

Market Research Report for:

Clean Heat Project Survey

Prepared for:

Environment Canterbury

July 2005

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1. Background

Opinions Market Research Ltd was invited by Bill Simpson, Communications Manager, Environment Canterbury to carry out research for a survey to measure awareness of the Clean Heat Project among the public in Christchurch.

The 'Clean Heat Project' is an incentives and assistance project that assists residents in Christchurch using solid fuels for home heating to change to cleaner forms of heating. The Clean Heat Project was developed as a result of new rules for home heating proposed in the Natural Resources Plan.

2. Objectives

A citywide advertising campaign was to start on 2 July 2005 and the research was required to measure awareness of the Project before and after this campaign and to measure the impact of the campaign.

This report outlines the first stage, being the benchmark survey – i.e. pre-campaign.

3. Methodology and Sample Structure

A telephone survey was conducted among a representative sample of 400 Christchurch residents. The sample was representative by age, gender and ward as defined in the 2001 Census. The margin of error associated with a sample of 400 is $\pm 4.9\%$.

Interviewing was conducted between 23 May and 1 July 2005.

The following table shows the sample structure achieved.

Base: Total Sample: 400	Census 2001	Clean Heat Pre Campaign
	%	%
Gender		
Male	48	47
Female	52	53
Age		
15-24	19	19
25-39	28	28
40-59	32	32
60+	22	22
Ward		
Burwood/ Pegasus	16	16
Fendalton/ Waimairi	16	16
Ferrymead/ Hagley	17	17
Heathcote/ Spreydon	16	16
Papanui/ Shirley	17	17
Riccarton/ Wigram	18	18
Working Status		
Full/ Part time paid employment	59	63
Not in paid employment	41	38

4. Summary of Findings

4.1 Most Important Environmental Problems Facing the World Today

The first most often mentioned problem facing the World today was pollution in general (23%). Global warming received 19% of mentions, air pollution 11% and rubbish/ litter/ human waste 10%.

When all aspects of pollution are combined (general, air and water), pollution was mentioned first by 41%.

Aggregated responses showed pollution in general and global warming/ climate change/ greenhouse effect received the most amount of mentions (30% each).

A quarter specified air pollution (smog) and almost a fifth rubbish/ litter/ human waste.

Combined responses of pollution totalled 76%.

4.2 Environmental Issues Facing New Zealand

Six of the eight issues suggested to respondents received a mean score of 5 or more indicating these issues are considered serious. These were:

- Emissions from motor vehicles
- The hole in the ozone layer
- Global warming/ climate change/ greenhouse gases
- Waste disposal e.g. rubbish, litter, human waste
- Pollution of lakes and rivers
- Air quality.

Water availability achieved a mean score of 4, indicating the issue is felt to be less serious and least serious of all was radiation from cell phones and cell phone sites with a mean score of 3.

4.3 Willingness to Take Steps to Save Power

A quarter to a half claimed to already be taking steps to save power in some form or another. Over half claimed to turn off lights or tell others to turn them off.

A third or more in each case stated they would be willing to take the steps suggested. The exception was stop using wood or coal for home heating, where just 21% stated they would be willing to do this.

Overall, few stated they were not willing (rated 1 or 2) to take the steps suggested (between 3% - 21%). The exception to this was installation of a solar water heater where 38% stated they would not be willing to do this, however, 40% would be willing.

4.4 Advertising and Information about Wintertime Air Quality in Christchurch

Just over half were aware of advertising about wintertime air quality in Christchurch and just under half were not.

Most recalled information/ advertising about smog/ smog levels/ air quality/ pollution. Whilst there were mentions of cleaner burning heat forms and banning of open fires, there were no spontaneous mentions of the 'Clean Heat Project'.

Most (69%) claimed to have seen/ heard this information/ advertising in The Press. A fifth or fewer mentioned other sources including TV, radio and brochures.

When prompted about the 'Clean Heat Project', 39% claimed to be aware of this. Just under half of these stated the project was about subsidies for changing/ replacing open fires and log burners and a further 38% thought it concerned converting to non polluting heating (with no mention of subsidies). Other responses included insulating your home and clean burning.

4.5 Air Pollution in Christchurch

Responses to the main cause of air pollution in Christchurch were:

- Vehicles 46%
- Home heating 41%
- Industry 9%
- Other 4%
- Don't know 1%

Those aged under 25 years and those aged 60+ years more often stated vehicles as the main cause of air pollution in Christchurch. Those aged 25 – 59 were more likely to state home heating as the main cause.

When asked what proportion of air pollution in Christchurch is caused by home fires, the entire range of responses was given – from 0% to 100%. The mean amount stated was 47% .

60% felt that air pollution in Christchurch contributed to respiratory/ lung problems and 58% felt it caused/ aggravated asthma.

- Level of agreement was highest for the statements
 - 'insulating my home will reduce heating costs'* (97% agreed)
 - 'I believe air pollution in Christchurch is a problem'* (95% agreed) and
 - 'air pollution is bad for my health'* (89% agreed).
- *'I think open fires and log burners over 15 years old should be banned'* had three quarters agreeing and a quarter disagreeing.

- Opinion was divided as to whether ‘90% of air pollution in winter is caused by home fires’ – 41% of respondents agreed and 54% disagreed.
- ‘The amount of wood I personally burn won’t make a difference to pollution overall’ attracted stronger levels of disagreement (37%) than agreement (21%), although 42% of respondents claimed this was not applicable to them.
- Few (22%) felt the appearance of the air in winter in Christchurch is acceptable.

4.6 Home Heating

Currently a third claim to use an electric heater and a similar proportion a log burner. Almost a fifth use a heat pump or a gas heater. Other forms are used by 3% each or less.

Of those currently using a log burner or open fire, a quarter to a third would convert if other sources were cheaper or if there were financial help. A fifth claimed that nothing would encourage them to change.

A third had changed their form of home heating in the past three years. Of these, a quarter to a third had changed from open fires, log burners and electric heaters. Just under half of those who had changed had opted for a heat pump with just under a fifth changing to a log burner.

Just 15% of respondents were considering changing or upgrading their home heating in the next 12 months. Of these, most were considering changing from an electric heater or a log burner. Over half of those considering changing felt they would convert to a heat pump.

4.7 Conclusion

Pollution and global warming/ climate change emerged as the most important environmental issues facing the world today.

The issue of air quality in New Zealand was not felt to be quite as serious an issue as some other, for example emissions from motor vehicles, the hole in the ozone layer and global warming/ climate change.

Most respondents claim to already take steps to save power or would consider doing so.

Whilst over half claimed to have seen or heard information/ advertising about wintertime air quality in Christchurch, there were no spontaneous mentions of the ‘Clean Heat Project’. Once prompted 39% claimed they were aware of the project and of these 45% thought it was about a subsidy for changing/ replacing open fires and log burners and almost as many thought it was about converting to non polluting heating (with no mention of a subsidy).

Vehicles were cited as the main cause of air pollution in Christchurch (46%) followed by home heating (41%) and industry (9%). The mean amount of air pollution in Christchurch caused by open fires was considered to be 47%. Almost all felt there were detrimental health effects of air pollution.

5. Research Findings

5.1 Most Important Environmental Problem Facing the World Today

Base: Total Sample: 400	First mention %	Aggregated Mentions %
Pollution (general)	23	30
Global warming/ climate change/ greenhouse effect	19	30
Air pollution (smog)	11	25
Rubbish/ garbage/ litter/ human waste	10	19
Over population/ too many people	5	8
Air pollution from vehicles	4	8
Availability of water/ quality of water	4	8
Ozone layer (not specific)	3	6
Cutting down trees/ deforestations	3	10
Pollution of marine environment/ waterways/ rivers	2	11
Too much waste of natural resources	2	6
Oil shortage/ lack of fuel	2	6
Air pollution from industries/ factories	1	2
Ozone layer breaking down/ getting smaller	1	2
Hunger/ starvation/ poverty	1	3
Nuclear dumps/ nuclear power/ nuclear testing/ nuclear bombs	1	2
Human greed/ people	1	4
Extinction of some animals/ reduction in wildlife	1	4
Over fishing	*	2
Lack of rain	*	1
Warfare/ war/ bombs	*	2
Heavy metal contamination/ sprays and chemicals in the environment	*	2
Oil spills	*	1
Coastal erosion	-	*
Spread of pests and disease	-	1
Other	3	4
Don't know/ no answer	4	4

