

Attitudes to Natural Gas from Shale

Report from a telephone survey of 1001 adult residents in Blackpool; Fylde and West Lancashire

Overview

This report sets out findings from a telephone survey of 1001 adults in three local authority areas in Lancashire. The survey was commissioned by Cuadrilla Resources to understand:

- Background levels of knowledge in the area about natural gas from shale, in comparison to other sources of energy
- Residents' unprompted views on the risks and benefits that the extraction of natural gas from shale might involve
- The relative importance of a range of the potential benefits and risks that the extraction of natural gas from shale might involve.
- Trust in a range of voices in the debate about fracking
- Support for ongoing exploration of natural gas reserves in the local area

The survey instrument was designed, and results analysed by BritainThinks. Fieldwork was carried out by Populus Data Solutions between 11th-16th October 2012.

Key findings:

- Knowledge levels in relation to natural gas from shale are lower than for other forms of energy tested in the survey. 15% feel they know a lot about natural gas from shale, and a further 38% feel they know a little.
- The most important potential disadvantages related to the exploration of shale gas reserves in Lancashire are earth tremors and water contamination
- The most important potential benefits are cheaper energy and the possibility of local jobs as a result of the extraction industry
- There is a desire amongst local people to know more about both the potential benefits and the potential disadvantages of natural gas from shale.
- The most trusted voices in the debate are felt to be academics/scientists, with 73% feeling they are very or quite trustworthy.
- 44% support continued exploration in the local area to understand the potential for natural gas from shale in the UK. 23% oppose further exploration in the area.

Methodology

We conducted a telephone survey of 1001 adults who live in three local authority areas in the North West of England:

- Blackpool Council - 334 respondents
- Fylde Borough Council - 334 respondents
- West Lancashire District Council - 333 respondents

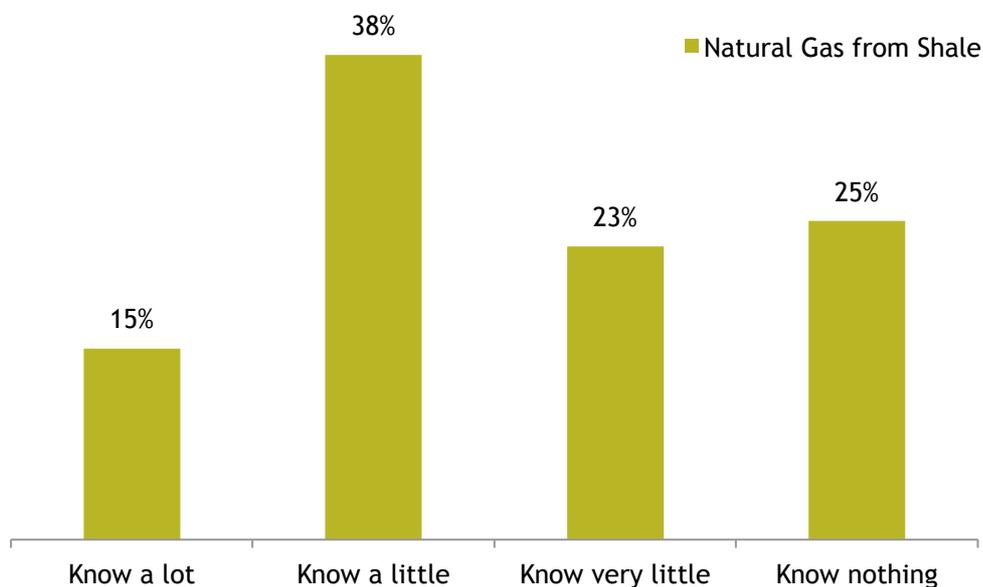
The sample was weighted to be representative of the demographics of the three areas combined in terms of age and gender.

- Statistics reported for the full sample (n=1001) are statistically significant at the 95% level subject to a confidence interval of +/- three percentage points.
- Statistics reported at the level of the three local authority areas (n=334) are statistically significant at the 95% level subject to a confidence interval of +/- 5.5 percentage points.

