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RESEARCH

# Daily Life Survey: wave 1 and 2, qualitative and quantitative combined report (summary)

A survey assessing the impact of COVID-19 on self-reported behaviours, attitudes and experiences related to net zero, green recovery measures and home energy use.

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## Introduction and background

Ipsos, 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 project ran until December 2021.

The research provided an overview of the impacts of the coronavirus (Covid-19) pandemic on households' self-reported behaviours, attitudes and experiences in relation to net zero, green recovery measures and home energy use. The research looked at differential impacts on sub-groups of the population, particularly relating to income levels, 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 consisted of two waves of a quantitative household survey and a

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stage of qualitative research. Rapid functional reviews of available secondary evidence were also conducted at several points throughout the project. This report summarises all phases of the research completed in Wales.

Fieldwork for the first wave was conducted between 20 November and 24 December 2020, and the second wave was conducted between 5 February and 16 March 2021.

Qualitative fieldwork consisted of 14 depth interviews with participants in Wales, which were conducted between 2 February and 18 February 2021, and a phase of app-based online diary fieldwork with 3 participants in Wales which ran between 19 February and 5 March 2021.

Throughout the research period, Wales was in various stages of lock-down and 'circuit-breaker' restrictions and participants would have answered questions about their behaviours on this basis.

For the quantitative survey, the following numbers of questionnaire responses were received:

- wave 1: 1,687 from 1,242 households (representing a 26% response rate)
- wave 2: 1,865 from 1,345 households (31% response rate)

Further detail about the breakdown of the sample can be found in the main report.

## Limitations

Possible limitations to the quantitative element of this study include:

- accuracy of participants' recollections, particularly with regard to recalling behaviours before the UK-wide lockdown which started on 23rd March 2020
- representativeness of the sample
- differences between online and postal samples leading to lower representativeness of the sample for online-only questions
- social desirability bias

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- non-response bias

The quantitative survey took a cross-sectional rather than longitudinal design, which means that comparisons are made on an individual rather than an aggregate basis, and this limits the statistical power of comparisons over time

For the qualitative element of this study, the primary limitation is non-representativeness of the sample (arising from the small sample sizes typically used in qualitative research).

Steps were taken to mitigate the impacts of these limitations wherever possible, including the use of cognitive testing to ensure the questionnaires were clear and straightforward to use; the application of data weights to the quantitative data to increase the sample's representativeness; consistency in survey methods over the two waves to enable like-for-like comparisons across waves; and the use of recruitment quotas for qualitative research to ensure inclusion of a range of participants. Further details can be found in the Technical Annex of the main report.

## Findings

### **What environment-related changes in behaviour happened since the start of the UK-wide lockdown?**

Waste and recycling behaviours were the most prevalent and consistent net zero (NZ) behaviours across Wales at both phases of the fieldwork. Eight in ten or more of participants said that they were consistently recycling (92% at Wave 2), separating out food waste (83% at Wave 2) and avoiding food waste (80% at Wave 2): consistent behaviours means that participants said they did it 'always' or 'most of the time'. Home energy behaviours were also prevalent, with 80% (at Wave 2) saying they were consistently trying to save energy at home and 71% using heating carefully.

Behaviours which have some of the highest potential for carbon-savings from lifestyle change were less frequently reported, including active travel (doing

errands and journeys on foot or by bike/scooter) which 25% said they were doing consistently at Wave 2, and eating a plant-based diet/reducing meat/dairy intake (16% at Wave 2).

At Wave 1, it was possible to assess individual level behaviour change between the period before the first UK-wide lockdown (which started on 23<sup>rd</sup> March 2020) and the time of completing the wave one survey (November/December 2020). 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".

In total, two thirds (63%) of participants in Wales reported at least one positive NZ behaviour change between the pre-pandemic period and the time of the Wave 1 survey in November/December 2020.

Overall, a greater proportion of the public reported at least one positive NZ behaviour change at Wave 1 (63%) than reported at least one negative NZ behaviour change (57%).

The highest levels of positive NZ behaviour change between pre-lockdown and Wave 1 of fieldwork were seen for working from home rather than commuting to work, buying only what you really need, gardening as a hobby and avoiding food waste. All of these behaviours may in some way be connected to the restrictions, guidance on reducing numbers of shopping trips and news/publicity about food shortages experienced during the first lockdown. 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.

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). It should be borne in mind that some people may have been answering that they were planning fewer holidays at all, rather than planning more holidays that involve flights.

