



Department
of Energy &
Climate Change

Green Deal Household Tracker survey

Research on awareness of the Green Deal and the
Domestic Renewable Heat Incentive

Wave 4 report

June 2014

© Crown copyright 2014

URN 14D/203

You may re-use this information (not including logos) free of charge in any format or medium, under the terms of the Open Government Licence.

To view this licence, visit www.nationalarchives.gov.uk/doc/open-government-licence/ or write to the Information Policy Team, The National Archives, Kew, London TW9 4DU, or email: psi@nationalarchives.gsi.gov.uk.

Any enquiries regarding this publication should be sent to us at Julia.Raybould@decc.gsi.gov.uk.

The views expressed in this report are those of the authors, not necessarily those of the Department of Energy and Climate Change (nor do they reflect Government policy).

Contents

Glossary of terms.....	4
Executive summary.....	5
Background and objectives	5
Methodology and sampling.....	5
Awareness and understanding of the Green Deal.....	6
Take up of energy efficient home improvements.....	7
Background and objectives	10
Background to the research	10
Objectives of the research.....	10
Survey methodology and sampling	11
Reporting conventions.....	12
Awareness and understanding of the Green Deal	14
Overall awareness of the Green Deal.....	14
General awareness of energy saving improvements.....	17
Awareness of publicity.....	18
Understanding of key elements of the Green Deal.....	19
Recognition of the Green Deal Quality Mark	22
Reassurance offered by the Green Deal Quality Mark	24
Take up of energy efficient home improvements	25
Motivations and barriers to making energy efficient home improvements	25
Which energy efficient home improvements do consumers already have?	26
Trusted sources of general advice about energy saving home improvements	28
Domestic Renewable Heat Incentive	29
Next steps	32

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, 3,424 interviews in November 2013 and 3,740 interviews in April 2014).
- 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 energy efficiency improvements
- Confidence and trust in industry standards

To date, GfK NOP has conducted four 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 wherever possible. This report focuses primarily on findings at Wave 4 of the quantitative tracking study with reference to any differences compared with Waves 1, 2 and 3. 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-4>.

Methodology and sampling

For all waves of the main tracker surveys, representative samples of around 3,500 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

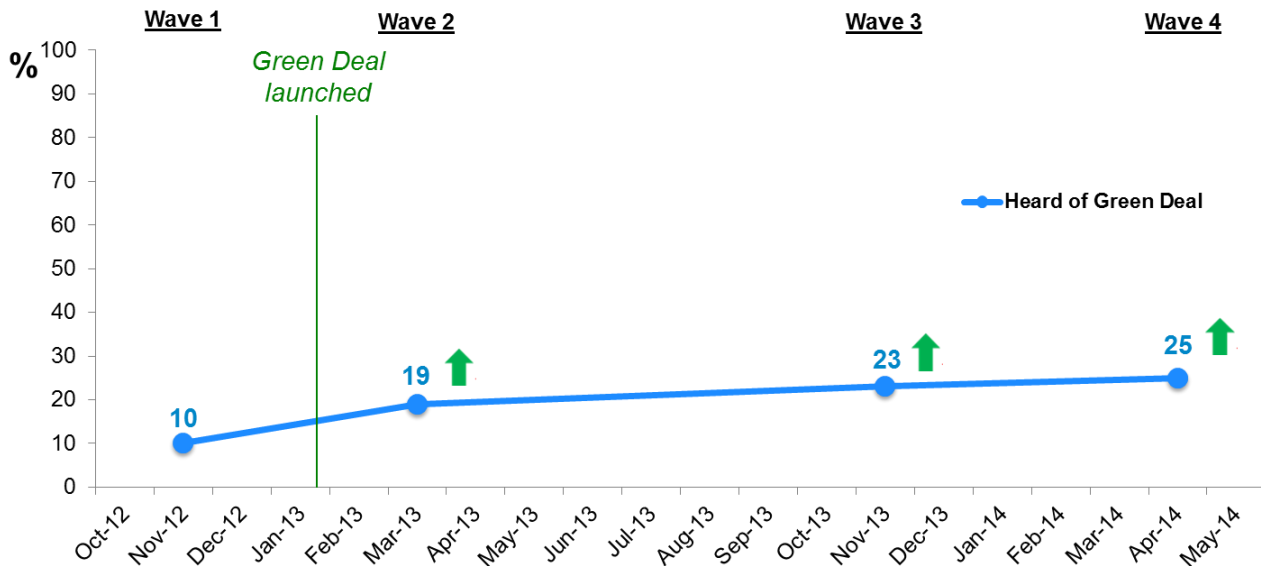
The same methodology and sampling was used both in Waves 1 to 4 and in the dips, so as to facilitate comparisons. Wave 1 fieldwork took place in November 2012, Wave 2 in March 2013, Wave 3 in November 2013 and Wave 4 in April 2014, while the two dips were conducted in February 2013 and May 2013.

Fuller methodological details are included in a separate technical report which is available at <https://www.gov.uk/government/publications/green-deal-household-tracker-wave-4>.

Awareness and understanding of the Green Deal

Awareness of the Green Deal stands at around a quarter of all respondents having seen continued growth in awareness over time. At Wave 1, which was conducted prior to the official launch of the scheme, awareness stood at 10%. This increased significantly to 19% at Wave 2, and has continued to rise steadily to a quarter of respondents (25%) by Wave 4.

