



Department  
of Energy &  
Climate Change

# Green Deal customer journey survey

Summary report: quantitative survey wave 2

June 2014

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# Contents

Introduction .....	4
Summary of headline findings .....	5
Awareness of Green Deal Assessments .....	5
Reasons for having a Green Deal Assessment .....	5
Paying for a Green Deal Assessment.....	6
The assessment experience.....	7
Green Deal Advice Report.....	8
Post-assessment actions and intentions .....	8
Paying for improvements.....	10
The installation experience.....	10
Technical notes .....	11

# Introduction

The Green Deal scheme was officially launched in early 2013 with the aim of enabling households to make energy saving improvements to their properties without having to pay all the costs up front. The Green Deal process comprises a number of steps, with the first of these being a Green Deal Assessment; the resulting Green Deal Advice Report explains what improvements can be made and estimates energy bill savings. At the time of publishing, 210,359 assessments had been carried out (up to the end of April 2014).<sup>1</sup>

As part of the wider Green Deal evaluation, GfK NOP was commissioned to conduct a second Green Deal Customer Experience survey of households which had a Green Deal Assessment in the first three months of 2014. These surveys are designed to understand the Green Deal customer experience and to determine what, if anything, households have done and plan to do since having the assessment. This research with ICF International builds upon previous surveys of Green Deal Assessment customers carried out since April 2013 by GfK NOP.<sup>2</sup>

This report presents summary headline findings from wave 2 of the Green Deal Customer Experience survey, conducted between 17 April and 1 June 2014 and makes comparisons with the first wave, conducted between 21 November 2013 and 20 December 2013. A full set of data tables have been released alongside this report (link at bottom of page). The surveys were conducted using a mixed-mode approach to data collection. In the first instance, sampled households who had had a Green Deal Assessment between 1 January 2014 and 31 March 2014<sup>3</sup> were sent a letter inviting them to complete an online survey. Those that did not complete the online survey were then followed-up by face-to-face interviewers. The interview gave the householder their laptop to complete the survey, therefore the online and face to face elements were both self-completion (done in order to reduce the impact of mode effects).

1800 letters were sent and in total, 946 households took part in the survey (representing a 53% response rate). All households which completed an interview were given a £10 voucher.

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.

This report uses the following conventions:

- All differences commented upon are statistically significant at the 95% confidence level.
- Significant differences between sub-groups are indicated by arrows (↑↓) within charts.
- All base sizes quoted in the report are unweighted.

For more information on the methodology please see the technical report at <https://www.gov.uk/government/publications/green-deal-customer-journey-survey-summary-report-quantitative-survey-wave-2>

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<sup>1</sup> For the latest information on assessments, see the Green Deal and ECO statistics webpage:

<https://www.gov.uk/government/collections/green-deal-and-energy-company-obligation-eco-statistics>

<sup>2</sup> Data from previous studies at: <https://www.gov.uk/government/collections/green-deal-assessments-research>

<sup>3</sup> There were approximately 55,000 Green Deal Assessments carried out during this period.

# Summary of headline findings

## Awareness of Green Deal Assessments

As in the first wave of the study, direct marketing was the most common way in which households heard about Green Deal Assessments. Overall, 48% of households cited a direct marketing approach (51% in wave one) such as cold calls/door-to-door sales, a telephone call, an in-store/street approach, a leaflet through their door or a letter in the post.

Word of mouth sources<sup>4</sup> – such as friends and family - were mentioned by 34% of households (35% in wave one), while advertising or news sources<sup>5</sup> were mentioned by a smaller proportion of households in both waves (14% in wave two and 12% in wave one).

## Reasons for having a Green Deal Assessment

The main motivations for having an assessment were: saving money on energy bills (52%), the offer of free assessments (46%), a warmer home (37%) and concerns over rising energy bills (31%).

Households were also motivated by making improvements for free/at a reduced price (23%), energy efficiency (22%) and environmental concerns (17%).