*Less than 1%

First mentions

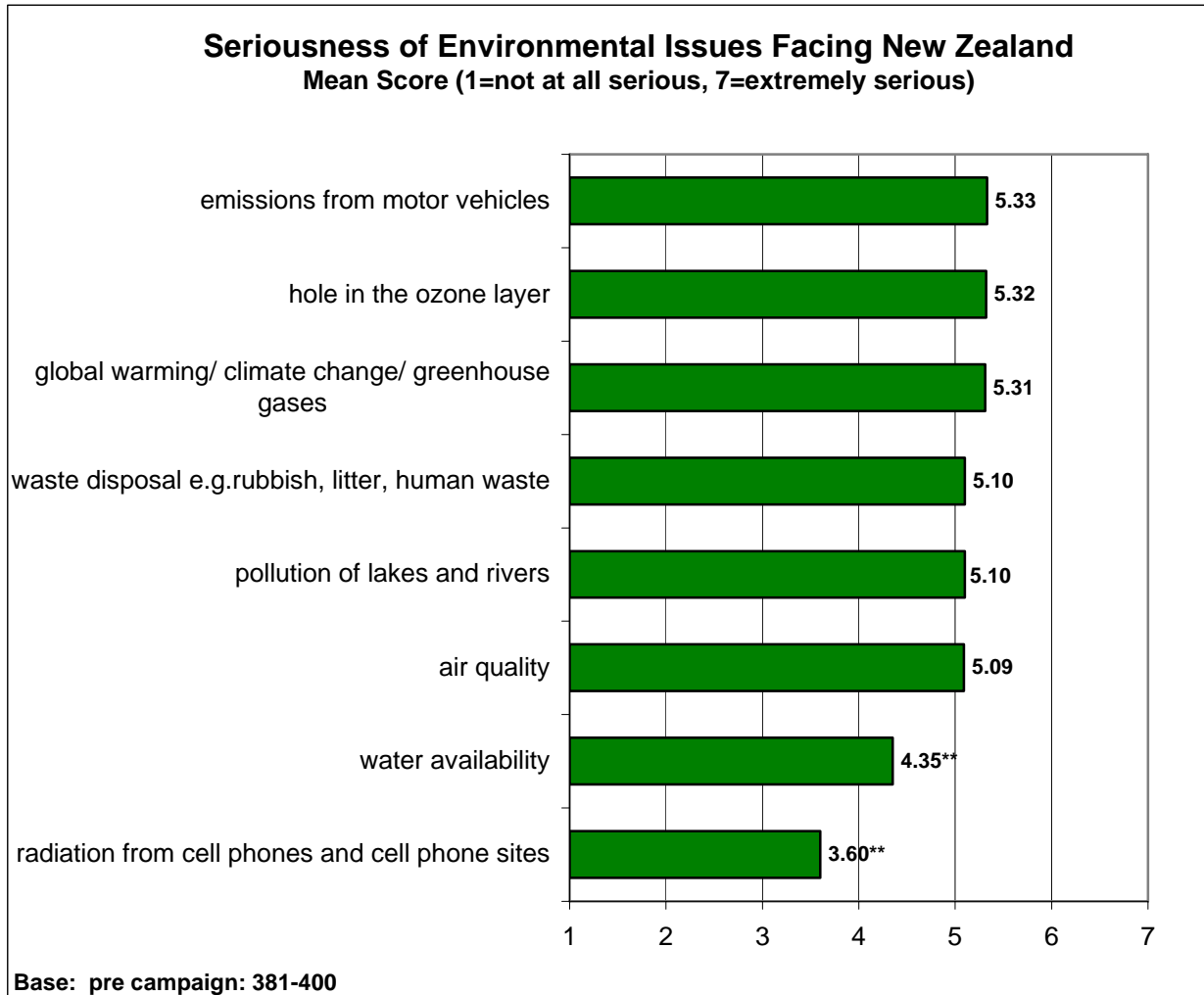
- Pollution in general was the most common environmental issue that was mentioned first by respondents (23%) followed by issues about global warming/ climate change/ greenhouse effect (19%).
- Air pollution was the next most common (11%) then issues regarding rubbish/ garbage/ litter/ human waste (10%).
- When all aspects of pollution are combined the total mentioning pollution as the most important environmental issue rises to 41%. (see Appendix I)
- Other environmental issues were mentioned by 5% or less.

Aggregated responses

- Overall, pollution in general and global warming/ climate change/ greenhouse effect received the most amount of mentions (30% each).
- Combined mentions of pollution (general, air and water) totalled 76%.
- One quarter of respondents felt that air pollution was one of the most important issues facing the world today.
- Just under a fifth felt rubbish/ garbage/ litter/ human waste was an important environmental issue.
- The next most common issues were pollution of the marine environment/ waterways/ rivers, and deforestation, both receiving around one in ten mentions.

5.2 Environmental Issues facing New Zealand

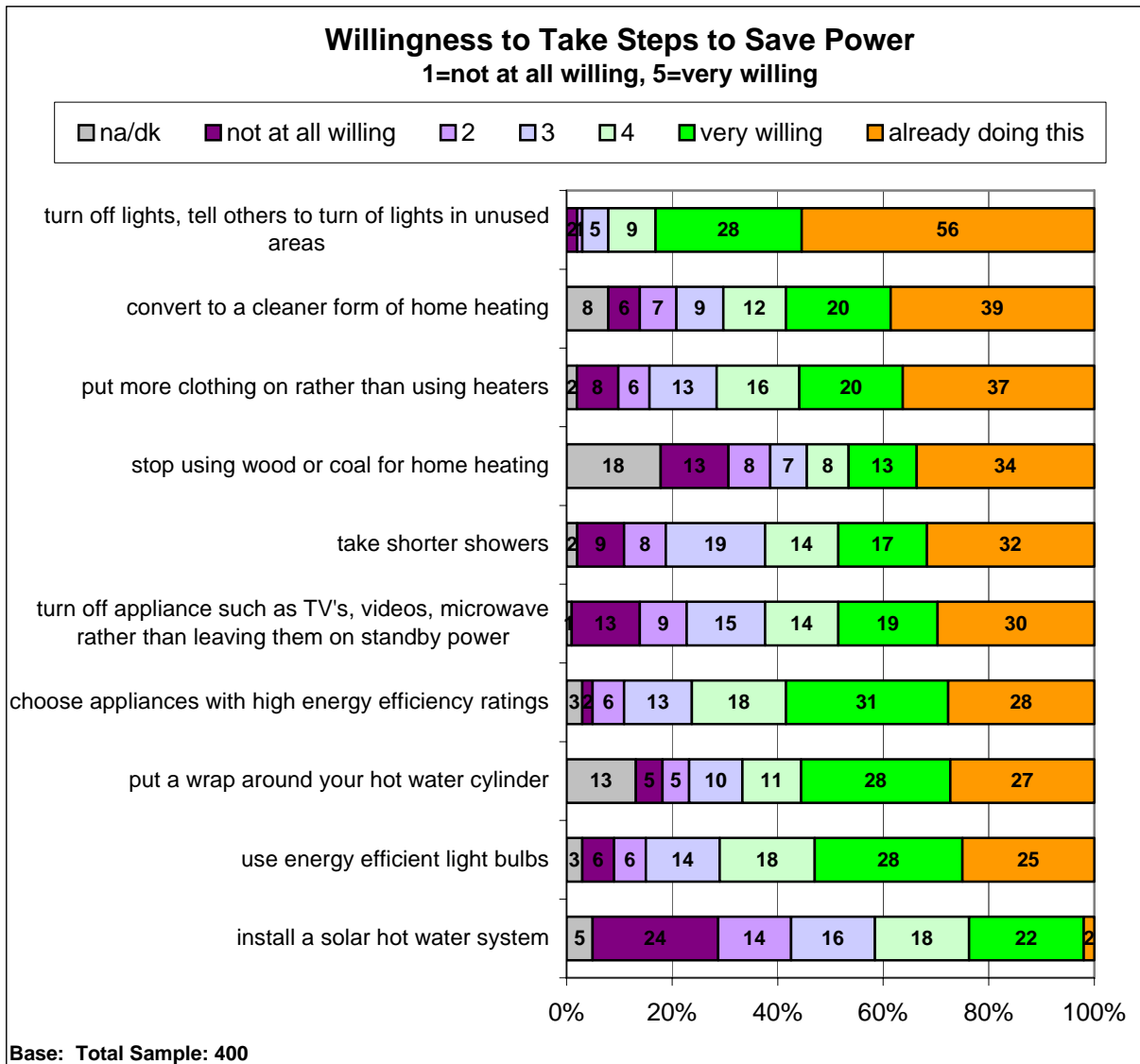
Respondents were asked to rate several environmental issues facing New Zealand on a scale of 1 to 7, where 1 = not at all serious and 7 = extremely serious.



**Significantly lower than other statements

- Emissions from motor vehicles, the hole in the ozone layer and global warming/ climate change/ greenhouse gases were deemed the most serious environmental issues facing New Zealand.
- Rating just lower were waste disposal, pollution of lakes and rivers and air quality.
- Water availability was regarded as less serious, with a mean score of 4 and radiation from cell phones and cell phone sites was regarded as the least serious with a mean score of 3.

5.3 Willingness to Save Power



Already doing

- The graph shows that more than half claim to already turn off lights or tell others to turn off lights in unused areas.
- The next most common step that respondents are already doing was using cleaner forms of home heating (39%), and putting on more clothes rather than using heaters (37%).
- Around a third claim to not use wood or coal for home heating, take shorter showers, and turn off appliances rather than leaving them on standby to save power.

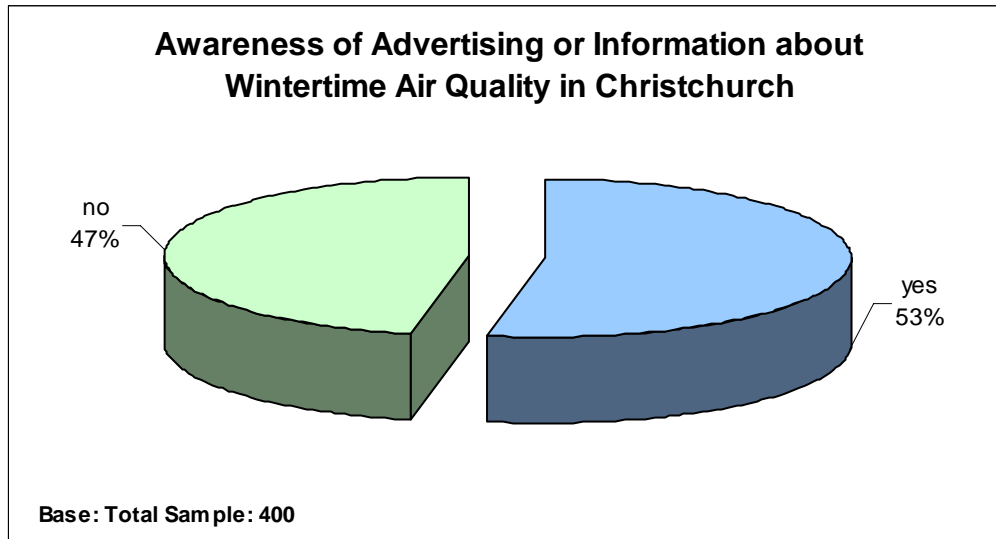
- Around a quarter choose appliances with high energy efficiency ratings, put wraps around hot water cylinders and use energy efficient light bulbs.
- Only 2% of respondents have solar hot water systems installed.

