Department of Energy & Climate Change

# Green Deal Household Tracker survey

Wave 3 report

March 2014

# Table of Contents

# 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 twenty minute face-to-face survey conducted amongst a large representative sample of households in Great Britain (3,562 interviews in November 2012, 3,409 interviews in March 2013 and 3,424 interviews in November 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 28th 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 and improve domestic energy efficiency in Great Britain and to 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 course of the tracker:

- 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 three 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 focuses primarily on findings at Wave 3 of the quantitative tracking study with reference to any differences compared with Wave 1 and 2. Findings from the short dips are included as a separate chapter. The full data tables can be found at https://www.gov.uk/government/publications/green-deal-household-tracker-wave-3.

## Methodology and sampling

For all waves of the main tracker surveys 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

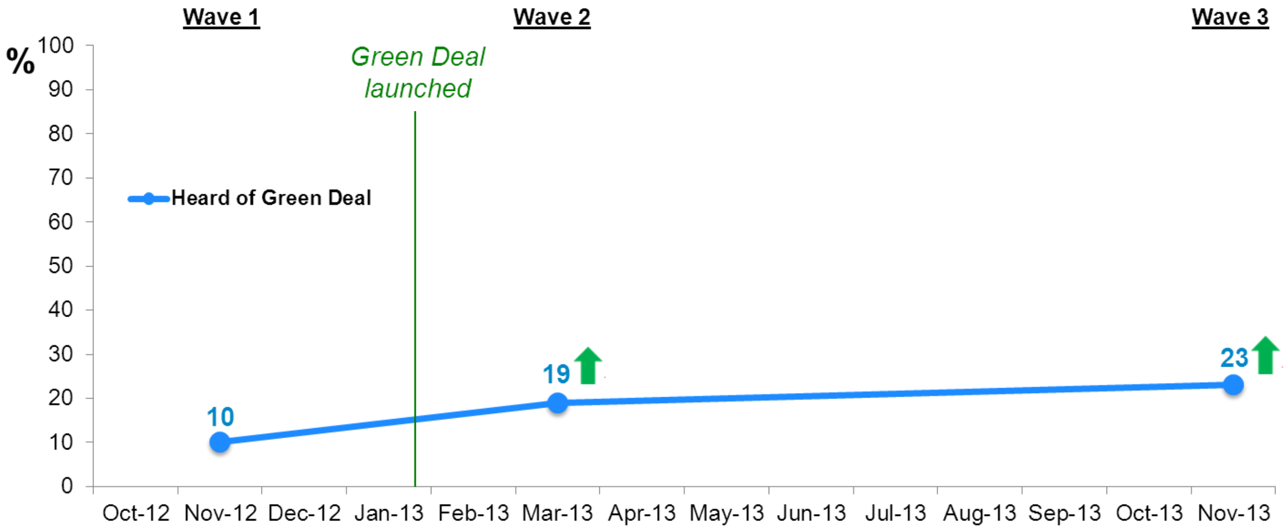
The same methodology and sampling was used both in Wave 1 (the baseline survey), Wave 2, Wave 3 and the dips, so as to ensure comparability of findings. Wave 1 fieldwork took place in November 2012, Wave 2 in March 2013 and Wave 3 in November 2013, while the two dips were conducted in February 2013 and May 2013.

Fuller methodological details are included in a separate Technical report which is available at https://www.gov.uk/government/collections/green-deal-household-tracker-survey

## Awareness and understanding of the Green Deal

Awareness of the Green Deal stands at around a quarter of all respondents. 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 has increased further still to 23% in Wave 3.

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




Base: All respondents (W1 = 3,562; W2 = 3,409; Wave 3 = 3,424)
Significant wave on wave increases are indicated by a green arrow (⬆) on the chart.

The main sources of Green Deal awareness at Wave 3 were broadly the same as in the previous waves - television advertising/programmes[1] and newspaper or magazine articles/advertising were most frequently cited – the proportion mentioning DECC returned to levels seen in wave 1 following a slight peak at Wave 2 (down from 9% at Wave 2 to 3% at Wave 3).

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 3 with 51% claiming to have seen, heard or read about such initiatives in Wave 1 and 50% claiming the same in Wave 3.

Respondents were also asked whether they had heard of any initiatives which featured a number of key Green Deal elements, to gauge their understanding of the policy. The elements of the Green Deal which were featured in the questionnaire were as follows:

- You can make energy saving home improvements to your home and repay the cost through savings on your electricity bill;

[1] Note that at the time of writing there had been no Green Deal television advertising, so these responses are most likely referring to mentions of the Green Deal on television programmes.

- 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.

The aggregate level of awareness has remained broadly stable across the three waves of research (Wave 1 = 52%; Wave 2 = 54%; Wave 3 = 51%).

In addition to the increase in overall awareness of the Green Deal (see Chart 1) there was also a further significant increase in recognition of the Green Deal Quality Mark to the highest level yet seen (up from 12% in Wave 1 to 20% at Wave 3).