Chart 1: Awareness of the Green Deal



Base: All respondents (W1 = 3,562; W2 = 3,409; W3 = 3,424; W4 = 3,740)

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

The main sources of Green Deal awareness at Wave 4 were broadly the same as at previous waves: television advertising/programmes¹ and newspaper or magazine articles/advertising were most frequently cited. The proportion saying they had heard about it through DECC has been fairly low, with 4% saying this at Wave 4; this is broadly consistent with the other waves, except for a slight peak at Wave 2 (6% at Wave 1, increasing to 9% at Wave 2 and falling back 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. At Wave 4, there has been a small but significant dip in awareness with 47% saying that they had seen, heard or read something. In comparison, 51% of respondents at Wave 1 and 50% at Waves 2 and 3 said they had seen, heard or read any advertising, news or publicity.

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 aggregate level of awareness has remained broadly stable across the four waves of research (Wave 1 = 52%; Wave 2 = 54%; Wave 3 = 51%; Wave 4 = 51%).

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 in television programmes.

At Wave 4, almost a quarter (23%) of people recognised the Green Deal Quality Mark. This represented a significant wave-on-wave increase since Wave 3 (up 3 percentage points) and followed the sharp increase in recognition –which was seen at that wave (up from 12% at 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 at Wave 4 the mean level of reassurance offered by the Quality mark was 6.0 (out of 10) - in line with the score of 6.1 which was observed at waves 1-3.

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 4 were to:

- reduce energy bills (65%)
- make the home warmer and more comfortable (50%)
- reduce the amount of wasted energy (37%)
- reduce carbon emissions (17%)

Although these have been the main motivations consistently mentioned across the four waves of the survey there have been drops between Waves 3 and 4 in the proportion of respondents mentioning reduced energy bills (down by 5 percentage points), making the home warmer and more comfortable (down 6 percentage points) and reducing the amount of wasted energy (down 5 points). These changes have been observed amongst most sub-groups. Particularly marked changes were observed amongst households having financial difficulties paying their energy bills and low-income owner occupiers in relation to reducing their energy bills (down by 7 and 14 percentage points, respectively).

The main barriers at Wave 4 were:

- cost of improvements is too high (40%)
- already doing enough (18%)
- landlord/freeholder won't allow (17%)

When asked if they already had specific energy saving improvements installed (loft insulation, energy efficient boiler and cavity wall insulation), respondents reported similar levels of installation across all waves of the main tracking survey. That said, there were a few changes between Waves 3 and 4 in terms of installed measures. The most notable change was the increase in the proportion of households with cavity walls saying that they have had cavity wall insulation installed (up 4 percentage points to 71%). The installation of cavity wall insulation has increased significantly amongst ABC1 households (up from 64% at Wave 3 to 73% at Wave 4) and amongst households with an annual income between £16,000 and £35,000 (up from 67% at Wave 3 to 76% at Wave 4), although the correlation between these two sub-groups should be noted, with higher earning households found amongst the higher social grades.

Some longer term trends were seen, with a decline in households saying that they “haven’t thought about” installing each of the three measures and a decline in the proportion saying they haven’t heard of each of the three measures since Wave 1.

When households were asked to choose which source they would trust for advice about energy saving improvements from a list there were few differences in terms of the main sources which were cited at Wave 4:

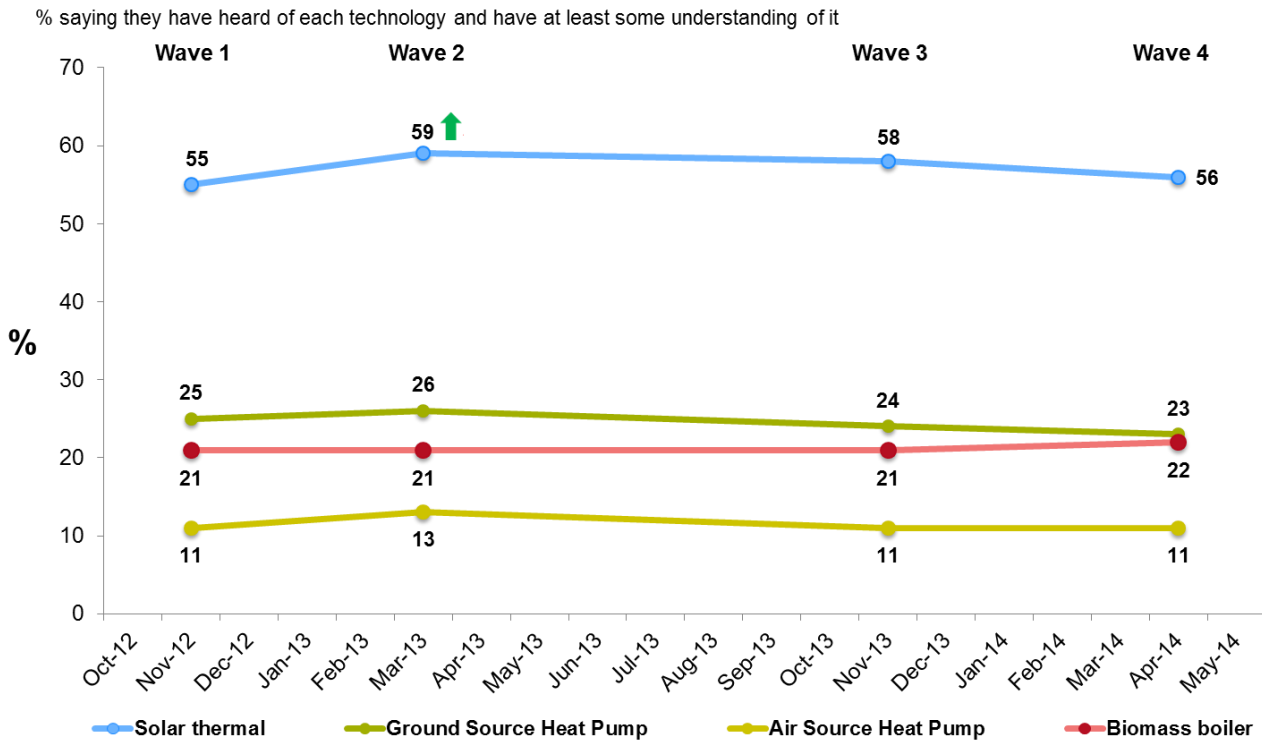
- Friends and family (34%)
- Local authorities (29%)
- DECC (20%)
- The Energy Saving Trust (19%)
- Specialist installers (18%)
- Plumber / tradesperson (18%)