Willingness to take steps to save power

- With the exception of stopping using wood or coal, a third or more in each case stated they would be willing to take the steps suggested.
- Choosing high energy efficient rating appliances was the step that respondents were most willing to take to help save power (49% rating 4 or 5).
- 46% (rated 4 or 5) of respondents were willing to use energy efficient light bulbs, 40% would install a solar hot water system and 39% were willing to wrap their hot water cylinder.
- The proportion willing to stop using wood or coal for home heating was the smallest recorded (21%) and the same proportion were not willing.
- Installation of a solar hot water system was polarised with 40% stating they would be willing and 38% would not be willing.

5.4 Advertising and Information about Wintertime Air Quality in Christchurch

5.4.1 Awareness of Advertising and Information about Wintertime Air Quality in Christchurch



- Awareness of advertising about wintertime air quality in Christchurch was fairly evenly divided with 53% being aware, and 47% unaware.

Age:	15 – 24	25 – 39	40 – 59	60 +
Total sample:	74	112	216	88
400	%	%	%	%
Yes, aware	24	46	69	64
No, not aware	76	54	31	36

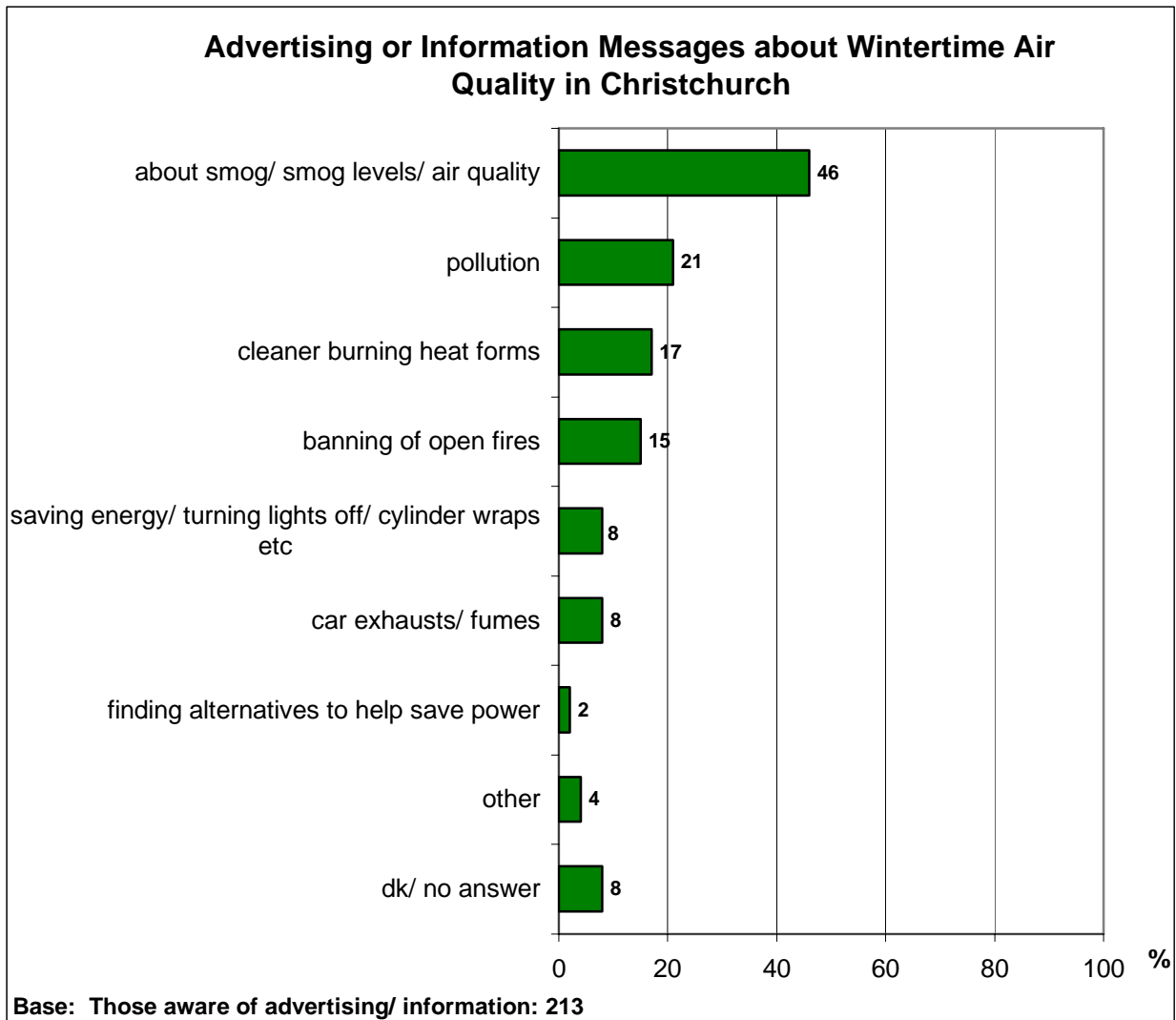
- Awareness of advertising about wintertime air quality in Christchurch was higher among those aged over 40 years old and lowest among those aged under 25 years.

Main form of heating:	heat pump	electric heater	log burner	open fire	gas heater	underfloor heating	other
Total sample:	71	122	112	13*	63	12*	7*
400	%	%	%	%	%	%	%
Yes, aware	66	49	49	69	51	58	43
No, not aware	34	51	51	31	49	42	57

*sample size too small for further analysis

- Awareness was higher among those that currently use heat pumps as the main form of heating.

Those that were aware of advertising/ information about wintertime air quality were asked what the message was. The following graph shows the responses.



- Almost half (46%) were aware of advertising about smog/ smog levels/ air quality in Christchurch, which consisted of the graph in the paper each day in comparison to World Health Organisation standards, and also about the inaccurate measures used recently.
- Around a fifth were aware of messages about pollution (in general), and messages about cleaner burning heat forms.
- 15% noted messages regarding the banning of open fires.
- All other mentions were by less than one in ten.
- There were no spontaneous mentions of the 'Clean Heat Project'.

Age:	15 – 24	25 – 39	40 – 59	60 +
Those aware of advertising or information: 213	18	52	87	56
	%	%	%	%
about smog/ smog levels/ air quality	39	56	49	36
pollution	11	15	25	23
cleaner burning heat forms	22	23	13	16
banning of open fires	17	10	16	18
saving energy/ lights off/ cylinder wrap	17	8	8	5
car exhausts/ fumes	6	8	6	11
find alternatives to help save power	-	2	-	7
other	-	-	7	4
don't know/ no answer	11	10	7	9

**Please note that sample sizes are small in each age group and as such are indicative only.*

- Awareness of advertising or information about smog levels/ air quality was higher among those aged 25-39 years old
- Awareness of advertising or information about saving energy/ turning lights off/ cylinder wraps was slightly higher among those aged 15 – 24 years old

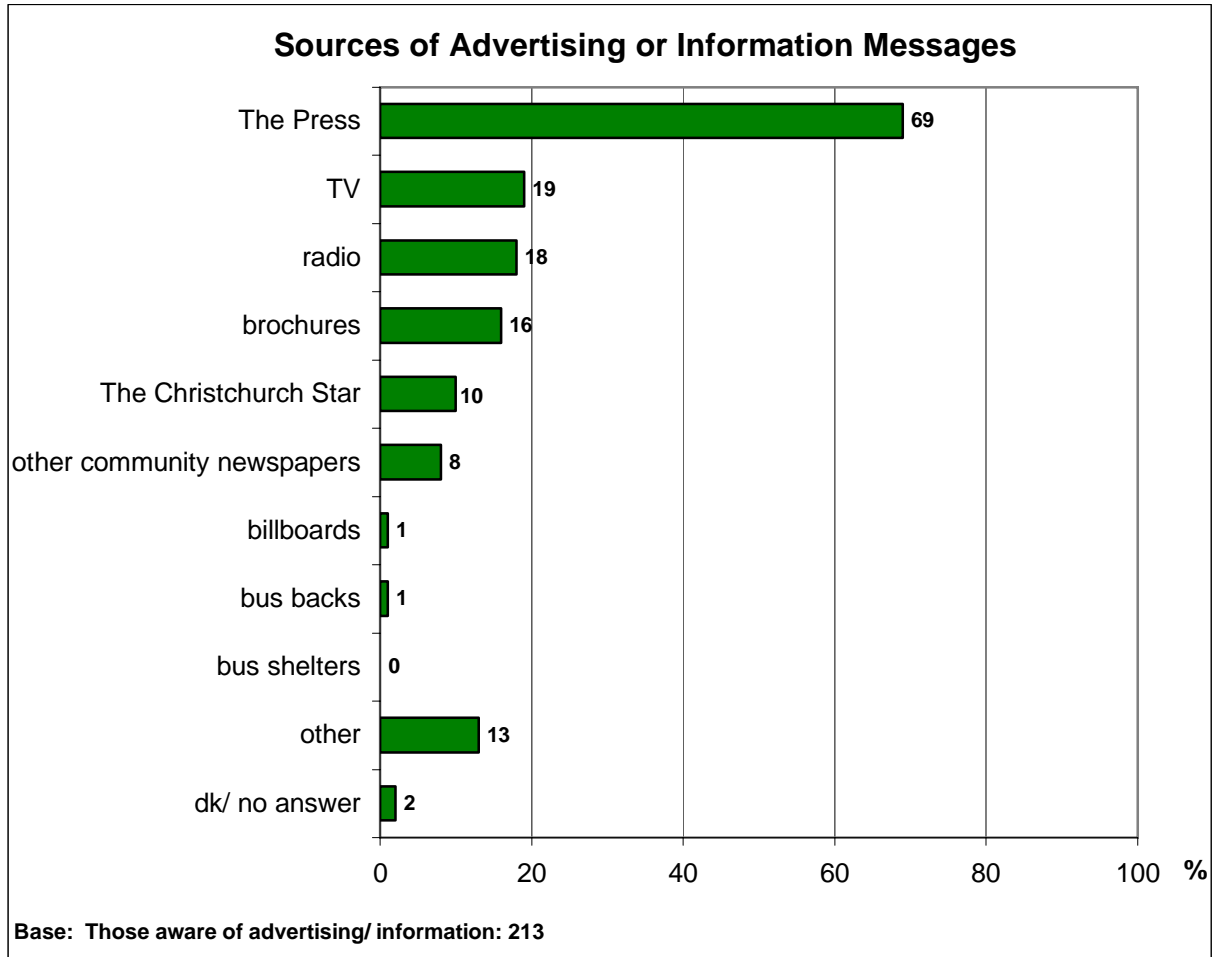
Main form of heating:	heat pump	electric heater	log burner	open fire	gas heater	underfloor heating	other
Those aware of advertising or information: 213	47	60	55	9*	32*	7*	3*
	%	%	%	%	%	%	%
about smog/ smog levels/ air quality	47	47	44	67	41	57	67
pollution	17	23	22	11	28	14	-
cleaner burning heat forms	15	18	15	11	25	-	33
banning of open fires	30	15	4	-	16	14	33
saving energy/ lights off/ cylinder wrap	9	7	7	-	13	14	-
Car exhausts/ fumes	9	5	11	11	-	29	-
Find alternatives to help save power	-	5	2	-	3	-	-
other	6	5	4	-	-	-	-
don't know/ no answer	6	7	18	-	3	-	-