Overall, the level of reassurance respondents felt they were offered by the Quality Mark has remained stable wave on wave. 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 all three waves the mean level of reassurance offered by the Quality Mark was 6.1 (out of 10). Reassurance was slightly higher amongst those who recognised the Quality Mark (mean score of 6.4 out of 10).

## Take up of energy efficient home improvements

The motivations and barriers associated with take up of energy efficient home improvements remain consistent across all waves of the main tracking survey. The main motivations at Wave 3 were to:

- reduce energy bills (70%)
- make the home warmer and more comfortable (56%)
- reduce the amount of wasted energy (42%)
- reduce carbon emissions (16%)

While the main barriers at Wave 3 were:

- cost of improvements is too high (37%)
- already doing enough (21%)
- landlord/freeholder won't allow (19%)

When asked if they already had energy saving improvements installed, respondents reported the same levels of installation across all waves of the main tracking survey.

There were few differences in findings across waves when households were asked to choose which source they would trust for advice about energy saving improvements from a list. At Wave 3 the main sources cited were:

- Friends and family (37%)
- Local authorities (30%)
- The Energy Saving Trust (22%)
- DECC (21%)
- Specialist installers 19%)

Although there were few changes overall there was an increase in the proportion of respondents who *haven't* installed energy saving home improvements saying they would trust DECC to provide advice (from 12% at Wave 2 to 20% at Wave 3).

# Background and objectives

**The Green Deal was launched by the Government on 28th January 2013 and aims to reduce carbon emissions and improve 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.**

## 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 the following ‘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.

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 and the third in November 2013. In addition to the three strand one waves, GfK NOP has also conducted two Strand two dips in February and May 2013. The remainder of the survey work will be completed by mid-2014.

This report focuses on the findings from Wave 3 of the quantitative study and makes comparisons with Wave 1 and 2.   It also makes reference, where appropriate, to findings from the short dips and the qualitative research undertaken. The Wave 1 and 2 report is available at https://www.gov.uk/government/publications/green-deal-household-tracker-survey-waves-1-and-2-report.

## 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 course of the tracker:

- 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[2].

## 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. These boosts 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. Findings from these questions are included in this report where appropriate.

Although the same methodology has been used for both strands of the research there are a number of factors which make comparisons between the two problematic. These factors include differences in the questionnaires - the strand two questionnaires were considerably shorter and much less detailed and there were some question wording differences – and the timing of the strand two dips which meant they were conducted straight after bursts of Green Deal advertising or other activity which could impact upon certain measures. As a result, this report focuses primarily upon comparisons between the three waves of the strand one research. The strand two findings are summarised in a separate chapter at the end of the report.

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

[2] 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

| | Strand one | | | Strand two | |
|---|---|---|---|---|---|
| | Wave 1 (baseline) | Wave 2 | Wave 3 | February dip | May dip |
| **Fieldwork dates** | 8-25 Nov 2012 | 7-22 Mar 2013 | 31 Oct – 12 Nov 2013 | 7-12 Feb 2013 | 9-14 May 2013 |
| **Sample size** | 3,562 | 3,409 | 3,424 | 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/collections/green-deal-household-tracker-survey

Copies of the survey questionnaires are available at https://www.gov.uk/government/collections/green-deal-household-tracker-survey

## 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 or chance. 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/collections/green-deal-household-tracker-survey

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. Generally, comparisons are between wave 3 and wave 2 but where appropriate comparisons with wave 1 have also been made.
- 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 is being 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[3] (asked in Wales only)
- The Energy Assistance Package (asked in Scotland only)
- Affordable Warmth Scheme
- Boiler Scrappage Scheme
- Domestic Renewable Heat Incentive Scheme (launching 2014)[4]

Awareness of any of these initiatives at an aggregate level remains similar to the previous wave, at 60%, though this has built slightly over time (up from 56% at Wave 1).

The Domestic Renewable Heat Incentive Scheme code was added to the questionnaire at Wave 3 and in total 4% of respondents claimed to be aware of the scheme.

As Chart 2 shows, awareness of the Green Deal has grown wave on wave. 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 23% at Wave 3.

