

GREEN DEAL ASSESSMENT SURVEY

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Executive summary

Background and objectives

- The Green Deal was officially launched on 28th January 2013 in England and Wales, and on 25th February 2013 in Scotland.
- The scheme aims to enable consumers to make energy saving improvements to their properties without having to pay all the costs up front.
- The first step is to have a Green Deal Assessment; the resulting Green Deal Advice Report explains what improvements can be made and estimates energy bill savings.
- Around 85K households in Great Britain had a Green Deal Assessment up to the end of September. Of these, around 41K took place in England, Wales and Scotland between July and September. For the latest information on assessments, see the Green Deal and ECO statistics webpage: [Green Deal and ECO Official Statistics website https://www.gov.uk/government/organisations/department-of-energy-climate-change/series/green-deal-and-energy-company-obligation-eco-statistics](https://www.gov.uk/government/organisations/department-of-energy-climate-change/series/green-deal-and-energy-company-obligation-eco-statistics)
- GfK NOP was commissioned to conduct three surveys of households which had had a Green Deal Assessment in order to find out more about the experience and what households have done and plan to do since having the assessment. Findings from the previous waves have been published [Green Deal assessments research summary page https://www.gov.uk/government/collections/green-deal-assessments-research](https://www.gov.uk/government/collections/green-deal-assessments-research)
- This report is a summary report and reports only headline findings from the wave 1, 2 and 3 survey. A more detailed report showing findings from all waves will be published at a later date.

Methodology and sampling

- For each wave, a clustered (semi random) sample of 900 addresses was drawn from the Green Deal Assessments database (supplied to GfK NOP by DECC).
- All sampled addresses were written to and invited to take part in an online survey. Non-responders were contacted by trained face-to-face interviewers to encourage completion on a laptop computer which the interviewers carried. To minimise mode effects the same survey was completed by respondents, not by interviewers, although interviewers were on hand to offer assistance if respondents required it.
- 507 households took part in the first wave of the research (56% response rate), 499 households took part in the second wave (55% response rate) and 500 took part in the third wave (50% response rate).

Executive summary

The assessment experience



Department
of Energy &
Climate Change



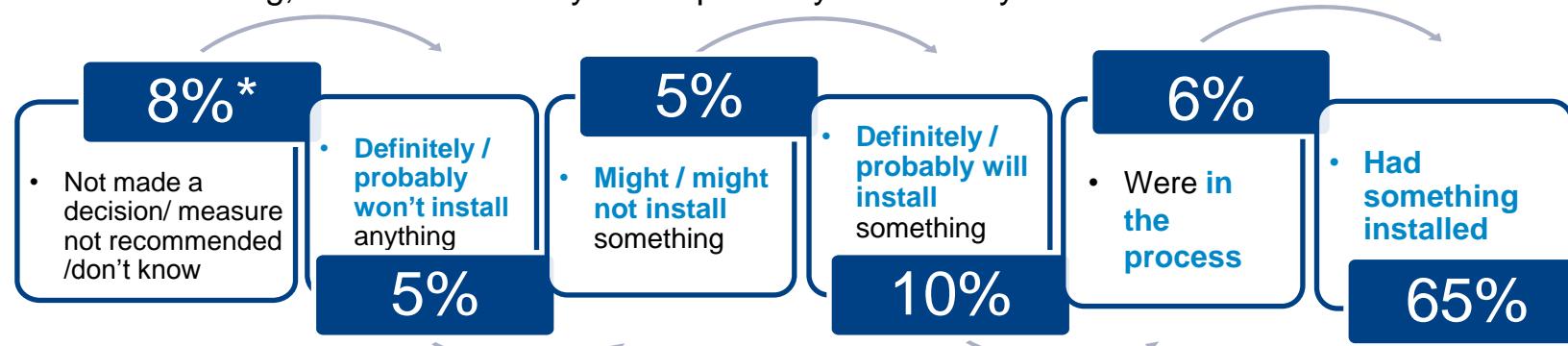
- The main **motivations** for having a Green Deal assessment were broadly the same across all waves of research (Wave 3 percentages shown):
 - to save money on energy bills (63%),
 - because the assessment was free (56%), and
 - to find out how to make properties more energy efficient (37%).
- **Paying for an assessment:** At Wave 3, 84% of respondents said they did not pay for an assessment, with 69% saying the assessor did not charge a fee and 15% saying it was paid for by a landlord, local authority or other organisation. Eight per cent paid for their assessment in full.
- **Accessibility of assessments:** The majority of consumers who had had a Green Deal assessment were satisfied with how long they had to wait for an appointment (74%) and with the ease of finding an assessor (63%). Levels of satisfaction were similar to those observed at Waves 1 and 2.
- **Usefulness of and confidence in assessments:** As at Waves 1 and 2, the assessment itself was highly rated in relation to its usefulness (78%). Similarly, consumer confidence in the recommendations made by the assessor has seen little change over time (78% at Wave 3, compared with 77% at Wave 1 and 82% at Wave 2).
- **Clarity of advice:** Households were asked which things were made clear to them in either the Green Deal Advice Report or in discussion with the assessor. At Wave 3:
 - 77% said it was clear which energy saving improvements were recommended during the assessment (compared with 78% observed at Wave 2),
 - 72% said it was clear what the improvements would entail (compared with 74% at Wave 2),
 - 70% said the next steps were clear (compared with 73% at Wave 2), and
 - 66% said the costs of the improvements were clear (compared with 67% at Wave 2).
- The likelihood of **recommending a Green Deal assessment** to friends and family has continued to increase over time (up from 64% at Wave 1 to 76% at Wave 3).

Executive summary

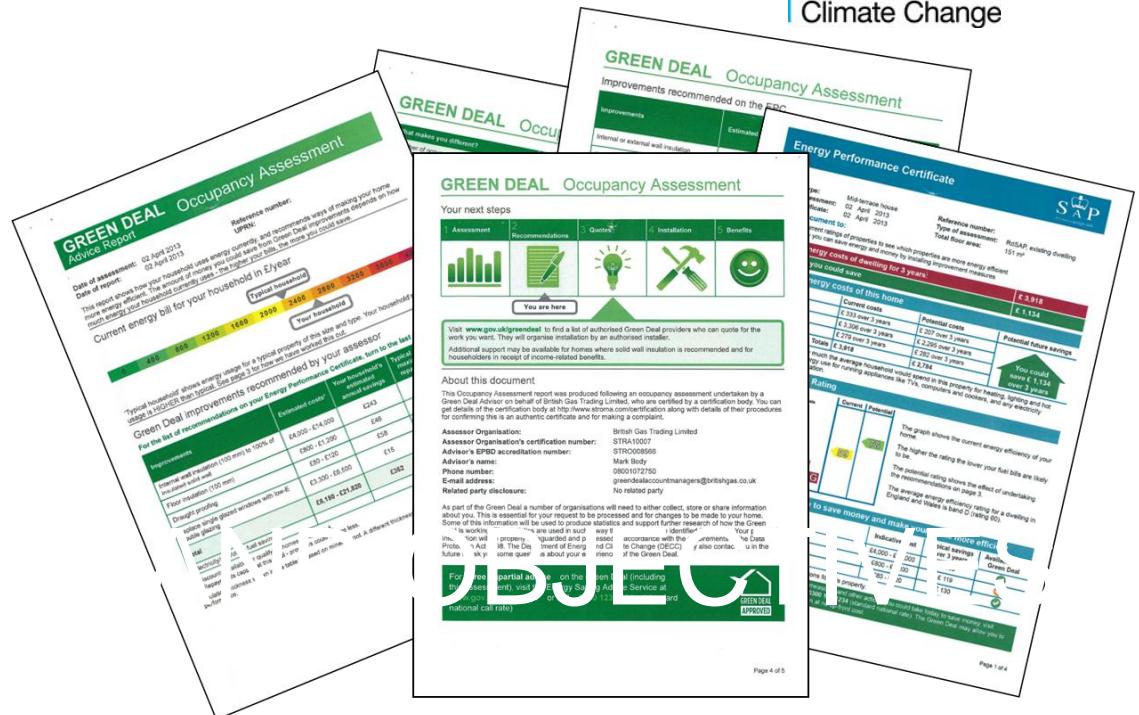
Post-assessment actions and intentions



- Post assessment actions and intentions.** All households were asked what they had done or intended to do after their assessment: Over two thirds (65%) claimed to have installed at least one of the measures they were recommended - a significant increase on Wave 2's 56%. A further 6% said they were in the process of installing, and 10% said they would probably or definitely install at least one measure.



- Paying for measures:** Households were asked how they funded installations (and were able to choose multiple answers) and indicated a large range of payment methods. The most common payment method amongst those who had had something installed was for an energy company (ECO) to have paid in full or in part (22%). Sixteen per cent said their local authority had paid in full or in part, and 11% had used their own savings or regular income. Ten per cent simply said that the installation was 'free', with no further specification, and 9% mentioned having used the Green Deal cashback scheme.
- For those in the process of having a measure installed, the most common potential payment methods were local authority funding (42%) and Other Green Deal provider / installer (16%).
- Amongst those who said they will definitely/probably install something in the future, 25% expected to pay from their own savings/regular income, 16% expected that their energy company would pay (ECO), and 15% expected that the local authority / council would pay.
- Barriers:** Amongst those who probably or definitely won't install a particular measure 51% mentioned financial barriers (down from 63% in Wave 2). The need to save up, for more information and for time to decide were the main reasons why respondents might or might not install key measures.



