

Heat pump awareness in Scotland

Survey commissioned for Energy Saving Trust and Home Energy Scotland

Background

The Scottish Government's draft Heat in Buildings strategy wants one million homeowners to have switched to heat pumps by the end of this decade.

Energy Saving Trust's Scottish Home Renewables Service, which delivers the specialist renewables advice from Home Energy Scotland, carried out a survey to establish the levels of awareness of heat pumps across Scotland.

Home Energy Scotland's mission is to help people in Scotland create warmer homes, reduce their bills and tackle climate change. The results of the research demonstrate Home Energy Scotland's importance as a source of free, expert and impartial advice and information.

Home Energy Scotland has a range of tools to help people find out more about heat pumps and promote the uptake of heat pumps across Scotland. For example, people can use the [Home Renewables Selector](#) to find out if a heat pump is suitable for their home and circumstances; people can read real-life stories on the [Green Homes Network](#); and it's possible to find out how Home Energy Scotland can help by using the [funding finder](#). For those who have already decided to install a heat pump, it will guide them through the process and help them find a suitable installer using the [Renewables Installer Finder](#).

Research objectives

- Establish the levels of awareness about heat pumps across Scotland.

Methodology

The research was conducted using quantitative online self-completion interviewing and was carried out by Taylor McKenzie, a strategic research and market research service provider based in Glasgow.

A comprehensive list of questions was provided to Taylor McKenzie and an online questionnaire was devised by Taylor McKenzie. This comprised primarily a range of questions with pre-coded answers as well as some questions requiring a verbatim response.

On average, the time taken to complete the online survey was 10 minutes.

Sample

A total of 1,000 Scottish respondents completed the survey between the 22 and 29 January 2021.

Respondents were asked screening questions to ensure they met the following criteria:

- aged over 18
- resident in Scotland
- leaseholder or owner-occupier
- do not already have a heat pump installed in their property.

Quotas were also set to ensure a spread of gender, age, socio-economic group, and geographical location.

Outcomes

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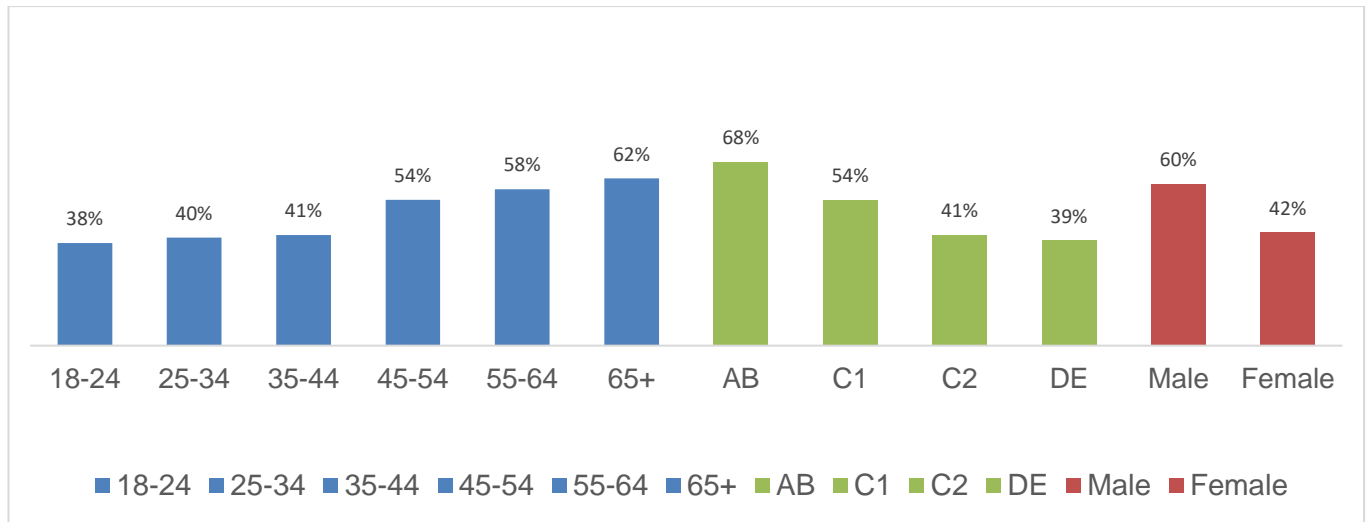
- 51% of Scottish residents have already heard of heat pumps
- 6% are currently very likely to consider installing

Results

Have you heard of air source heat pumps or ground source heat pumps?

