



Department  
of Energy &  
Climate Change

# Green Deal Household Tracker survey

Waves 1 and 2 report

25<sup>th</sup> June 2013

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# Glossary of terms

This report contains data from a number of different strands of the Green Deal Household Tracker. These are described as 'waves' and 'dips'.

- Waves refer to the main Household Tracker Survey – a 20 minute face-to-face survey conducted amongst a large representative sample of households in Great Britain (3,562 interviews in November 2012 and 3,409 interviews in March 2013).
- Dips refer to separate short surveys where a small number of questions are asked of a representative sample of households in Great Britain (1,613 interviews in February 2013 and 1,648 interviews in May 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.

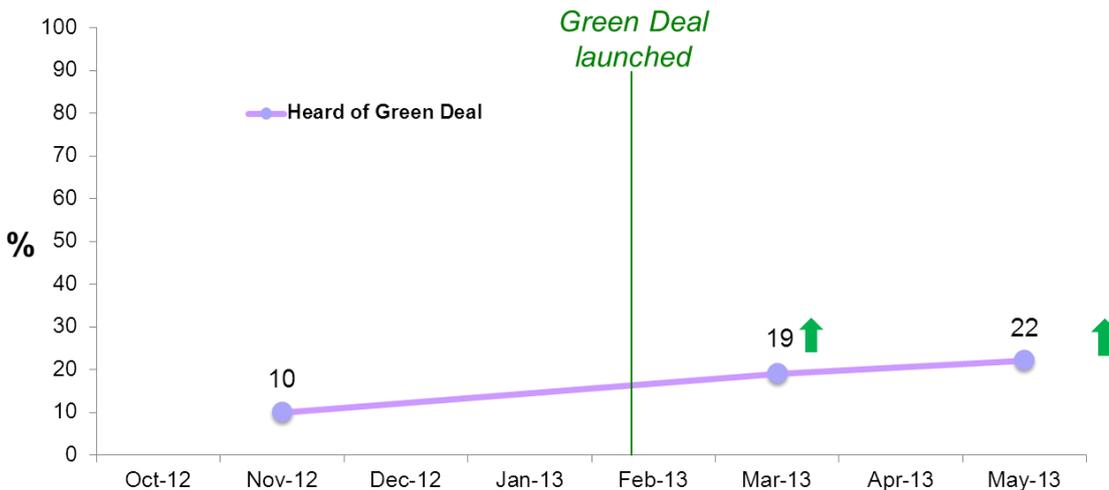
As this is an omnibus study the same methodology and sampling was used both in Wave 1 (the baseline survey), Wave 2 and the dips, so as to ensure comparability of findings. Wave 1 fieldwork took place in November 2012 and Wave 2 in March 2013 while the two dips were conducted in February 2013 and May 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 18% 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 19% 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)

# Background and objectives

**The Green Deal was launched by the Government on 28<sup>th</sup> January 2013 and aims to reduce carbon emissions and improve domestic and non-domestic energy efficiency in Great Britain, by offering a new way to pay for energy saving home improvements through electricity bills. Addressing fuel poverty is also a key objective of the scheme.**

**Detailed information about the Green Deal can be found at <https://www.gov.uk/green-deal-energy-saving-measures>.**

**The Green Deal launch was supported by a press-led media campaign which ran between 29th January and 24th February 2013, plus online activity from mid-February to early April 2013 and ongoing partnership activity from late March 2013. Further press advertising was run in the second half of March 2013 up until the end of May 2013.**

## Background to the research

In 2012, GfK NOP was commissioned by DECC to conduct tracking research to explore attitudes towards the Green Deal and towards energy efficiency measures more widely. The research consists of three 'strands', which are briefly described below:

- Strand one: four waves of quantitative research, starting in November 2012 and finishing in March 2014 to track key objectives (every six months).
- Strand two: three separate short 'dips' to be deployed flexibly to test public opinion after any major events or planned communications activity. The 'dips' are a small number of questions (around 6) that can be added to the GfK NOP Random Location Omnibus survey.
- Strand Three: three rounds of qualitative research.

The first strand one survey was conducted in November 2012 to provide a baseline measure of awareness and understanding of the Green Deal. The second wave was conducted in March 2013. In addition to the two strand one waves, GfK NOP has also conducted dips in February and May 2013. The remainder of the survey work will be completed by mid-2014.

This report combines the findings from Wave 1 and 2 of the quantitative tracking study and includes findings from the short dips where appropriate and the qualitative research undertaken.