**Please note that sample sizes are small in each group and as such are indicative only*

- Awareness of information about banning open fires was slightly higher among heat pump users.

5.4.2 Sources of Advertising and Information about Wintertime Air Quality in Christchurch

Respondents were then asked where they had seen or heard this information.



- Over two thirds of respondents had seen advertising in The Press.
- Less than a fifth had seen/ heard advertising on TV, radio and in brochures. One in ten had seen messages in The Christchurch Star and 8% in other community newspapers.
- Other mediums were:
 - word of mouth
 - Living Here
 - On-line
 - Library
 - Museum
 - Hospital.

Age:	15 – 24	25 – 39	40 – 59	60 +
Those aware of advertising or information: 213	18	52	87	56
	%	%	%	%
The Press	39	67	70	77
TV	22	23	15	21
radio	17	15	17	23
brochures	28	17	16	13
The Christchurch Star	6	6	11	13
other community newspaper	-	12	5	14
billboards	-	2	-	2
bus backs	6	2	1	-
bus shelters	-	2	-	-
other	6	17	13	11
don't know/ no answer	17	2	-	2

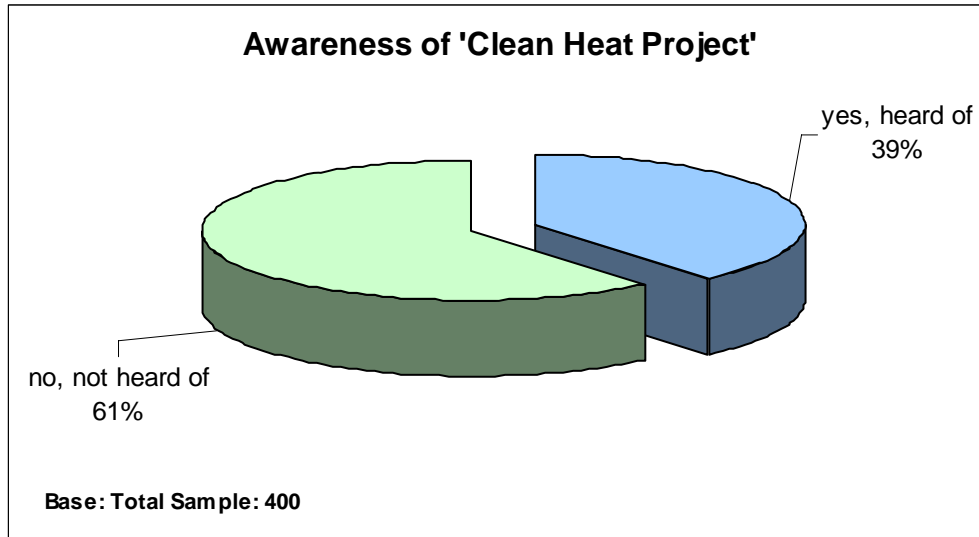
- Awareness of advertising/ information in The Press was higher among those aged 25 years and over, whereas those aged under 25 years more often stated a brochure than those older.

Main form of heating:	heat pump	electric heater	log burner	open fire	gas heater	underfloor heating	other
Those aware of advertising or information: 213	47	60	55	9	32	7	3
	%	%	%	%	%	%	%
The Press	70	73	64	67	59	100	67
TV	13	17	20	33	28	14	33
radio	17	18	18	22	22	14	-
brochures	17	15	20	-	16	14	33
The Christchurch Star	13	12	4	22	9	-	33
other community newspaper	15	12	2	-	9	-	-
billboards	2	-	2	-	-	-	-
bus backs	-	3	2	-	-	-	-
bus shelters	-	-	2	-	-	-	-
other	11	12	9	33	16	29	-
don't know/ no answer	2	2	4	-	3	-	-

**Overall, the sources were too varied and sample sizes too small for meaningful analysis.*

5.5 Awareness of Clean Heat Project

Respondents were asked if they had heard of the 'Clean Heat Project'.



- Three fifths had not heard of the Clean Heat Project, while two fifths had heard of it.

Age:	15 – 24	25 – 39	40 – 59	60 +
Total Sample: 400	74	112	126	88
	%	%	%	%
Yes, heard of	18	47	44	40
No, not heard of	82	53	56	60

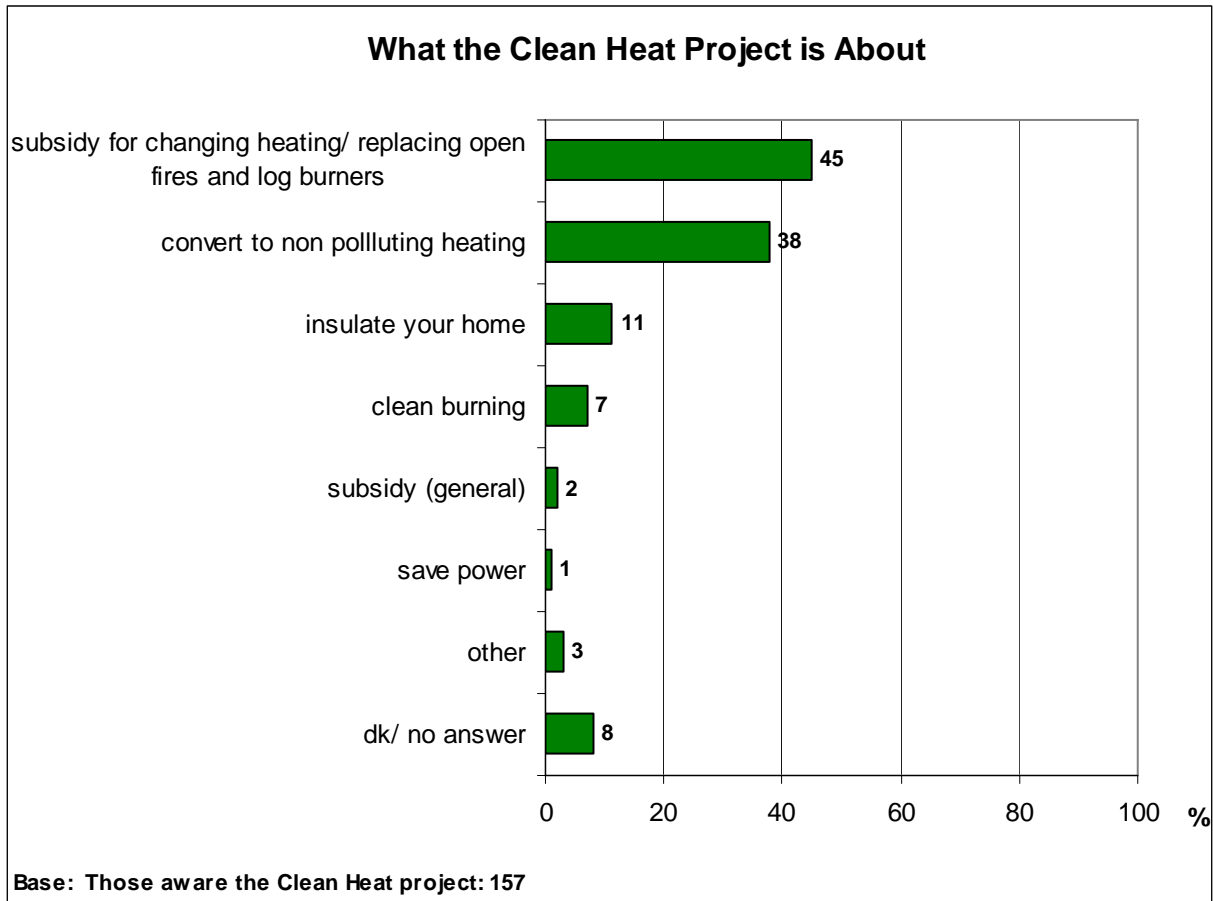
- Awareness of the Clean Heat Project was slightly higher among those aged 25 – 39 years old, than other age groups, while those aged 15 – 24 years old were more likely to be unaware of the project.