Overall, 51% of Scottish residents are aware of heat pumps.

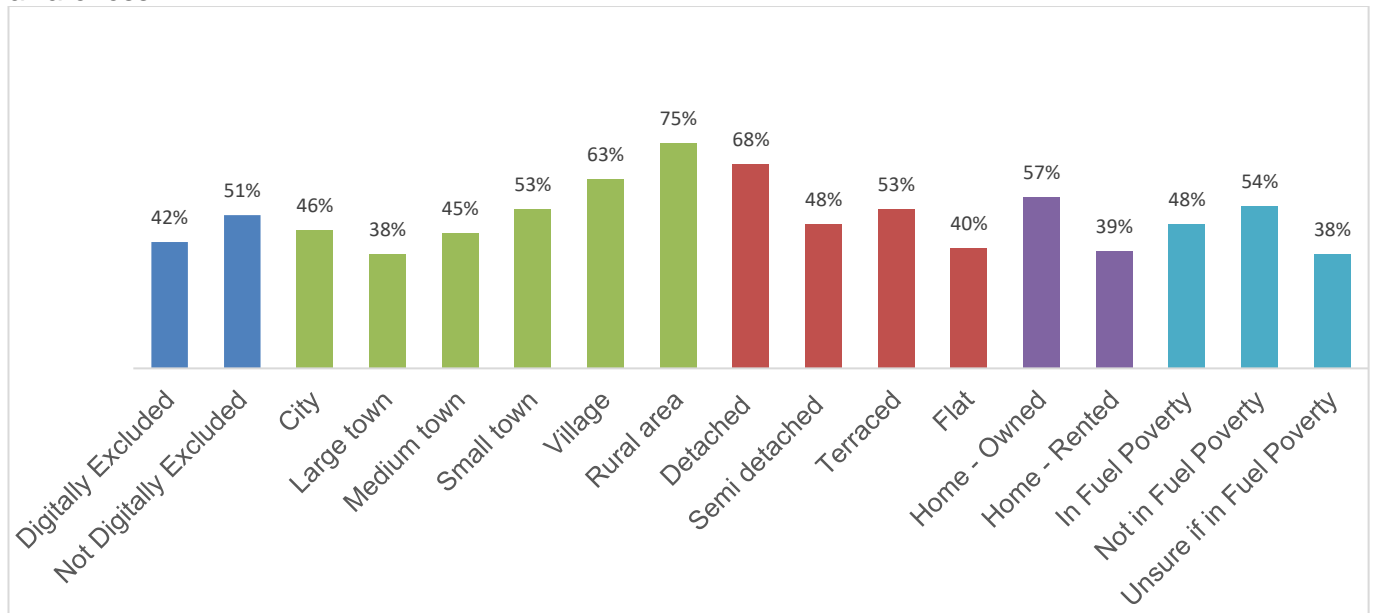
Awareness of heat pumps is higher among men, higher socioeconomic* groups, and older people.