While the main sources were the same as in previous waves there was a significant decrease in the proportion of households mentioning the Energy Saving Trust as a trusted source of advice (down from 22% at Wave 3 to 19% at Wave 4).

Domestic Renewable Heat Incentive

Chart 2 shows the proportion of respondents who reported to have both heard of and have at least some understanding of, the renewable heat technologies eligible for the Domestic Renewable Heat Incentive (RHI) scheme at each of the four waves. Awareness levels were generally very consistent – both in terms of the technologies that consumers are most likely to be aware of and awareness levels across waves for each technology.

Chart 2: Awareness of different types of renewable heat technologies



Base: All respondents (W1 = 3,562; W2 = 3,409; W3 = 3,424; W4 = 3,740)

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

In total, 5% of respondents had heard of the Domestic Renewable Heat Incentive (RHI) scheme at Wave 4. This is in line with the 4% who were aware in the previous wave; the increase of one percentage point is not statistically significant.

Those respondents who had heard of the RHI were asked an unprompted question about how they had heard of the scheme. The main sources of awareness at Wave 4 were Television Programmes (20%), through work (11%) and word of mouth (10%); mentions of Local Authority/Council dropped significantly from 10% at Wave 3 to 3% at Wave 4.

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.²

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 before the scheme was launched. The second wave was conducted in March 2013, the third in November 2013 and the fourth in April 2014. In addition to the three strand one waves, GfK NOP has also conducted two Strand two dips in February and May 2013.

This report focuses on the findings from Wave 4 of the quantitative study and makes comparisons with the previous waves. Findings from the short Strand two dips are included in a separate chapter of the report. The Wave 3 report is available at <https://www.gov.uk/government/publications/green-deal-household-tracker-wave-3> and the reports for Waves 1 and 2 are 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

² Detailed information about the Green Deal can be found at: <https://www.gov.uk/green-deal-energy-saving-measures>.

- Confidence in the tangible benefits of energy efficiency
- Intention to install measures
- Confidence and trust in industry standards

In addition, the research helps 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 (Figure 1 below) which GfK NOP developed as part of a previous research project in 2012³.

Figure 1: Overview of the Green Deal segmentation

GfK NOP and DECC developed the Green Deal segmentation in order to understand which key groups exist in relation to potential demand for the Green Deal, what their motivations and barriers are, and which communications channels might best be used to reach them.

The segmentation was primarily developed amongst owner occupiers and private rented tenants to help DECC develop communications and messages for the Green Deal but it was also felt that the segments would provide powerful analysis if used in subsequent Green Deal research.

Overstretched: While they could potentially benefit from the Green Deal, this segment is strongly put off by the costs of improvements.
Disengaged Rejectors: Older households who aren't planning on making their homes more energy efficient. They don't appear to want to consider the Green Deal at all.
Not on the radar: Average households for whom energy efficiency isn't a priority at present.
Convertible: Higher income working families who were already considering making energy efficiency improvements. The Green Deal could help them get over barriers including distrust of installers & confusion over conflicting information.
Carbon Savers: Young professionals who are particularly interested in the environmentally friendly benefits of making their home more energy efficient through the Green Deal.
Money Savers: Families on low incomes who are especially interested in the cost-saving features of the Green Deal to help them make energy efficiency improvements.

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.

³ 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>

Background and objectives

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 the Wave 3 report <https://www.gov.uk/government/publications/green-deal-household-tracker-wave-3>.

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.

	Strand one				Strand two	
	Wave 1 (baseline)	Wave 2	Wave 3	Wave 4	February dip	May dip
Fieldwork dates	8-25 Nov 2012	7-22 Mar 2013	31 Oct – 12 Nov 2013	10-30 Apr 2014	7-12 Feb 2013	9-14 May 2013
Sample size	3,562	3,409	3,424	3,740	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-wave-4>.

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 data tables are available at <https://www.gov.uk/government/publications/green-deal-household-tracker-wave-4>.

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 4 and wave 3 but where appropriate comparisons with previous waves 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 are 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
- Nest⁴ (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)⁵

Awareness of any of these initiatives at an aggregate level remains similar to the previous wave, at 59%, though this has built slightly over time (up from 56% at Wave 1).

In total, 5% claimed to have heard of the Domestic Renewable Heat Incentive Scheme. This is in line with the 4% which was observed when this option was added to the questionnaire at Wave 3.