## Objectives of the research

The key objective of this programme of research is to conduct 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

In addition, the research is required to:

- Explore perceptions of the Green Deal
- Identify communication channels by which people receive information about the Green Deal
- Understand how these core measures vary by key demographics, geographic and situational factors, as well as by the Green Deal segments which GfK NOP developed as part of a previous research project in 2012<sup>1</sup>

## Survey methodology and sampling

Findings shown in this report are based upon face-to-face in-home interviews conducted with a representative sample of householders/ those responsible for making decisions about their home aged 18+ in Great Britain. Fieldwork for all strand one waves and strand two dips was conducted on GfK NOP's Random Location Omnibus, which uses a random location quota sampling method.

Each wave of the strand one research was augmented by a boost sample of low income owner occupiers, and householders in six of eight Core Cities<sup>2</sup> which were awarded funding for their proposals to lower their carbon emissions. The boost samples were also conducted using random location quota sampling.

So as to ensure comparability with the main tracking survey the same methodology and sampling method was used for both of the dips. The questionnaires used for the dips were different, being shorter in length, but featured a selection of questions from the main tracking survey.

Sample sizes and fieldwork dates for the work which has been conducted so far are shown in the table below.

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<sup>1</sup> Detailed information about the Green Deal segments can be found at <http://www.decc.gov.uk/assets/decc/11/tackling-climate-change/green-deal/7057-research-report-green-deal-segmentation.pdf>

<sup>2</sup> See <https://www.gov.uk/local-authorities-and-the-green-deal>

	Strand one		Strand two	
	Wave 1 (baseline)	Wave 2	February dip	May dip
<b>Fieldwork dates</b>	8-25 Nov 2012	7-22 Mar 2013	7-12 Feb 2013	9-14 May 2013
<b>Sample size</b>	3,562	3,409	1,613	1,648

The questionnaires were designed by DECC and GfK NOP and drew on a number of questions from previous DECC surveys. Questions for the main tracking study were refined through piloting prior to conducting Wave 1.

The representativeness of the data was controlled through sample design, fieldwork quotas and post-fieldwork weighting. Data were weighted for the following characteristics: sex, age, social grade, region, number of adults in the household and working status within gender. Results included in this report are based on weighted data.

For full details of the survey methodology and sampling, please refer to the technical report, which is available at <https://www.gov.uk/government/publications/green-deal-household-tracker-survey-waves-1-and-2-report>. Copies of the survey questionnaires are also available at this link.

## Reporting conventions

This report provides selected headlines and highlights statistically significant differences between the different waves of the research. Throughout the report, whenever the word significant is used it is done to express a statistically significant difference. This means that any differences between results are likely to be down to an actual change, rather than something related to sampling or methodology. **Where appropriate some differences by sub-groups are highlighted, but for full comparisons the full dataset and data tables are available at <https://www.gov.uk/government/publications/green-deal-household-tracker-survey-waves-1-and-2-report>**

This report uses the following conventions:

- All differences commented upon are statistically significant at the 95% confidence level.
- Significant differences between waves are indicated by arrows (↑↓) within charts and tables.
- All base sizes quoted in the report are unweighted.
- A finding of less than 0.5% but greater than zero is indicated by an asterisk (\*).

# Awareness and understanding of the Green Deal

One of the key measures which will be tracked throughout the course of this research is awareness and understanding of the Green Deal.

This section of the report looks at overall awareness of the Green Deal, general awareness of energy saving improvements, understanding of key elements of the scheme, awareness of publicity and recognition of the Quality Mark.

## Overall awareness of the Green Deal

Respondents were prompted with the following list of initiatives and were asked which, if any, they had heard of:

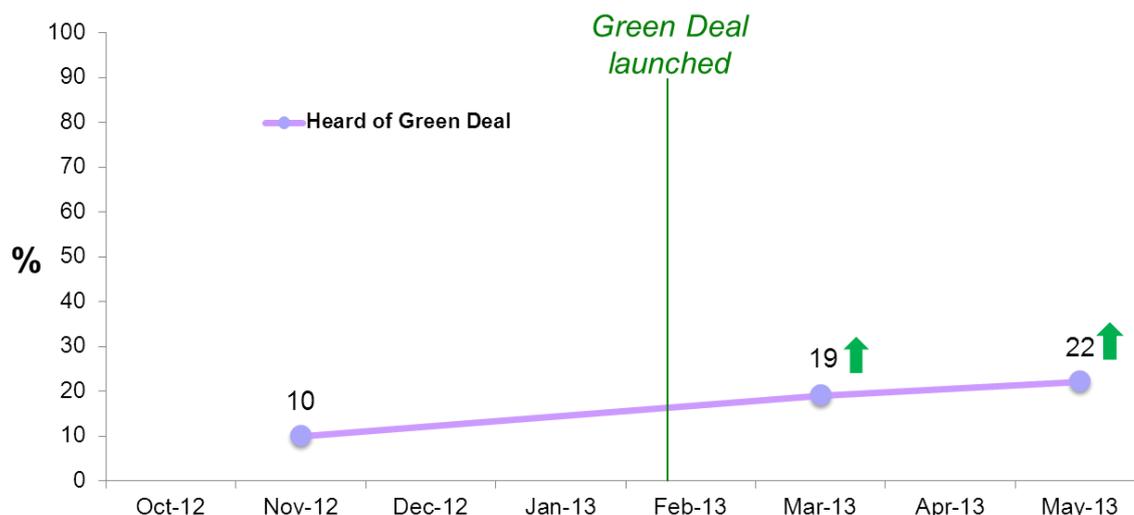
- Green Deal
- Warm Front Scheme
- Nest<sup>3</sup> (asked in Wales only)
- The Energy Assistance Package (asked in Scotland only)
- Affordable Warmth Scheme
- Boiler Scrappage Scheme

