centres and are frequent even in the evening Improve footpaths and pedestrianised more places

Less driving is not an option for a economy such as the Isle of Man. Better road infrastructure to reduce traffic delays and improve traffic flows would benefit the environment much more

Make public transport free and charge more for parking

Bus services that leave remote areas in time to get to college or jobs on time

Park & ride for workers School busses for primary children as parents are too rushed / lazy to walk children to school

The bus service is great on main routes, but the thought of doing my shopping, then having to walk for 20 minutes to the bus stop and having the same trek when I get off the bus is off-putting.

Improve public transport, especially to outlying areas, reduce public transport costs, make parts of Douglas, Ramsey, Castletown & other larger towns vehicle free, charge more for parking

More public transport options available and better routes including all buses attending high traffic routes such as the business park or the hospital if they are going to Douglas

Very difficult to persuade people to use something other than their cars for commuting, shopping, school run etc. Extensive and safe cycle routes and safe cycle parking in the larger towns might help to a certain extent.

Reduce the cost of public transport so that it does not make financial sense to drive and park in town. A material difference would attract people to taking a bus instead. More bike lanes. More pedestrianised parts of town etc.

Bus routes need to be circular and not be mostly driven from Douglas hub, a number of UK cities have fixed fares that work well and this and day tickets should be developed better

SELECTED COMMENTS: DRIVING LESS CAUTIOUS, DOUBTFUL & DISMISSIVE

They shouldn't, but better public transport would help.

Encourage working from home.

Make Douglas a congestion zone!

Better services! More frequent, or even just existing regularly, at times that are useful to get to work!

Public transport doesn't 'work' for us

Rural communities are difficult to accommodate with regard to bus transport so private vehicles will always be necessary for many people. Eg older people may not be able to cycle and collecting shopping etc

I don't think that should be the focus - public transport will never outdo the convenience of a car. Focus should be on supporting switch to zero emission vehicles.

I don't think they should encourage people to drive less

1) Move on with legalisation of electric scooters, and allow them to be carried for "last-mile" transport on buses and trams 2) Move on with increases to the legal threshold for wattage of electric bicycles, as noted in the DOI consultation paper on electric transportation 3) Remove VED on electric motorcycles and mopeds. 4) Improve cycle routes - complete the bridges over Peel Road and Glen Wyllin, resurface the Northern railway route and compulsorily purchase the old railway line from Sulby to Ramsey. 5) Open cycle paths to electric scooters and create dedicated cycle/EV routes into town centres (with minimum impact on arterial traffic routes). 6) Consider closure of majority of heritage rail/tram routes and conversion to walking/cycle/EV infrastructure.

Drop bus fares and give a better service to more remote areas.

Nothing, there are too many hills and the weather restricts not using a car for 3/4s of the year. By trying to reduce car usage all the government are doing is harming local businesses, they have reduced parking so people shop online.

I don't think there is too much government can do. Could reduce fare to £2 as they did before. It's too hilly in Isle of Man to cycle. Not practical to walk everywhere.

People should be able to make their own mind up how they get around this island. It's not the government's job to tell people what to do you work for us

Properly thought out cycle lanes, which would encourage safe cycling. Prohibit cyclists on pavements which would encourage safe walking.

Don't waste money on electric buses

Improve rail transport, improve electric buses. Limit single person per journey travel

Build a modern electric tram system using the old railway lines. Stop clogging up the roads with Lycra clad heros

I really don't see it as the Government's job to limit the personal freedom of individuals or to dictate how they should choose to travel. It's either legal or it isn't. Leave the public alone to use their own judgement.

Encourage use of electric scooters and end any legal limitations on them.

Not dramatically increase the island population chasing GDP (rather than quality of life) forcing more people to commute

I don't see how this is possible without forcing people to move out of the rural areas into urban ones and building roofs over cycle paths so that people don't get soaked when the weather is wet. In addition, all fresh provisions / produce and supplies might need to be delivered via some kind of communal service. The elderly and less able members of our society would struggle.

ENERGY USE AT HOME



PRIMARY MOTIVATION TO SAVE ENERGY

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

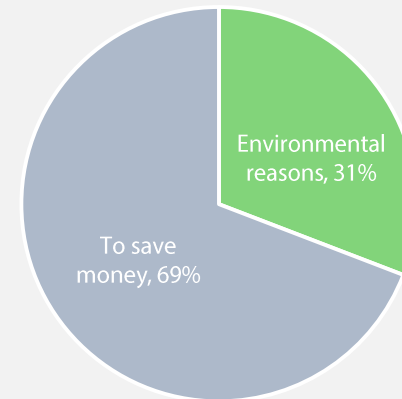
Over two-thirds (69%) of people in the latest survey said their primary motivation for saving energy would be to save money, while 31% said it would be primarily for environmental reasons.