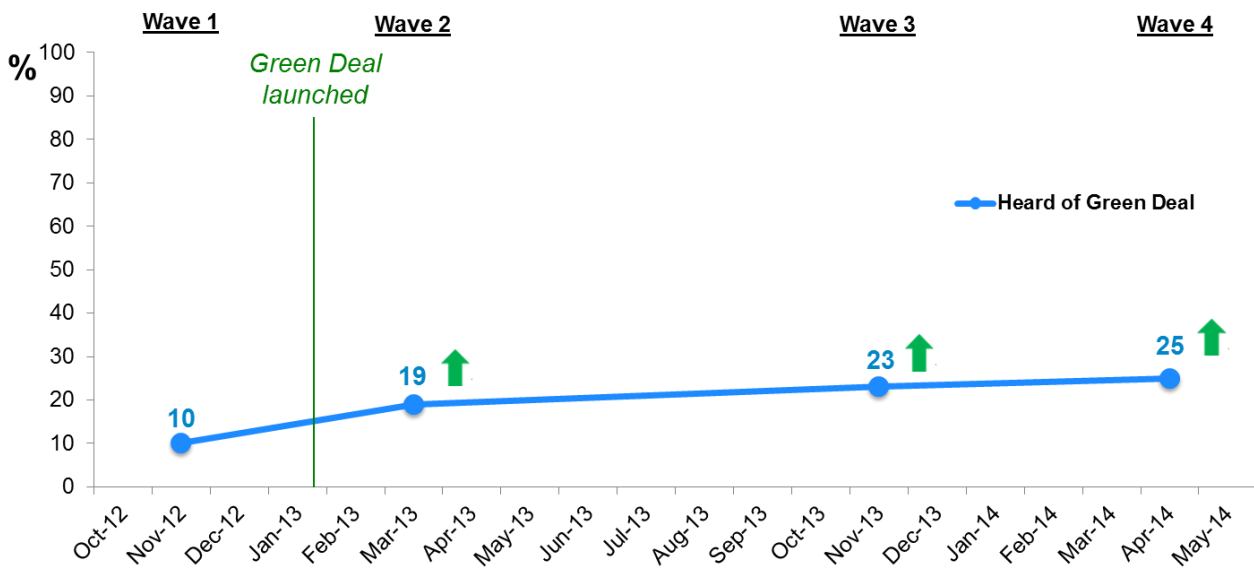
As Chart 3 shows, awareness of the Green Deal has grown wave on wave. At Wave 1, which was conducted prior to the official launch of the scheme, awareness stood at 10%. This

⁴ 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/>

⁵ New code introduced for the November 2013 wave of the tracker.

increased significantly to 19% at Wave 2 and has continued to rise steadily to a quarter of respondents (25%) by Wave 4

Chart 3: Awareness of the Green Deal



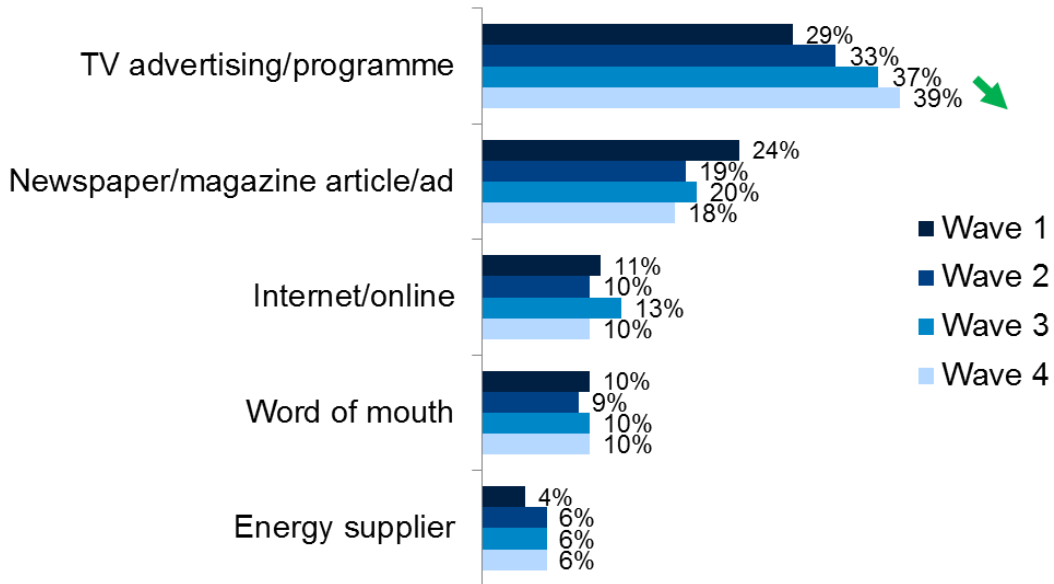
Base: All respondents (W1 = 3,562; W2 = 3,409; W3 = 3,424, W4 = 3,740)

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

It is important to note that the wave-on-wave increases in awareness of the Green Deal have not been mirrored for the other schemes: no changes in awareness were observed for the other schemes in the list.

Chart 4 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. While newspapers and magazines remain the second most cited source of awareness, this has shown a directional decrease since Wave 1 (from 24% to 18% at Wave 4).

Chart 4: Top 5 sources of Green Deal awareness



Base: All respondents who had heard of the Green Deal (W1 = 367; W2 = 646; W3 = 778; W4 = 922)

Significant increases since Wave 1 indicated by a diagonal green arrow (↘) on the chart.