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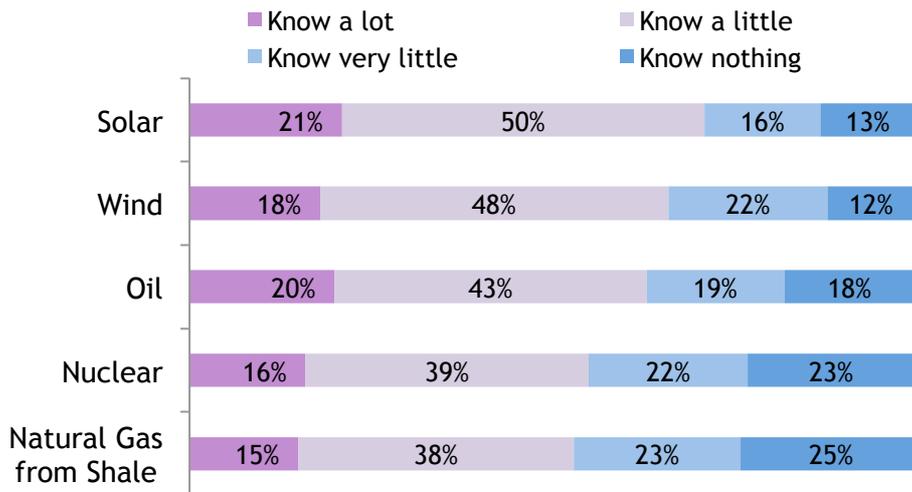
Knowledge about Shale Gas

Overall, knowledge levels about natural gas from shale are low. 15% of respondents said they know “a lot” and 38% “a little” about natural gas from shale. With the remaining 48% saying they know very little or nothing.



Q: Thinking about a range of potential sources of energy for providing our gas and electricity, how much would you say you know about each of the following? Base: All respondents (n=1001)

Knowledge about natural gas from shale is highest in the Fylde area, where 22% say they know “a lot”; and lowest in Blackpool, where only 10% say they know “a lot”. Knowledge about natural gas from shale is lower than for any other energy source included in the survey:



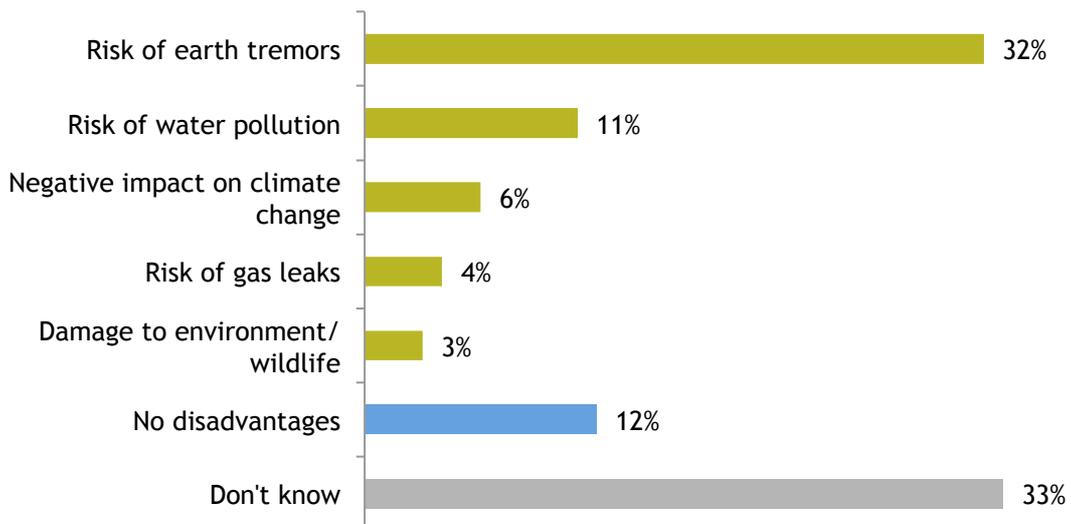
Q: Thinking about a range of potential sources of energy for providing our gas and electricity, how much would you say you know about each of the following? Base: All respondents (n=1001)

Potential disadvantages of natural gas from shale

Respondents in the survey were made aware of the current exploration of the potential for the extraction of natural gas from shale in Lancashire with the following words:

“I would like to get you to think more now about natural gas from shale, sometimes described as fracking, which is currently being explored in Lancashire”

Respondents were then asked what they believed to be the potential disadvantages of fracking. 55% of respondents were able to recall a disadvantage; 12% felt there were no disadvantages; and 33% responded “don’t know”. The most commonly mentioned disadvantage was associated with earth tremors.