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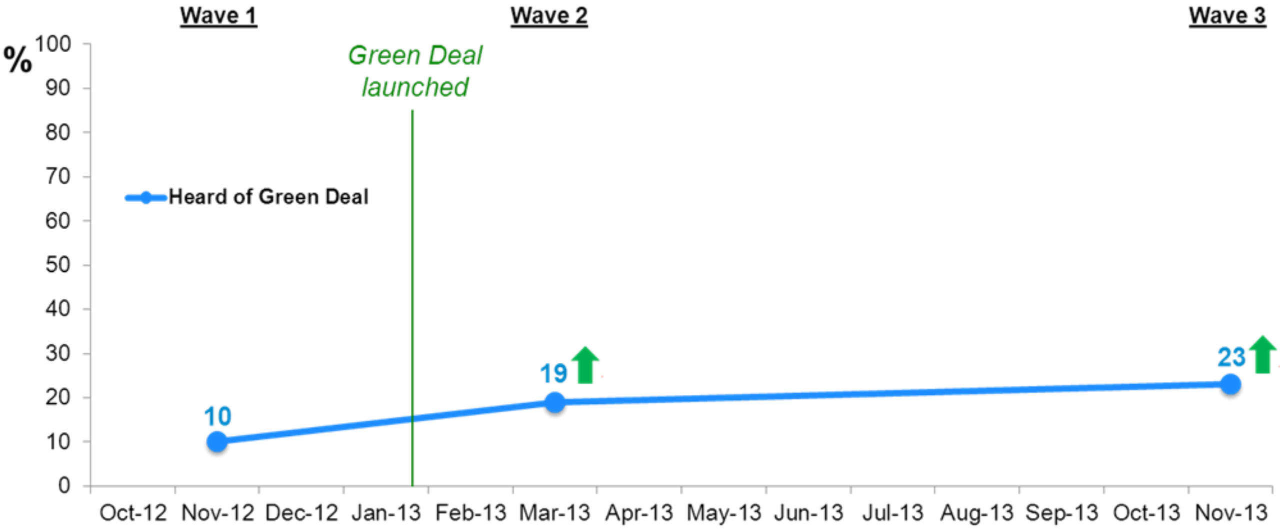
[3] Nest is the Welsh Government's fuel poverty scheme. It aims to help reduce the number of households in fuel poverty and make Welsh homes warmer and more fuel-efficient places to live. For further information visit http://www.nestwales.org.uk/.

[4] New code introduced for the November 2013 wave of the tracker.

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

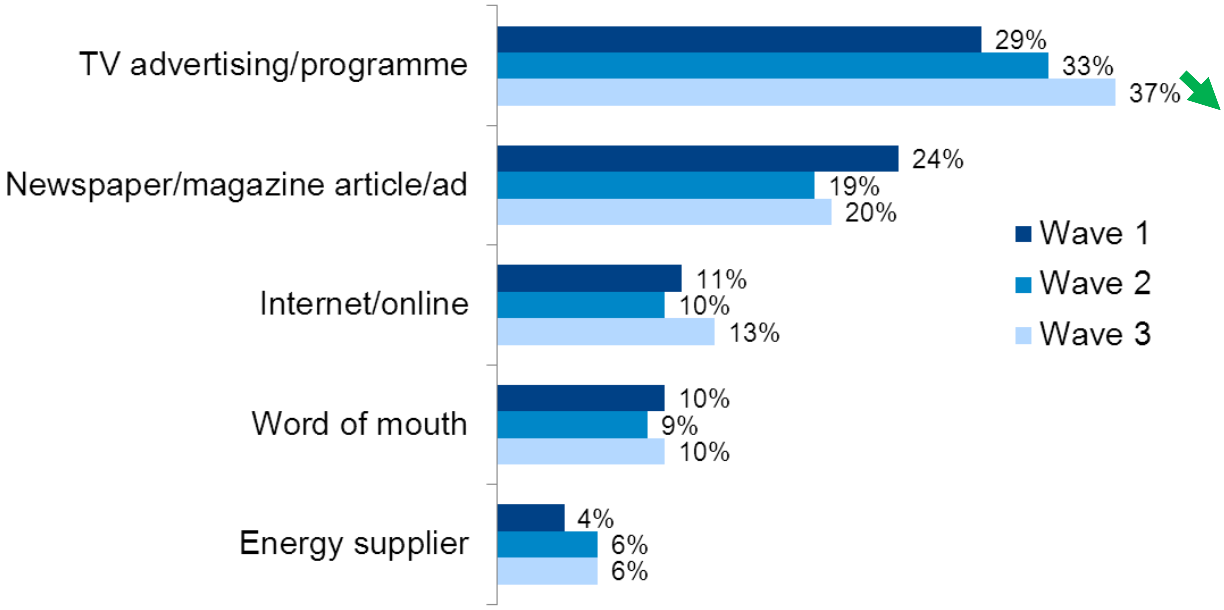



Base: All respondents (W1 = 3,562; W2 = 3,409; W3 = 3,424)
Significant wave on wave increases are indicated by a green arrow (⬆) on the chart.

It is important to note that the increase in awareness of the Green Deal has not been mirrored for the other schemes as no changes in awareness were observed in relation to the other schemes.

Chart 3 shows the top five sources of awareness amongst those who had heard of the Green Deal, it shows that the main sources of awareness across the three waves have been consistent: television (which has increased significantly since Wave 1), newspaper and magazines and the internet.