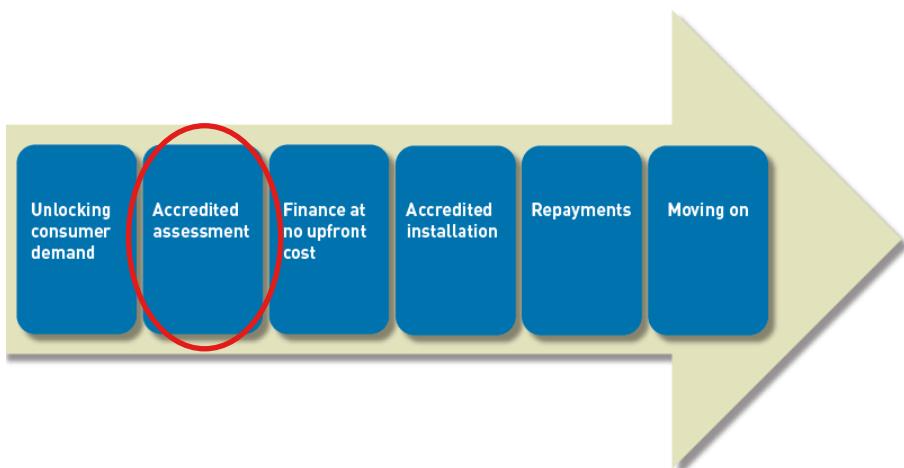
BACKGROUND AND OBJECTIVES

Background to the research

The Green Deal was officially launched on 28th January 2013 in England and Wales, and 25th February 2013 in Scotland, with the aim of helping households to make energy saving home improvements to their properties. The scheme enables households to make energy saving improvements to their home without having to pay all the costs up front.

The Green Deal process comprises a number of steps, each of which is outlined in Figure 1.

Figure 1: The Green Deal Process¹



Because the scheme is new, it was crucial to understand how well the process was working for customers.

As such, GfK NOP was commissioned by DECC to undertake an initial survey about the Green Deal Assessment customer experience in April 2013, and two further surveys of customers in August and November 2013. The findings from previous waves of the research can be found at [Green Deal assessment research website](#)

<https://www.gov.uk/government/collections/green-deal-assessments-research>.

This report is a summary report and reports only headline findings from the Wave 3 survey and changes from Wave 2. A more detailed report showing findings from all waves will be published at a later date.

The objectives for each of the surveys were to gain an understanding of the following issues:

- The assessment experience: How they heard about Green Deal assessments, why they had an assessment and satisfaction with the assessment
- Post assessment actions and intentions: What, if anything, they have done or intend to do as a result of the assessment and likely actions for those who may make improvements in the future

¹. Source: [Green Deal customer journey diagram link https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/47978/1010-green-deal-customer-journey-diagram.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/47978/1010-green-deal-customer-journey-diagram.pdf)



Survey Method (1)

Questionnaire

- Questionnaire designed by GfK NOP and DECC.
- A small cognitive pilot was conducted before Wave 1 by telephone to ensure the questionnaire was ‘fit for purpose’.
- A small number of changes were made for the second and third waves of the survey in order to improve the data collected.

Target Group

- Consumers who had a Green Deal assessment carried out at their property.
- Assessment dates:
 - Wave 1 = launch - end March 2013.
 - Wave 2 = 1st April - end June 2013.
 - Wave 3 = 1st July - end September 2013.
- Includes owner occupiers, private and social renters.
- In Waves 1 and 2, only consumers from England and Wales were included. Wave 3 also included consumers from Scotland due to a data arrangement agreement not being in place when the other waves took place, and therefore Scottish data not being available.

Sampling

- DECC provided GfK NOP with complete files of addresses from which to sample. No names or telephone numbers were provided as part of the sample file.
- GfK NOP analysed the files in order to create efficient ‘clusters’ from which to draw the sample.
- For the purposes of practicality and timings, clusters were formed from addresses which were sufficiently close to other addresses. As a result, some addresses were excluded from the sampling frame because they were impractical.
- All potential ‘eligible’ addresses were stratified by Region, Core City* vs. Non-Core City, Urbanity, Tenure, Property Type and EPC rating.
- Following stratification, a random sample of 900 addresses was selected for each survey.

* In 2012 eight cities in England were awarded funding to help them kick-start the Green Deal in their regions. The cities also sought matching funding and/or provided support themselves. For more information see: [Link to information on local authority schemes](#)
<https://www.gov.uk/local-authorities-and-the-green-deal>

Survey Method (2)

Data Collection

- All sampled addresses were sent an advance/invitation letter which informed them about the study and asked them to take part in an online survey. Non-responders were visited in-home by trained interviewers in order to encourage self-completion. To reduce the impact of mode effects the questionnaires were exactly the same.
- Respondents were offered a £10 incentive for taking part (conditional upon completion).
- The table below shows key fieldwork figures

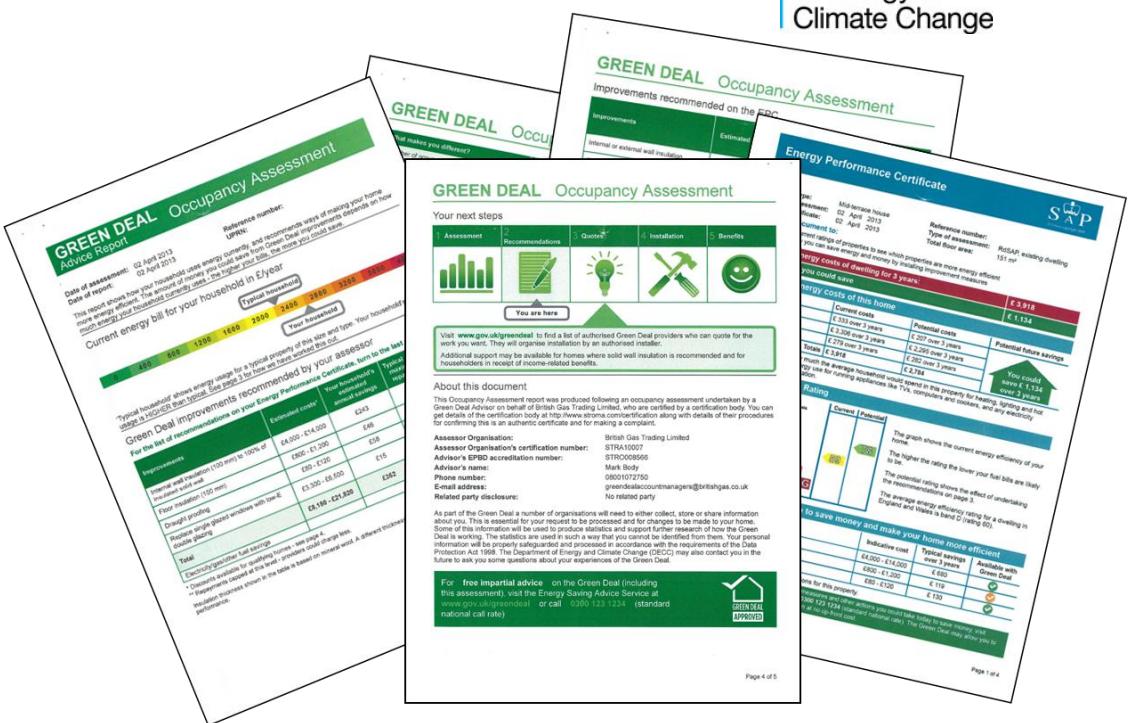
Wave	Fieldwork dates	Number of interviews	Response rate
Wave 1	26/4-2/6	507	56%
Wave 2	26/7-26/8	499	55%
Wave 3	24/10-1/12	500	56%

Reporting conventions

This report provides selected headlines and highlights statistically significant differences between Waves 2 and 3 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 chance.

This report uses the following conventions:

- All differences commented upon are statistically significant at the 95% confidence level.
- Significant differences between Waves 2 and 3 are indicated by arrows ( ) within charts.
- All base sizes quoted in the report are unweighted.



GREEN DEAL Occupancy Assessment

Advice Report

Date of assessment: 02 April 2013
Date of report: 02 April 2013

This report gives advice on how your household uses energy currently, and recommends ways of making your home more energy efficient. The amount of money you save by using Green Deal improvements depends on how much energy your household currently uses and your typical bills.

Current energy bill for your household in £/year

Typical household	£483	£463	£398	£168	£299	£466	£283	£328	£328
Total household	£483	£463	£398	£168	£299	£466	£283	£328	£328

Reference number: UPRN: 00000000000000000000000000000000

This report gives advice on how your household uses energy currently, and recommends ways of making your home more energy efficient. The amount of money you save by using Green Deal improvements depends on how much energy your household currently uses and your typical bills.

GREEN DEAL Occupancy Assessment

Improvements recommended on the EPC

- Internal or external wall insulation
- Estimated

GREEN DEAL Occupancy Assessment

Improvements recommended on the EPC

- Internal or external wall insulation
- Estimated

GREEN DEAL Occupancy Assessment

Improvements recommended on the EPC

- Internal or external wall insulation
- Estimated

Energy Performance Certificate

Ref: Mid-terrace house
Report date: 02 April 2013
Document type: EPC
Reference number: 70000000000000000000000000000000
Total floor area: 103 m²
R35AP existing dwelling

You can save energy and money by making improvements now.

Energy costs of dwelling for 3 years

Typical costs of this home	£ 3,818	£ 1,134	
Current costs	£ 3,818 over 3 years	Potential costs	£ 1,134 over 3 years
£ 3,818 over 3 years	£ 1,257 over 3 years	£ 1,257 over 3 years	£ 1,134 over 3 years
£ 3,799 over 3 years	£ 1,259 over 3 years	£ 1,259 over 3 years	£ 1,136 over 3 years
£ 3,818	£ 2,284	£ 2,284	£ 1,134

You could save £ 1,781 over 3 years.