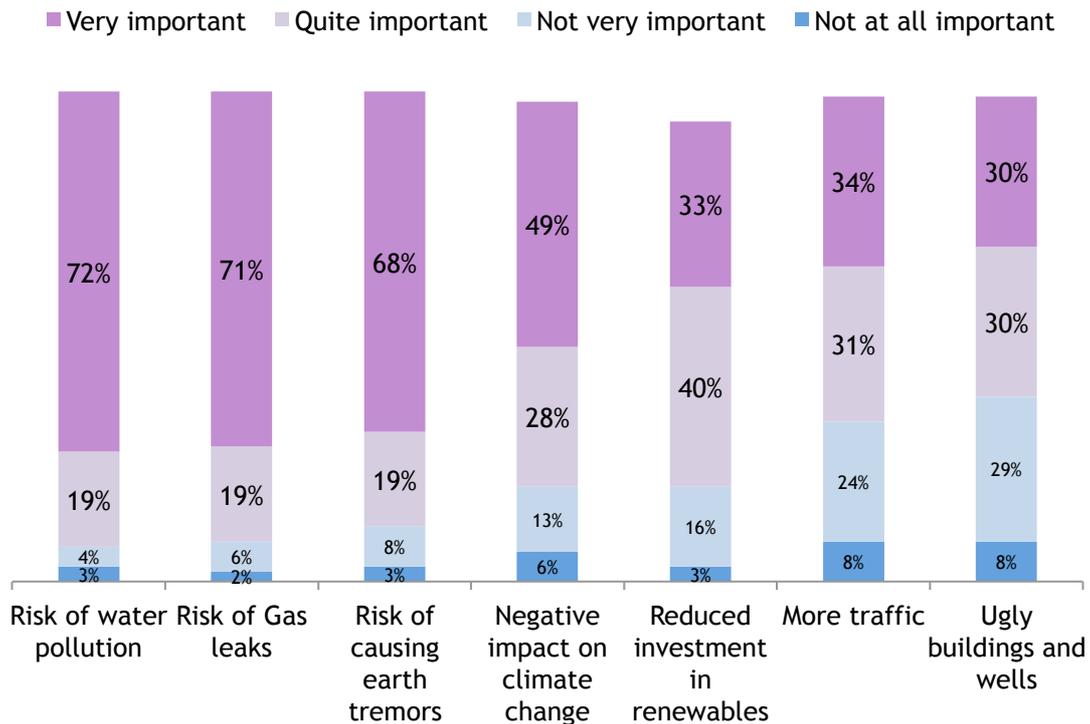
Q: Based on what you know now, what do you think are the potential disadvantages of developing natural gas resources through fracking? Base: All respondents (n=1001) Chart shows top 5 most common responses.

Following this open response question, the survey then asked respondents to rate the importance of a series of potential disadvantages of fracking. Three potential disadvantages stand out as particularly important to local adults:

- “Risk of water pollution” - 91% very/quite important
- “Risk of gas leaks” - 90% very/quite important
- “Risk of causing earth tremors” - 87% very/quite important

Asked to choose the single most important disadvantage, 30% of respondents said that risk of causing tremors was the most concerning disadvantage.