**Chart 3: Top 5 sources of Green Deal awareness**



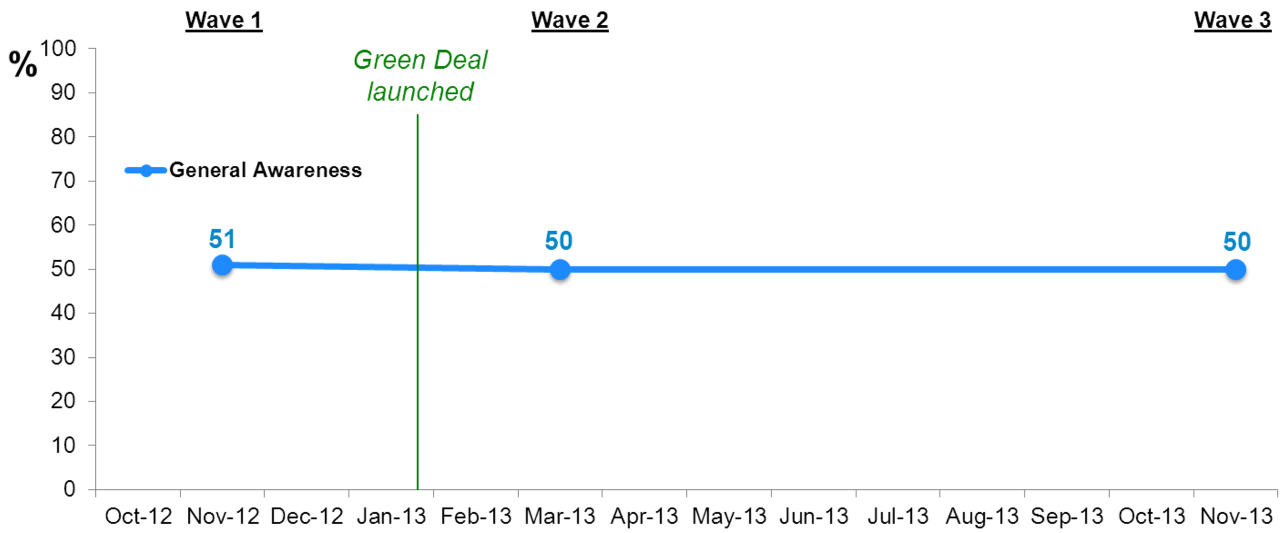

Base: All respondents who had heard of the Green Deal (W1 = 367; W2 = 646; W3 = 778)
Significant increases since Wave 1 indicated by a diagonal green arrow ( ) on the chart.

For the full findings from these questions please refer to the data tables which are available at [https://www.gov.uk/government/collections/green-deal-household-tracker-survey](https://www.gov.uk/government/collections/green-deal-household-tracker-survey)

## 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 4 shows, general awareness did not change significantly between Waves 1 and 3 with 50% reporting to have seen, heard or read about such initiatives in Wave 3 compared to 51% in Wave 1.

**Chart 4: General awareness of energy saving improvements**




Base: All respondents (W1 = 3,562; W2 = 3,409; W3 = 3,424)

Across all three waves the findings have consistently shown that the following groups were more likely to say they were aware of energy saving improvements:

- Owner-occupiers (58% compared with 41% of tenants)
- ABC1s (59% compared with 38% of C2DEs)
- Households which were 'managing well' with their energy bills (55% compared with 45% of households which were having difficulties)
- Households which have had an energy saving improvement installed (53% compared with 38% of households which have not had an improvement installed)
- Convertibles (65%) and Overstretched (61%) compared with Disengaged Rejectors (39%).

There is considerable overlap between these groups and, as such, the findings suggest that more affluent households are generally more likely to be aware of energy saving improvements.

## 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 at all waves tended to broadly focus upon sources (e.g. TV and newspapers) and types of energy saving improvements (e.g. loft insulation) and were largely stable. However, there were some differences at Wave 3 in the types of energy saving improvements mentioned.  There was a significant increase in the proportion mentioning Central heating/Boiler (16% at Wave 3 compared with 7% at both previous waves). Conversely, there was a decline in the proportion mentioning Solar Panels (14% compared with 19% at Wave 2 and 18% at Wave 1) and Cavity Wall Insulation (8% compared with 11% at Wave 2 and 13% at Wave 1).

As in Wave 2, 4% of all respondents mentioned the Green Deal by name spontaneously when asked to describe what they had heard in their own words. Spontaneous awareness in Wave 1 was considerably lower (1%).

## 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, the aggregate level of awareness of these initiatives was broadly similar across all three waves, with around half aware of at least one key element of the Green Deal.

The table also shows that awareness of the individual elements – whilst subject to minor variations – has been stable across the three waves of research.