Typical costs of this home

Current costs

Potential costs

£ 3,818 over 3 years

£ 1,257 over 3 years

£ 1,259 over 3 years

£ 1,134 over 3 years

£ 2,284

£ 1,134

Your next steps

Assessment	Recommendations	Quicks	Installation	Benefits

You are here

What [www.gov.uk/green-deal](#) will do to find a list of authorised Green Deal providers who can quote for the work you want. They will organise installation by an authorised installer.

Additional support may be available for homes where solid wall insulation is recommended and for households in receipt of income-related benefits.

About this document:

This Occupancy Assessment report was produced following an occupancy assessment undertaken by a Green Deal Advisor on behalf of British Gas Trading Limited, who are certified by a certification body. You can get further information about the Green Deal and the role of the advisor by visiting [www.gov.uk/green-deal](#) along with details of their procedures for confirming this is an authentic certificate and for making a complaint.

Advisor Organisation:
British Gas Trading Limited
Advisor's certification number: STRO000999
Advisor's EPCR accreditation number: STRO000999
Advisor's name: Mark Body
Phone number: 080012345679
E-mail address: green-deal.accounts@britishgas.co.uk
Related party disclosure: No related party

As part of the Green Deal, a number of organisations will need to either collect, store or share information about you. This is essential for your request to be processed and for changes to be made to your home. The Green Deal is run by the Department of Energy and Climate Change (DECC). DECC is responsible for the Green Deal working. The statistics are used in such a way that you cannot be identified from them. Your personal information will be treated in accordance with the Data Protection Act 1998. The Data Protection Commissioner is the independent regulator of the Data Protection Act 1998. The Department of Energy and Climate Change (DECC) may also contact you in the future to ask you some questions about your experiences of the Green Deal.

For free impartial advice on including this assessment, visit the Energy Saving Advice Service at [www.gov.uk/green-deal](#) or call 0800 123 1234 (standard national rate)

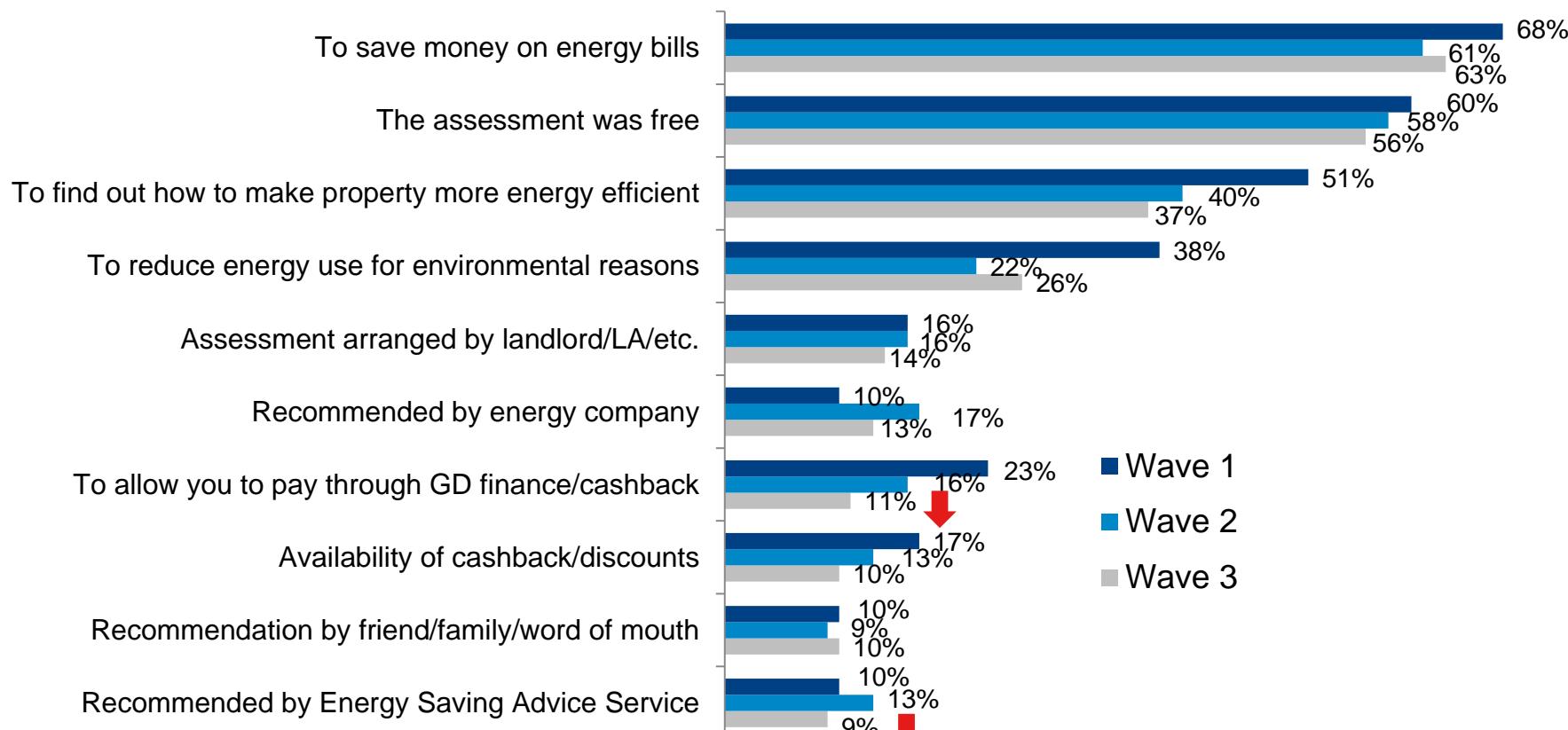
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THE ASSESSMENT EXPERIENCE



Reasons for having an assessment: Wanting to save money on energy bills has remained the most common reason for having an assessment, though free assessments remained important. The availability of Green Deal Finance/Cashback was mentioned less.



Base: All respondents (Wave 1 = 507; Wave 2 = 499; Wave 3 = 500)

Findings sum to more than 100% as this was a multicoded question

Significant differences between Waves 2 and 3 are indicated by arrows (↑↓)

Chart shows all responses mentioned by 9% or more at any wave

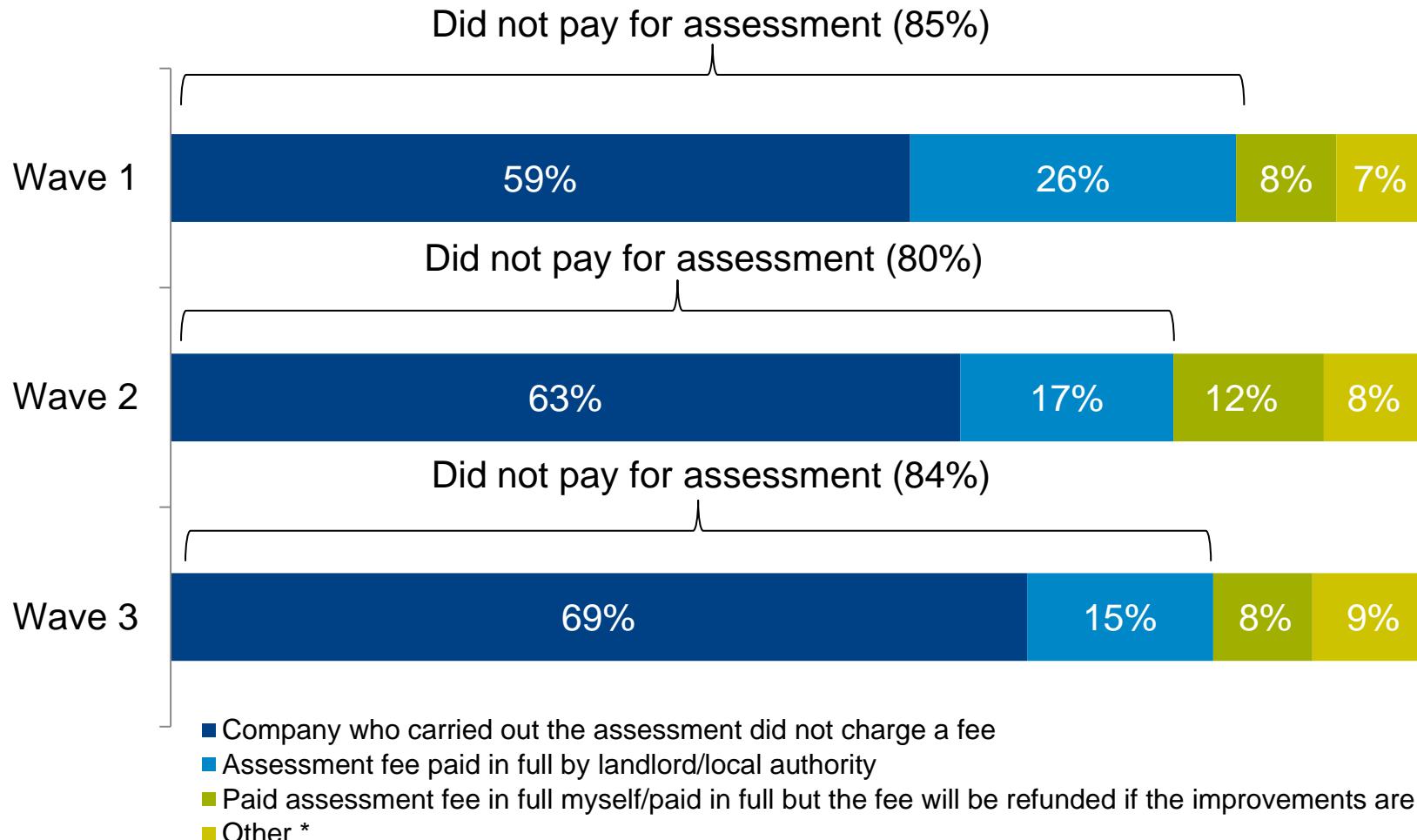
The following significant difference was observed between Waves 2 and 3:

- The proportion saying they had the assessment because of the availability of Green Deal finance/cashback has declined further from 16% at Wave 2 to 11% at Wave 3: continuing the decline from 23% at Wave 1
- On average, respondents chose more options at Wave 1 (3.2) compared with Waves 2 (2.8) and 3 (2.7)

Note: Although the chart shows a number of wave by wave changes, it should be noted that these are largely the result of respondents selecting fewer answers, rather than as a result in the proportion saying 'Don't know'.