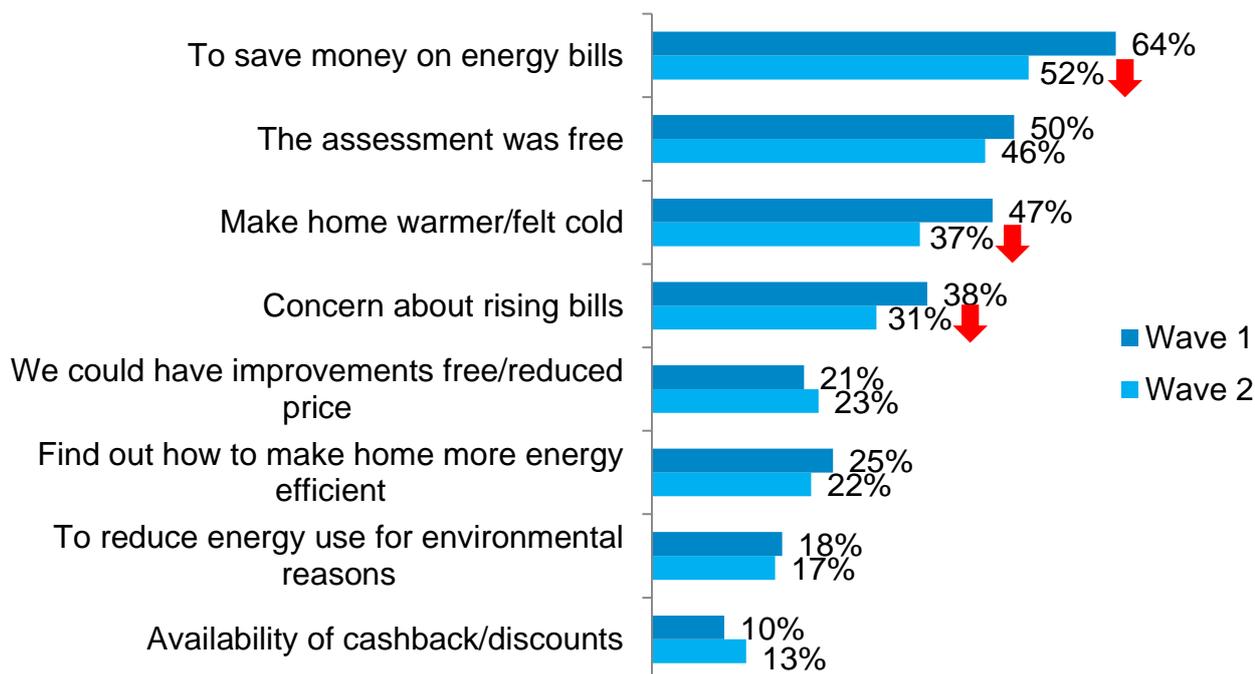
Figure 1 shows that these motivations were broadly similar between waves 1 and 2.

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<sup>4</sup> Word of mouth sources include: Energy Saving Advice Service/Home Energy Scotland, from an energy company, from a friend/relative/word of mouth, from a landlord/local authority/housing association, from a charity/community group/other advice service, from freeholder/property management company/committee.

<sup>5</sup> Advertising/news sources include: advert in newspaper/magazine, advert online, other internet/online/Google search, TV advertising, advert/stand in store/supermarket/shopping centre, show home/stand elsewhere, news/media (e.g. saw something on TV/heard on radio/read in newspaper article).