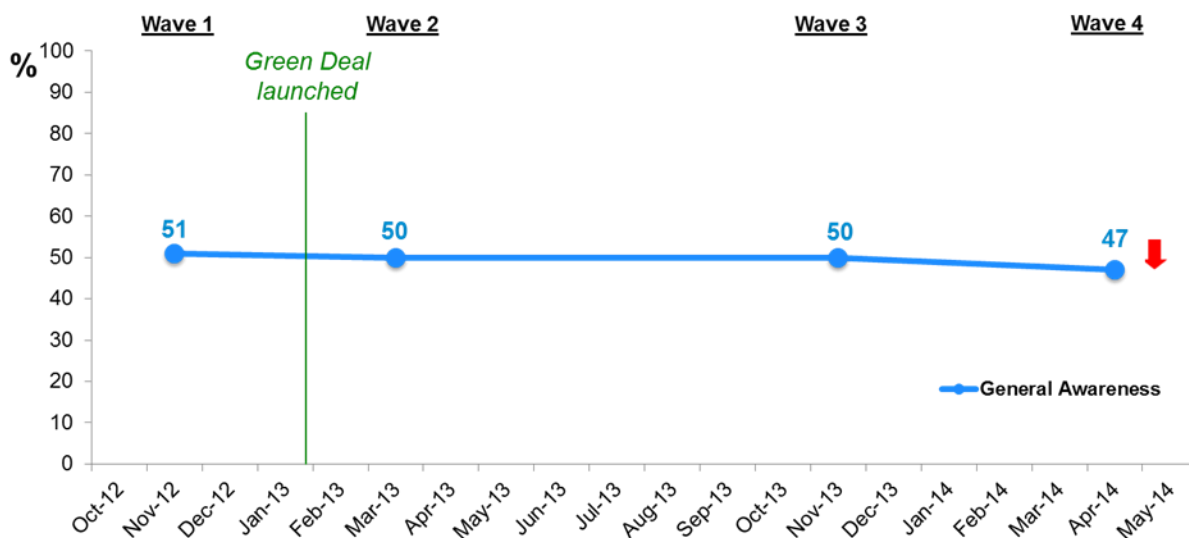
For the full findings from these questions please refer to the data tables which are available at <https://www.gov.uk/government/publications/green-deal-household-tracker-wave-4>.

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 5 shows, after a period of stability between Waves 1 and 3, in which prompted awareness of publicity around these initiatives stood at around 50%, this dipped to 47% at Wave 4 – a significant decrease.

Awareness dropped particularly amongst tenants (down by 5 percentage points since Wave 3) and households having ‘financial difficulties’ with their energy bills (down by 9 percentage points since Wave 3). There is considerable overlap between these two groups as 66% of those in ‘financial difficulties’ were also tenants.

Chart 5: General awareness of energy saving improvements



Base: All respondents (W1 = 3,562; W2 = 3,409; W3 = 3,424; W4 = 3,740)

Significant decrease since previous wave indicated by a red arrow (↓) on the chart.

Across all four waves the findings have consistently shown that the following groups were more likely to say they were aware of energy saving improvements (Wave 4 figures):

- Owner-occupiers (56% compared with 35% of tenants)
- ABC1s (55% compared with 40% of C2DEs)
- Households which were ‘managing well’ with their energy bills (52% compared with 36% of households which were having difficulties)
- Households which have had an energy saving improvement installed (51% compared with 31% of households which have not had an improvement installed)
- Convertibles (61%) and Overstretched (59%) compared with Disengaged Rejectors (36%).⁶

⁶ See p.11 of this report for an overview of the Green Deal segmentation.

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). As Table 1, below, shows, sources of awareness were largely stable across waves, but mentions of certain types of energy saving improvements have experienced change or fluctuation.

Table 1: Sources of awareness of initiatives that allow people to make energy saving improvements to their home

Base: All respondents aware of advertising, news or publicity about initiatives that allow people to make energy saving improvements	Wave 1	Wave 2	Wave 3	Wave 4
	1,766	1,662	1,665	1,683
	%	%	%	%
Source of information				
Television	25	23	23	23
From Energy Company	16	10↓	10	9
Phone call/telesales	7	6	6	8
Newspaper/magazine articles/ads	9	10	8	8
Leaflets	8	10	6↓	7
From the Government	8	10	8	6↓
Other grants/subsidies available	14	10↓	13	6↓
Grants/subsidies available for specific people	4	4	7↑	5
Door to door sales	5	5	3	5
Any mention of sources of information	65	61↓	61	57↓
Types of energy saving improvement				
Solar panels	18	19	14↓	19↑
Central heating/boiler	7	7	16↑	14

Base: All respondents aware of advertising, news or publicity about initiatives that allow people to make energy saving improvements	Wave 1	Wave 2	Wave 3	Wave 4
Loft insulation	21	18↓	16	10↓
Cavity Wall Insulation	13	11	8↓	10
Any mention of energy saving improvements	45	42	43	41

Significant wave on wave changes are indicated by an arrow (↑↓) on the table.

At Waves 2 to 4, 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%); the significant increase experienced at Wave 2 has been sustained, but not yet built upon.

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 2 shows, the aggregate level of awareness of these initiatives was broadly similar across all four 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 four waves of research.

The proportion of respondents who were aware that “you can make energy saving home improvements to your home and repay the cost through savings on your electricity bill” has dropped to 19% (from a high of 26% at Wave 2) and the proportion who were aware that “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

Awareness and understanding of the Green Deal

installed and how much they would cost” has dropped to 14% (from a high of 17% at Wave 2). Sub-group analysis indicates that these changes have not been driven by any particular sub-group as awareness of these key elements of the Green Deal has dropped across the board.