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

| Base: All respondents | Wave 1 | Wave 2 | Wave 3 |
|---|---|---|---|
| | 3,562 | 3,409 | 3,424 |
| | % | % | % |
| You can make energy saving home improvements to your home and repay the cost through savings on your electricity bill | 23 | 26 | 22 |
| 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 | 17 | 14 |
| You can make energy saving home improvements to your home and receive cash back from the Government | 23 | 23 | 21 |
| You should look out for a quality mark which shows who is part of the scheme | 8 | 9 | 9 |
| Support is available to pay for more expensive energy saving home improvements | 12 | 12 | 13 |
| Financial support is available to those who get certain means tested benefits to help pay for energy saving improvements to their home | 21 | 21 | 23 |
| None of these | 48 | 46 | 49 |

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. At Wave 3, the main sources of awareness of any initiatives that help people to make energy saving improvements to their home were broadly the same as at previous waves: television advertising/programmes (mentioned by 50% at Wave 3) and newspaper or magazine articles and advertising (24%).

Other sources included the internet (12%) and word of mouth (13%).  Energy suppliers and local authorities were also mentioned, though both of these have seen a decline over time (energy suppliers, down from 17% at Wave 1 to 13% at Wave 3; local authorities down from 12% at Wave 1 to 8% at Wave 3).  Fewer than one in ten mentioned either the Government (8%) or DECC (3%) as sources of awareness.

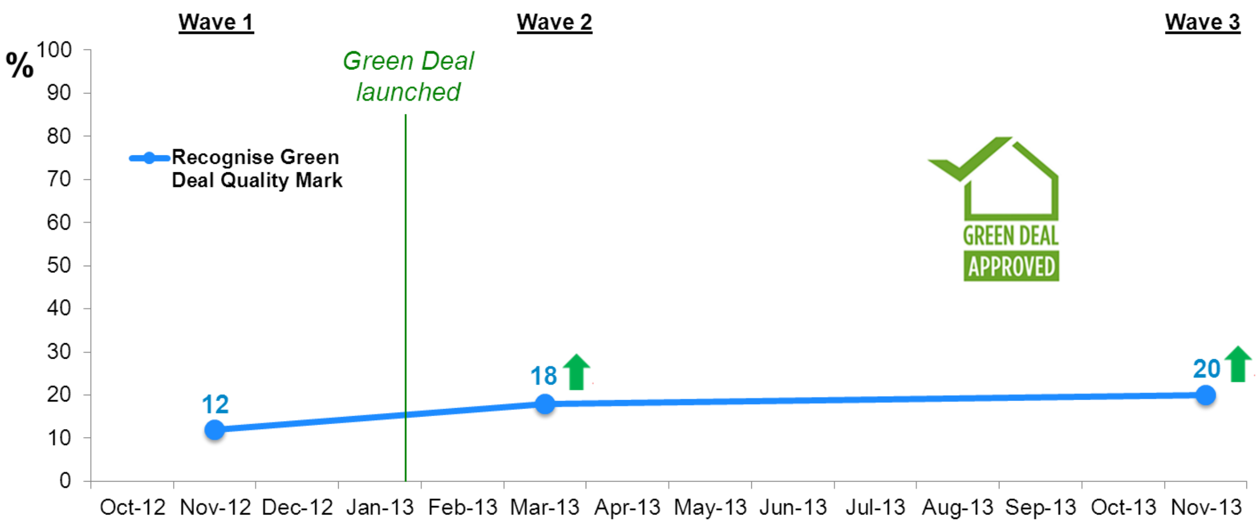
## Recognition of the Green Deal Quality Mark

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 5 shows the proportion of respondents who reported they recognise the Green Deal Quality Mark at each wave. At Wave 3, recognition of the logo is at the highest level yet seen, recognised by a fifth of respondents (20%). This means that recognition has increased significantly with each wave of research.

**Chart 5: Recognition of the Green Deal Quality Mark**




Base: All respondents (W1 = 3,562; W2 = 3,409; W3 = 3,424)
Significant wave on wave increases are indicated by a green arrow (⬆) on the chart.

As Table 2 shows, recognition of the Green Deal Quality Mark logo has increased since Wave 1 while all of the other logos (except the Gas Safe/Corgi logo) have remained at or around the same level of recognition as observed in Wave 1.

**Table 2: Recognition of logos**

| Base: All respondents | Wave 1 | Wave 2 | Wave 3 |
|---|---|---|---|
| | 3,562 | 3,409 | 3,424 |
| | % | % | % |
| Gas Safe/Corgi | 39 | 45 | 45 |
| Energy Saving Trust | 31 | 32 | 30 |
| National House Building Council | 28 | 31 | 28 |
| National Inspection Council for Electrical Installation Contracting | 25 | 27 | 25 |
| Green Deal Quality Mark | 12 | 18 | 20 |
| Microgeneration Certification Scheme | 5 | 6 | 5 |
| None of these | 33 | 27 | 28 |

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

As in previous waves, those who were aware of publicity were more likely to recognise the logo; at Wave 3, 25% of those who were aware of publicity recognised the Green Deal Quality Mark whilst just 12% of those who were not aware of any publicity claimed to do so.