Main form of heating: Total sample: 400	heat pump	electric heater	log burner	open fire	gas heater	underfloor heating	other
	71	122	112	13*	63	12*	7*
	%	%	%	%	%	%	%
Yes, heard of	55	29	40	54	38	50	14
No, not heard of	45	71	60	46	62	50	86

**sample size too small for further analysis*

- Those aware of the Clean Heat Project were more likely to use heat pumps as their form of heating.

Those aware of the Clean Heat Project were asked what the project was about. The following graph shows the responses.



- Just under half thought the Clean Heat Project was about a subsidy for changing heating and replacing of open fires and log burners.
- Just under two fifths (38%) felt it was about converting to non-polluting heat sources (with no mention of subsidies).
- 11% thought the Clean Heat Project was regarding insulating your home, while 7% mentioned clean burning (unspecific).

Age:	15 – 24	25 – 39	40 – 59	60 +
Those aware of Clean Heat Project:	13	53	56	35
157	%	%	%	%
subsidy for changing heating/ replacing open fires/ log burners	46	47	41	49
convert to non polluting heating	46	36	38	37
insulate your home	8	6	14	14
clean burning	8	8	7	6
subsidy (general)	-	-	5	-
Save power	-	2	2	-
other	-	4	2	3
don't know/ no answer	8	13	5	3

**Please note that sample sizes are small in each group and as such are indicative only*

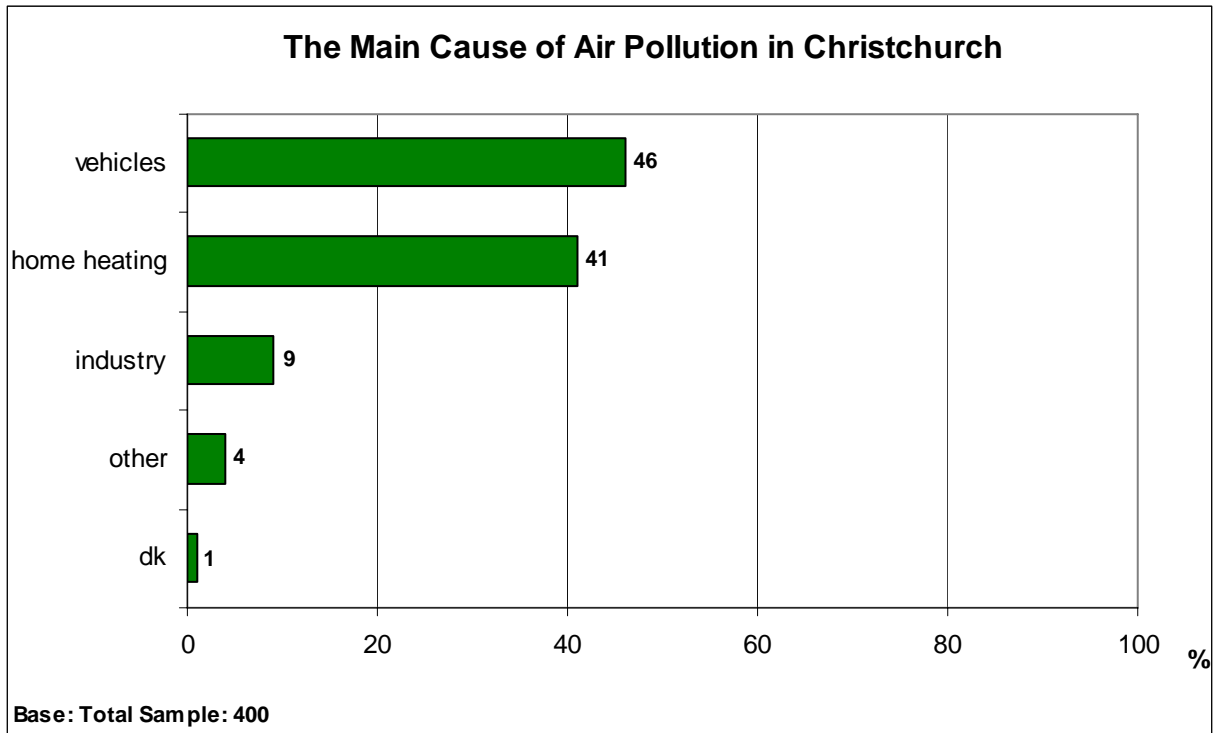
- Overall, responses were similar across the age groups.

Main form of heating:	heat pump	electric heater	log burner	open fire	gas heater	underfloor heating	other
Those aware of Clean Heat Project: 157	39	35	45	7	24	6	1
	%	%	%	%	%	%	%
subsidy for changing heating/ replacing open fires/ log burners	59	49	31	43	38	67	100
convert to non polluting heating	31	31	49	29	42	33	-
insulate your home	13	11	9	43	4	-	-
clean burning	10	6	4	-	13	-	-
subsidy (general)	3	3	-	-	4	-	-
Save power	-	-	4	-	-	-	-
other	3	-	4	-	4	-	-
don't know/ no answer	-	11	11	14	8	-	-

**Please note that sample sizes are small in each group and as such are indicative only*

- Mention of the subsidy for changing heating was slightly higher among heat pump users.

5.6 Causes of Air Pollution in Christchurch



- Just under half (46%) felt that vehicles were the main course of air pollution in Christchurch. Following this, 41% felt that home heating was the main course of air pollution and 9% felt that industry was the main cause.
- ‘Other’ causes were mentioned by 4%. These were the ‘geography’ of Christchurch - the fact it is built on swamp, low level land and is set among hills, the weather and people burning rubbish.
- A further 1% did not know the cause of air pollution in Christchurch.

Age:	15 – 24	25 – 39	40 – 59	60 +
Total	74	112	126	88
Sample: 400	%	%	%	%
vehicles	46	36	40	66
home heating	34	53	47	24
industry	19	7	8	2
other	-	3	4	8
don't know	1	2	2	-

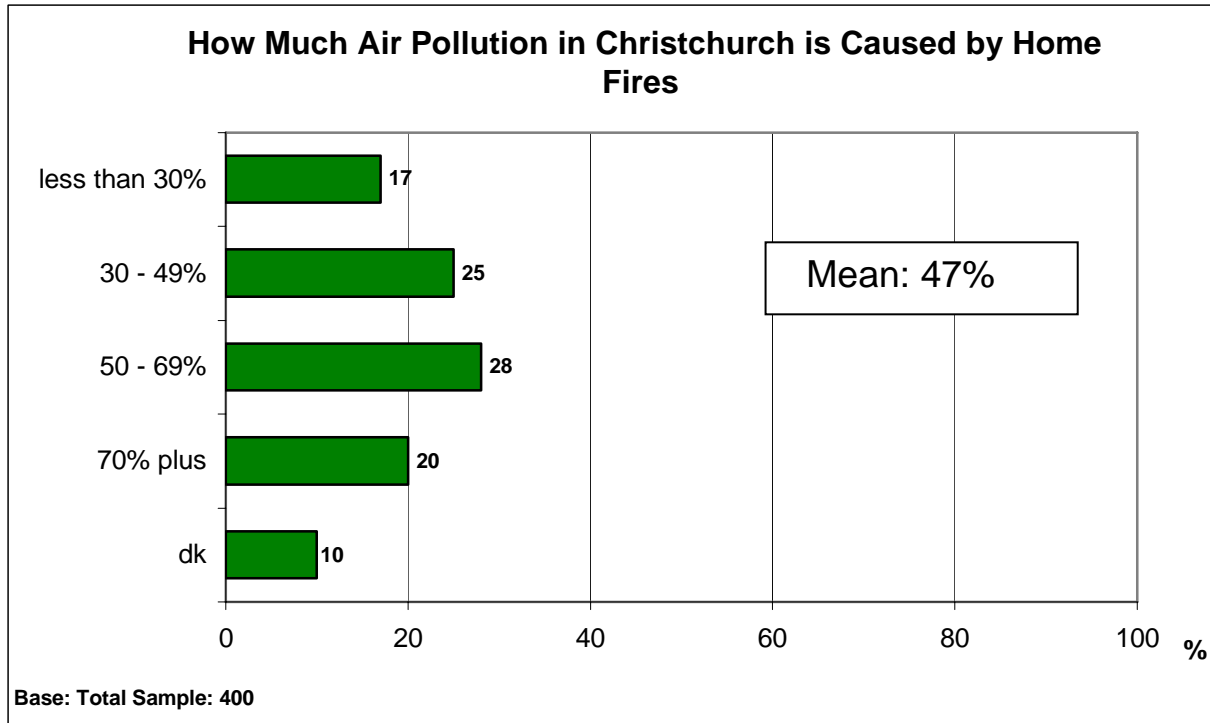
- Those who felt that home heating was the main cause of air pollution in Christchurch were more likely to be aged 25 – 59 years old.
- Those aged under 25 years and those over 60 years were more likely to state that vehicles were the main cause of air pollution in Christchurch.
- Industry was more often mentioned by those aged under 25 years than those over 25 years.

Main form of heating:	heat pump	electric heater	log burner	open fire	gas heater	underfloor heating	other
Total sample: 400	71	122	112	13*	63	12*	7*
	%	%	%	%	%	%	%
vehicles	37	50	47	38	43	50	57
home heating	48	39	38	38	44	33	29
industry	10	7	9	15	11	-	-
other	6	2	3	8	2	17	14
don't know	-	2	3	-	-	-	-

**sample size too small for further analysis*

- Those using heat pumps were more likely to feel that the main cause of air pollution was home heating than other form of heating users and than other causes.
- Those with log burners and electric heaters more often stated vehicles as the main cause of air pollution rather than home heating or industry.