As Chart 2 shows, awareness of the Green Deal scheme in Wave 1 - prior to its launch - stood at 10%. Awareness increased significantly to 19% in Wave 2 (conducted six weeks after launch) and increased further to 22% in the May dip<sup>4</sup>.

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<sup>3</sup> Nest is the Welsh Government's fuel poverty scheme. It aims to help reduce the number of households in fuel poverty and make Welsh homes warmer and more fuel-efficient places to live. For further information visit <http://www.nestwales.org.uk/>.

<sup>4</sup> It is worth noting that the February dip asked the question in a different way, and elicited a different result. It is not possible to say whether this is the result of the question wording or the timing of the dip (other measures also received higher measures in this dip).

**Chart 2: Awareness of the Green Deal**

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

It should also be noted that between November 2012 and May 2013 there were significant increases in awareness of both the Affordable Warmth Scheme (up from 5% to 15%) and the Warm Front Scheme (up from 22% to 27%). No increases in awareness were observed in relation to the other schemes.

Amongst those who had heard of the Green Deal the main sources of awareness were broadly the same in both waves: television advertising/programmes (mentioned by 29% in Wave 1 and 33% in Wave 2) and newspaper or magazine articles and advertising (24% in Wave 1 and 19% in Wave 2).

Other sources included the internet (11% in Wave 1 and 10% in Wave 2) and word of mouth (10% in Wave 1 and 9% in Wave 2). Whilst there were very few changes overall, there was a significant increase in the proportion mentioning DECC (up from 3% in Wave 1 to 9% in Wave 2).

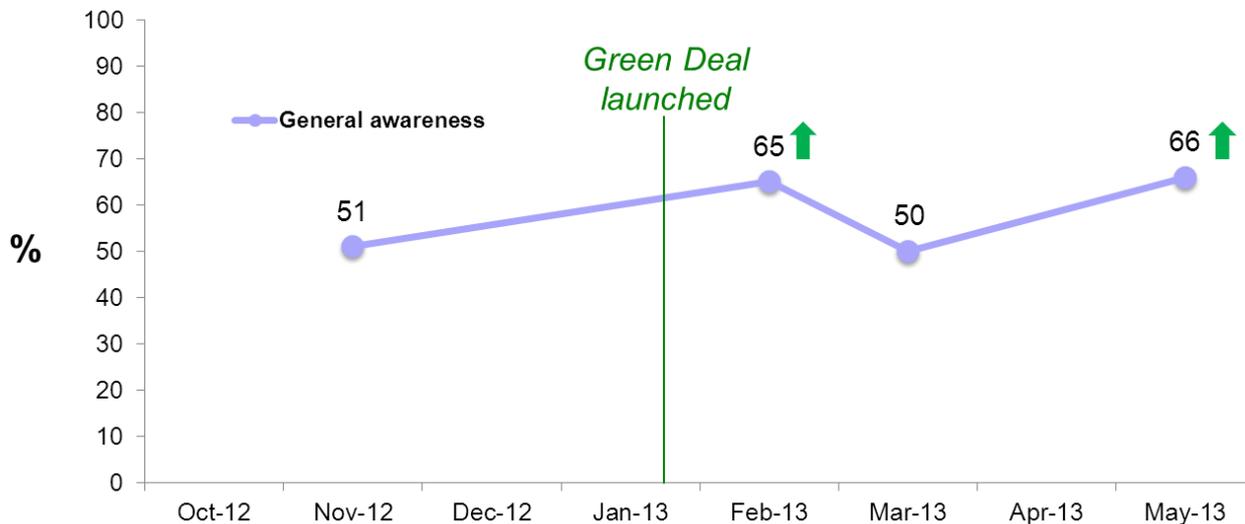
## General awareness of energy saving improvements

Prior to the prompted question about Green Deal awareness, 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. As Chart 3 shows, 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.

