



Llywodraeth Cymru
Welsh Government

RESEARCH

Daily Life Survey, COVID-19 household research Wales: wave 1 interim report (summary)

The report summarises the environment-related changes in respondents' behaviour since the onset of COVID-19, and any demographic or geographic differences influencing behaviour change.

First published: 25 November 2021

Last updated: 25 November 2021

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Introduction and background

Ipsos MORI, working with Centre for Climate Change and Social Transformations (CAST) and BRE, was commissioned in September 2020 to deliver the COVID-19 Household Research (called the ‘Daily Life Survey’).

The research provides a robust and comprehensive overview of the impacts of the coronavirus pandemic on households’ self-reported behaviours, attitudes and experiences in relation to net zero, green recovery measures and home energy use. The research looks at differential impacts on sub-groups of the population, particularly relating to income level, and the anticipated durability of changes. Support needs of participants with respect to maintaining net zero (NZ) behaviours, and with respect to coping with pandemic impacts on their experiences as energy consumers, were also explored.

The research consists of two waves of a quantitative household survey and a stage of qualitative research. This report summarises the first wave of the quantitative survey in Wales, for which fieldwork was conducted between 20 November and 24 December 2020. The fieldwork for the rest of the UK took place between 12 November and 24 December 2020: fieldwork in Wales started

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slightly later to enable translation of fieldwork documents in to Welsh. In Wales, the end of the fieldwork period overlapped with the winter lockdown which started on 19 December 2020.

In Wales, a total of 4,843 addresses was selected. The total number of valid responses included in this report from Wales is 1,687, with 1,242 households returning at least one questionnaire. Further detail about the breakdown of the sample can be found in the main report.

Limitations

Possible limitations to this study include: accuracy of participants' recollections, particularly with regard to recalling behaviours before 23rd March 2020; social desirability bias; representativeness of the sample; differences between online and postal samples leading to lower representativeness of the sample for online-only questions; and non-response bias. Steps were taken to mitigate the impacts of these limitations wherever possible.

Findings

What environment-related changes in behaviour have there been since the onset of the pandemic?

Waste and recycling were the most prevalent and consistent net zero (NZ) behaviours across Wales at the time the survey was conducted. Eight in ten or more of participants said that they were recycling (93%), separating out food waste (82%) and avoiding food waste (78%) 'always' or 'most of the time'. Behaviours which have some of the highest potential for carbon-savings from lifestyle change, such as active travel and eating a plant-based diet, were less frequently reported (23% and 18% were doing these 'always' or 'most of the time' respectively). Prevalence of each behaviour in Wales was very similar to the all UK average.

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There was an increase in frequency across most of the NZ behaviours asked about since the first UK-wide lockdown on 23rd March 2020, with two thirds (63%) of participants in Wales saying they had taken up or increased at least one NZ behaviour – similar to the 66% saying this on average across the UK.

Where there was an increase in frequency of a NZ behaviour (e.g. a move from ‘sometimes’ to ‘most of the time’), this was referred to as a “positive NZ behaviour change” and where there was a decrease in frequency (e.g. a move from ‘always’ to ‘never’), this was referred to as a “negative NZ behaviour change”. The highest levels of positive NZ behaviour change were seen for working from home rather than commuting to work[1], buying only what you really need, and avoiding food waste. Positive NZ changes were more commonly reported than negative NZ changes. In a few cases, however, substantial negative NZ change was seen, equalling, or far outstripping levels of positive change within that category (for example for planning no-fly holidays and public transport usage).

A key negative NZ behaviour change seen was the shift away from using public transport and towards private car use (24% of participants in Wales were using public transport instead of a private car less often), and this was not counterbalanced by a similar shift from car use to active travel (11% are doing errands on foot/bike more often). Both proportions are similar to the all UK average.

Financial benefits and physical and mental well-being benefits of NZ behaviours were the most important drivers of uptake or increase (receiving mean importance scores of 3.78 and 3.32 out of 5 respectively[2]), over and above concern for the environment (mean importance score: 2.80). Even where concern for the environment was high, the number of positive NZ behaviour changes reported did not always reflect this. Those most concerned about climate change were not always the most likely to have made positive NZ behaviour changes. Patterns of response in Wales are similar to the all UK average.

A strong majority (84%) of participants said they believe in anthropogenic climate change, (i.e. that climate change is caused by human activities), and 76% believe the UK will be negatively impacted by climate change within their

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lifetime. Around a quarter (21%) said their overall degree of concern regarding climate change had increased since the first UK-wide national lockdown: largely among those who were already worried. Most, however, reported that their level of concern remains unchanged (69%). Once again, views in Wales are similar to the all UK average. Three quarters (76%) of participants in Wales said they wish to see a green economic recovery, but fewer than half (47%) said they would oppose policies that would promote economic growth at the expense of the environment.

[1] Not all participants were in work, and therefore this NZ positive behaviour change was not applicable to all. It should also be noted that there is considerable scientific debate about whether working from home is NZ positive.

[2] Participants were asked to rank 5 motivations for any positive NZ behaviour changes: a high mean score (out of 5) indicates that the motivation was a more important influence on the positive NZ behaviour changes reported.

Are behavioural changes net zero positive or net zero negative?

Overall, a greater proportion of the public reported at least one positive NZ behaviour change (63%) than reported at least one negative NZ behaviour change (57%).

