



Department
of Energy &
Climate Change

Green Deal Household Tracker survey – Executive Summary

Wave 3 report

March 2014

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 [\[insert link\]](#).

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

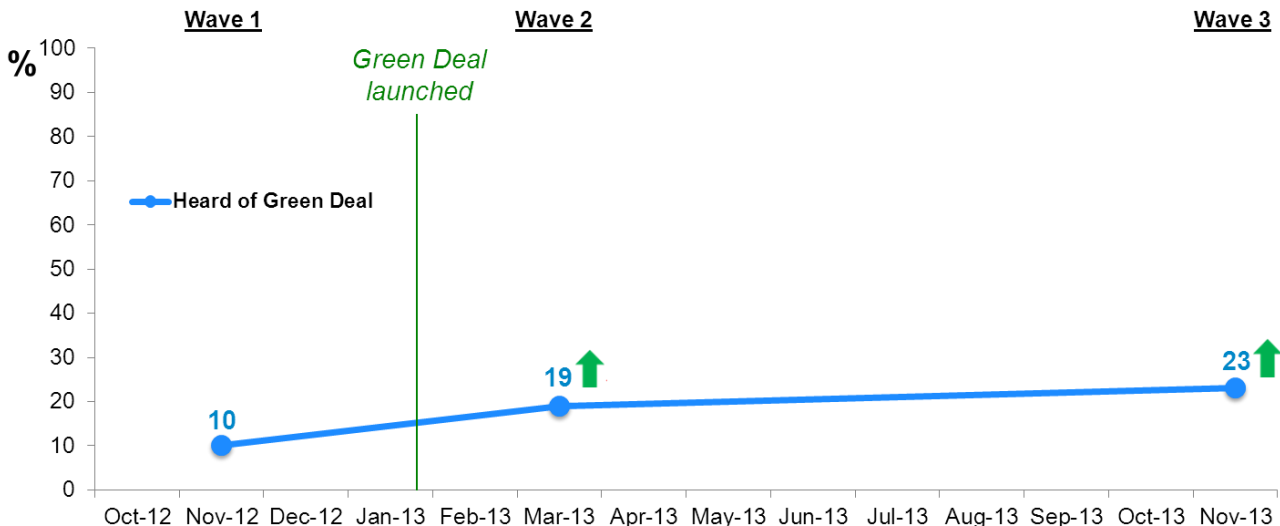
The same methodology and sampling was used both in Wave 1 (the baseline survey), Wave 2, Wave 3 and the dips, so as to ensure comparability of findings. Wave 1 fieldwork took place in November 2012, Wave 2 in March 2013 and Wave 3 in November 2013, while the two dips were conducted in February 2013 and 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/programmes¹ 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%)

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Department of Energy & Climate Change
3 Whitehall Place
London SW1A 2AW
www.gov.uk/decc

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