**Figure 1: Reasons for having a Green Deal Assessment (wave one and two comparison of all reasons mentioned by 10% or more at both waves)**

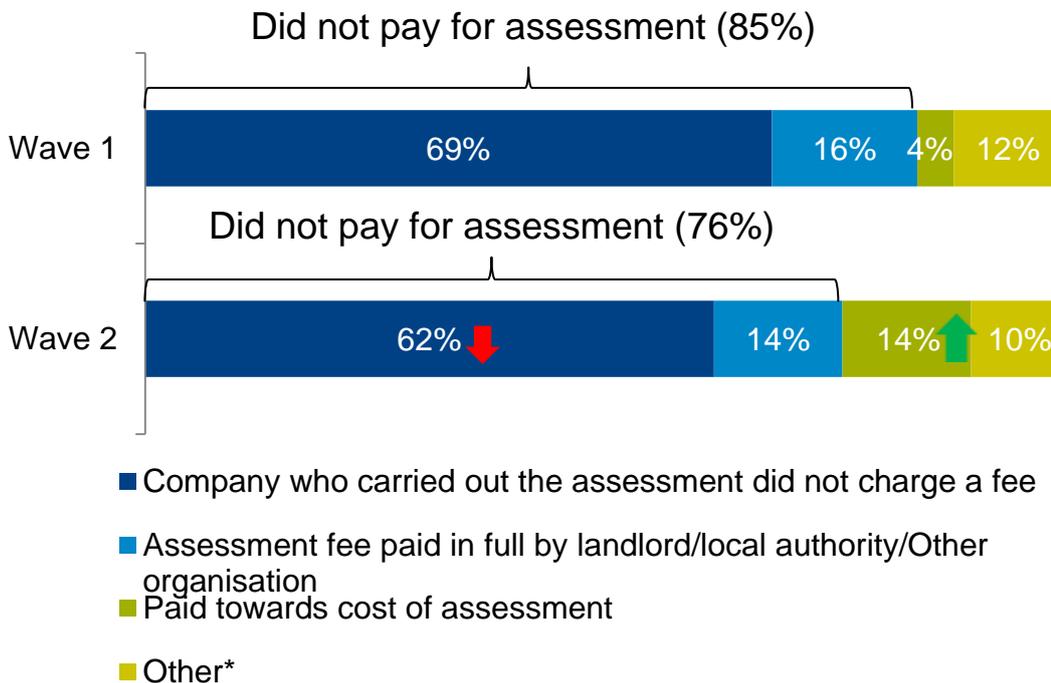


Base: All who had a say in whether or not the assessment took place (wave one: 358; wave two: 841)

## Paying for a Green Deal Assessment

Figure 2 shows how assessments were funded. Although the majority of households (76%) at wave 2 did not pay to have a Green Deal Assessment, the proportion reporting this has dropped significantly since wave 1 (down from 85%). Of the remaining 24%, 14% said they paid towards the cost of the assessment (a significant increase from wave 1) and 10% said 'other'.

**Figure 2: Methods used to pay for Green Deal Assessments**



Base: All respondents (wave one: 439; wave two: 946)

\*Other category includes those who answered 'Don't know' and those giving 'Other' responses (where households indicate other and write in a response).