## 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.

At Wave 3, the mean level of reassurance offered by the Quality Mark was 6.1 (out of 10) and this remains very similar to previous waves (Chart 6).

**Chart 6: Levels of reassurance offered by the Green Deal Quality Mark**

| | 1 (NOT AT ALL REASSURED) | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 (COMPLETELY REASSURED) | Don't Know | MEAN |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **W1** | 6% | 2% | 5% | 5% | 17% | 10% | 14% | 15% | 5% | 8% | 13% | **6.1** |
| **W2** | 6% | 2% | 4% | 5% | 17% | 11% | 14% | 15% | 5% | 8% | 13% | **6.1** |
| **W3** | 6% | 2% | 4% | 5% | 18% | 10% | 15% | 17% | 5% | 6% | 12% | **6.1** |

Base: All respondents (W1 = 3,562; W2 = 3,409; W3 = 3,424)

Reassurance was higher amongst those who recognised the Quality Mark (mean score of 6.4 out of 10). Recognisers were considerably more likely than those who had not heard of the Green Deal to give a score between 8 and 10 (36% compared with 27%).

# 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 to previous waves of the main tracker and are summarised below.

As at previous waves, the main motivations for making energy efficient home improvements at Wave 3 would be to:

- reduce energy bills (70%)
- make the home warmer and more comfortable (56%)
- reduce the amount of wasted energy (42%)
- reduce carbon emissions (16%)

The main barriers preventing people from doing more to make their homes energy efficient at Wave 3 were also similar to previous waves:

- cost of improvements is too high (37%)
- already doing enough (21%)
- landlord/freeholder won't allow (19%)
- lack of time (10%)
- no guarantee that it will save money (9%)
- hassle/disruption of making improvements (9%)

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

Respondents 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
- 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 and are therefore claimed figures. This had the biggest bearing upon the number of households which claimed to have solid wall insulation. At Wave 1, around one in five households with solid walls claimed to have solid wall insulation, in comparison DECC's own figures estimate that only 2-4% of homes with solid walls actually have this measure installed.

In order to investigate this overclaim GfK NOP conducted qualitative interviews with households who claimed to have solid wall insulation and who had agreed to be re-contacted. The qualitative interviews indicated considerable confusion around concepts such as "solid walls" and "solid wall insulation" and the firm of surveyors who accompanied the qualitative interviewers confirmed that none of the five households which were interviewed had either internal or external solid walls. As a result of recommendations following the qualitative research the Wave 2 questionnaire was amended slightly, however considerable overclaim was observed again (19% claimed to have solid wall insulation at Wave 2).

Despite the attempts to improve the way in which this data was collected no suitable means for reliably measuring whether or not a household has solid wall insulation were determined and so, Wave 3 respondents were not asked whether or not they had this measure.

As Table 3 shows, there were few wave on wave changes in terms of installed measures, though the proportion claiming to already have an energy efficient boiler has increased slowly – yet significantly – since wave 1 (from 61% to 64%). While the table suggests that the proportions installing cavity wall insulation or loft insulation have dropped compared with previous waves it is important to note that these changes are not significant.

It is worth noting the general increase over time 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 all waves.

**Table 3: Take up of energy saving home improvements**

| | CWI | | | Loft | | | Boiler | | |
|---|---|---|---|---|---|---|---|---|---|
| | W1 | W2 | W3 | W1 | W2 | W3 | W1 | W2 | W3 |
| | 2,262 | 2,370 | 2,216 | 3,562 | 3,409 | 3,424 | 3,539 | 3,210 | 3,198 |
| | % | % | % | % | % | % | % | % | % |
| Already have/done this | 69 | 67 | 67 | 70 | 72 | 71 | 61 | 62 | 64⬆ |
| In the process of doing this | 1 | 1 | 1 | 2 | 1 | 1 | 1 | 1 | 1 |
| Have firm plans to do this soon | 1 | 1 | 1 | 1 | 1 | 1 | 2 | 2 | 2 |
| Would like to do this but not at this stage | 3 | 2 | 2 | 2 | 2 | 1 | 7 | 8 | 6 |
| Have looked into it but don't want to/probably won't do this | 5 | 4 | 3 | 2 | 1 | 1 | 4 | 2 | 2 |
| Haven't thought about doing this | 9 | 6⬇ | 5 | 7 | 2⬇ | 2 | 13 | 9⬇ | 7⬇ |
| Haven't heard of this | 3 | 2 | 1 | 3 | 1 | 1 | 4 | 2 | 2 |
| Not my decision to make (I'm renting the property) | 9 | 12⬆ | 13 | 10 | 9 | 10 | 9 | 13⬆ | 16 |
| Not applicable | - | 4 | 7 | 2 | 11⬆ | 13 | - | - | - |

Note: CWI = Cavity Wall Insulation.
Significant wave on wave changes are indicated by arrows (⬆⬇) on the table.