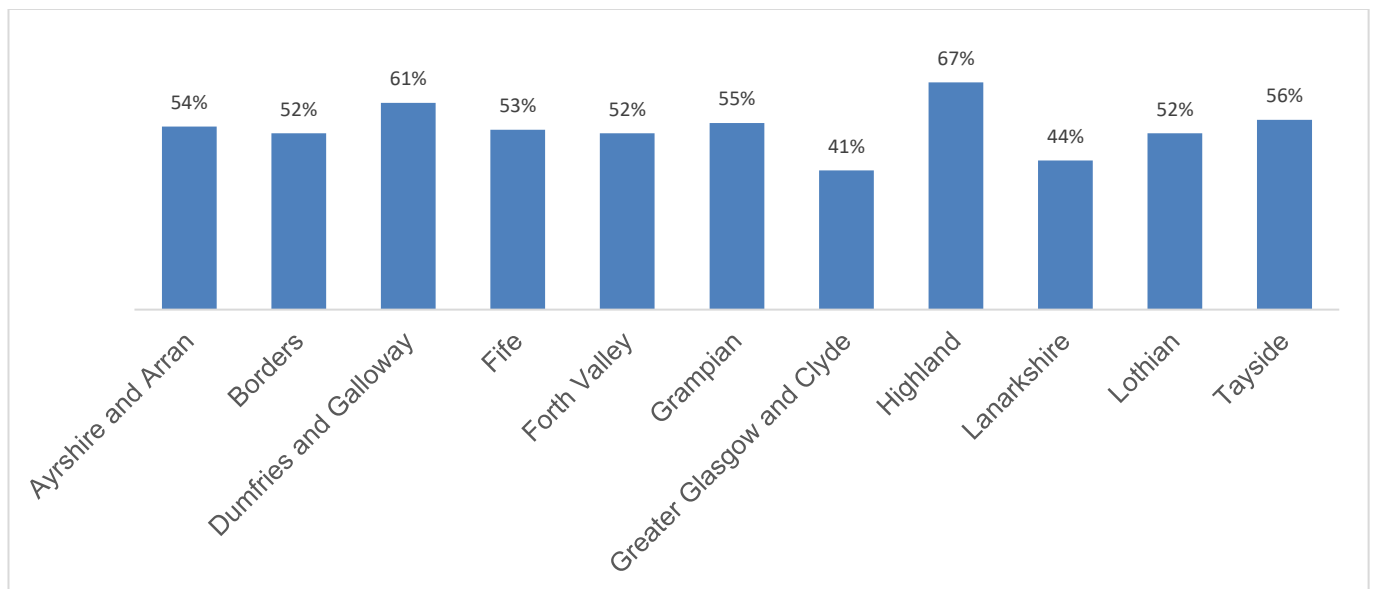
*Socioeconomic groups:

- AB = Higher and intermediate managerial, administrative, professional occupations
- C1 = Supervisory, clerical and junior managerial, administrative, professional occupations
- C2 = Skilled manual occupations
- DE = Semi-skilled & unskilled manual occupations, unemployed and lowest grade occupations.

Those living in more rural areas, in detached properties, and who own their own home have higher awareness.

