



Department  
of Energy &  
Climate Change

# Green Deal Household Tracker survey

Waves 1 and 2 Executive Summary

25<sup>th</sup> June 2013

# Executive summary

## Background and objectives

The Green Deal was officially launched on 28<sup>th</sup> January 2013 with the aim of enabling households and businesses to make energy saving home improvements to their properties.

The overall objective of the scheme is to reduce carbon emissions, improve domestic energy efficiency in Great Britain and address fuel poverty.

GfK NOP was commissioned by DECC to carry out tracking research to test the hypothesis that there will be positive changes in the following measures over the next two years:

- Awareness and understanding of the Green Deal
- Awareness of opportunities to improve home energy efficiency
- Confidence in the tangible benefits of energy efficiency
- Intention to install measures
- Confidence and trust in industry standards

To date, GfK NOP has conducted two waves of the main tracker survey, two smaller-scale surveys (referred to as 'dips') and one round of qualitative research. The dips had a separate objective of testing public opinion of certain parts of the Green Deal communication campaign and therefore different questions were used, though consistency was maintained whenever possible. This report combines the findings from Wave 1 and 2 of the quantitative tracking study, findings from the short dips where appropriate and findings from the qualitative research. The full data tables can be found at <https://www.gov.uk/government/publications/green-deal-household-tracker-survey-waves-1-and-2-report>

## Methodology and sampling

For both waves of the main tracker survey representative samples of over 3,000 owner-occupiers and tenants (from both the private and social rented sectors) in Great Britain were interviewed face-to-face as part of GfK NOP's Random Location Omnibus. The 'dips' had approximately 1,500 face to face interviews.

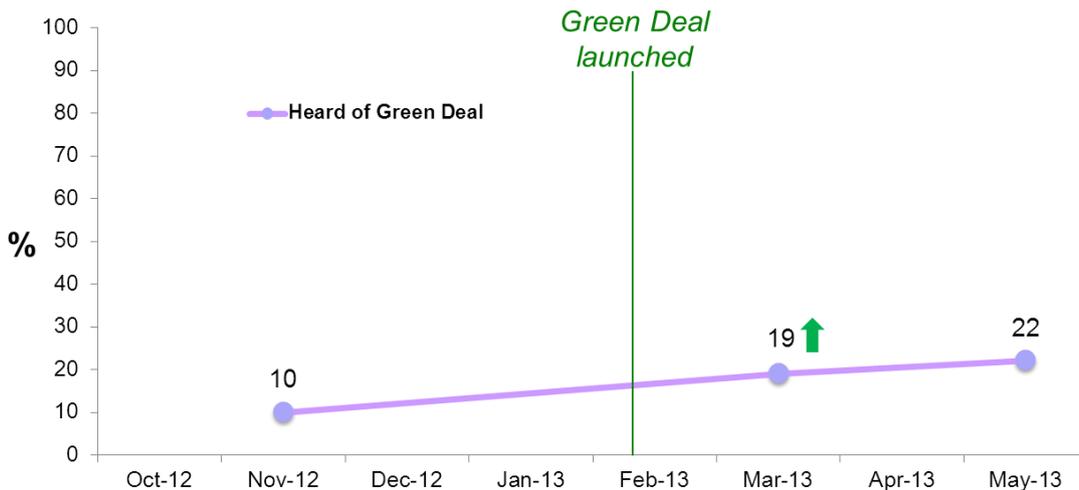
As this is an omnibus study the same methodology and sampling was used both in Wave 1 (the baseline survey), Wave 2 and the dips, so as to ensure comparability of findings. Wave 1 fieldwork took place in November 2012 and Wave 2 in March 2013 while the two dips were conducted in February 2013 and May 2013.

Fuller methodological details are included in a separate Technical report which is available at <https://www.gov.uk/government/publications/green-deal-household-tracker-survey-waves-1-and-2-report>

## Awareness and understanding of the Green Deal

Awareness of the Green Deal has increased significantly since Wave 1, as shown in the chart below. In Wave 1, which was conducted prior to the official launch of the scheme, awareness stood at 10%. This increased significantly to 19% in Wave 2 and increased further to 22% in the May dip.

**Chart 1: Awareness of the Green Deal**



Base: All respondents (W1 = 3,562; W2 = 3,409, May Dip = 1,648)

Significant wave on wave increases are indicated by a green arrow (↑) on the chart.

While the main sources of Green Deal awareness were broadly the same in both waves - television advertising/programmes and newspaper or magazine articles and advertising were most frequently cited – there was a significant increase in the proportion who mentioned DECC as a source (up from 3% in Wave 1 to 9% in Wave 2).

Respondents were asked whether they had seen, heard or read any advertising, news or publicity about any initiatives that allow people to make energy saving improvements to their home. General awareness did not change significantly between Waves 1 and 2 with 51% claiming to have seen, heard or read about such initiatives in Wave 1 and 50% claiming the same in Wave 2. However, for the dips this figure was significantly higher, with 65% answering yes in February and 66% in May. Both of the dips were undertaken at a time when DECC marketing spend was significantly higher than the March wave, and hence this increase in awareness could be a response to the increased activity.

Respondents were also asked whether they had heard of any initiatives which featured a number of key Green Deal elements. Again, there was no wave on wave change on this measure; in Wave 1 52% had seen, heard or read about initiatives with any of these features while in Wave 2 54% said this. For the February dip 59% of households said they had heard of at least one of the key elements. This question was not asked in May.

In addition to the increase in overall awareness of the Green Deal there was also a significant increase in recognition of the Green Deal Quality Mark (up from 12% in Wave 1, to 17% for the

February dip and to 18% in Wave 2), although there was also a statistically significant drop in recognition in the May dip (15%).

Despite the increase in Quality Mark recognition there was no increase in the level of reassurance offered by it. All respondents were asked to say how reassured they were by the Quality Mark using a scale from 1-10 (where 1 meant they were not at all reassured and 10 meant they were completely reassured) and in both waves the mean level of reassurance offered by the Quality Mark was 6.1 (out of 10).

## Take up of energy efficient home improvements

The motivations and barriers associated with take up of energy efficient home improvements were consistent across both waves of the main tracking survey.

The main motivations were to:

- reduce energy bills (67% in Wave 1 and 70% in Wave 2)
- make the home warmer and more comfortable (58% in both waves)
- reduce the amount of wasted energy (45% in Wave 1 and 41% in Wave 2)
- reduce carbon emissions (19% in Wave 1 and 19% in Wave 2)

While the main barriers were:

- cost of improvements is too high (38% in Wave 1 and 39% in Wave 2)
- already doing enough (21% in Wave 1 and 19% in Wave 2)
- landlord/freeholder won't allow (15% in Wave 1 and 18% in Wave 2)
- no guarantee that it will save money (10% in both waves)

When asked if they already had energy saving improvement, respondents stated the same levels of installation across both waves of the main tracking survey.

The levels of claimed solid wall insulation and loft insulation were considerably higher than DECC's own estimates, which are derived from official insulation statistics and robust evidence from the English Household Survey. These discrepancies are important as they suggest that there is a lack of awareness and understanding about different types of energy saving improvements which could affect take up of improvements offered under the Green Deal scheme.

There was little difference in findings from waves one to two when households were asked to choose which source they would trust for advice about energy saving improvements from a list:

- Friends and family (35% in Wave 1 and 34% in Wave 2)
- Local authorities (30% in both waves)
- The Energy Saving Trust (24% in Wave 1 and 23% in Wave 2)
- DECC (23% in Wave 1 and 21% in Wave 2)
- Specialist installers (21% in Wave 1 and 20% in Wave 2)

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