As you might expect people who are “Alarmed” about climate change were the most likely to select environmental reasons (64% compared to 25% who are “Concerned” and 5% or less in the other segments).

People aged 16-39 and 40-64 were more likely to be motivated by environmental reasons than those aged 65+ (37% and 32% respectively compared to 24% aged 65+). Females were also more likely to be motivated by environmental reasons (35% vs 27% of males).

There were also differences by household income: 22% with a household income that is less than £40,000 were motivated by environmental reasons compared to 34% with household income between £40,001 and £80,000 and 41% of people with household income over £80,000.

Which of the following would be your primary motivation for saving energy? Please select ONE.



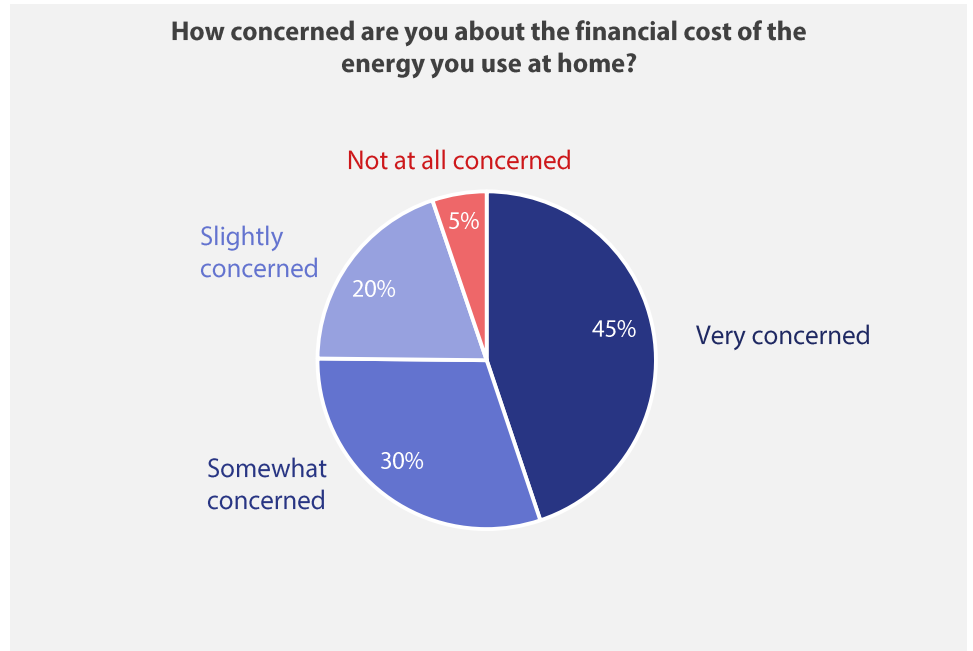
CONCERNS ABOUT ENERGY USE AT HOME

Respondents were asked how concerned they are about the financial cost of the energy they use at home.

45% respondents said they very concerned about the financial cost of the energy they use at home.

There were no notable differences by climate change segment, age group or gender, however there were some differences by household income:

- 53% of people with a household income up to £40,000 and 45% with a household income between £40,001 and £80,000 were very concerned compared with 30% with a household income over £80,000.



LOW CARBON HEATING SYSTEMS



KNOWLEDGE OF LOW CARBON HEATING SYSTEMS

All respondents were asked to indicate how much they knew about different types of low carbon heating systems.

The majority of respondents had heard of the different types of low-carbon heating systems, though most people indicated they don't know much about them or know only a little:

- 85% had heard about energy-efficient electric boilers, though only 19% said they knew a lot about them
- 87% had heard about biomass boilers, though only 18% said they knew a lot about them
- 91% had heard about air source heat pumps, though only 29% said they knew a lot about them
- 89% had heard about ground-source heat pumps, though only 25% said they knew a lot about them
- 73% had heard about hybrid heat pumps, though only 13% said they knew a lot about them

There were no notable differences in knowledge by climate change segment or by age group. However, the sub-group analysis showed that males were more likely than females to say they know a lot about each of the low carbon heating systems asked about. There were also some differences by household income, with those on incomes over £80,000 more likely than those on incomes up to £40,000 to know a lot about air-source and also ground-source heat pumps and about energy-efficient electric boilers.