It should be noted that the question used in the dips was slightly different, as the dip questions included the word 'recently'. A minor change such as this should not have resulted in such different findings and logic suggests this would lead to lower levels of awareness. It is more

likely to be as a result of increased media activity around the launch of the scheme in late January and early February and higher marketing spend by DECC in the weeks preceding the dips.<sup>5</sup>

**Chart 3: General awareness of energy saving improvements**



Base: All respondents (W1 = 3,562; Feb dip = 1,613; W2 = 3,409; May dip = 1,648)

## Awareness of publicity

Those respondents who had seen, heard or read any advertising, news or publicity about any initiatives that allow people to make energy saving improvements to their home were asked to describe that publicity in their own words.

Responses in both Waves 1 and 2 tended to broadly focus upon sources (e.g. TV and newspapers) and types of energy saving improvements (e.g. solar panels, loft insulation) and were largely stable. However, there was a significant increase in the proportion who spontaneously mentioned the Green Deal specifically by name (up from 1% in Wave 1 to 4% in Wave 2) when asked to describe what they had heard in their own words.

<sup>5</sup> DECC media spend was £136k in the week preceding the February dip, £78k before Wave 2 and £220k the week before the May dip.

## Understanding of key elements of the Green Deal

In order to establish whether or not respondents understood key elements of the Green Deal they were asked whether they had seen or heard or read any advertising, news or publicity about initiatives with any of the following features:

- You can make energy saving home improvements to your home and repay the cost through savings on your electricity bill
- You can have a skilled and accredited assessor come to your home and tell you which energy saving home improvements could be made to your property, the benefits of having them installed and how much they would cost
- You can make energy saving home improvements to your home and receive cash back from the Government
- You should look out for a quality mark which shows who is part of the scheme
- Support is available to pay for more expensive energy saving home improvements
- Financial support is available to those who get certain means tested benefits to help pay for energy saving improvements to their home

As Table 1 shows, there was no change at the aggregate level in the main tracker; in Wave 1 52% had seen, heard or read about initiatives with any of these features while in Wave 2 54% said this. However, findings from the February dip showed a greater proportion saying yes with 59% indicating they had heard of at least one feature.

In the main tracker data there were small but significant increases in awareness of both “You can make energy saving home improvements to your home and repay the cost through savings on your electricity bill” (up from 23% in Wave 1 to 26% in Wave 2) and “You can have a skilled and accredited assessor come to your home and tell you which energy saving home improvements could be made to your property, the benefits of having them installed and how much they would cost” (up from 14% in Wave 1 to 17% in Wave 2). For the February dip there were significant increases in relation to a number of the key elements (see the table below). As previously suggested, this could be explained by more press activity and larger amounts of marketing spend at the time of the dip. The question was not asked in the May dip.

**Table 1: Understanding of key elements of the Green Deal**

Base: All respondents	Wave 1	Feb dip	Wave 2	
	3,562	1,613	3,409	
	%	%	%	
You can make energy saving home improvements to your home and repay the cost through savings on your electricity bill	23	36↑	26↓	Note: Wave 2 significantly higher than Wave 1
You can have a skilled and accredited assessor come to your home and tell you which energy saving home improvements could be made to your property, the benefits of having them installed and how much they would cost	14	20↑	17↓	Note: Wave 2 significantly higher than Wave 1
You can make energy saving home improvements to your home and receive cash back from the Government	23	32↑	23↓	
You should look out for a quality mark which shows who is part of the scheme	8	10	9	
Support is available to pay for more expensive energy saving home improvements	12	22↑	12↓	
Financial support is available to those who get certain means tested benefits to help pay for energy saving improvements to their home	21	20	21	
None of these	48	41↓	46↑	

Those who had seen, heard or read any advertising, news or publicity about any initiatives that allow people to make energy saving improvements to their home or who were aware of at least one of the Green Deal features mentioned above, were prompted with a list and asked how they had heard about these initiatives. The main sources of awareness of any initiatives that help people to make energy saving improvements to their home were broadly the same in both waves: television advertising/programmes (mentioned by 52% in Wave 1 and 47% in Wave 2) and newspaper or magazine articles and advertising (25% in both waves).