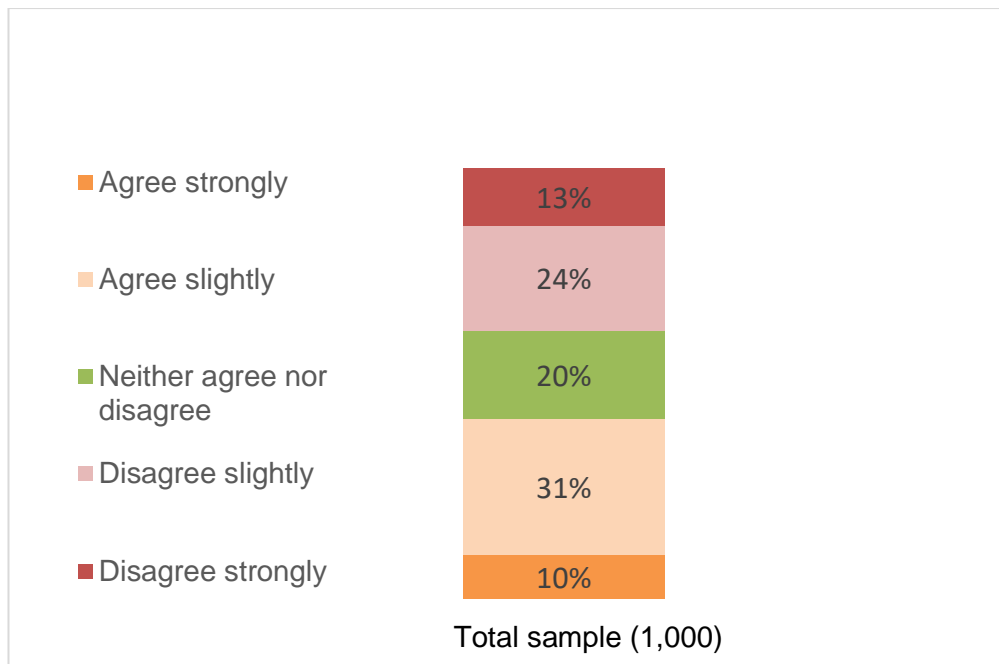


Awareness is higher in the Highland and in Dumfries and Galloway health board areas, but it is lower in Greater Glasgow and Clyde and Lanarkshire health board areas.

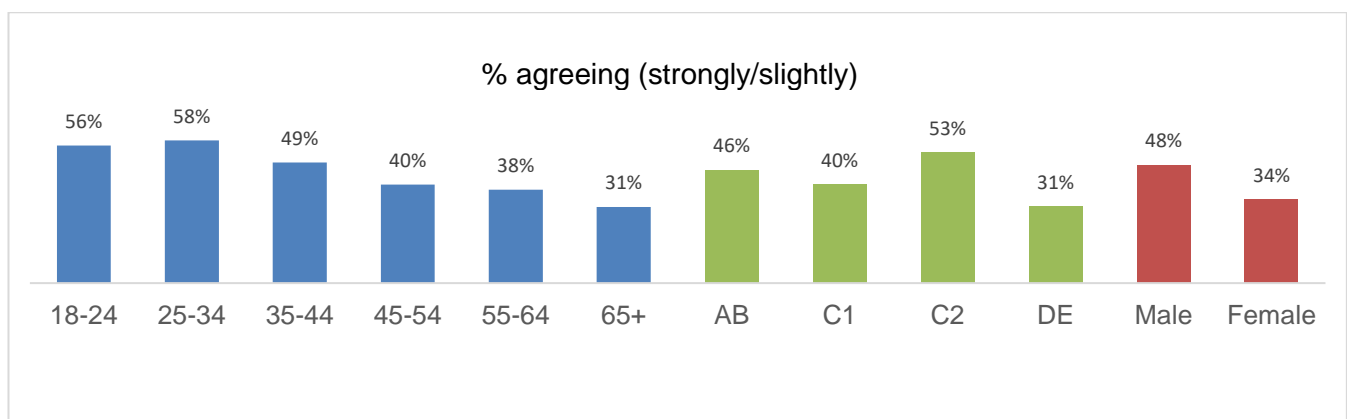


How much do you agree or disagree with the following statement? “I have a good understanding of how an air source or ground source heat pump works to heat a home.”