How much do you know about the following low carbon heating systems?

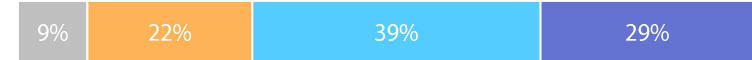
Energy-efficient electric boilers



Biomass boilers (i.e. wood pellet / log-burning)



Air source heat pumps



Ground source heat pumps



Hybrid heat pumps (i.e. heat pump and boiler combined)



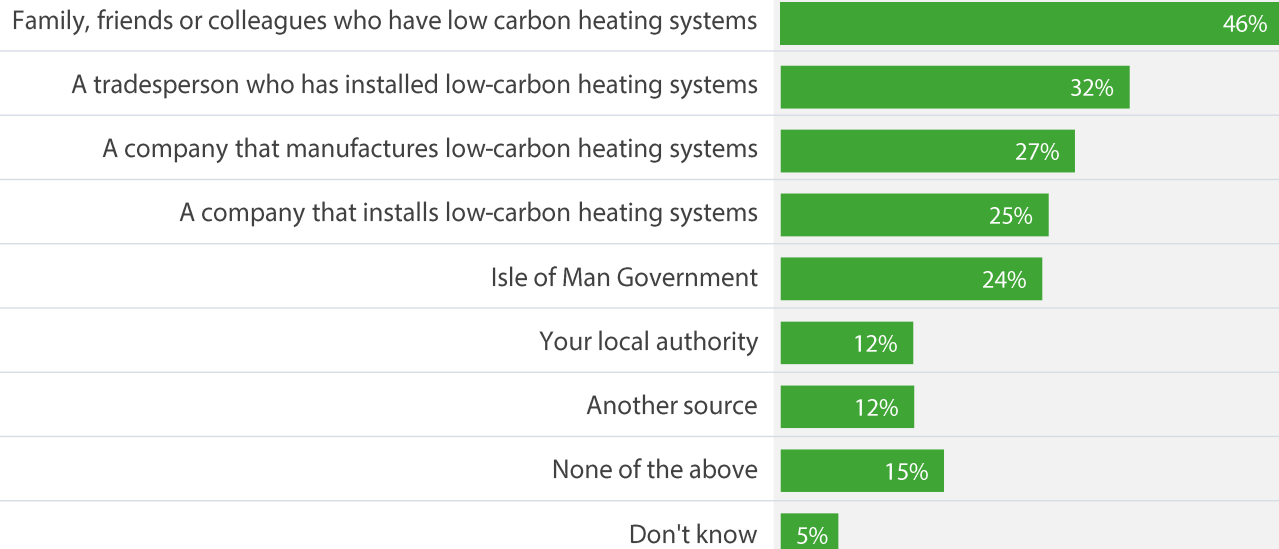
■ Never heard of it ■ Heard of it, but don't know much about it ■ A little ■ A lot

TRUST FOR INFORMATION ON LOW CARBON HEATING SYSTEMS

All respondents were asked who they would trust to provide them with accurate information about low carbon heating systems.

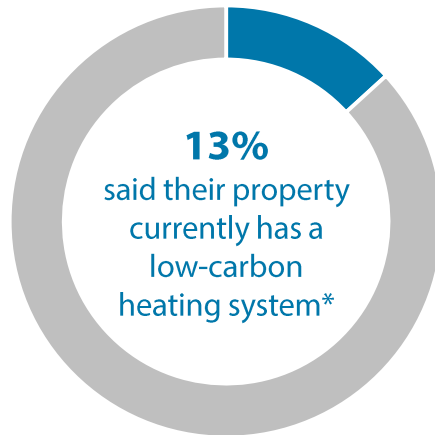
- 80% of people would trust one of more of the sources asked about, 15% said none of the above and 5% didn't know.
- Family, friends or colleagues who have low-carbon heating systems were the most trusted source and were selected by 46% of people. Between a quarter and a third of people selected a tradesperson with experience of the low-carbon heating systems, a company that manufactures low-carbon heating systems, and a company that installs low-carbon heating systems.
- 24% indicated they would trust the Isle of Man Government to provide accurate information about low carbon heating systems.

Who would you trust to provide you with accurate information about low carbon heating systems? Please select all that apply.



ALREADY HAVE A LOW CARBON HEATING SYSTEM

All respondents were asked if their property has a low-carbon heating system.