Paying for an assessment: At all waves around 80% of customers reported they did not pay for their assessment. 69% at Wave 3 said that the assessment company had not charged a fee.



Base: All respondents (Wave 1 = 507; Wave 2 = 499; Wave 3 = 500)

Significant differences between Waves 2 and 3 are indicated by arrows ()

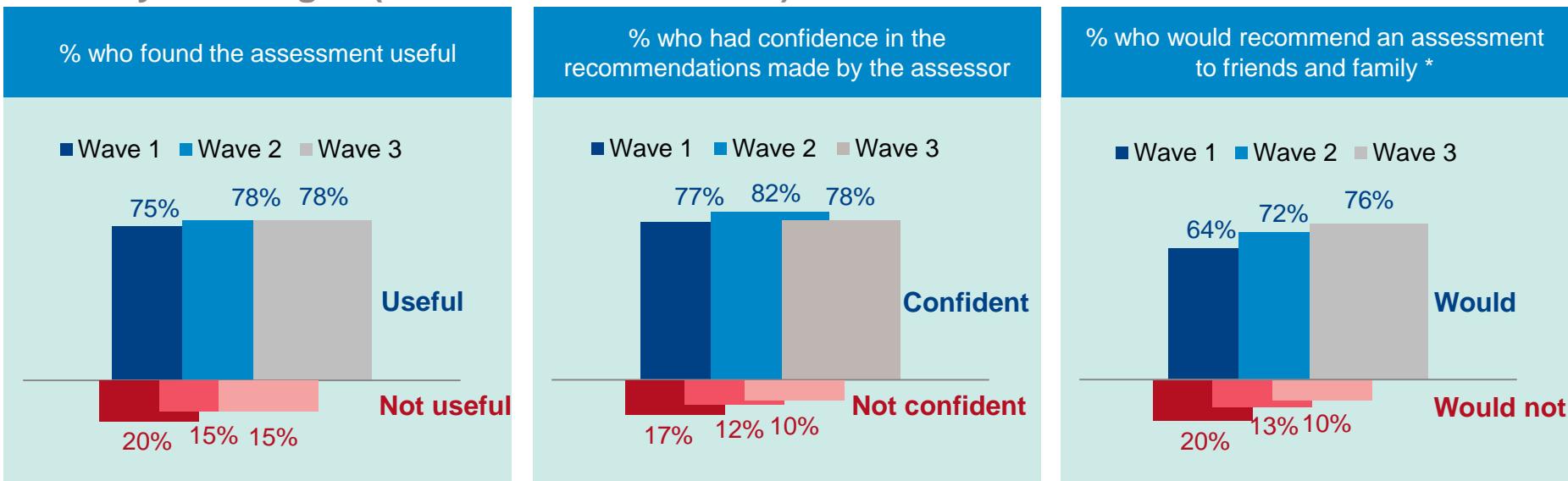
* Other category includes those whose assessment was paid for partially themselves/partially by landlord/local authority, those who answered 'Don't know' and those giving 'Other' responses

¹ ECO info <http://www.ofgem.gov.uk/Sustainability/Environment/ECO/Pages/index.aspx>

² LA info https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/65570/6712-local-authority-competition-fund-application-pack.pdf



Assessment experience satisfaction: Likelihood of recommending an assessment increased (though not significantly) between wave 2 and wave 3, while the perceived usefulness of the report and confidence in the assessors' recommendations remain positive but relatively unchanged (between waves 2 and 3).

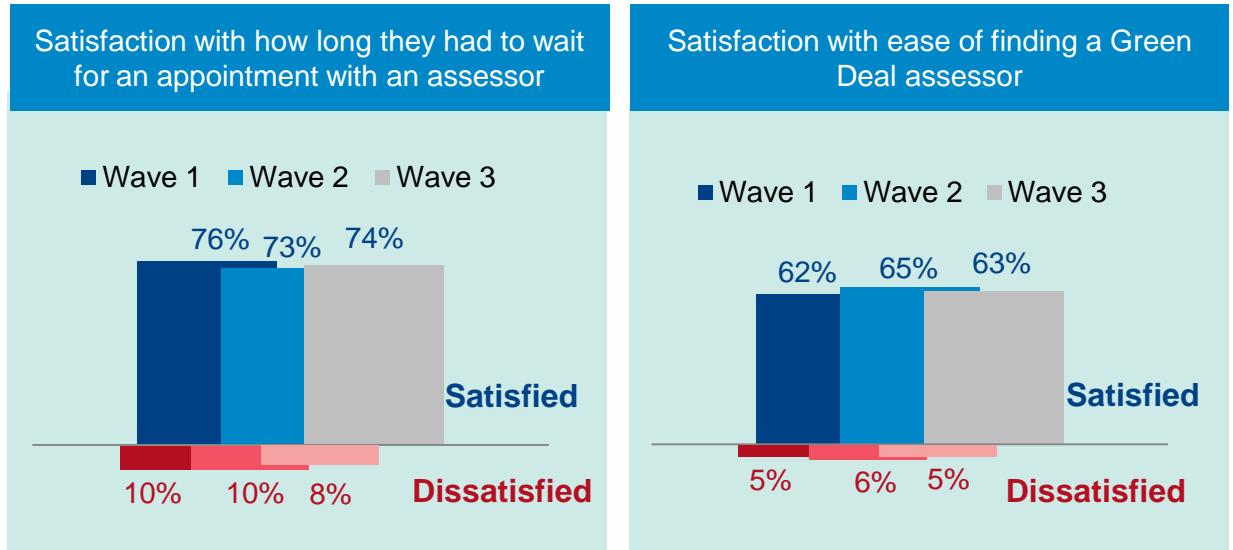


- At all waves, around three quarters said they found the assessment very/somewhat useful, with less than a fifth saying they found it not very/at all useful.
- Confidence in the recommendations (very/somewhat confident) made by the assessor increased significantly between Wave 1 (77%) and Wave 2 (82%), but dropped back slightly at Wave 3 (78%).
- Likelihood to recommend a Green Deal assessment to friends and family has continued to increase over time, up from 64% at Wave 1 to 76% at Wave 3. One in ten (10%) said they would not recommend an assessment at Wave 3.

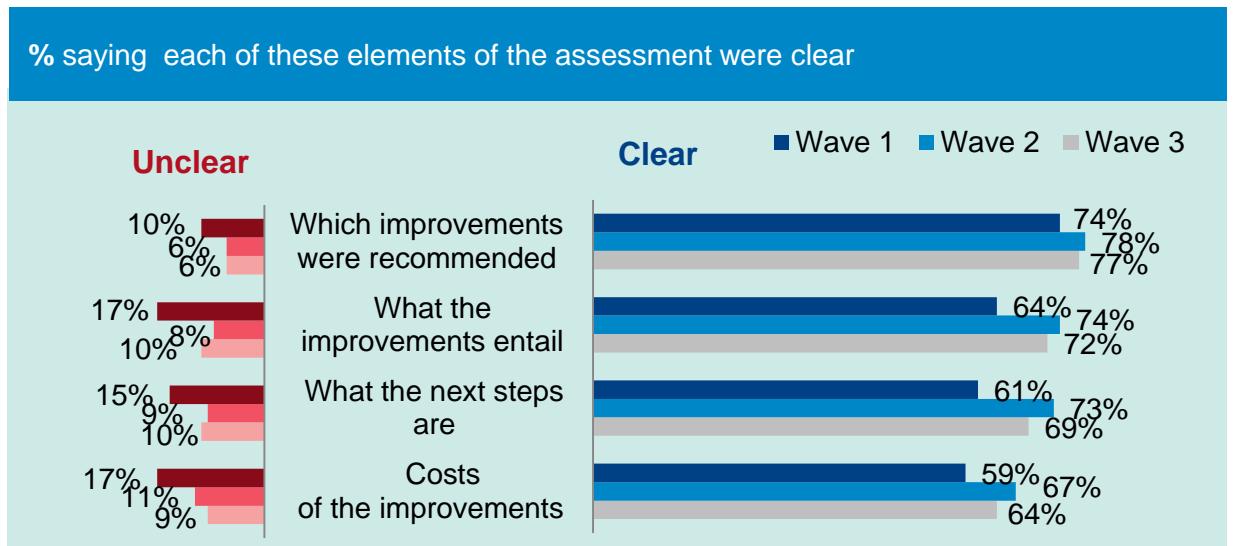


Assessment experience satisfaction: Satisfaction levels at Wave 3 remain high and are similar with both Wave 1 and 2.