## 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.

As Table 4 shows, the findings across the three waves are very consistent. As before, the most trusted sources of advice were:

- Friends and family (37% at Wave 3)
- Local authorities (30%)
- The Energy Saving Trust (22%)
- DECC (21%)
- Specialist installers (19%)

**Table 4: Trusted sources of general advice about making homes more energy efficient***

| Base: All respondents | Wave 1 | Wave 2 | Wave 3 |
|---|---|---|---|
| | 3,562 | 3,409 | 3,424 |
| | % | % | % |
| Friends and family | 35 | 34 | 37 |
| My Local Authority | 30 | 30 | 30 |
| Energy Saving Trust | 24 | 23 | 22 |
| DECC | 23 | 21 | 21 |
| A specialist installer of energy efficient measures | 21 | 20 | 19 |
| A tradesperson | 19 | 19 | 18 |
| My energy supplier/another energy supplier | 18 | 19 | 17 |

*The table shows all of the sources which were mentioned by 10% or more at Wave 3.

Although there were few changes overall there has been an increase in the proportion of respondents who *haven't* installed energy saving home improvements saying they would trust DECC to provide advice (from 12% at Wave 2 to 20% at Wave 3).

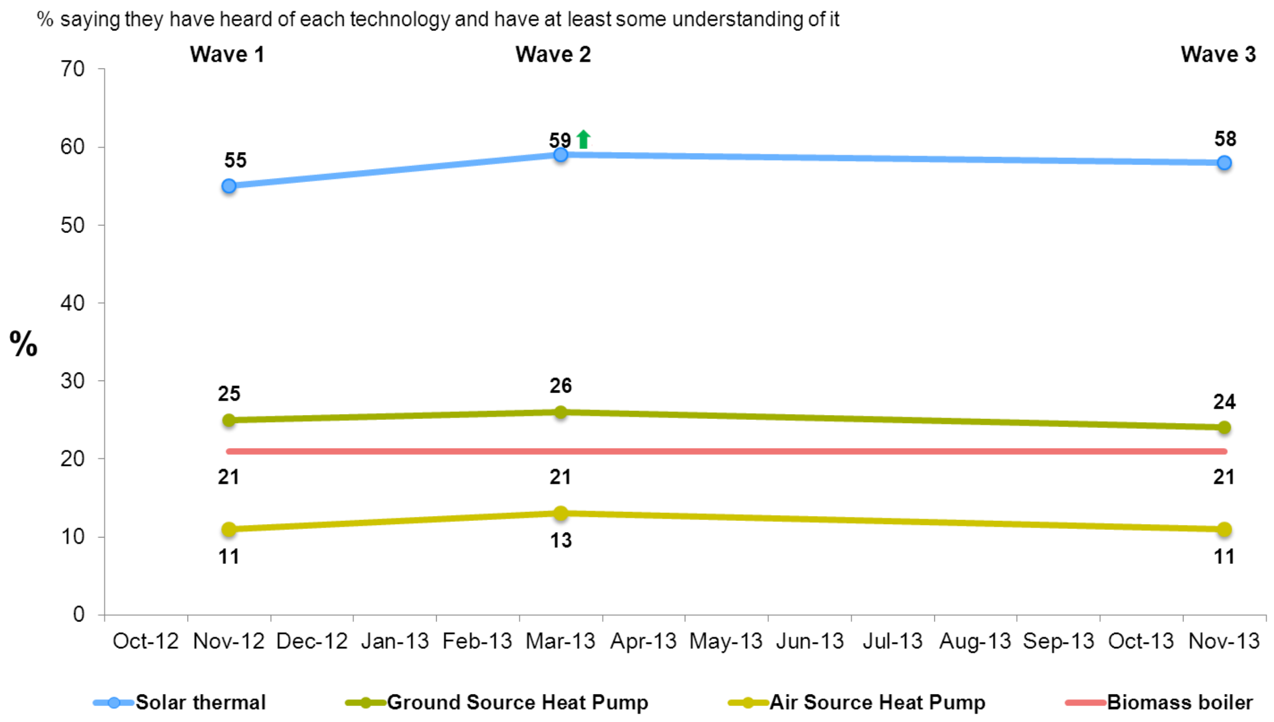
Whilst at previous waves trust in DECC was considerably higher amongst those who had already installed energy saving home improvements, this difference was not observed at Wave 3. At Wave 3 22% of this group trusted DECC to provide general advice (compared with 20% of households with no improvements installed). However, at Wave 2 the difference between the two groups was considerable (23% compared with 12%) as it had been at Wave 1 as well (24% compared with 15%).