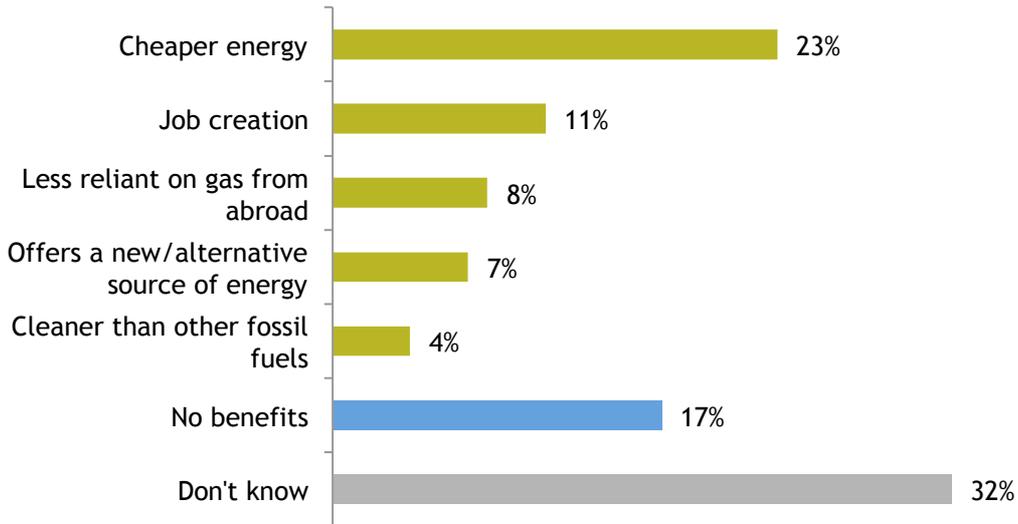
Potential benefits of natural gas from shale



Q: Now thinking about a number of potential disadvantages of fracking, how important do you think each of these are? Base: All respondents (n=1001)

Potential benefits of natural gas from shale

Respondents were asked an open question about what they believed to be the potential benefits of fracking. 51% were able to offer a potential benefit; 17% felt there are no potential benefits; and 32% said ‘don’t know’. The most commonly mentioned potential benefit of fracking was an expectation that energy would become cheaper.

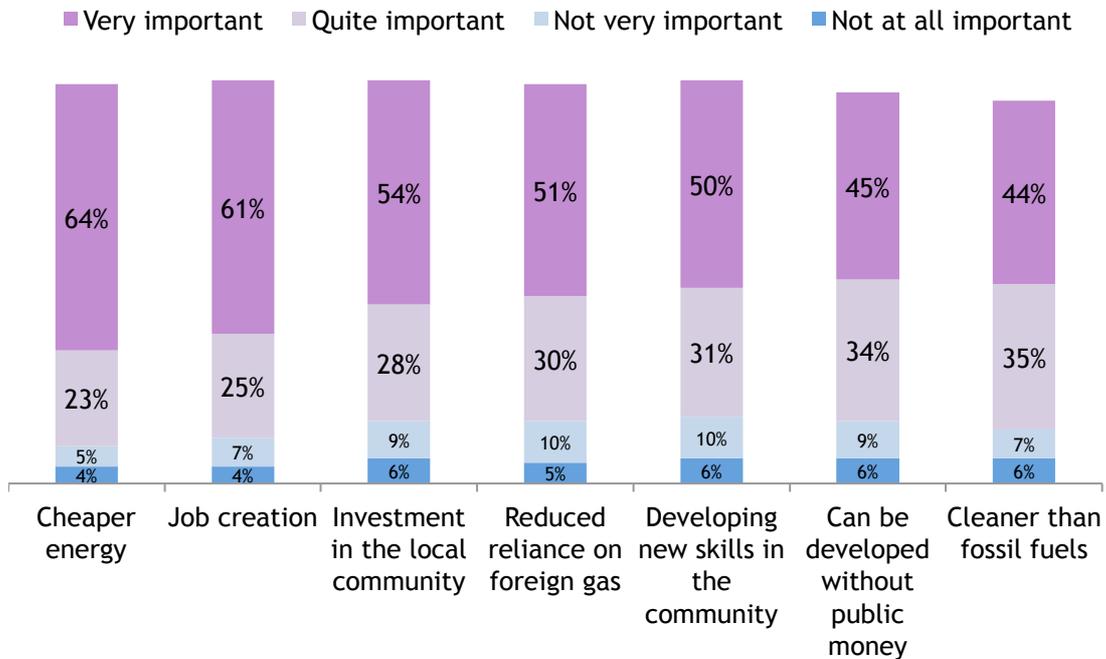


Q: Based on what you know now, what do you think are the potential benefits of developing natural gas resources through fracking? Base: All respondents (n=1001) Chart shows top 5 most common responses.