- Satisfaction with how long respondents had to wait for an appointment and the ease of finding an assessor remained similar over time.



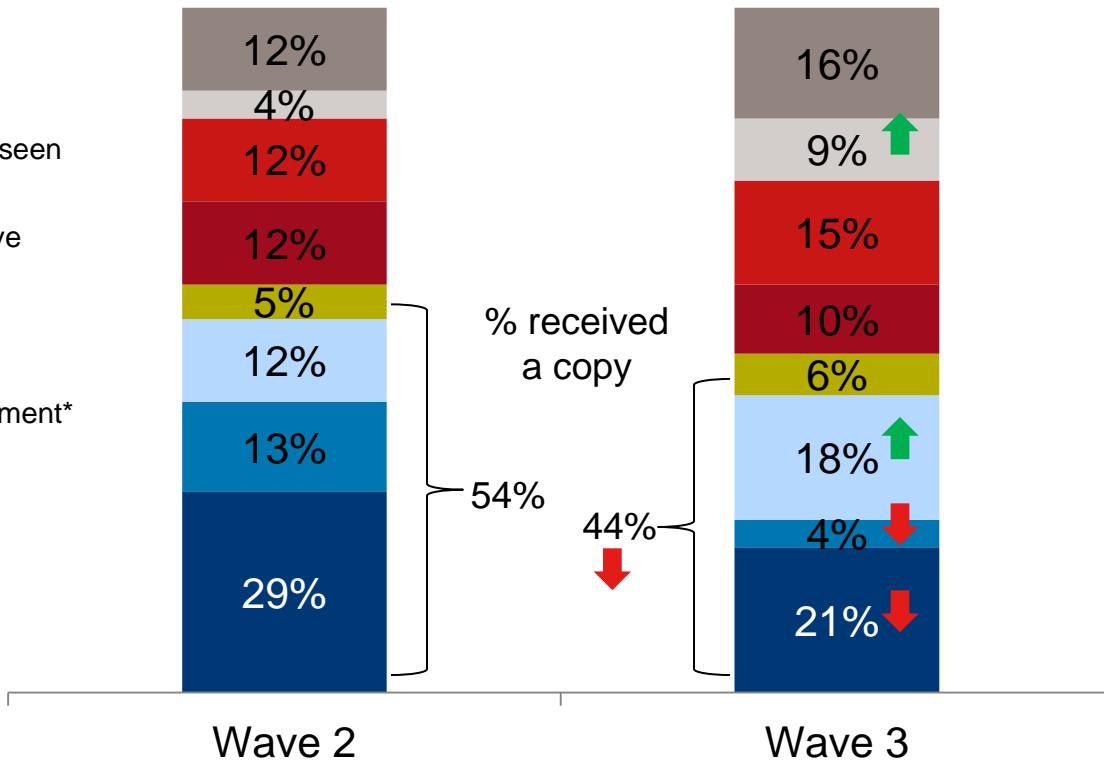
- The significant increases between Wave 1 and Wave 2 in perceived clarity of elements of the assessment were maintained at Wave 3: namely what the improvements entail, what the next steps are, and the costs involved.



Base: All respondents except those whose assessment was arranged for them and whose report was sent straight to their landlord/housing association (Wave 1 = 460; Wave 2 = 483; Wave 3 = 477)

Receipt of the Green Deal Advice Report: The proportion of households who had received their Green Deal Advice Report at the time of their interview declined from 54% at Wave 2 to 44% at Wave 3.

- Don't know/not sure
- Report sent straight to landlord/HA & not seen
- Not seen a copy & not expecting to receive
- Not seen a copy but expecting to receive
- Not received but saw copy during assessment*
- Received printed copy at assessment*
- Received email copy
- Received postal copy



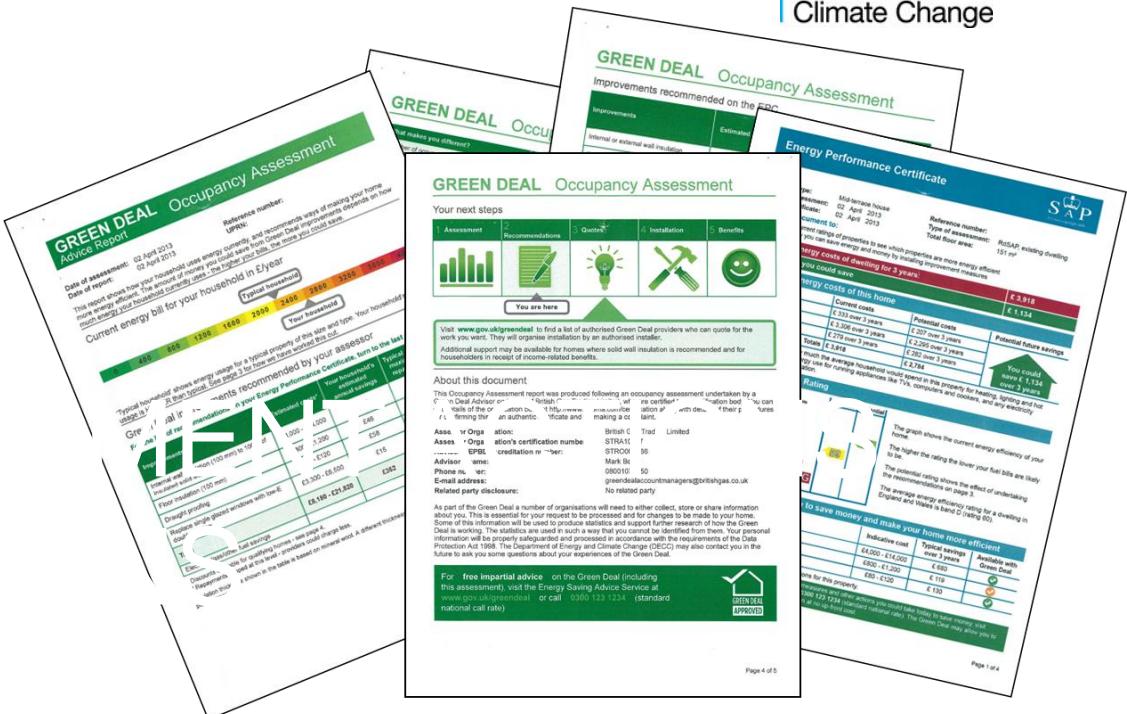
Base: All respondents (Wave 2 = 499; Wave 3 = 500)

Significant differences between Waves 2 and 3 are indicated by arrows (↑↓)

- This question was amended after Wave 1 to understand whether those who had not received their Green Deal Advice Report had seen or expected to see a copy. Wave 1 data are therefore not shown, and comparisons should be treated with caution.
- At Wave 1, 64% of households said they had received their Green Deal Advice Report, but this fell somewhat to 54% at Wave 2 and further to 44% at Wave 3. The proportion saying the report was sent directly to a landlord/housing association/other organisation has increased from 4% at Wave 2 to 9% at Wave 3.

Note: Energy companies are using Green Deal assessments to deliver ECO measures, which could explain why households are not receiving their Green Deal Advice Report's. This is particularly the case for those that have not seen a copy and are not expecting to receive one.

* It is technically not possible to see the Green Deal Advice Report at the time of the assessment, as this is created at the time it is lodged. However, households may have seen a mock Advice Report or Energy Performance Certificate during the assessment.

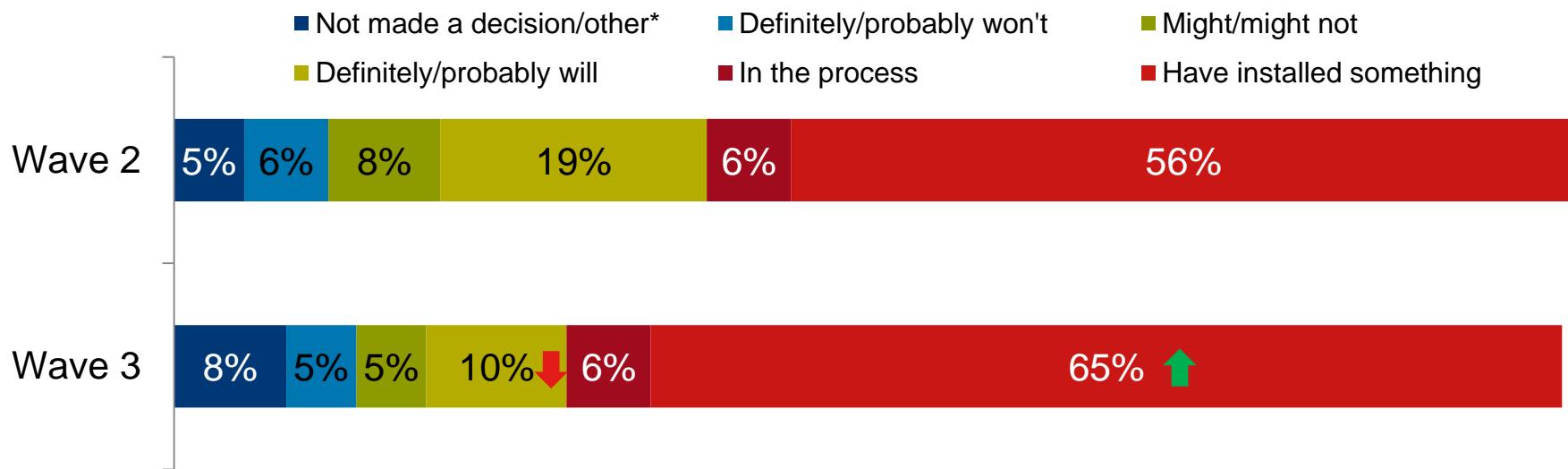


POST ASSESSMENT: ACTIONS AND INTENTIONS



Household's post-assessment actions and intentions: 65% of customers at Wave 3 claimed to have already installed at least one energy saving home improvement, up significantly from 56% at Wave 2.