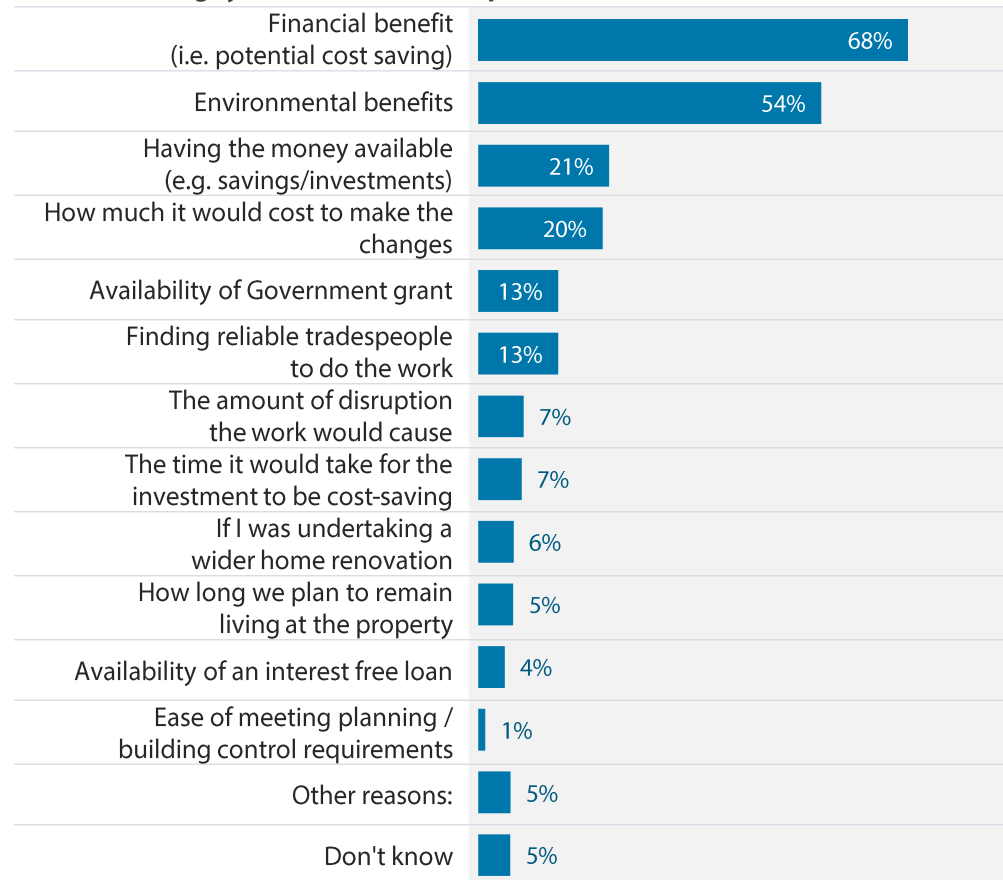
This includes

- 7% who have an energy-efficient electric boiler, 3% who have a biomass boiler, 4% who have an air source heat pump and 1% who have a hybrid heat pump (a respondent may have more than one).

The graph on the right shows the most important considerations selected by respondents who indicated they were responsible for the decision to install a low-carbon heating system (includes a few who are currently installing one).

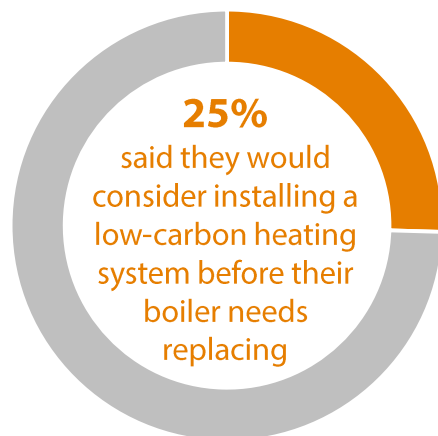
- More than half of this group selected the financial benefit (i.e. potential cost saving) and the environmental benefits. Around 1 in 5 selected having the money available and how much it costs to make the changes.
- 13% indicated the availability of Government grant was an important consideration.

What were the most important considerations in your decision to install a low carbon heating system? Please select up to 3 reasons



WOULD CONSIDER A LOW CARBON HEATING SYSTEM

Homeowners who do not already have a low-carbon heating system were asked if they were considering switching to one.



This includes:

- 7% who are currently considering switching to a low carbon heating system; 12% who are likely to consider one in the next 3 years; and 7% who said not in the next 3 years, but they are likely switch before their boiler needs replacing.

Homeowners who would consider switching were asked which are or are likely to be the most important considerations.