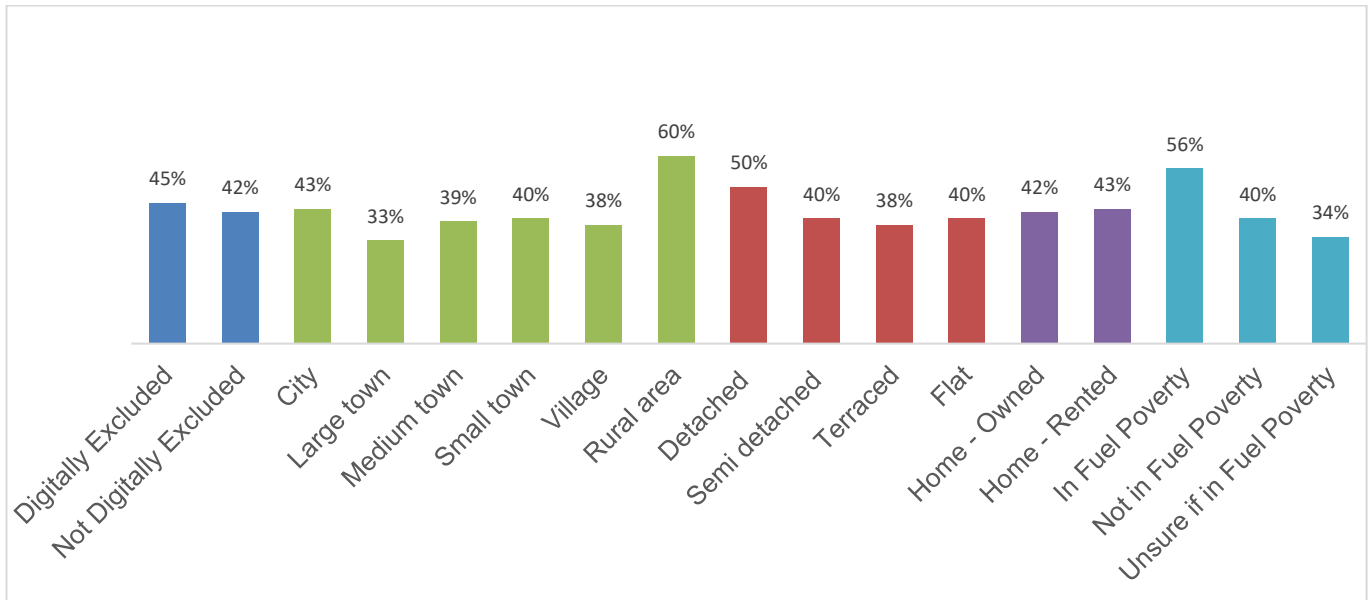
Overall, 41% of those aware of heat pumps say they have a good understanding, 10% agreeing strongly while 31% agree slightly.



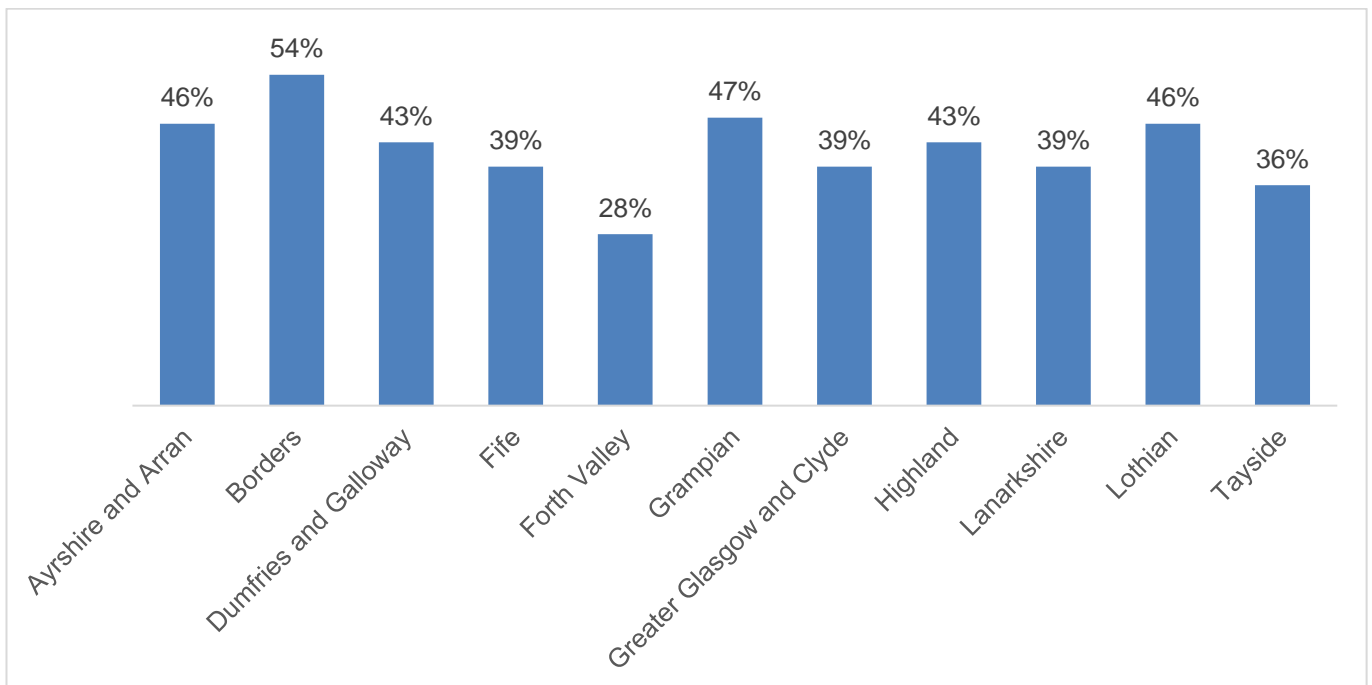
Understanding of heat pumps is higher for younger people who are aware of heat pumps than for older people, and for men more than women.