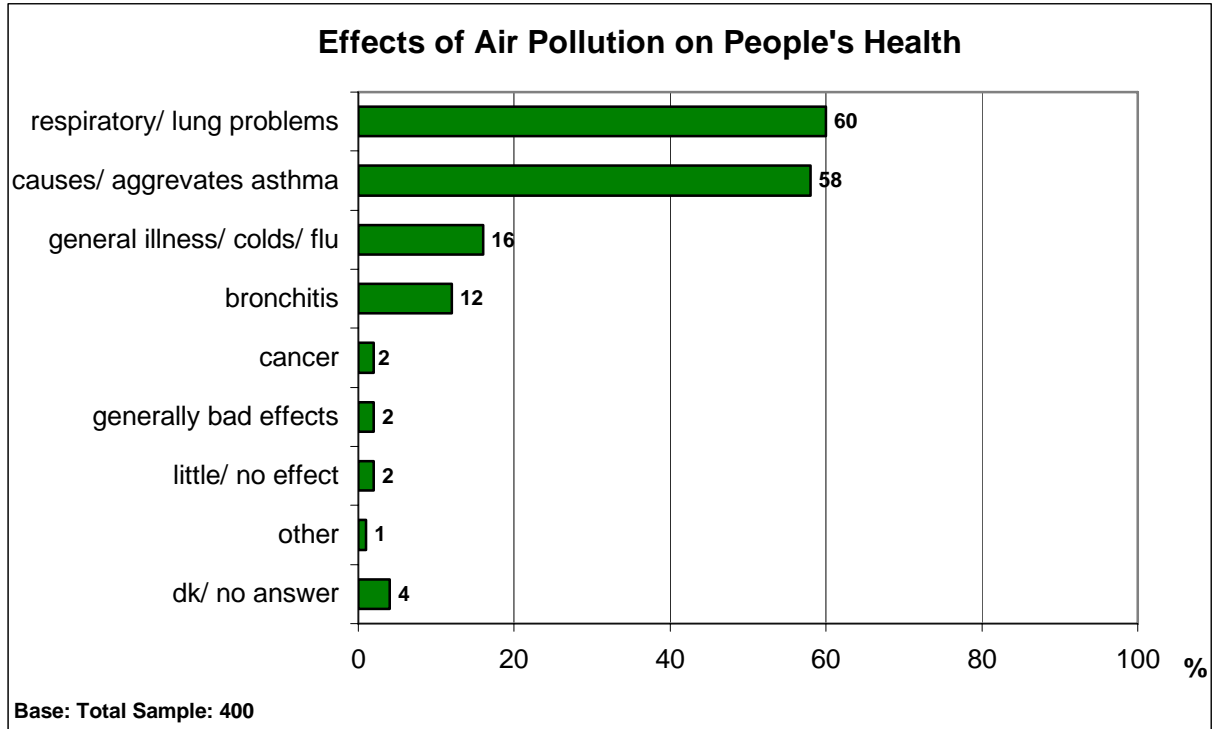
Respondents were then asked what percentage of the air pollution in Christchurch home fires cause. The following graph shows the grouped responses.



- The mean percentage specified was 47%.
- Less than a fifth thought home fires contributed up to 30% of Christchurch air pollution, while a quarter felt home fires caused 30 – 49% of air pollution in Christchurch.
- Just under half (48%) felt that home fires caused more than 50% of air pollution in Christchurch with 20% nominating more than 70%.

5.7 Effects of Air Pollution on People's Health

Respondents were asked what they felt the effects were of air pollution on people's health.



- Almost two thirds (60%) felt that air pollution caused respiratory/ lung and breathing problems, while 58% felt it causes/ aggravates asthma.
- A further 16% believed air pollution contributed to general illness like colds, flus and coughs and 12% that it contributed to bronchitis.
- Cancer and general bad effects were mentioned by 2% each.
- Just 2% felt air pollution had little or no effect on people's health.

Age:	15 – 24	25 – 39	40 – 59	60 +
Total Sample: 400	74	112	126	88
	%	%	%	%
respiratory/ lung problems	53	55	70	56
causes/ aggravates asthma	42	69	58	59
general illness/ colds/ flu	22	21	12	8
bronchitis	3	10	14	17
cancer	5	2	1	-
Generally bad	1	3	2	-
Little/ no effect	3	-	2	2
other	3	2	-	1
don't know/ no answer	12	2	2	3

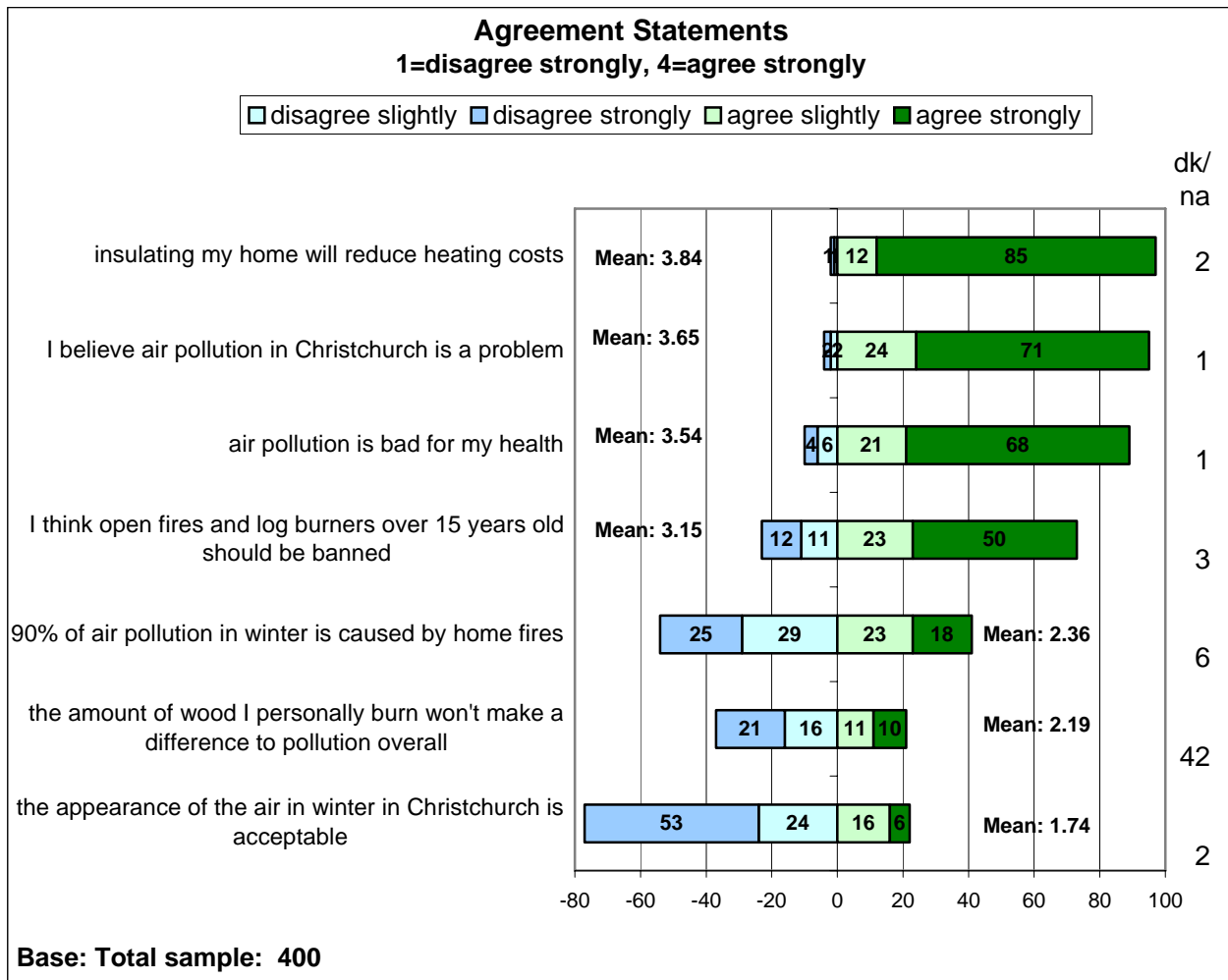
- Overall there was little difference between the age groups although those aged under 25 years were less likely to state that air pollution caused/ aggravated asthma, caused respiratory/ lung problems or bronchitis than older age groups.
- Mentions of air pollution causing bronchitis increased with age.

Main form of heating: Total sample: 400	heat pump	electric heater	log burner	open fire	gas heater	underfloor heating	other
	71	122	112	13*	63	12*	7*
	%	%	%	%	%	%	%
respiratory/ lung problems	56	61	60	38	65	58	57
causes/ aggravates asthma	65	56	56	54	65	42	43
general illness/ colds/ flu	11	23	11	15	13	33	-
bronchitis	14	14	12	-	10	-	-
cancer	3	1	3	-	2	-	-
generally bad	1	2	2	-	-	-	14
little/ no effect	3	2	2	-	-	-	-
other	3	2	-	-	2	-	-
don't know/ no answer	3	2	8	8	5	-	-