Other sources included energy suppliers (17% in Wave 1 and 15% in Wave 2), the internet (16% in Wave 1 and 12% in Wave 2), word of mouth (14% in Wave 1 and 15% in Wave 2) and local authorities (12% in Wave 1 and 10% in Wave 2). Fewer than one in ten mentioned either

the Government (9% in both waves) or DECC (6% in Wave 1 and 5% in Wave 2) as sources of awareness.

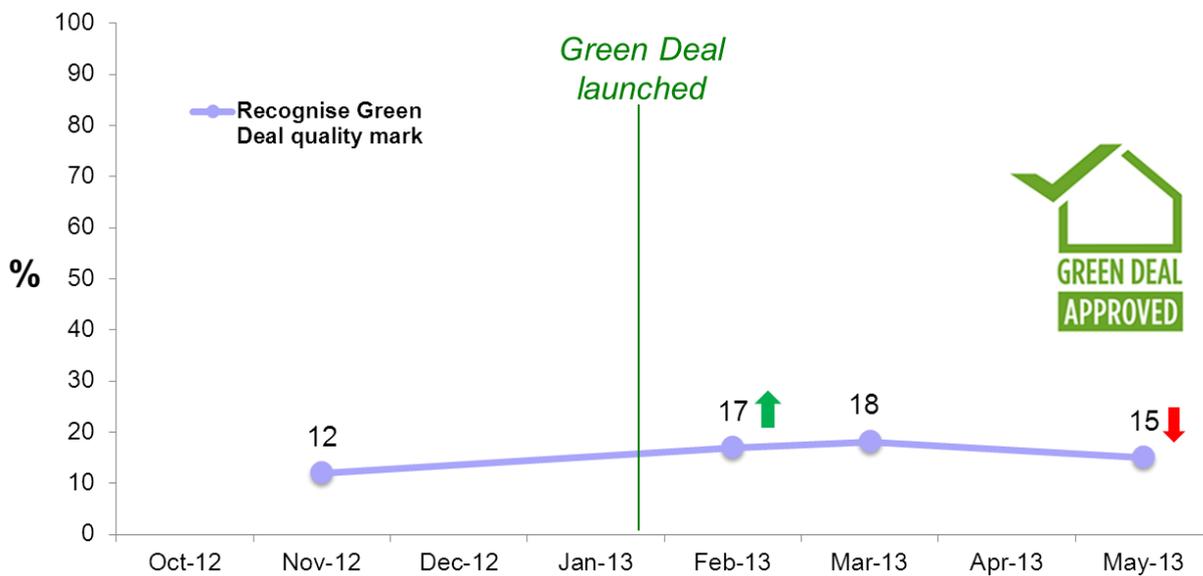
## Recognition of the Green Deal Quality Mark

All respondents were shown six logos on a show card and were asked to say which, if any, they recognised. The logos shown to respondents were for each of the following:

- Green Deal Quality Mark
- Gas Safe/Corgi
- EST (Energy Saving Trust)
- MCS (Microgeneration Certification Scheme)
- NICEIC (National Inspection Council for Electrical Installation Contracting)
- NHBC (National House Building Council)

Chart 4 shows the proportion of respondents who claimed to recognise the Green Deal Quality Mark at each wave. In Wave 1 – prior to the scheme’s launch – 12% claimed to recognise the logo. This increased significantly to 18% in Wave 2 (six weeks after the scheme had launched). The February dip was broadly in line with Wave 2 at 17%, while a small but significant drop was observed in the May dip (15%). The increase (from Waves 1 to 2) in recognition appeared to be strongly driven by awareness of publicity; in Wave 2 23% of those who were aware of publicity also recognised the Green Deal Quality Mark whilst just 10% of those who were not aware of any publicity claimed to recognise the logo.

**Chart 4: Recognition of the Green Deal Quality Mark**



Base: All respondents (W1 = 3,562; Feb dip = 1,613; W2 = 3,409; May dip = 1,648)

## Reassurance offered by the Green Deal Quality Mark

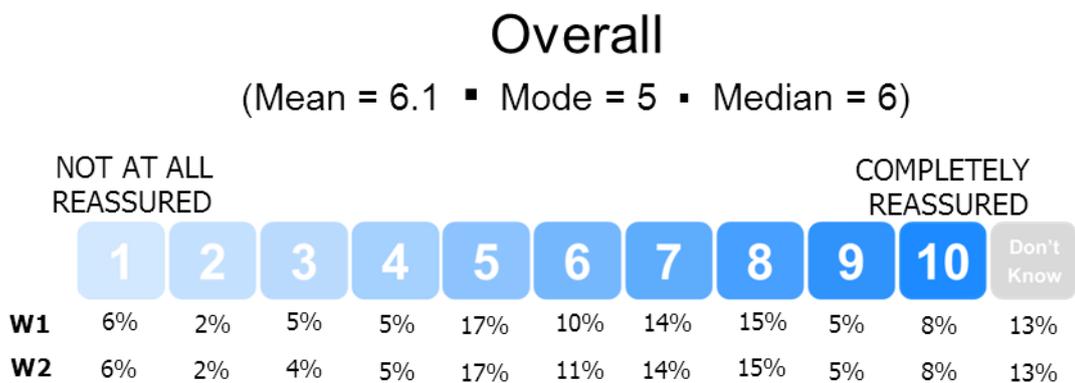
Regardless of their own levels of awareness all respondents were given the following brief details about “a new initiative called the Green Deal”.