Table 2: Understanding of key elements of the Green Deal

Base: All respondents	Wave 1	Wave 2	Wave 3	Wave 4
	3,562	3,409	3,424	3,740
	%	%	%	%
You can make energy saving home improvements to your home and repay the cost through savings on your electricity bill	23	26↑	22↓	19↓
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↓	14
You can make energy saving home improvements to your home and receive cash back from the Government	23	23	21	21
You should look out for a quality mark which shows who is part of the scheme	8	9	9	10
Support is available to pay for more expensive energy saving home improvements	12	12	13	12
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	26↑
None of these	48	46	49↑	49

Significant wave on wave changes are indicated by an arrow (↑↓) on the table.

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 4, 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 was by far the most frequently mentioned source (49% at Wave 4), followed by newspaper or magazine articles and advertising (22%).

Other sources included energy suppliers and word of mouth (both 14%), and the internet (13%). Local authorities were also mentioned, but mentions were down from 12% at Wave 1 to 8% at

both Waves 3 and 4). Fewer than one in ten mentioned either the Government (7%) or DECC (3%) as sources of awareness.

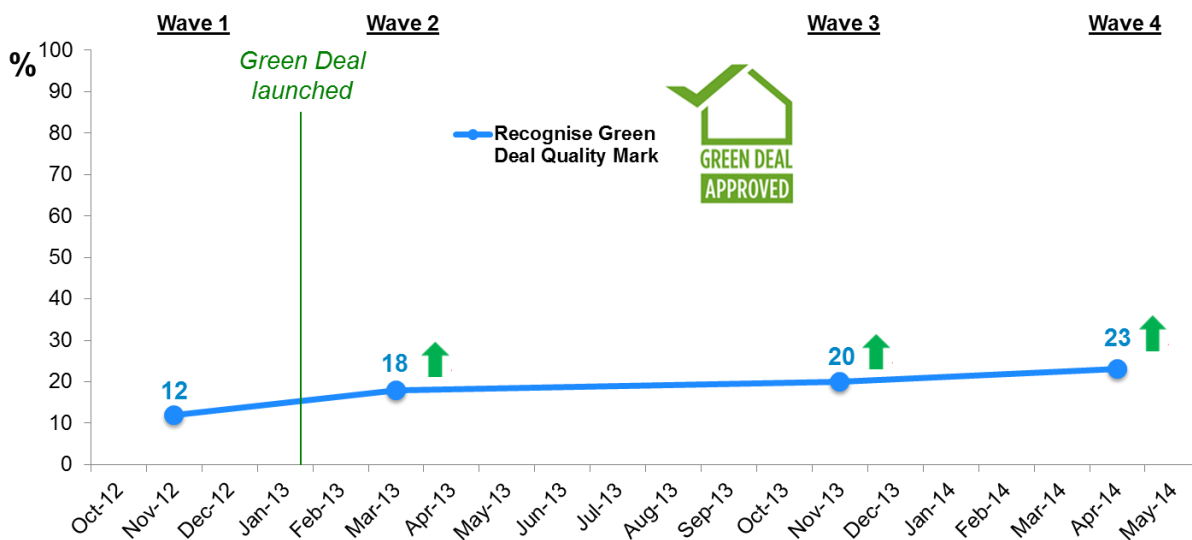
Recognition of the Green Deal Quality Mark

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 6 shows the proportion of respondents who reported they recognise the Green Deal Quality Mark at each wave. The rate of recognition has almost doubled since Wave 1, having increased significantly with each wave of research to almost a quarter of respondents (23% at Wave 4).

Chart 6: Recognition of the Green Deal Quality Mark



Base: All respondents (W1 = 3,562; W2 = 3,409; W3 = 3,424; W4 = 3,740)

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

It is important to note that while recognition of the Green Deal Quality Mark logo has been rising recognition of the other logos has not followed such a clear trend (see Table 3):

- Despite an initial increase in awareness of the Gas Safe/Corgi logo at Wave 2 (up 6 percentage points) awareness has remained at the same level since;
- Awareness of the Energy Saving Trust logo has dropped in successive waves from 32% in Wave 2 to 26% in Wave 4. This drop was particularly marked amongst households with 'financial difficulties' paying their energy bills (down 9 percentage points since Wave 2) and both Convertibles and Money Savers (both down 9 percentage points since Wave 2);
- There has been a small, but significant, increase in awareness of the Microgeneration Certification Scheme (up 2 percentage points). As might be expected, this increase appears to be driven by households which are off of the gas grid; recognition of the logo amongst this group has increased from 5% at Wave 3 to 11% at Wave 4, while awareness amongst households which are on the gas grid has not increased.

Table 3: Recognition of logos

Base: All respondents	Wave 1	Wave 2	Wave 3	Wave 4
	3,562	3,409	3,424	3,740
	%	%	%	%
Gas Safe/Corgi	39	45↑	45	45
Energy Saving Trust	31	32	30↓	26↓
National House Building Council	28	31	28↓	30
National Inspection Council for Electrical Installation Contracting	25	27	25↓	24
Green Deal Quality Mark	12	18↑	20	23↑
Microgeneration Certification Scheme	5	6	5	7↑
None of these	33	27↓	28	28

Significant wave on wave changes are indicated by an arrow (↑↓) on the table.