Following this open response question, the survey then asked respondents to rate the importance of a series of potential benefits of fracking. While all were ranked highly, two potential benefits stand out as particularly important to local adults:

- “Cheaper energy” - 87% very/quite important
- “Job creation” - 86% very/quite important

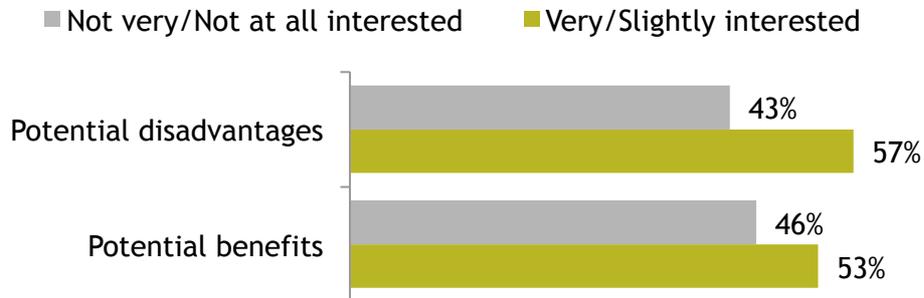
Asked to choose the single most important benefit, 25% of respondents said that job creation was the most important potential benefit, and 24% said that cheaper energy was the most important.



Q: Now thinking about a number of potential benefits of fracking, how important do you think each of these are? Base: All respondents (n=1001)

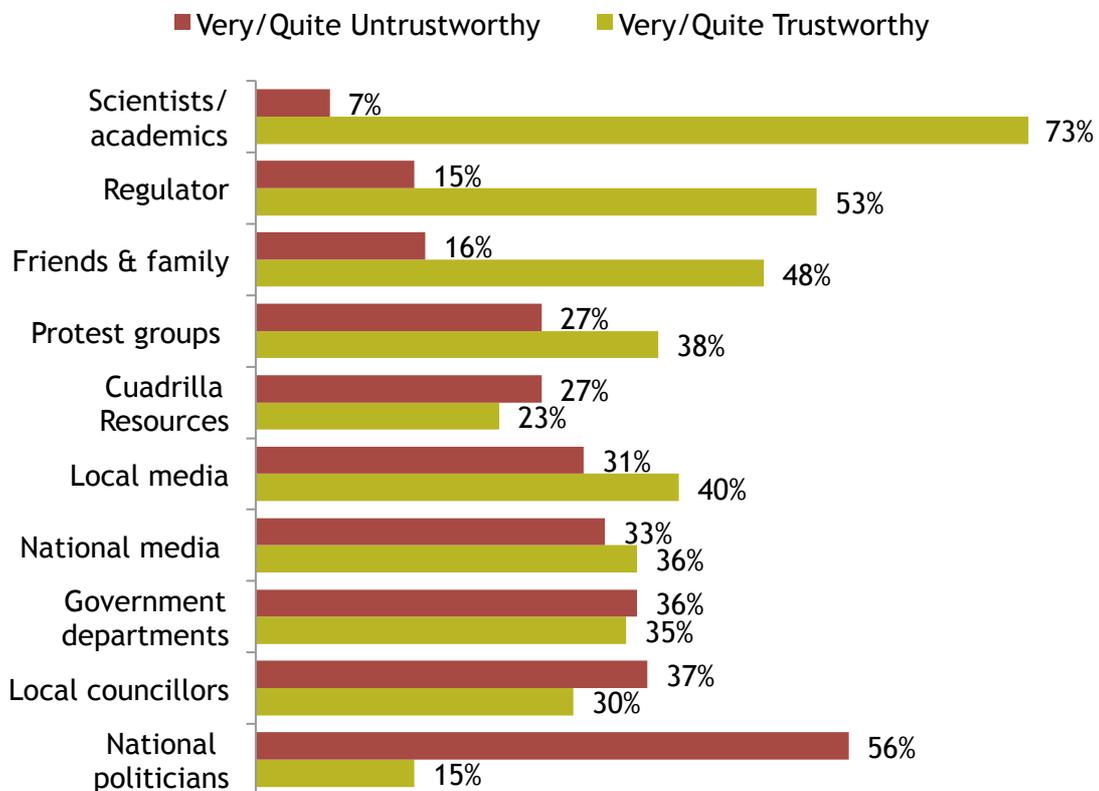
Appetite for information and trust in different voices within the debate around fracking