Understanding of heat pumps in those aware of heat pumps is also higher among more rural communities.

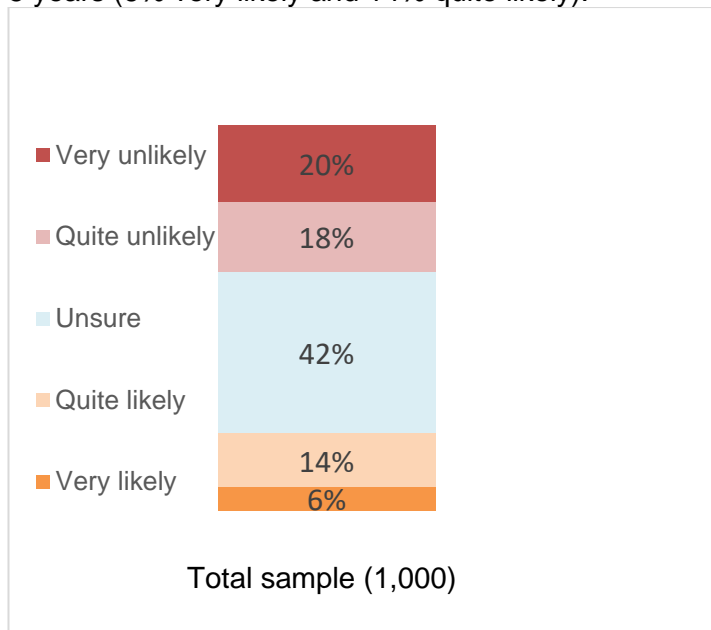


For those aware of heat pumps across Scotland, understanding is highest in the Borders and lower in Forth Valley and Tayside.



How likely or unlikely would you be to consider installing a heat pump in your home in the next 5 years?

Our research found that 20% of people are currently likely to consider installing a heat pump in the next 5 years (6% very likely and 14% quite likely).



38% said that they are unlikely to consider installing one, but there is also a great extent of uncertainty. Uncertainty declines for those who have heard of and have a good understanding of what heat pumps are, and these people are slightly more likely to consider installing a heat pump (28% vs 20% overall).

Those aged 18-24 years are more likely than average to consider installing a heat pump, and the 55-64 age groups are less likely. Likelihood is also marginally greater among those living in detached or semi-detached properties.

Putting insight into action

Using findings and insight from this research, we have identified key audiences that require to be further informed about heat pumps and Home Energy Scotland will be taking steps to reach these audiences in the near future.

The challenge is to increase awareness as Scotland aims for the target of one million homeowners having switched to heat pumps by the end of this decade. Energy Saving Trust and Home Energy



Scotland are increasing the focus on heat pumps in all of our campaigns, so that people know where to find information and access free, impartial and expert advice.

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