As at previous waves, those who were aware of publicity were more likely to recognise the logo; at Wave 4, 28% of those who were aware of publicity recognised the Green Deal Quality Mark whilst just 14% of those who were not aware of any publicity claimed to recognise it.

Other sub-groups with higher levels of recognition included households with an annual income of £50k+ (33% compared with 23% of households with an income lower than £16k per annum), ABC1 households (25% compared with 21% of C2DE households) and owner-occupiers (25% compared with 20% of tenants). Note that there is overlap amongst these sub-groups.

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 4, the mean level of reassurance offered by the Quality Mark was 6.0 (out of 10) and this remains very similar to previous waves (Chart 7).

Chart 7: Levels of reassurance offered by the Green Deal Quality Mark

	NOT AT ALL REASSURED					COMPLETELY REASSURED						
	1	2	3	4	5	6	7	8	9	10	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
W4	6%	2%	4%	4%	17%	10%	16%	15%	5%	6%	15%	6.0

Base: All respondents (W1 = 3,562; W2 = 3,409; W3 = 3,424; W4 = 3,740)

As has been observed in previous waves, 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 (34% compared with 23%).

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 4 would be to:

- reduce energy bills (65%)
- make the home warmer and more comfortable (50%)
- reduce the amount of wasted energy (37%)
- reduce carbon emissions (17%)

Although these have been the main motivations consistently across the four waves of the survey there have been drops between Waves 3 and 4 in the proportion of respondents mentioning reduced energy bills (down by 5 percentage points), making the home warmer and more comfortable (down 6 percentage points) and reducing the amount of wasted energy (down 5 points).

These changes have been observed amongst most sub-groups, but particularly marked changes were apparent amongst households having financial difficulties paying their energy bills and low-income owner occupiers in relation to reducing their energy bills (down by 7 and 14 percentage points respectively).

The main barriers preventing people from doing more to make their homes energy efficient at Wave 4 were also similar to previous waves:

- cost of improvements is too high (40%)
- already doing enough (18%)

Take up of energy efficient home improvements

- landlord/freeholder won't allow (17%)
- no guarantee that it will save money (11%)
- lack of time (10%)
- 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.

As Table 4 shows, there were few changes between Waves 3 and 4 in terms of installed measures. The most notable change is the increase in the proportion of households with cavity walls saying that they have had cavity wall insulation installed (up 4 percentage points to 71%). The installation of cavity wall insulation has increased significantly amongst ABC1 households (up from 64% at Wave 3 to 73% at Wave 4) and amongst households with an annual income between £16,000 and £35,000 (up from 67% at Wave 3 to 76% at Wave 4), although the correlation between these two sub-groups should be noted, with higher earning households found amongst the higher social grades.

Table 4 also shows longer term trends with the decline in households saying that they "haven't thought about" installing each of the three measures and the decline in the proportion saying they haven't heard of each of the three measures since Wave 1.

Table 4: Take up of energy saving home improvements

Base: All respondents	Cavity Wall Insulation				Loft insulation				Energy Efficient Boiler			
	W1	W2	W3	W4	W1	W2	W3	W4	W1	W2	W3	W4
	2,262	2,370	2,216	2,476	3,562	3,409	3,424	3,737	3,539	3,210	3,198	3,475
	%	%	%	%	%	%	%	%	%	%	%	%
Already have/done this	69	67	67	71↑	70	72	71	71	61	62	64	62
In the process of doing this	1	1	1	1	2	1	1	1	1	1	1	2
Have firm plans to do this soon	1	1	1	1	1	1	1	1	2	2	2	2
Would like to do this but not at this stage	3	2	2	2	2	2	1	2	7	8	6	7
Have looked into it but don't want to/probably won't do this	5	4	3	3	2	1	1	1	4	2	2	3
Haven't thought about doing this	9	6↓	5	5	7	2↓	2	3	13	9↓	7	8
Haven't heard of this	3	2	1	*	3	1	1	*	4	2	2	2
Not my decision to make (I'm renting the property)	9	12↑	13	14	10	9	10	11↑	9	13↑	16↑	14
Not applicable	-	4	7	2↓	2	11↑	13	10↓	-	-	-	-

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

- Friends and family (34% at Wave 4)
- Local authorities (29%)
- DECC (20%)
- The Energy Saving Trust (19%) – the decrease since Wave 3 coincides with the decrease in recognition of their logo

The decrease in the proportion saying that they would trust the Energy Saving Trust as a source of general advice was particularly marked amongst Convertibles (down from 45% at Wave 3 to 33% at Wave 4) – a sub-group amongst whom recognition of the EST's logo also dropped.

Table 5: Trusted sources of general advice about making homes more energy efficient*

Base: All respondents	Wave 1	Wave 2	Wave 3	Wave 4
	3,562	3,409	3,424	3,740
	%	%	%	%
Friends and family	35	34	37↑	34↓
My Local Authority	30	30	30	29
Energy Saving Trust	24	23	22	19↓
DECC	23	21	21	20
A specialist installer of energy efficient measures	21	20	19	18
A tradesperson	19	19	18	18
My energy supplier/another energy supplier	18	19	17↓	16

*The table shows all of the sources which were mentioned by 10% or more at Wave 4.