A majority of respondents to our survey reported being interested in hearing more about both the potential benefits and the potential disadvantages of natural gas from shale.



Q: How interested are you in hearing more about these benefits/disadvantages? Base All respondents (n=1001)

The survey asked participants to say how far they trust a range of organisations and individuals on the subject of fracking. By far the most trusted sources are scientists and academics - with 73% saying they are very or quite trustworthy, and 23% saying very or quite untrustworthy. With the exception of a regulator, no other source was felt to be trustworthy by a majority of respondents. National politicians are the least trusted to speak on the subject, with 56% saying they are an untrustworthy source.

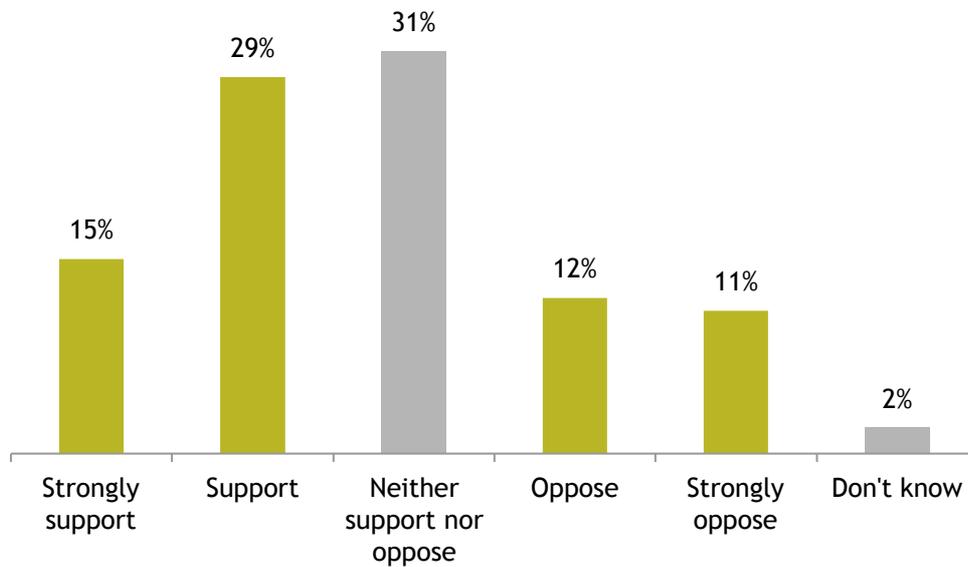


Q: How trustworthy do you believe each of these sources to be in talking about fracking? Base: All respondents (n=1001)

Support for continued exploration in the local area

Following their unprompted and prompted consideration of the potential benefits and disadvantages of shale gas extraction, respondents were asked how far they support or oppose continued exploration “in your area” to understand the potential for natural gas from shale for the UK.

- 44% of respondents said they “strongly support” or “support continued exploration
- 23% of respondents said they “strongly oppose” or “oppose” continued exploration
- 35% said “neither support nor oppose” or “don’t know”



Q: Finally, how much do you support continuing exploration, in your area, to understand the potential for natural gas from shale in the UK? Base: All respondents (n=1001)