* sample size too small for further analysis

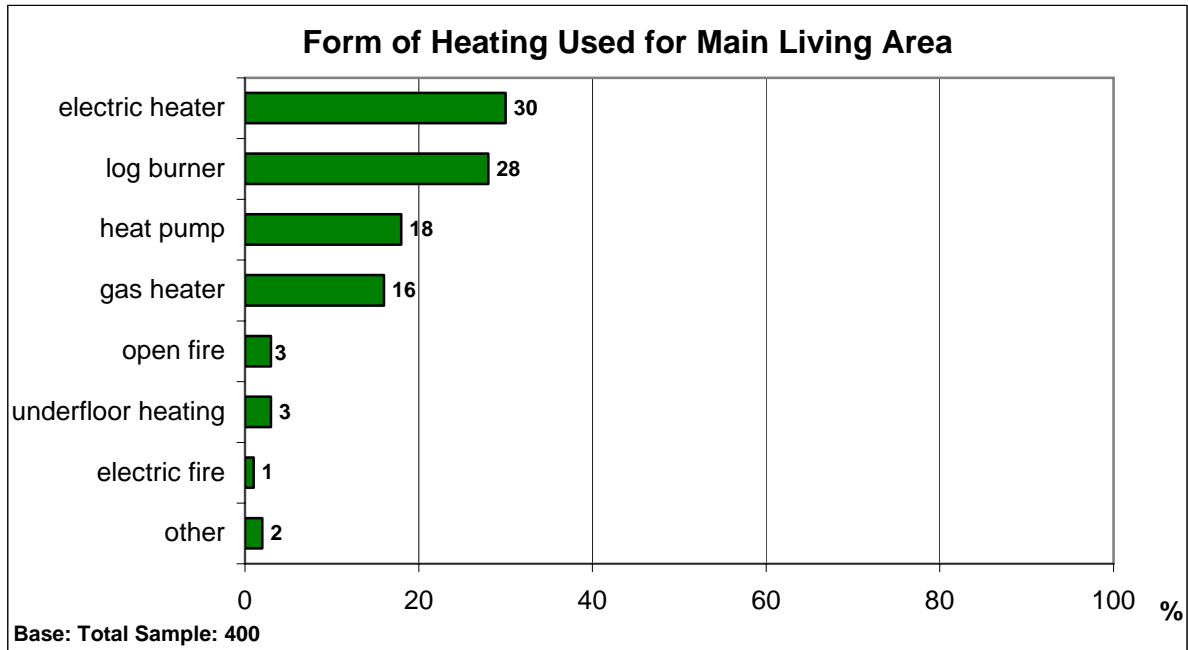
- Overall, there was little difference among heating sources.

5.8 Level of Agreement with Air Pollution Statements



- Level of agreement was highest for the statements:
 - *‘insulating my home will reduce heating costs’* (97% agreed)
 - *‘I believe air pollution in Christchurch is a problem’* (95% agreed) and
 - *‘air pollution is bad for my health’* (89% agreed).
- *‘I think open fires and log burners over 15 years old should be banned’* had three quarters agreeing and a quarter disagreeing.
- Opinion was divided as to whether *‘90% of air pollution in winter is caused by home fires’* – 41% of respondents agreed and 54% disagreed.
- *‘The amount of wood I personally burn won’t make a difference to pollution overall’* attracted stronger levels of disagreement (37%) than agreement (21%), although 42% of respondents claimed this was not applicable to them. (Some non log burner and open fire users also stated an opinion (28%)).
- Few (22%) felt the appearance of the air in winter in Christchurch is acceptable.

5.9 Current Form of Heating Used



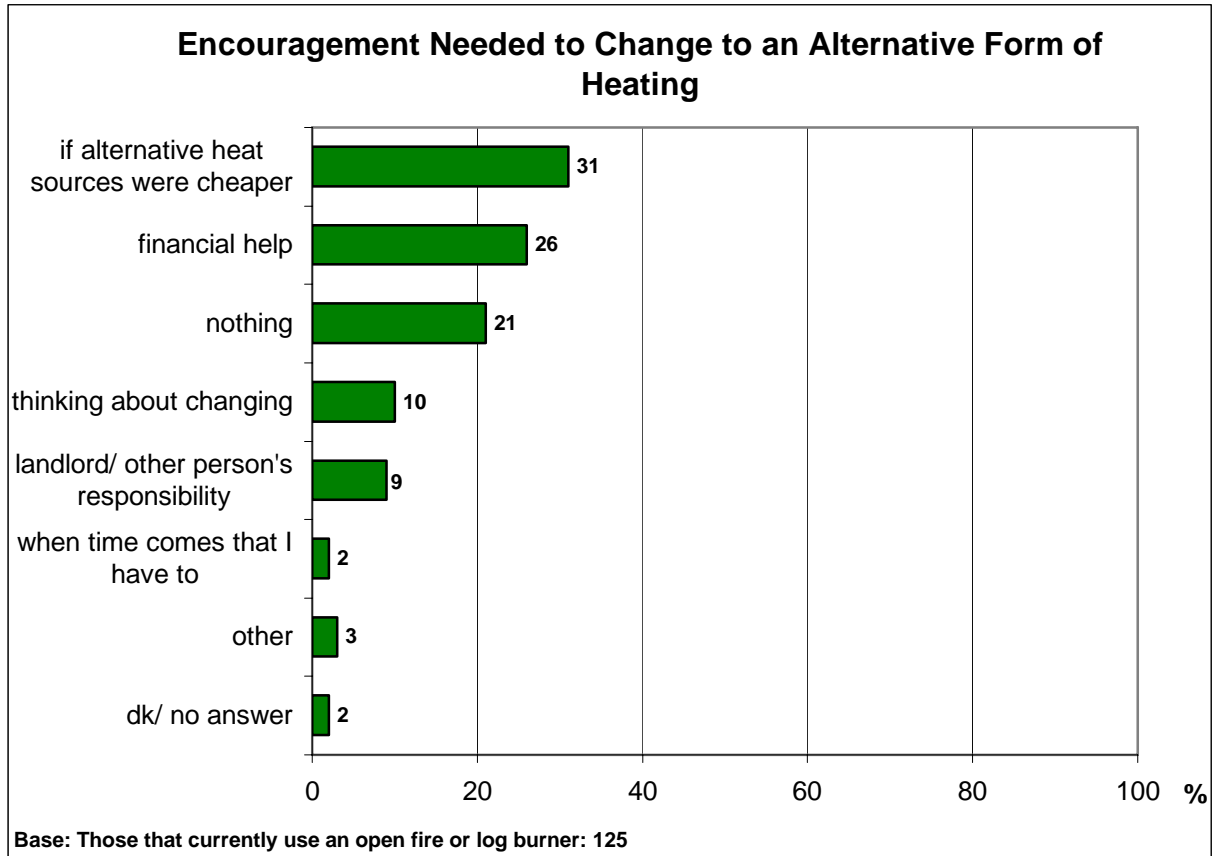
- Both electric heaters and log burners were used by around a third of respondents to heat the main living areas.
- Using a heat pump was the next most common form of heating with 18% of respondents using one for their main living area, followed by a gas heater (16%).
- All other forms of heating were used by 3% or less.

Age:	15 – 24	25 – 39	40 – 59	60 +
Total Sample: 400	74	112	126	88
	%	%	%	%
heat pump	9	17	16	28
electric heater	32	21	33	38
log burner	31	35	29	16
open fire	4	4	2	2
gas heater	20	15	17	11
underfloor heating	3	4	3	2
other		4	1	2

- Those aged over 60 years old were more likely to use a heat pump and electric heater than other ages and less likely to be log burner or gas heater users.
- Those aged 15 – 24 years were more likely to use gas heaters as their main form of heating than older age groups.
- Log burners were more often used by those aged 25 – 39 years.

5.10 Changing or Updating Home Heating

Those that used either a log burner or an open fire were asked what would encourage them to change to an alternative form of heating.



- Almost a third of respondents stated that they would change to an alternative form of heating if those alternative sources were cheaper.
- A further 26% felt they would need some financial help/ support as encouragement to change heating.
- A fifth felt that nothing would encourage them to change to alternative heating forms.
- Around one in ten stated that the responsibility lay with another person or they were thinking of changing.

Age:	15 – 24	25 – 39	40 – 59	60 +
Those that use an open fire or log burner: 125	26	44	39	16
	%	%	%	%
nothing	4	25	18	44
financial help	27	25	31	13
if alternative sources were cheaper	35	30	44	-
recently changed/ thinking about changing	8	9	10	13
landlord/ other person's responsibility	15	9	3	13
when time comes that I have to	4	2	3	-
other	4	-	-	19
don't know/ no answer	8	2	-	-

**sample sizes in each category are small and as such results are indicative only.*

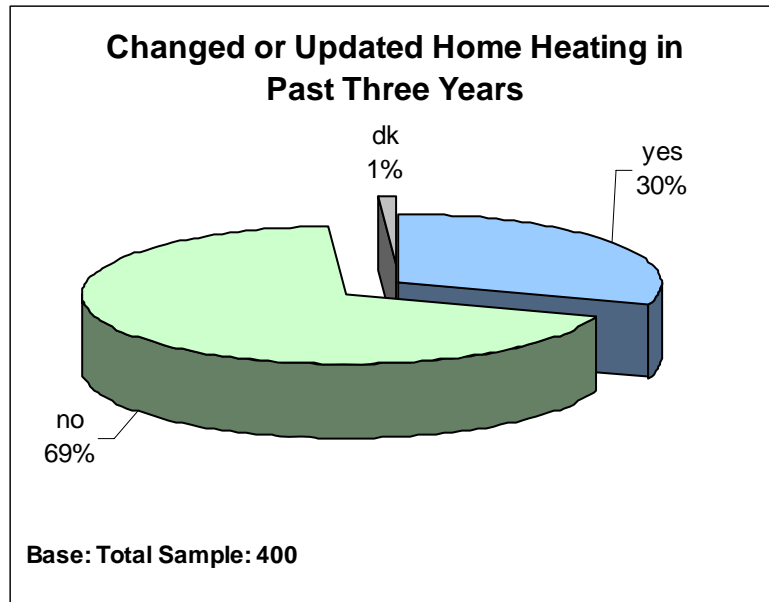
- Those aged 60 years and over were more likely to state that nothing would encourage them to change to an alternative form of heating.