- The financial benefit and the environmental benefits were each selected by around two-thirds of this group. Half in this group said it would depend on how much it cost to make the changes.
- 43% indicated having a Government grant would be an important consideration.

Which are, or are likely to be, the most important considerations when deciding to install a low carbon heating system? Please select up to 3 reasons

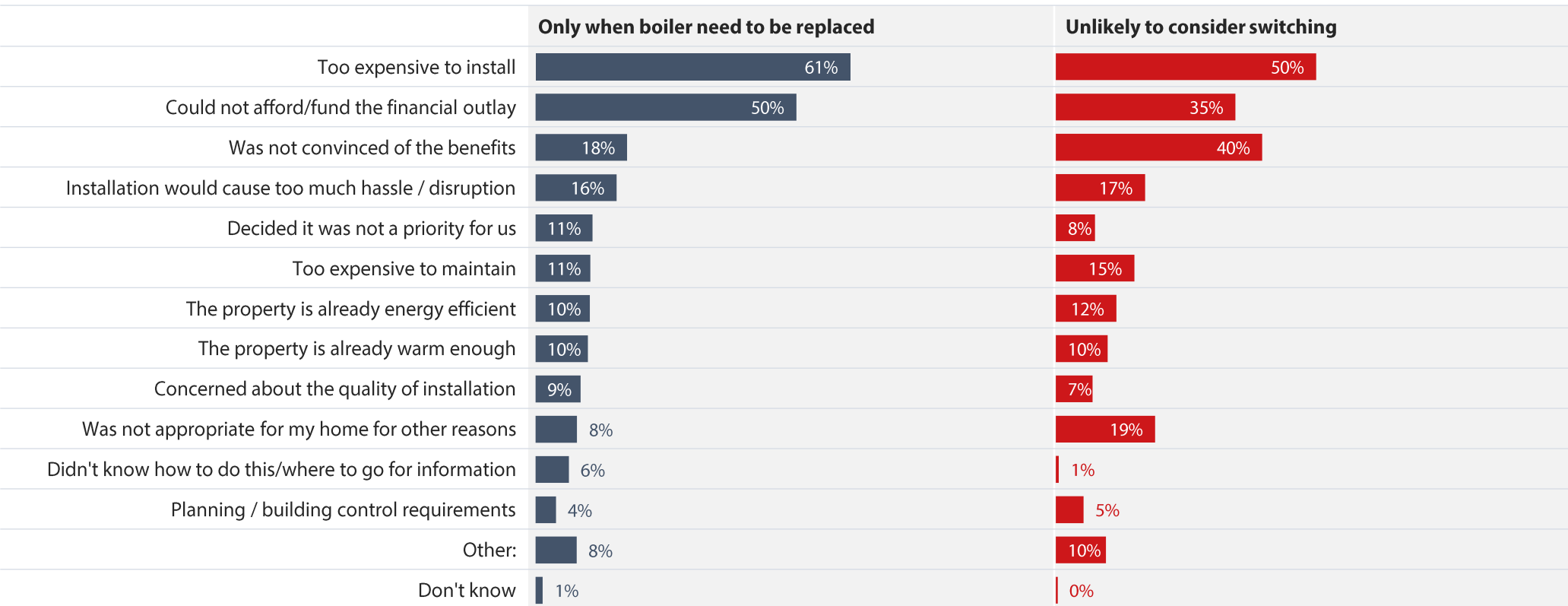
Financial benefit (i.e. potential cost saving)	68%
Environmental benefits	67%
Having the money available (e.g. savings/investments)	36%
How much it would cost to make the changes	50%
Availability of Government grant	43%
Finding reliable tradespeople to do the work	34%
The amount of disruption the work would cause	16%
The time it would take for the investment to be cost-saving	29%
If I was undertaking a wider home renovation	2%
How long we plan to remain living at the property	20%
Availability of an interest free loan	18%
Ease of meeting planning / building control requirements	20%
Other reasons:	4%
Don't know	0%

REASONS WHY UNLIKELY TO CONSIDER A LOW CARBON HEATING

43% of homeowners who do not have low-carbon heating said they would only consider switching to a low-carbon heating system when their boiler needs replacing and a further 23% said they would be unlikely to consider switching.

Respondents who said they would be unlikely to consider switching were asked about the reasons why. The cost of installation and being able to afford the switch were frequently selected. In addition, 40% of those who were unlikely to consider switching indicated they were not convinced of the benefits.

What are the main reasons why you are unlikely to consider installing a low carbon heating system (before your boiler needs replacing)? Please select up to 3 reasons





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