For most of the NZ behaviours covered in the research, significant changes to the proportions of adults in Wales performing the behaviour consistently occurred between the start of the first UK-wide lockdown and the time of the Wave 1 fieldwork (Nov/Dec 2020). Changes between Wave 1 and Wave 2 of the survey (Feb/Mar 2020) were less common and tended to be smaller.

A key negative NZ behaviour change seen was the shift away from using public transport and towards private car use. At the population level, the proportion saying they were consistently using public transport fell by 5 percentage points from 11% pre-lockdown to 8% at Wave 2. However, it should be noted that there was also an increase in active travel (doing errands/journeys on foot or by bike/scooter) over the same period which rose by 5 percentage points from 20% pre-lockdown to 25% at Wave 2.

## **What were the motivations for change, and what part did worry about climate change play in this?**

At Wave 1, those who reported increased positive NZ behaviour changes were asked about their motivations for doing so. 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), over and above concern for the environment (mean importance score: 2.80). 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.

Even where concern for the environment was high, NZ behaviour change did not always reflect this. Those who said they were most worried about climate change were not always the most likely to have made positive NZ behaviour changes. However, it is notable that their baseline levels of NZ behaviours before the pandemic did tend to be more NZ positive than the all-Wales average.

A strong majority of participants in Wales (84% at Wave 1 and 82% at Wave 2) believed in anthropogenic climate change (i.e. that human activities contribute to

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climate change). Most (76% at Wave 1, 71% at Wave 2) also believed the UK will be negatively impacted by climate change within their lifetime. At both waves those reporting NZ positive behavioural changes were more likely than those not reporting such changes to agree with each statement, though older participants were less likely to agree that negative impacts will be seen in their lifetime than younger participants.

Concern around climate change increased after the onset of the pandemic, and remained high into 2021. At both Waves of fieldwork, around three quarters (78% Wave 2) said they were at least somewhat worried about climate change and a third (33%) were very or extremely worried. At Wave 1, participants were also asked how much their level of worry had changed since the start of the first UK-wide lockdown, and a fifth (21%) said they were more worried at the time they completed the survey (Nov/Dec 2020), though for most their level of worry was unchanged (69%).

Most said they supported a green recovery, though this depended on how a green recovery is presented. Two thirds of participants (65% at Wave 2) in Wales said they wished to see a green economic recovery from the COVID-19 pandemic, and there was strong support for policies which create green jobs (78%). However, fewer (46%) said they would oppose policies that would promote economic growth at the expense of the environment. At both waves, those who described themselves as worried about climate change displayed greater support for policies supporting a green economic recovery than those who were not worried.

## Do participants want to continue with changes?

Findings suggested that some positive NZ behaviour changes amongst households in Wales are likely to continue in the long-term. Wave 1 survey participants who reported individual-level behaviour changes expressed a strong desire to maintain these changes, and also high expectations that they would do so.

Wave 2 participants showed little desire to perform NZ behaviours less once COVID-19 restrictions are removed. For the most part, participants wanted to

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maintain behaviours at their current levels, and they were more likely to say they hoped to increase NZ behaviours than to want to decrease them. The main exception to this was working from home rather than commuting to work: two fifths (42%) of those doing this consistently said they wanted to do it less once restrictions were removed, and few of those who were not doing so consistently wanted to do it more.

However, once again for some of the most impactful NZ behaviours, desire to maintain behaviours was towards the lower end of the scale:

- of the 13% who were planning more no-fly holidays at the time of the Wave 1 survey, 43% said they wanted to continue to do so
- of the 6% who were consistently plant-based diet/reducing meat/dairy intake at Wave 1, 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 Wave 1 survey, 97% said they wanted to continue doing it

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

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 also tended to have been made by younger participants and households with children.

The groups which were most likely to have made the largest number of positive NZ behaviour changes between pre-lockdown and Wave 1 (i.e. who reported six or more positive changes) included younger people (under 44s); those living in larger, sometimes multi-generational households; and those under financial pressure, but not retired.

The types of behaviour changes which participants reported also varied according to circumstances. For example, participants under financial pressure, and particularly those in households likely to be fuel poor were significantly more likely to report making positive NZ changes relating to saving energy including careful heating use, washing clothes at 30°C or lower, and trying to save energy

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at home. It is also notable that participants who had made the most positive NZ changes, and in particular those who were under financial pressure, were also most likely to say that these changes were to save money, rather than for other reasons (for example wellbeing, climate concern).