Those that use an open fire or log burner: 125	log burner	open fire
	112	13*
	%	%
nothing	23	
financial help	26	23
if alternative sources were cheaper	32	23
thinking about changing	8	23
landlord/ other person's responsibility	6	31
when time comes that I have to	3	
other	4	
don't know/ no answer	3	

**please note small sample size*

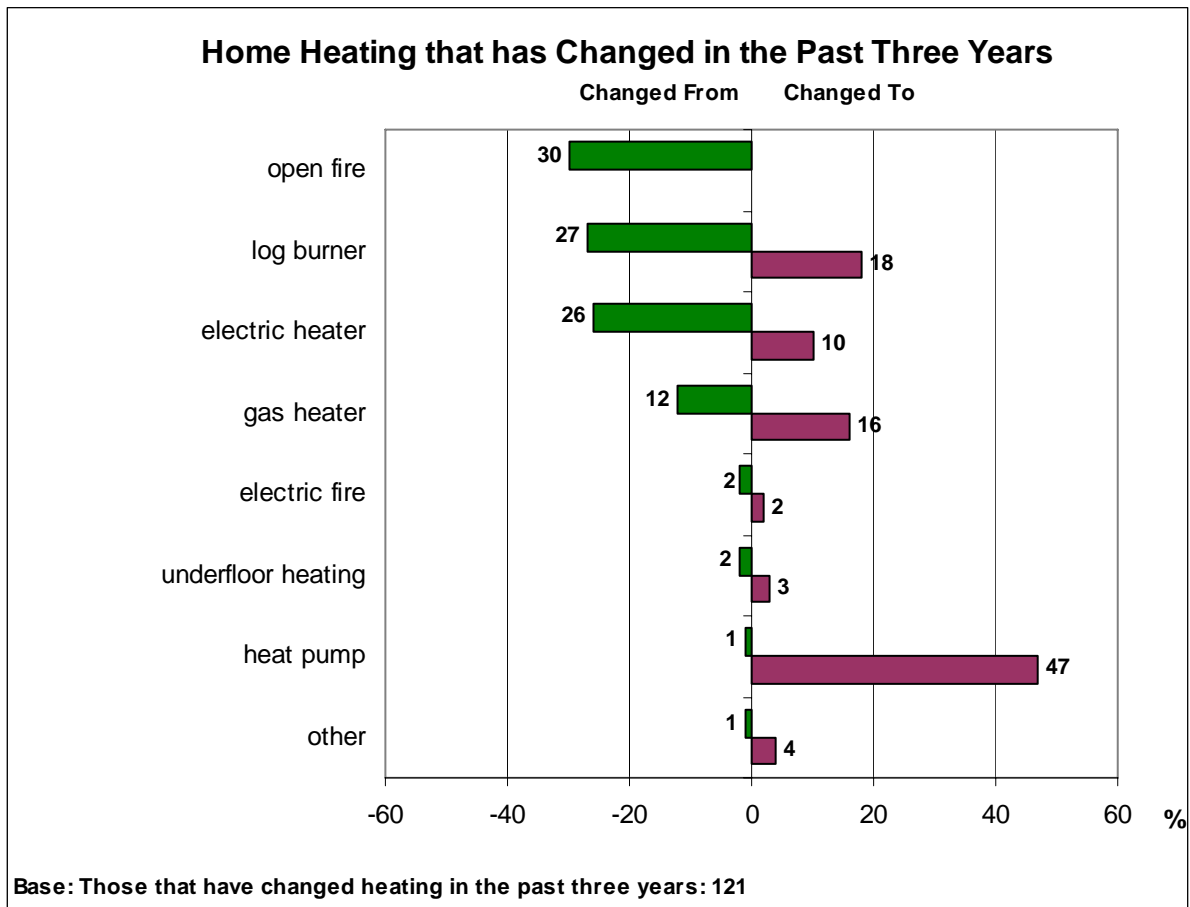
- Log burner users were more likely to change to an alternative form of heating if alternative sources were cheaper.
- Open fire users were more likely to be thinking about changing, or feel it was the landlords responsibility to change, than log burner users.

Respondents were then asked if they had changed or updated their home heating in the past three years.



- Two thirds had not changed or updated their heating, while a third (30%) had in the past three years.

Those that had changed or updated their heating were asked what form of heating they had changed from and changed to.

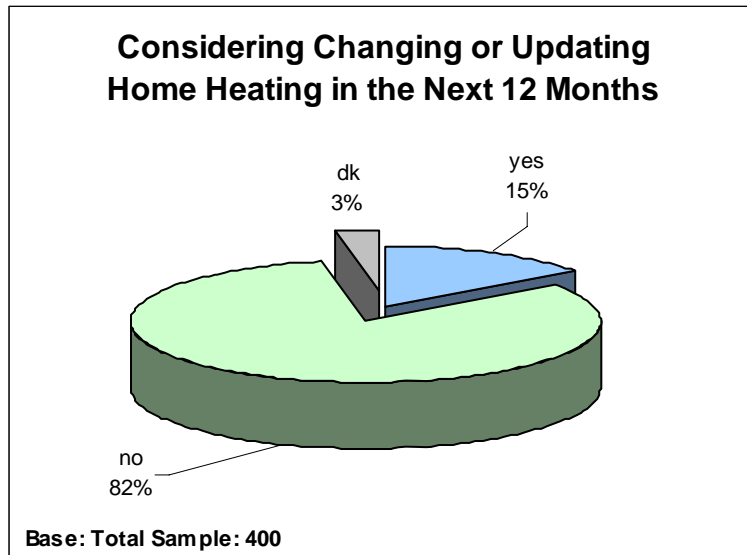


- The majority of respondents had changed their home heating **from** open fires, log burners, and electric heaters (26% - 30% for each source).
- The most common form of heating that respondents changed **to** was a heat pump (47%).
- Between 10% and 18% had changed their form of home heating to more efficient/ approved log burners, gas heaters and electric heaters.

Respondents that had changed from open fires and log burners changed to:

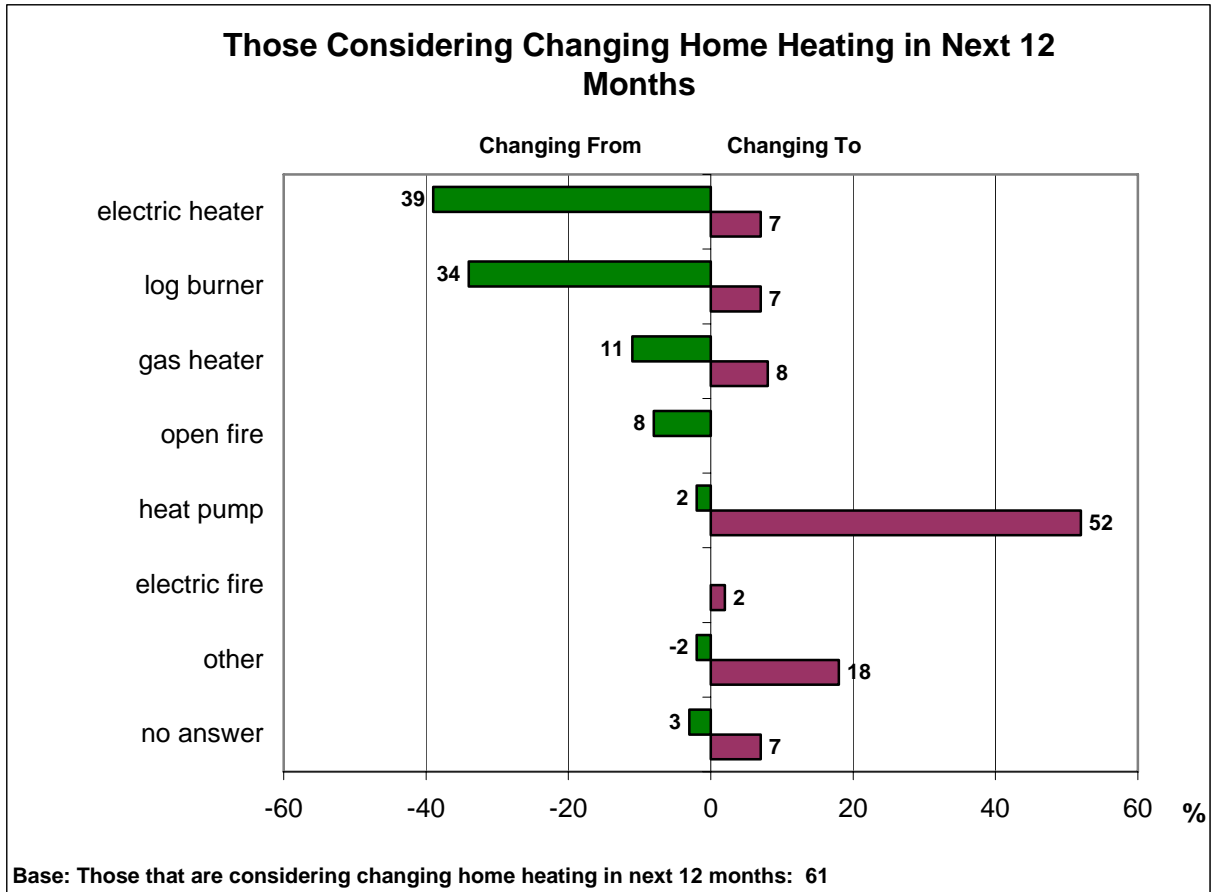
	Open fire N=36	Log burner N=33
Heat pump	17	11
Gas heater	10	5
Log burner	6	12
Electric heater	1	2
Underfloor heating	1	1
Pellet fire	1	2

Following from this, respondents were asked if they were considering changing or updating their heating in the next twelve months.



The majority (82%) were not considering changing or updating their heating in the next twelve months.

Those that were considering changing or updating their heating (15%) were asked what they were considering changing from and changing to.



- The majority were considering changing from electric heaters and log burners.
- Over half (52%) were considering changing to a heat pump, with all other heating forms mentioned by less than one in ten.
- ‘Other’ forms of heating included pellet fires, diesel and solar power.
- Those considering changing/ updating log burner were all currently log burner users.