- This scheme lets you pay for some or all of the improvements over time on your electricity bill.
- Repayments will be no more than what a typical household should save in energy costs.
- The actual savings costs will depend on how much energy you use and the future costs of energy.
- Authorised suppliers and installers can be identified by the Green Deal Quality Mark which looks like this

They were then shown the Green Deal Quality Mark and were asked if you were to make energy saving home improvements using the Green Deal scheme, how reassured would you feel knowing that the supplier is authorised under the Green Deal Quality Mark? Respondents were asked to answer using a scale from 1-10 where 1 meant they were not at all reassured and 10 meant they were completely reassured.

In Wave 1 the mean level of reassurance offered by the Quality Mark was 6.1 (out of 10) and no changes were observed in Wave 2 (Chart 5).

**Chart 5: Levels of reassurance offered by the Green Deal Quality Mark**



Base: All respondents (W1 = 3,562; W2 = 3,409)

# Green Deal ad recognition

The Green Deal launch was complemented by an ad campaign featuring two press ads with the strapline “Green Deal with it”. In order to measure awareness of these ads questions were added to both of the strand two dip questionnaires in February and May 2013 respectively.

## Overall recognition of Green Deal ads

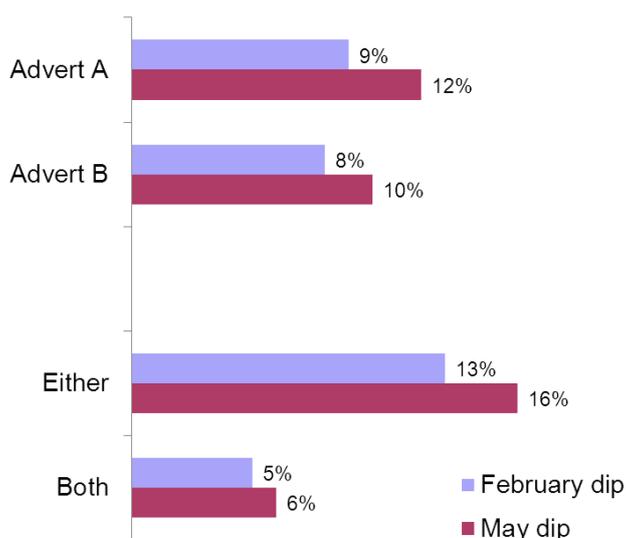
All respondents were given a colour show card which featured both of the Green Deal ads (as shown below) and were asked whether they had seen either of the ads before.



As Chart 6 shows, recognition of the adverts was relatively low in both dips with around one in ten respondents recognising each of them. However, the findings do indicate significant increasing recognition of the adverts between February and May.

In total, 16% of respondents recognised either ad in the May dip (a significant increase from 13% in February). Recognition was significantly higher amongst those who had heard of the scheme (32% in the February dip; 30% in the May dip 2).

Chart 6: Recognition of Green Deal ads



Base: All respondents (Feb dip = 1,613; May dip = 1,648)

For the full findings please refer to the data tables which are available at <https://www.gov.uk/government/publications/green-deal-household-tracker-survey-waves-1-and-2-report>

# Take up of energy efficient home improvements

One of the key objectives of this programme of research is to track consumers' intention to install energy efficient home improvements. Questions were included in the main tracker to explore what, if anything, respondents had already done or were planning to do, how those improvements were paid for and which organisations were trusted to provide general advice on energy saving home improvements.

Findings from these questions are discussed in this section of the report.

## Motivations and barriers to making energy efficient home improvements

All survey respondents were asked about what their motivations and barriers would be in relation to making energy efficient home improvements. The findings were very similar across both waves of the main tracker and are summarised below.

The main motivations for making energy efficient home improvements would be 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 18% in Wave 2)

The main barriers preventing people from doing more to make their homes energy efficient were the same in each wave of the research also:

- 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 19% in Wave 2)
- no guarantee that it will save money (10% in both waves)

## Which energy efficient home improvements do consumers already have?

Respondents in the main trackers were asked whether they had already installed, were in the process of installing, planned to install or would not install the following energy efficient home improvements.