Conversely, the groups who were most likely to have made no positive NZ behaviour changes at all were older/retired people; those who do not have children in their households and participants in Mid Wales. In addition, households on higher incomes and who reported fewer financial problems/issues were also more likely to say they had not changed behaviours at all.

## **What support does the public need to maintain changes 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 a large number (6+) of 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%). Improvements to infrastructure and services were also commonly suggested.

Participants in the qualitative research felt that the pandemic could provide learnings to Welsh Government around climate policy. Qualitative participants who had expressed a high degree of concern about climate change and support for green economic recovery felt that the pandemic had demonstrated the usefulness of decisive action and clear communications on the part of government in changing public behaviour.

Qualitative participants who were less concerned about climate change and less supportive of green economic recovery felt that because of the economic problems created by the pandemic, the priority after the pandemic should be the

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promotion of the economy rather than combatting climate change.

## **What have been the impact of financial difficulties associated with the pandemic?**

The research explored participants' financial difficulties in general, and from the point of view of increased spending on energy bills.

On average, two-fifths (39%) of Welsh participants at Wave 2 said they were finding it more difficult to manage financially at the time they completed the survey compared with before the first UK-wide lockdown. Groups particularly likely to say they were experiencing financial pressure included younger participants, households with children under five, and those in lower income households and/or households likely to be fuel poor. Older people (65+s) were less likely to say they are experiencing financial pressure than under 65s.

Many participants found they were also under increased financial pressure as a result of increased energy use associated with the lockdown/spending more time at home.

At both waves, and reflecting on lockdown restrictions in place at the time of fieldwork, around nine in ten (91% at Wave 2, up from 84% at Wave 1) 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 (45%) said someone from their household had worked from home in the past seven days at Wave 2.

At Wave 1 (Nov/Dec 2020), 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. This rose significantly in Wales to seven in ten (69%) of those interviewed at Wave 2 (Feb/March 2021, although it should be noted that the Wave 2 fieldwork took place during a particularly cold period in the UK).

These higher levels of energy use, taken together with general financial pressures, were felt to translate to increased financial difficulties, as more than

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three in ten (31% Wave 1, 36% Wave 2) said they were finding it more difficult to keep up with their energy bills compared with the same time last year. Almost half of all participants (45% at each wave) said they were cutting back spending in some way to better manage their energy bills, including 16% who said they had cut back spending on food.

In addition, a quarter of participants (24% at Wave 2) said that they had made 'energy rationing' changes at home, with most of these saying they had done so because of concerns about affording energy bills (79% of those reporting 'energy rationing' at Wave 2 said this was because of such concerns). Examples of 'energy rationing' changes include heating the home for fewer hours, to a lower temperature or heating fewer rooms than before. Some also reduced/avoided use of appliances.

A quarter or more of those in households in Wales likely to be fuel poor reported they could not afford to heat their households to a comfortable level (32% v 21% on average), or were rationing energy use because of financial concerns (38% 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.

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

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

Saving money and improving physical and mental well-being could be highlighted as central benefits of behaviour change, as these were more important motivators to those who had changed behaviours than motivations to protect the environment or avert climate change.

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Increasing levels of knowledge of the implications of different behaviours may help people to make better choices about future behaviours. Poor understanding of the environmental impact of positive NZ changes may be limiting the extent to which environment is considered or post-rationalised as a driver of change. For example, people who were worried about climate change were more likely to report negative NZ behaviour change relating to flying. This suggests that public knowledge of the carbon impacts of flying, or public willingness to connect values and actions for this behaviour, remains low.

A balance of emotional and rational triggers is likely to be important in bringing about positive NZ behaviour change. Personal worry about climate change was more strongly linked to positive NZ behaviour change than more rational or calculated consideration of the issues, for example, expectation that there will be negative impacts from climate change during the individual's lifetime.

With respect to wider policy implications, the findings highlight a number of support needs among the public in Wales. While behaviour changes are NZ 'positive', they are not always positive indicators or impactors of well-being. This is indicated by the disproportionate impact of the pandemic on heating and energy use behaviours on households likely to be fuel poor. These include higher levels of energy rationing behaviour, concern about energy bills and high anxiety.

Further, the lower likelihood of maintaining behaviours which have some of the highest potential positive NZ impact indicates support measures may be needed if these changes are to be maintained.

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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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