- The chart shows the **furthest** point that customers had reached following their assessment (for at least one of the measures recommended to them).
- It is possible that customers had reached different stages for two or more measures, for example the customer may have installed one measure and be in the process of installing another, but they would only be shown under 'Had something installed'.



Significant differences between Waves 2 and 3 are indicated by arrows (↑↓)

Base: All respondents (Wave 2 = 499; Wave 3 = 500).

* only those who had not received a Green Deal Advice Report were able to give these responses.

Notes: Findings are based upon all **measures** recommended as part of the Green Deal Advice Report.

Comparisons are only made between Waves 2 and 3 because in Wave 1 only those households who had received their Green Deal Advice Report were asked about their intended actions.

Because the rest of this report is based upon the full sample – rather than just Green Deal Advice Report recipients – apart from slide 18, no further comparisons with Wave 1 data are made.

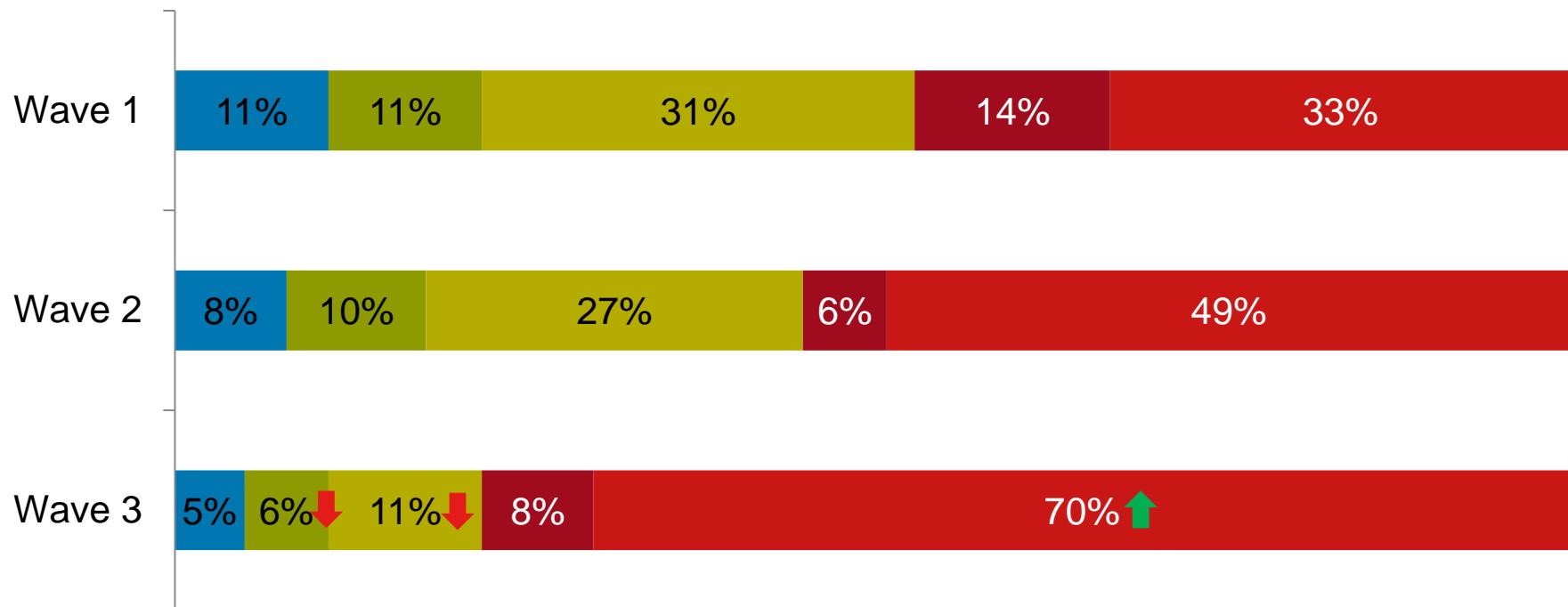


Household's post-assessment actions and intentions:

There has been a strong increase in the proportion of those who have received their Green Deal Advice Report and installed at least one recommended measure (70% at Wave 3, up from 49% at Wave 2 and 33% at Wave 1).

- The chart shows the furthest point that customers had reached following their assessment (for at least one of the measures recommended to them) amongst those that had received their Green Deal Advice Report only.
- This allows for comparisons to be made with Wave 1.

■ Definitely/probably won't ■ Might/might not ■ Definitely/probably will ■ In the process ■ Have installed something



Significant differences between Waves 2 and 3 are indicated by arrows (↑↓)

Base: All respondents that had received their Green Deal Advice Report (Wave 1 = 285; Wave 2 = 258, Wave 3 = 210).

Notes: Findings are based upon all measures recommended as part of the Green Deal Advice Report.



Post assessment actions and intentions by recommended measures

measures: respondents claimed that 37% of all recommended measures had already been installed at Wave 3, up significantly from 28% at Wave 2. Around two thirds of the recommended cavity wall insulation and loft insulation installations had already been installed.

- The table below shows the **overall post assessment actions and intentions to install for all recommended measures**. This is the 1259 (Wave 2) / 1179 (Wave 3) measures recommended to the households interviewed.

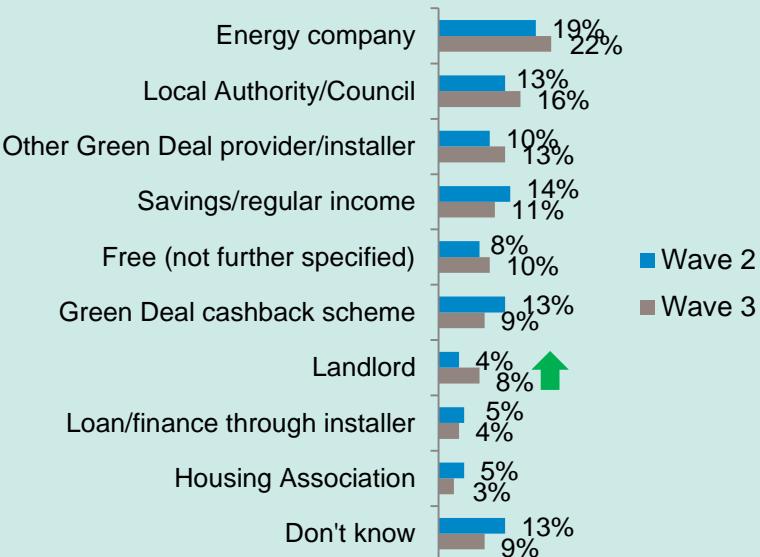
	Stage of post assessment journey and intention to install											
Measure (brackets show the number of respondents recommended each)	Not made a decision/ measure not recommended / don't know *		Probably/ definitely will not install		Might or might not		Definitely/ probably will install		In the process of installing		Already installed	
Wave	Wave 2	Wave 3	Wave 2	Wave 3	Wave 2	Wave 3	Wave 2	Wave 3	Wave 2	Wave 3	Wave 2	Wave 3
All measures (1,259/1,179)	11%	18%	28%	24%	11%	7%	17%	9%	4%	4%	28%	37%
Cavity wall insulation (179/213)	7%	11%	12%	6%	6%	5%	12%	8%	3%	7%	61%	63%
Loft insulation (208/190)	8%	8%	7%	7%	9%	6%	13%	8%	4%	2%	60%	70%
Boiler (129/120)	10%	20%	22%	12%	9%	9%	21%	14%	7%	2%	31%	43%
Heating controls (93/98)	10%	21%	20%	18%	14%	11%	29%	10%	3%	4%	24%	36%
Solid wall ins. (158/130)	11%	14%	23%	15%	16%	10%	20%	21%	9%	10%	20%	31%
Solar photovoltaic (111/98)	17%	27%	53%	54%	9%	3%	15%	4%	3%	-	5%	12%
Solar thermal (63/73)	13%	32%	64%	61%	6%	2%	11%	3%	2%	-	4%	2%
Floor insulation (108/114)	15%	28%	63%	53%	12%	8%	8%	7%	1%	1%	1%	2%

Base: All Wave 2/Wave 3 respondents (bases shown on table). * Only those who had not received a Green Deal Advice Report were able to give these responses. **Significant increases from Waves 2-3 are highlighted in Red bold/italics**

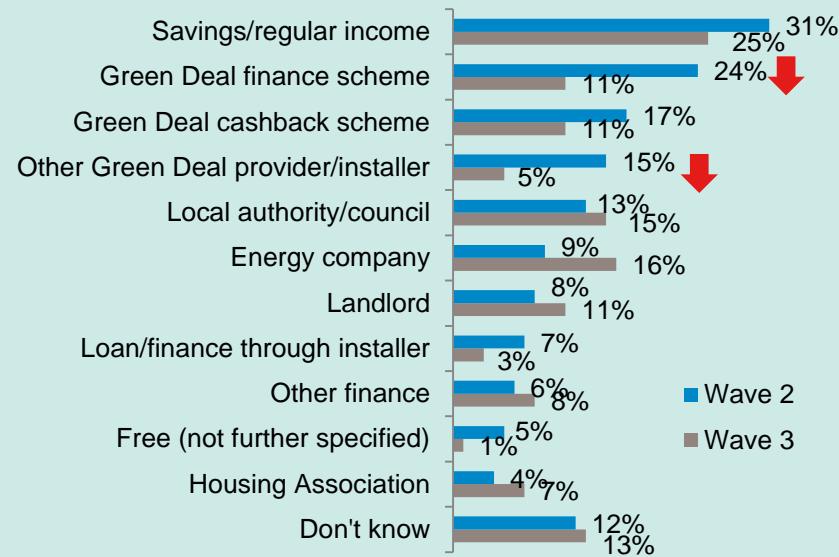


Paying for improvements: energy companies were consistently the most frequently mentioned payment method for those who had already installed a measure. Those who were likely to install were more likely to say they would use savings or regular income and fewer at Wave 3 compared with Wave 2 said they planned to use Green Deal finance (11%, down from 24% Wave 2).