- Loft insulation/ top up.
- An energy efficient boiler (condensing boiler) – either new or replacing an existing boiler with a more energy efficient one.
- External Solid Wall Insulation (if their home had solid walls)
- Internal Solid Wall Insulation (if their home had solid walls)
- Cavity wall insulation (if their home had cavity walls)

It is important to note that property surveyors were not sent to respondents' homes and, as such, responses to this question are based upon the respondent's own knowledge and understanding.

Differences between the claimed level of installation from these survey findings and DECC's own estimates (which are based on robust evidence from official statistics and the English Household Survey) can be observed in relation to solid wall insulation. In Wave 1 20% of households with solid walls claimed to have already installed either internal or external solid wall insulation (19% claimed to have this in Wave 2). In comparison, DECC's experimental statistics indicate that the figure is closer to 2%.<sup>6</sup>

As a result of this discrepancy GfK NOP, in partnership with a firm of building surveyors, undertook a small qualitative project in February 2013 to establish whether or not those who claimed to have solid wall insulation did actually have this measure installed already. None of the five homes studied actually had solid wall insulation. The research uncovered a lack of awareness and understanding of solid wall insulation which had resulted in the level of overclaim seen in the survey data.

Following the qualitative research a number of changes to the quantitative questionnaire were recommended (including the order in which the improvements were asked and the introduction of show cards to better explain internal and external solid wall insulation) for Wave 2 of the main tracker. However these changes had no noticeable impact upon the level of claimed solid wall insulation at Wave 2. This issue will be investigated further and the question reviewed before the next wave of the survey.

In addition to the solid wall insulation overclaim there was a smaller discrepancy between survey estimates and DECC's experimental statistics in relation to loft insulation. The Tracker survey results put the level of loft insulation at 70% in Wave 1 and 72% in Wave 2, which is slightly higher than DECC statistics<sup>6</sup>. This discrepancy may be explained by the fact that the survey only asks whether respondents have 'loft insulation/top up' - it does not specify to what depth, whilst DECC figures count anything less than 125mm as uninsulated. So, while some respondents might claim to have loft insulation it is likely that they are not insulated to the depth required. Additionally the loft insulation figures should be treated with caution due to potential discrepancies in the answers given. There are 26.9m homes in the UK, of which 23.5m have a loft. Wave 2 findings seem to have captured this with 11% choosing not applicable when answering the question (presumably as they do not have a loft). However in wave 1, only 2% of households chose not applicable, suggesting those without a loft chose a different option.

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<sup>6</sup> Source: the latest DECC statistical releases on insulation levels can be found at <https://www.gov.uk/government/statistical-data-sets/estimates-of-home-insulation-levels-in-great-britain>

These discrepancies are important as they indicate there is a lack of awareness and understanding about certain energy saving improvements which could affect take up of improvements offered under the Green Deal scheme.

As Table 2 shows, there were very few changes between waves 1 and 2 in terms of (claimed) installed measures. The only significant difference was a slight drop in the proportion claiming to have internal solid wall insulation (down from 15% to 11% of homes with solid walls). It is difficult to say whether this changed as a result of the questionnaire changes because there was no corresponding drop in relation to external solid wall insulation.

It is also worth noting the general increase in the proportion saying the installation of energy efficient home improvements was not their decision. While these changes were primarily driven by private tenants it is difficult to explain overall because the tenure profiles (owner occupiers vs. renters) for each measure are consistent across both waves. For internal and external solid wall insulation it could be explained by the introduction of show cards, as tenants may realise that this is a big job and potentially state this is not their decision. However this does not explain the increases for cavity wall insulation and boilers.

**Table 2: Take up of energy saving home improvements**

	External SWI		Internal SWI		CWI		Loft		Boiler	
	W1	W2	W1	W2	W1	W2	W1	W2	W1	W2
	1,248	1,025	1,248	1,025	2,262	2,370	3,562	3,409	3,539	3,210
	%	%	%	%	%	%	%	%	%	%
Already have/done this	13	15	15	11↓	69	67	70	72	61	62
In the process of doing this	1	*	1	1	1	1	2	1	1	1
Have firm plans to do this soon	1	1	1	1	1	1	1	1	2	2
Would like to do this but not at this stage	3	5	2	4	3	2	2	2	7	8
Have looked into it but don't want to/probably won't do this	11	12	9	10	5	4	2	1	4	2
Haven't thought about doing this	28	25	31	27↓	9	6↓	7	2↓	13	9↓
Haven't heard of this	24	14↓	22	17↓	3	2	3	1	4	2
Not my decision to make (I'm renting the property)	19	29↑	19	29↑	9	12↑	10	9	9	13↑
Not applicable	-	-	-	-	-	4	2	11↑	-	-

Note: SWI = Solid Wall Insulation and CWI = Cavity Wall Insulation.