Do participants want to continue with changes?

Early findings suggest that some positive NZ behaviour changes amongst households in Wales, as those in the rest of the UK, are likely to continue in the long-term. However, for some of the most impactful NZ behaviours, such as reduced use of air travel and eating a plant-based diet, desire to maintain was towards the lower end of the scale compared to other NZ behaviours.

- Of the 13% who were planning more no-fly holidays at the time of the survey, 43% want to continue to do so

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- Of the 6% had reduced their meat/dairy intake, 51% said they wanted to continue to do so
- In comparison, of the 9% who were trying to save energy at home at the time of the survey, 97% said they wanted to continue doing it.

How do changes vary across nations and demographic groups, with a specific focus on fuel poor households?

Changes were remarkably consistent across UK nations and different regions in Wales. Those spending more time at home since the first UK-wide lockdown were more likely to have made one or more positive NZ behaviour changes. More changes tended to have been made by younger participants and households with children.

Participants more likely to indicate they have made six or more positive NZ changes include younger people (under 44s); those living in larger, sometimes multi-generational households; those under financial pressure, but not retired; those renting privately; those living in a flat; or those who have heating-related problems in their home. Those making 6+ positive NZ changes were most driven to change by financial concerns.

The third of participants who had made no positive NZ behaviour changes tend to be older or retired; to not have children in the household; to be social renters; or to report no heating-related problems in their home. Those who are financially better off were also less likely to have made positive NZ behaviour changes, as were participants in Mid Wales.

Participants in households likely to be fuel poor were significantly more likely to report making positive NZ changes relating to careful heating use, washing clothes at 30°C or lower, and trying to save energy at home. They were also less likely than average to say that they had made changes for environmental reasons.

What support does the public need to maintain changes

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over the longer term?

Policy interventions and incentives to encourage people to maintain NZ behaviours in the longer term could be useful, given the variation across behaviours. Financial factors and well-being were more important drivers of positive NZ behaviour change than concern for the environment, even amongst those who had made 6+ positive NZ changes.

When asked directly what Welsh Government could do to help the public maintain positive NZ behaviours participants strongly favoured ‘carrots’ over ‘sticks’. Provision of financial help, subsidies or incentives were by far the most commonly requested support mechanism (by 31% in Wales, v 34% UK average). Improvements to infrastructure and services were also commonly suggested.

What has been the impact of financial difficulties associated with the pandemic?

More than half (54%) of participants in Wales reported they were using more energy at the time they completed the survey than in the comparable period in the previous year, before the first UK-wide lockdown (55% UK average). Groups most likely to say their energy consumption had increased were also the most likely to say that someone from their household has worked from home (e.g. younger participants, households with children).

Over four-fifths (84%) of participants in Wales said their household was spending more time at home at the time they completed the survey, compared with before the first UK-wide lockdown. Two fifths (44%) said someone from their household had worked from home in the past seven days: very similar to the all UK average.

On average, two-fifths (36%) of Welsh participants said they are finding it more difficult to manage financially compared with before the first UK-wide lockdown: slightly lower than the all UK average of 40%. Groups particularly likely to say

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they were experiencing financial pressure are similar in Wales and the rest of the UK and include households with children, those on lower incomes and those likely to be fuel poor. Those aged 65+ were less likely to say they are experiencing financial pressure than under 65s. Most participants in Wales said they have heating-related issues in their homes (60%, slightly higher than the all UK average of 56%).

Financial difficulties associated with the pandemic and being in a fuel poor household

When asked to compare their financial situation at the time they completed the survey (in November/December 2020) with before the first UK-wide lockdown, just over one third (36%) of households in Wales said they were finding it more difficult to manage financially at that time. This rose significantly to half (50%) of households likely to be fuel poor and/or on low income (below £16,000 pa) (58%).

At least two in five of those in households in Wales likely to be fuel poor reported they could not afford to heat their households to a comfortable level (36% v 21% on average), or were rationing energy use because of financial concerns (43% v 26% on average).

Whilst behaviours that reduce energy use are seen as beneficial to net zero because they can reduce carbon emissions, there is no suggestion that these are positive policy outcomes in contexts where changes are being made out of necessity to save money: as these households may be unable to heat their homes sufficiently or use appliances as they need to.

What are the potential impacts on short, medium- and longer-term policy?

There are also several important implications for how Welsh Government or UK Government communicates with the public about making or maintaining positive NZ behaviour changes.

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- Saving money and improving physical and mental well-being are currently more important motivators than environmental concern.
- Personal worry about climate change is more strongly linked to positive NZ behaviour change than more rational or calculated consideration of the issues, such as expectation of negative impacts from climate change during the individual's lifetime. This indicates that messaging about impacts should be personal rather than generic to prompt action.
- Poor understanding of the environmental impact of positive NZ changes may be limiting the extent to which environmental concerns are cited as a driver for change. Alternatively, this may be simple reluctance around intrusive lifestyle change.

Further, given that it was less likely that behaviours with the highest potential for positive NZ impact would be maintained (for example, active travel, reducing air travel), measures may be needed to support these behaviour changes.

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Views expressed in this report are those of the researchers and not necessarily those of the Welsh Government.

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Social research number: 76/2021

Digital ISBN: 978-1-80391-264-6

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