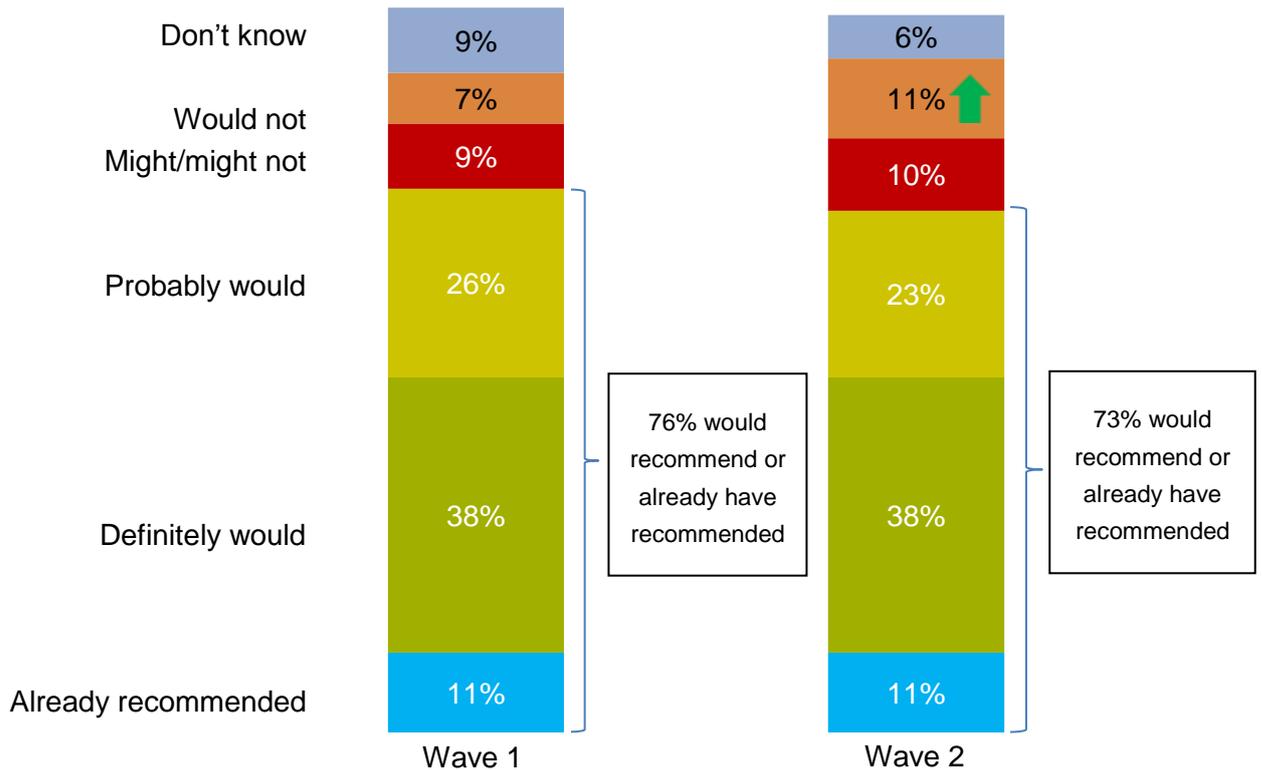
## The assessment experience

Feedback from both waves of the survey indicates that the Green Deal Assessment experience was generally a positive one. Figures shown below are from wave two only, but are in line with those from wave one:

- Households were satisfied with the professionalism of the assessor (81%), with only 5% saying they were dissatisfied (10% said they were neither satisfied nor dissatisfied and 4% said don't know);
- 76% of households were satisfied with the thoroughness of the assessment, 10% said they were neither satisfied nor dissatisfied and 6% said don't know. Just 7% were dissatisfied;
- As has already been noted, just 14% of households paid for their assessment. Of the households that paid for an assessment, more than half (56%) were satisfied with the assessment in terms of value for money, though a quarter (25%) were dissatisfied. 15% were neither satisfied nor dissatisfied and 3% did not know;
- Three quarters of households (76%) said they were confident in the recommendations made by the assessor, but 12% said they were not confident. A further 12% did not know;
- 69% felt that the assessment was useful in helping them to understand what they can do to make their homes more energy efficient, though a fifth (20%) thought it was not useful. 11% stated that they did not know;

- Satisfaction with the different elements of the assessment leads to considerable word of mouth recommendations: Figure 3 shows that, as in Wave 1, 11% had already recommended the assessments to their friends and family and a further 61% said they definitely or probably would make the same recommendation. There was however a significant increase in the proportion of households saying they would not recommend an assessment to friends and family between waves one and two (from 7% to 11%).

**Figure 3: Likelihood of recommending Green Deal Assessments to family and friends (wave one and two comparison)**



Base: All respondents (wave one: 439; wave two: 946)

## Green Deal Advice Report

Results from wave 2 showed that 37% of households had definitely received their Green Deal Advice Report, a significance decrease from wave 1 (43%). In addition, 43% said they had not received a copy and 19% said they did not know/were unsure. Of the 43% that that had not received a copy: 5% claimed to have seen a copy during the assessment, 32% had not seen a copy and 7% stated that (they thought) it had been sent directly to a landlord/housing association/other organisation.