## Trusted sources of general advice about energy saving home improvements

All respondents were asked a prompted question, choosing from a list of sources, to ascertain which of a number of different sources they would trust to provide general advice on how to go about making energy saving home improvements.

The findings from both waves were consistent and indicated that the most trusted sources of advice were:

- 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)

Trust in DECC was considerably higher amongst those who had already installed energy saving home improvements in both waves; in Wave 1 24% of this group trusted DECC to provide general advice (compared with 15% of households with no improvements installed) and these findings were largely mirrored in Wave 2 (23% compared with 12% respectively).

## Core Cities summary

**In 2012 eight cities across England were awarded funding of around £13 million to help them kick-start the Green Deal in their regions. The cities also sought matching funding and/or providing direct support themselves.**

**The focus of the Core Cities is upon raising awareness of the Green Deal through community engagement and show homes, and providing support to local supply chains including trained Green Deal advisors and registered installers.**

The main Random Location Omnibus does not provide sufficient interviews for separate analysis of the Core Cities, so additional interviews targeted in order to provide c.100 interviews per city in the six of the eight Core Cities included in the research, in both waves of the main tracker. These numbers are sufficient for making comparisons between the six Core cities included in the research and with the national average (as shown in Table 3). In total there were 400 extra interviews were undertaken across Newcastle, Birmingham, Manchester, Leeds, Bristol and Sheffield. In order for statistically significant analysis to take place, six of the eight Core Cities were chosen for the analysis.

Comparisons between the Core Cities and Great Britain national average are indicated in the table by arrows which show whether the Core City is significantly higher or significantly lower than that average. Wave on wave change is shown in the rows marked '+/-'. Where the change is green this indicates a significant wave on wave increase within the Core City. Where the change is red this indicates a significant wave on wave decrease within the Core City. Those changes which are in black are not significant.

As the table shows, while there were few significant changes in most cities, there have been a number of positive changes in Birmingham:

- awareness of the Green Deal had increased by 16 percentage points since Wave 1,
- recognition of the Quality Mark had also increased (up by 12 percentage points)
- awareness of messages about energy saving initiatives had increased (up by 13 percentage points)

**Table 3: Core Cities: overall comparison of key measures**

		GB Average	Birmingham	Bristol	Leeds	Manchester	Newcastle	Sheffield
Base: All (shown to right)		W1=731 W2=647	W1= 121 W2 = 91	W1 = 129 W2 = 99	W1 = 107 W2 = 104	W1 = 152, W2 = 131	W1 = 94, W2 = 109	W1 = 128 W2 = 113
		%	%	%	%	%	%	%
Awareness of the Green Deal	W1	10	9	11	9	9	11	17↑
	W2	17	25↑	16	17	15	17	12
	+/-	+7	+16	+5	+8	+6	+6	-5
Recognise Green Deal Quality Mark	W1	15	14	8	11	15	21↑	15
	W2	14	26↑	13	15	10	11	19
	+/-	-1	+12	+5	+4	-5	-10	+4
Awareness of messages about energy saving initiatives	W1	47	45	59	53	40↓	50	56
	W2	50	58	51	43	49	52	53
	+/-	+3	+13	-8	-10	+9	+2	-3
Green Deal Quality Mark reassurance (8 out of 10)	W1	24	19↓	29	25	21	37↑	21
	W2	31	23↓	29	31	30	43↑	33
	+/-	+7	+4	-	+6	+9	+6	+12

Note: Wave on wave change is shown in the rows marked '+/-'. Changes shown in green are significant wave on wave increases within the Core City. Changes in red indicate significant wave on wave decreases within the Core City. Changes in black are not significant.

## Next steps

**GfK NOP has been commissioned to undertake two more waves of the strand one tracking survey, one more strand two dip and two more rounds of qualitative research (strand three).**

The two remaining waves of the strand one tracking survey are currently scheduled to take place in September 2013 and March 2014 and the qualitative research will be carried out as necessary. The last Strand two dip is, like the two previous dips, intended to be deployed flexibly as and when needed.

In addition to the three strands of the Green Deal Household Tracker GfK NOP has also been commissioned by DECC to undertake a follow-up survey of a sample of households which had Green Deal Assessments soon after the scheme was launched. This survey will also be reported on in June 2013.

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