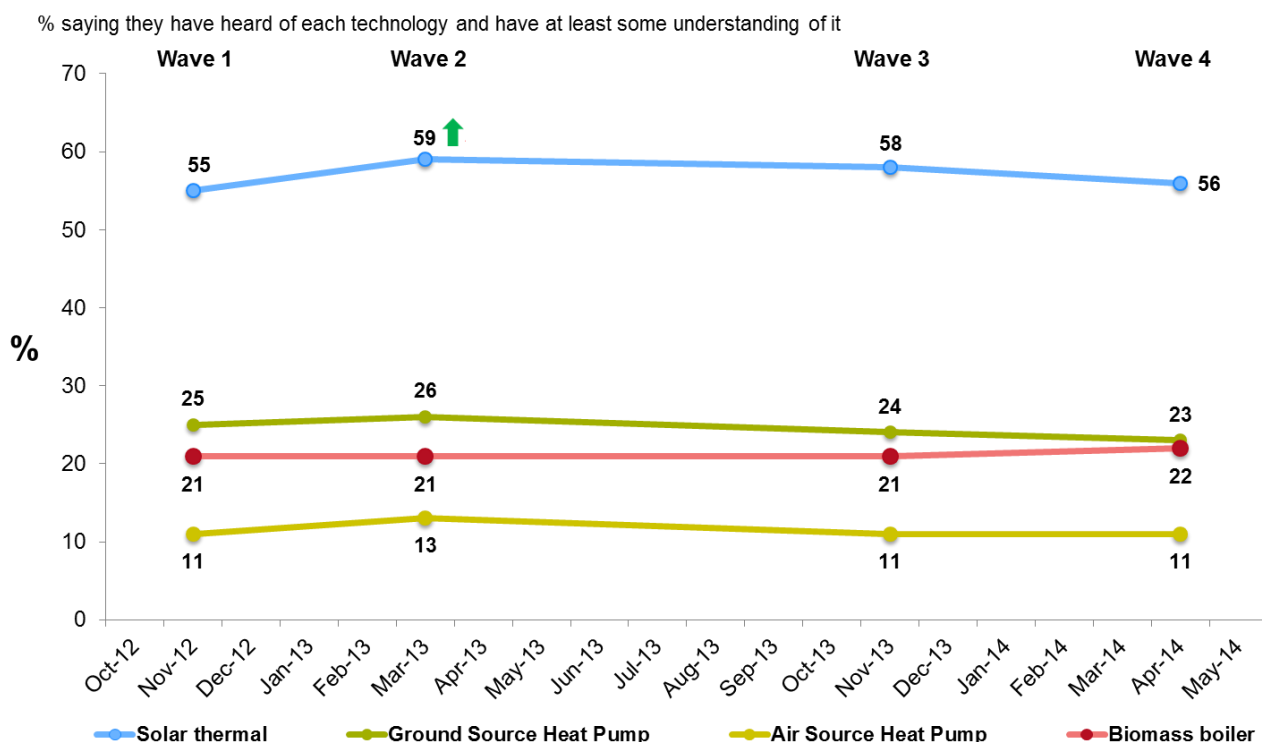
Significant wave-on-wave changes are indicated by arrows (↑↓) on the table.

Domestic Renewable Heat Incentive

The Domestic Renewable Heat Incentive launched in Spring 2014. Participants are 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. At Wave 3 new questions were added in order to track both the level of and sources of awareness for, the Domestic Renewable Heat Incentive.

Chart 8 shows the proportion of respondents who reported to have both heard of and have at least some understanding of, the renewable heat technologies eligible for the scheme at each of the four waves. Awareness levels were generally very consistent – both in terms of the technologies that consumers are most likely to be aware of and awareness levels across waves for each technology.

Chart 8: Awareness of different types of renewable heat technologies



Base: All respondents (W1 = 3,562; W2 = 3,409; W3 = 3,424; W4 = 3,740)

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

As mentioned on page 14 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, 5% of respondents had heard of the scheme at Wave 4. This is in line with the 4% who were aware in the previous wave; the increase of one percentage point is not statistically significant.

Those respondents who had heard of the RHI were asked an unprompted question about how they had heard of the scheme. As Table 6 shows, the main sources of awareness at Wave 4 were Television Programmes (20%), through work (11%) and word of mouth (10%); mentions of Local Authority/Council dropped significantly from 10% at Wave 3 to 3% at Wave 4. Although a range of other sources of awareness 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 was most important to them. As shown in Table 6, the distribution of most important sources of awareness is similar to the most frequently cited sources in the previous question.

Table 6: Source of awareness of Renewable Heat Incentive and most important source

	Wave 3		Wave 4	
	Source of awareness	Most important	Source of awareness	Most important
Base: All respondents who were aware of the Domestic Renewable Heat Incentive	126	126	198	198
	%	%	%	%
Television programme	22	18	20	16
Through work	8	6	11	10
From a friend or relative/Word of Mouth	15	14	10	9
Internet/Online (search engines, social networks, government sites, other sites)	9	6	8	8
Newspaper	8	6	6	6
Energy supplier	7	6	4	3
Tradesperson (e.g. plumber, gas fitter)	5	4	4	4
From my Local Authority/Council	10	9	3↓	3↓

Note: Table 6 only shows those sources of information which were mentioned by 5% or more of those who were aware of the Domestic Renewable Heat Incentive at Waves 3 or 4. Respondents who replied that they didn't know (11% at W3, 23% at W4) are also not included.

Significant wave-on-wave changes are indicated by arrows (↑↓) on the table.

Next steps

GfK NOP has been commissioned to undertake one more dip, which is currently scheduled to take place in summer 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>.

© Crown copyright 2014

Department of Energy & Climate Change

3 Whitehall Place

London SW1A 2AW

www.gov.uk/decc

URN 14D/203