Payment methods for those who have already installed an improvement



Potential payment methods for those who definitely/probably will install an improvement



- For those **in the process of installing** measures the most common potential payment methods at Wave 3 were the Local Authority/Council (42% Wave 3, 25% Wave 2) and Other Green Deal provider / installer (16%; 5% at Wave 2). It should be noted that the base size for this group was small and findings should be treated with caution.

Significant differences between Waves 2 and 3 are indicated by arrows ()

Base: All respondents who have installed a recommended key measure (Wave 2 = 259; Wave 3 = 310) / definitely/probably will install a recommended key measure (Wave 2 = 87; Wave 3 = 62). Note: In some cases households were answering about more than one key measure. It should be noted that base size for those who were in the process of installing measures is small (38 in both Wave 2 and 3), as a result these findings should be treated with caution. **Charts show all responses mentioned by 5% or more at either wave**

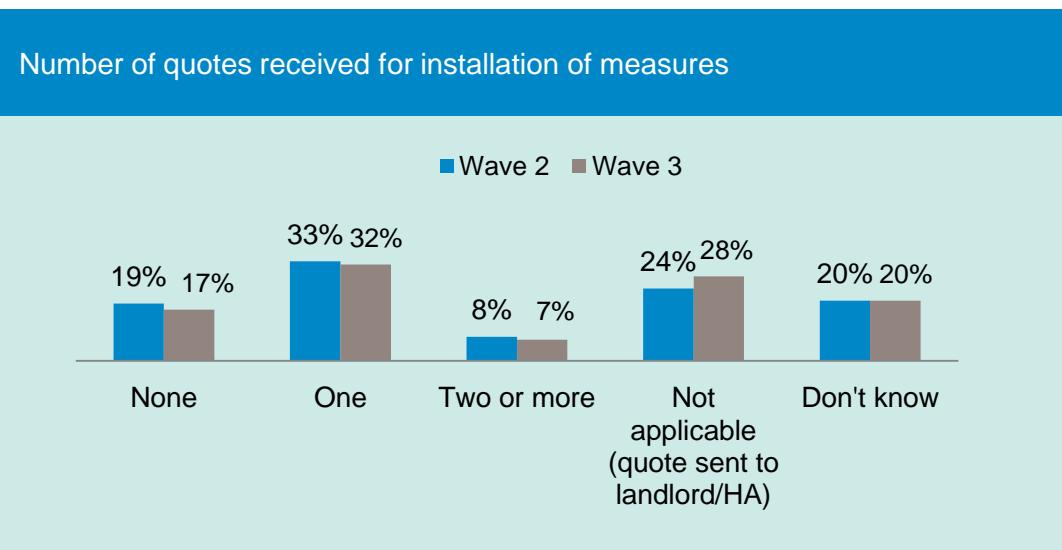


Shopping around: amongst those who had installed measures, findings consistently indicate that few households shop around for installers.

- The majority of those who had had a measure installed said it had been done by the same company that had carried out the assessment (59% in wave 3). No significant changes have been observed over time.



- Households were unlikely to get many, if any, quotes for the installation.



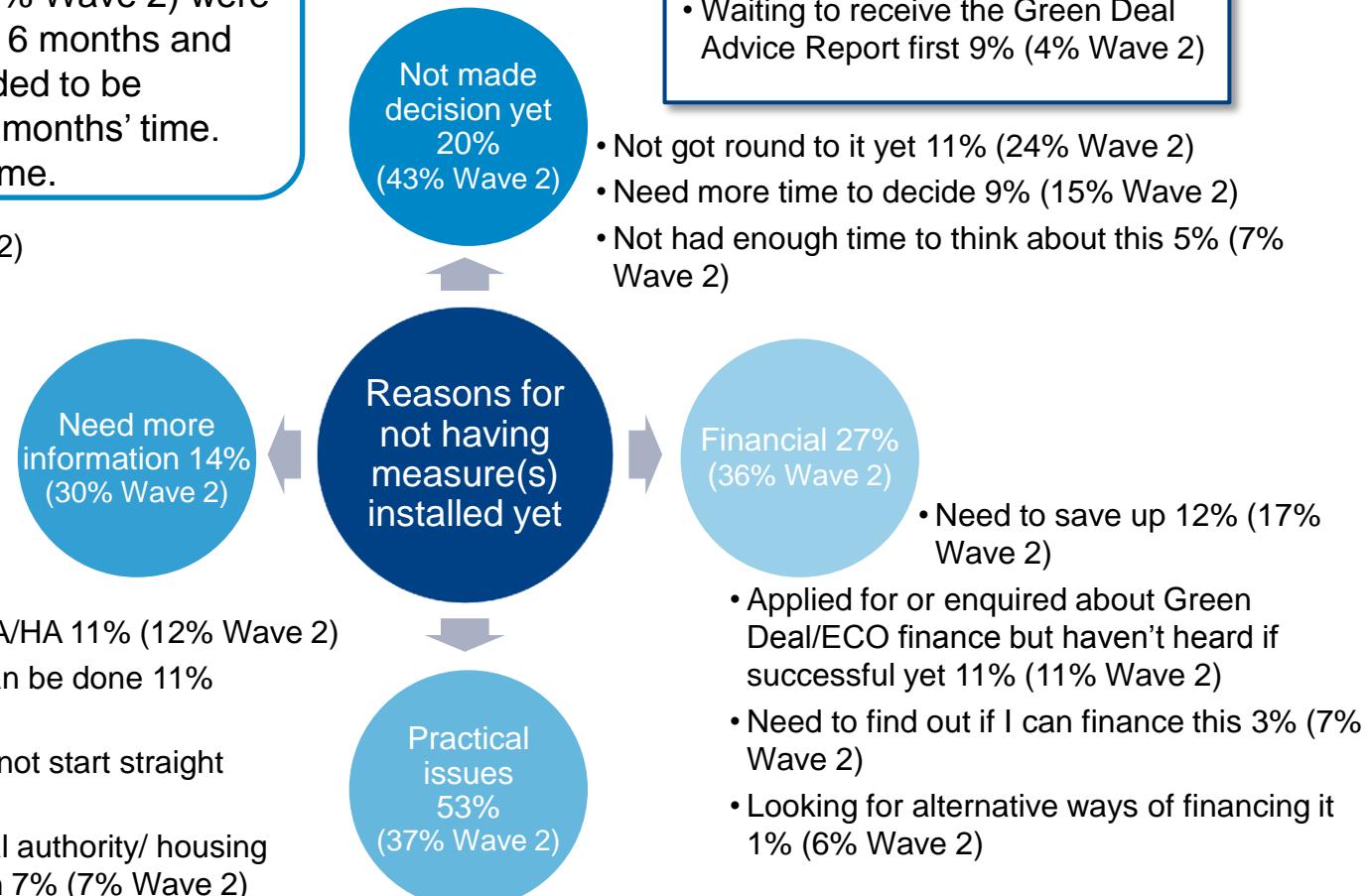
Base: All respondents who have installed a recommended key measure (Wave 2 = 259; Wave 3 = 310). Note: In some cases households were answering about more than one key measure.

Intend to install: When those that said they will definitely or probably

install were asked why measures had not yet been installed, practical issues were most commonly cited at Wave 3. Small base sizes mean that any differences between the waves are not significant.

Of the measures which will definitely or probably be installed 41% (50% Wave 2) were intended to be installed within 6 months and 8% (11% Wave 2) were intended to be installed in between 6 and 12 months' time. No significant changes over time.