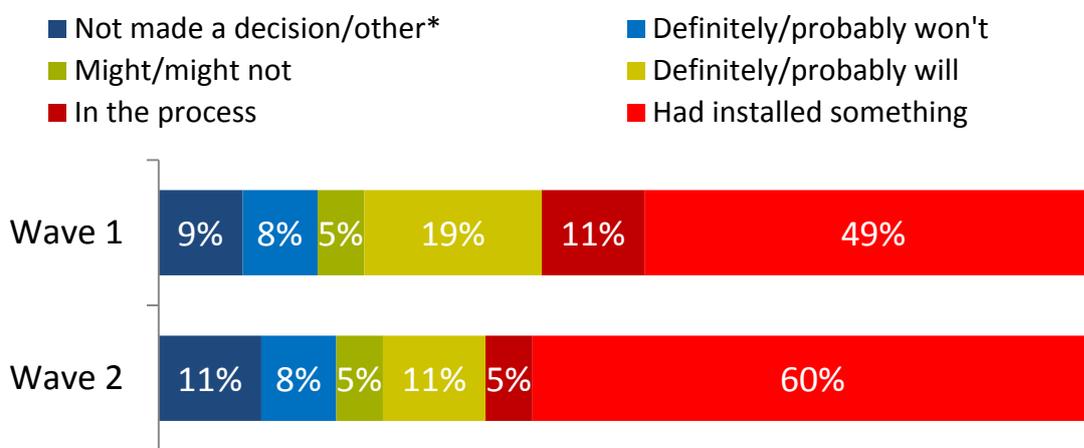
## Post-assessment actions and intentions

In both waves, around four in five households report either having already installed, being in the process of installing or intending to install at least one energy saving home improvement

recommended by their Green Deal Assessment. There has been an increase between waves in the proportion who have already installed something (from 49% to 60%).

In comparing responses from wave 1 and wave 2, it should be noted that the wave 1 survey only included households that had a Green Deal Assessment during a single month (October 2013), so respondents may have had less time between their Assessment and interview to take action and install measures compared with the wave 2 survey (which covered a 3 month period between January and March 2014).

**Figure 4: The furthest point in the Green Deal customer journey that respondents had reached (wave one and two comparison)**



Base: All respondents (wave one: 439; wave two: 946)

\* only those who had not received a Green Deal Advice Report were able to give these responses which included: Not made a decision because I've not received my Green Deal Advice Report yet; The assessor did not recommend this; I don't know/can't remember if the assessor recommended this and Don't know.

## Paying for improvements

Households were asked how they paid for their improvements and were able to choose more than one response. In wave 2 of survey 78% of households that installed an energy saving improvement indicated that it had been paid for either fully or partially by third parties<sup>6</sup>.

Of the 78% that of households that claimed to have had third party funding, 21% said that the improvement had been installed for free (that is, it was paid for by a third party but they did not know exactly who), 17% said that it came from other Green Deal providers (that are not energy companies<sup>7</sup>), 17% from the local authority and 16% the Energy Company Obligation, that is energy companies delivering energy saving improvements for free under the obligation. Seven per cent said that their Housing Association paid, 6% said their landlord paid and 1% said the improvement was paid for by a Government scheme (although they did not specify which).

There is some confusion around third party funding and many households don't appear to know exactly where the funding is coming from, just that it was free (they did not pay). Therefore whilst there can be confidence in the robustness of the overall figure of three quarters of households paying for measures through third party funding, the findings for sub categories (other Green Deal providers, local authority etc.) should be treated with caution.

From the households that claimed to have paid for the energy saving improvement themselves (that is not been paid for by third party funding) they mentioned paying for the installation either through the Green Deal scheme (14%) or through self-financing (19%)<sup>8</sup>.