# Domestic Renewable Heat Incentive

**The Domestic Renewable Heat Incentive will be launched in Spring 2014. Participants will be paid a tariff over seven years for the renewable heat they generate. The Green Deal Household Tracker has measured awareness of different types of renewable heat technologies since inception and at Wave 3 new questions were added in order to understand sources of awareness.**

Chart 7 shows the proportion of respondents who claimed to have both heard of and have at least some understanding of each of four different types of renewable heat technology at each of the three waves. Awareness levels were generally very consistent across the three waves – both in terms of the technologies that consumers are most likely to be aware of and in terms of awareness levels per technology.

**Chart 7: Awareness of different types of renewable heat technologies**




Base: All respondents (W1 = 3,562; W2 = 3,409; W3 = 3,424)
Significant wave on wave increases are indicated by a green arrow (⬆) on the chart.

As mentioned on page 12 of this report, in Wave 3 the Domestic Renewable Heat Incentive (RHI) scheme was included in the questionnaire as one of the initiatives that respondents might have heard of when prompted. In total, 4% of respondents had heard of the scheme.

Those respondents who had heard of the RHI at Wave 3 were asked an unprompted question about how they had heard of the scheme. As Table 5 shows, the main sources of information were Television Programmes (22%), Word of Mouth (15%) and the Local Authority/Council (10%). Although a range of other sources of information were mentioned, none were reported by more than one in ten respondents.

The initial question allowed respondents to mention as many sources of awareness as they liked. So, in order to determine the most important source of awareness about the scheme, respondents were asked which of the sources they had mentioned they felt was most important to them. As shown in Table 5, patterns of responses were similar to the overall level.

**Table 5: Source of awareness of Renewable Heat Incentive and most important source**

| | Source of awareness | Most important |
|---|---|---|
| Base: All respondents who were aware of the Domestic Renewable Heat Incentive | 126 | 126 |
| | % | % |
| Television programme | 22 | 18 |
| From a friend or relative/Word of Mouth | 15 | 14 |
| From my Local Authority/Council | 10 | 9 |
| Internet/Online (search engines, social networks, government sites, other sites) | 9 | 6 |
| Newspaper | 8 | 6 |
| Through work | 8 | 6 |
| Energy supplier | 7 | 6 |
| Tradesperson (e.g. plumber, gas fitter) | 5 | 4 |

Note: Table 2 only shows those sources of information which were mentioned by 5% or more of those who were aware of the Domestic Renewable Heat Incentive. Respondents who replied that they didn’t know (11%) are also not included.

# Selected findings from Strand Two

**In addition to the bi-annual tracking research (Strand One) GfK NOP has also undertaken two short 'dips' as part of Strand Two of the research programme. While these dips used much the same methodology as the main tracking research they were conducted as separate shorter surveys with fewer respondents and so it was felt that they should be reported on separately. This chapter summarises the findings from the questions which were also asked in the main tracking research.**

## Awareness of the Green Deal

Awareness of the Green Deal was measured in the May 2013 'dip'. This question was asked following press advertising which ran between March and May 2013. In total, 22% of respondents were aware of the Green Deal – a finding which is broadly consistent with the findings from the main tracker in March 2013 (19%) and November 2013 (23%). Analysis indicated that those respondents who recognised a Green Deal advertisement were significantly more likely to be aware of the Green Deal than those who did not recognise the ads (42% compared with 18%).

## General awareness of energy saving improvements

Respondents in both of the 'dips' were asked whether they had recently seen, heard or read any advertising, news or publicity about any initiatives that allow people to make energy saving improvements to their home. In both surveys around two thirds of the sample said they were aware of advertising, news or publicity (65% in February and 66% in May).

These levels of awareness are considerably higher compared with the main tracking survey, but it should be noted that both of the dips used slightly different questions and both were conducted after Green Deal advertising had been carried out.

## Understanding of key elements of the Green Deal

Respondents who took part in the February dip 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

In total, 59% had seen, heard or read about initiatives with any of these features. This is considerably higher than the level of awareness observed in the three waves of the main tracker. However, this is perhaps not surprising given that there had been more press activity and larger amounts of marketing spend in the week preceding the February dip.  This suggests that media activity may have temporarily influenced awareness, though it is unclear to what extent this can be attributed to DECC given that this measure will also reflect background noise, for example communications from energy companies and general news stories.

## Recognition of the Green Deal Quality Mark

As in the main tracking study, logo recognition was measured in both the February and May 2013 dips. Findings were broadly in line with the main tracking study with 15% of respondents claiming to recognise the logo in the February dip and 17% saying the same in the May dip.

# Next steps

**GfK NOP has been commissioned to undertake one more wave of the tracking survey, which is currently scheduled to take place in spring 2014.**

In addition to the Green Deal Household Tracker GfK NOP has also conducted three waves of the Green Deal Assessments survey. This study follows up households which have had a Green Deal Assessment in order to understand the assessment experience and actions taken post-assessment. Findings from these studies are available at https://www.gov.uk/government/collections/green-deal-assessments-research.

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