- Need to get quotes 4% (17% Wave 2)
- Need more information about what to do next 5% (15% Wave 2)
- Need more time/information to make a decision 2% (5% Wave 2)
- Not sure what has been recommended 5% (3% Wave 2)
- Awaiting information from landlord/LA/HA 11% (12% Wave 2)
- Need to carry out work before this can be done 11% (12% Wave 2)
- Supplier carrying out the work could not start straight away 15% (10% Wave 2)
- Need to speak with my landlord/ local authority/ housing association before making a decision 7% (7% Wave 2)
- Difficulties finding someone to provide quotes/carry out the work 5% (5% Wave 2)
- Waiting for weather to improve 8% (2% Wave 2)



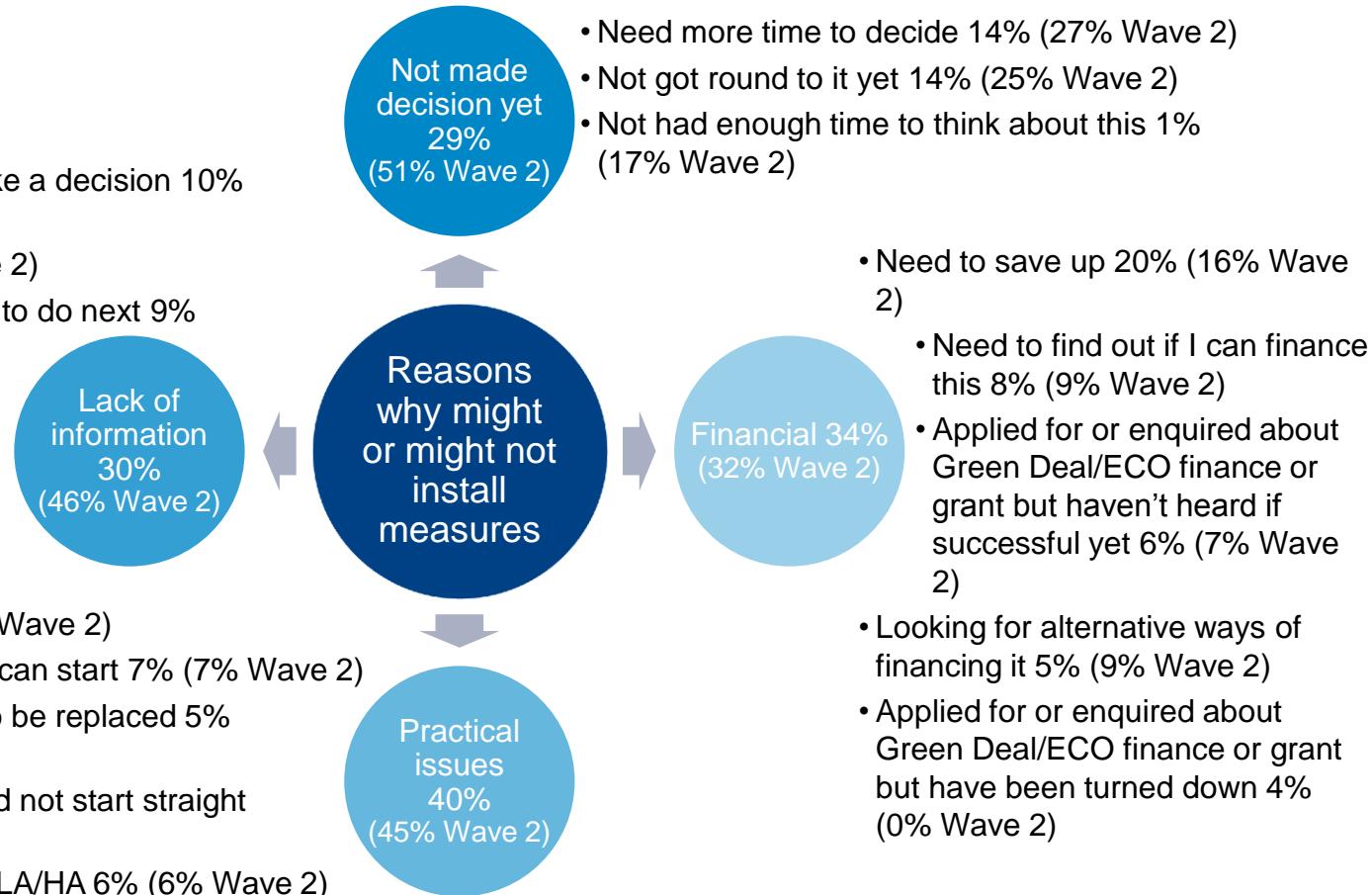
Charts show Wave 3 findings, with Wave 2 comparisons following in brackets

Charts show all responses mentioned by 4% or more at either wave

Base: All respondents who definitely/probably will install a measure (Wave 2 = 87; Wave 3 = 62). Households were able to choose more than one option and in some cases were answering about more than one key measure. **Small base: findings should be treated with caution.**

Might/might not install: the most common reasons why an improvement either might or might not be installed were needing to save up, needing more information and time to decide.

- Need more time/information to make a decision 10% (25% Wave 2)
- Need to get quotes 8% (16% Wave 2)
- Need more information about what to do next 9% (14% Wave 2)
- Not sure what has been recommended 9% (9% Wave 2)
- Need to speak with my landlord/ LA/ HA before deciding 14% (10% Wave 2)
- Need to get other consent before I can start 7% (7% Wave 2)
- Waiting until current boiler needs to be replaced 5% (9% Wave 2)
- Supplier carrying out the work could not start straight away 5% (3% Wave 2)
- Awaiting information from landlord/LA/HA 6% (6% Wave 2)
- Difficulties finding someone to provide quotes/carry out the work 3% (6% Wave 2)
- Need to carry out other work before this can be done 1% (13% Wave 2)



Charts show Wave 3 findings, with Wave 2 comparisons following in brackets

Charts show all responses mentioned by 4% or more at either wave

Base: All respondents who might / might not install measures (Wave 2 = 69; Wave 3 = 47). Households were able to choose more than one option and in some cases were answering about more than one key measure. **Because of the small base sizes these findings should be treated with caution.**

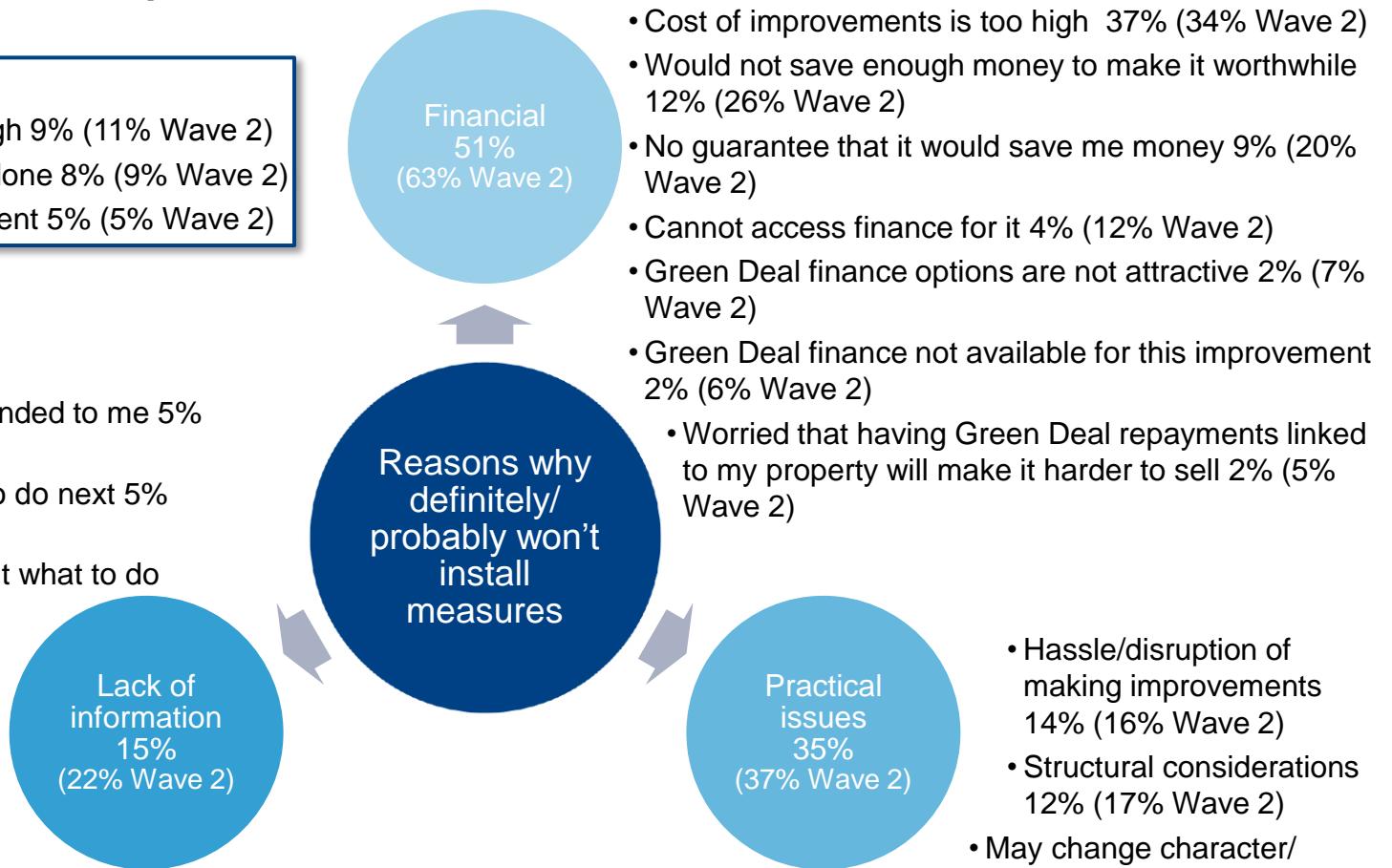


Reasons why improvements won't be installed: Cost remains the main barrier for those who probably or definitely won't install a key improvement. Lack of guaranteed savings, structural considerations and hassle/disruption were also prominent barriers.

OTHER RESPONSES:

- Won't stay here long enough 9% (11% Wave 2)
- Already have this/already done 8% (9% Wave 2)
- Other priorities at the moment 5% (5% Wave 2)

- Not sure what has recommended to me 5% (8% Wave 2)
- Confused/don't know what to do next 5% (7% Wave 2)
- Need more information about what to do next 3% (6% Wave 2)
- Need more time/ information to make decision 1% (9% Wave 2)



Charts show Wave 3 findings, with Wave 2 comparisons following in brackets

Charts show all responses mentioned by 4% or more at either wave

Base: All respondents who definitely/probably won't install measures (Wave 2 = 133; Wave 3 = 116).

Households were able to choose more than one option and in some cases were answering about more than one key measure.