## The installation experience

Satisfaction levels amongst those households which have had energy saving improvements installed were very positive, with over four in five saying they were satisfied in terms of the following elements of the installation:

- Time taken to install (88%)
- How long they had to wait for an appointment (85%)
- The professionalism of the installer (85%)
- The quality of the installer's work (84%)
- How clean and tidy the property was left after the installation (83%)
- The quality of the improvement installed (82%)
- 9% of households reported an issue or problem with the installation.

Of those who had had an energy saving improvement installed,<sup>9</sup> 84% said they had either already recommended having the 'measure' installed or would recommend it in future. 76% of

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<sup>6</sup> This figure was 62% in wave 1. However a comparison should not be made, as the way the figure was compiled is slightly different. In wave 2 households that said 'don't know' for payment method were followed up and asked to choose if it was paid for by someone else, themselves or (they still) don't know.

<sup>7</sup> Green Deal providers offer finance, help with cashback and arrange installation of energy saving improvements. They are made up of a range of different business, from SME's to large energy companies. Energy companies were not included in this option, as they have an obligation to deliver energy saving improvements under the Energy Company Obligation where they primarily deliver them for free.

<sup>8</sup> Households were allowed to choose more than one option, therefore the percentages do not add up to 100. For example a household may pay for an energy saving improvement using savings (self-finance) and Green Deal finance or Green Deal finance and third party funding etc.

all households said they had or would recommend installing 'energy saving improvements in general' to friends or family.

## Technical notes

The results shown here are based on 946 interviews conducted with a clustered sample of households which had a Green Deal Assessment between the start of January and end of March 2014. Fieldwork was conducted between 17 April and 1 June 2014 by GfK NOP and Ipsos MORI, using mixed-mode online and face-to-face interviewing.

Addresses were selected from the Landmark database, which is an administrative data source used to compile DECC Official Statistics. No names or telephone numbers were available as part of the sample file. Clusters of addresses were formed (to make it practical and cost effective for interviewers to get to households), meaning that many addresses were excluded from the sample. A stratified random sample was then drawn from the clustered addresses using house type, tenure, region, urbanity and energy rating as stratification variables.

The questionnaire was designed by GfK NOP in conjunction with DECC and ICF International. It built upon:

- Previous quantitative research amongst households which had had assessments;
- Feedback from qualitative research with households who had recently had an assessment;
- A small cognitive pilot which was carried out prior to wave one.

A letter was sent to households, inviting them to take part in an online survey and stating that if they did not an interviewer would be sent to the house. 1800 letters were sent and there were 946 completions, meaning a 53% response rate. There were 171 online completions and 773 CAPI (on the interviewer's laptop).

The average interview length was 32 minutes.

The profile of those interviewed looked similar to that of the overall sample. However, there were some discrepancies between the profile of those interviewed and that of the universe. In order to correct for such imbalances, the data were weighted by the following key variables: region, property type, tenure, urbanity and energy band (EPC rating).

Analysis was undertaken on the data using statistical tests to work out statistically significant differences. This means that any differences between results are likely to be down to an actual change, rather than survey error associated with the sampling or methodology. As surveys sample the population and don't ask everyone, then there is scope for a small amount of error. Significance tests account for this and can show when there are likely to be real changes.

In making comparisons between waves, it should be noted that the wave 1 survey only included households that had a Green Deal Assessment during a single month (October 2013), so respondents may have had less time between their Assessment and interview to take action and install measures compared with the wave 2 survey (which covered a 3 month period between January and March 2014).

Please refer to the full technical note at <https://www.gov.uk/government/publications/green-deal-customer-journey-survey-summary-report-quantitative-survey-wave-2> for further details.

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<sup>9</sup> Energy saving measures include: Loft insulation, cavity wall insulation, solid wall insulation, flat roof insulation, room in roof insulation, floor insulation, new boiler, solar photovoltaic, solar thermal, renewable heat technologies (ground and air source heat pumps, biomass boiler), replacement windows/doors.

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