



Department
of Energy &
Climate Change

Green Deal Customer Journey survey

Summary report: Quantitative survey wave 3

September 2014

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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. In total, 263,068 assessments had been carried out up to the end of June 2014.¹

As part of a wide programme of Green Deal evaluation work, GfK NOP and ICF International were commissioned to conduct a third Green Deal Customer Experience survey of households which had had a Green Deal Assessment in the second quarter 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 builds upon previous surveys of Green Deal Assessment customers carried out since April 2013 by GfK NOP.²

This report presents summary headline findings from wave 3 of the Green Deal Customer Experience survey, conducted between 8 August and 7 September 2014 and makes comparisons with the first and second waves which were conducted in November-December 2013 and April-May 2014 respectively. A full set of data tables has been released alongside this report [here](#). The surveys were conducted using a mixed-mode approach to data collection. In the first instance, sampled households who had a Green Deal Assessment between 1 April 2014 and 30 June 2014 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 interviewer 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).

A sample of 1,800 addresses was drawn and all households were written to. In total, 904 households completed the survey (representing a 50% 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 [here](#).

¹ 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>.

² Previous studies are available at: <https://www.gov.uk/government/collections/green-deal-assessments-research>

Summary of headline findings

Awareness of Green Deal Assessments

Sources of awareness of Green Deal Assessments were broadly in line with those which were reported in waves one and two.

As in those waves, direct marketing was the most common source of awareness with 48% of households in wave three citing a direct marketing approach 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 (48% in wave two and 51% in wave one).

Word of mouth sources³ – such as friends and family - were mentioned by 37% of households (33% in wave two and 35% in wave one). Eighteen per cent of households mentioned advertising or news sources⁴, a significant increase of four percentage points since wave 2 (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 (50%), the offer of free assessments (41%), a warmer home (41%) and concerns over rising energy bills (30%).

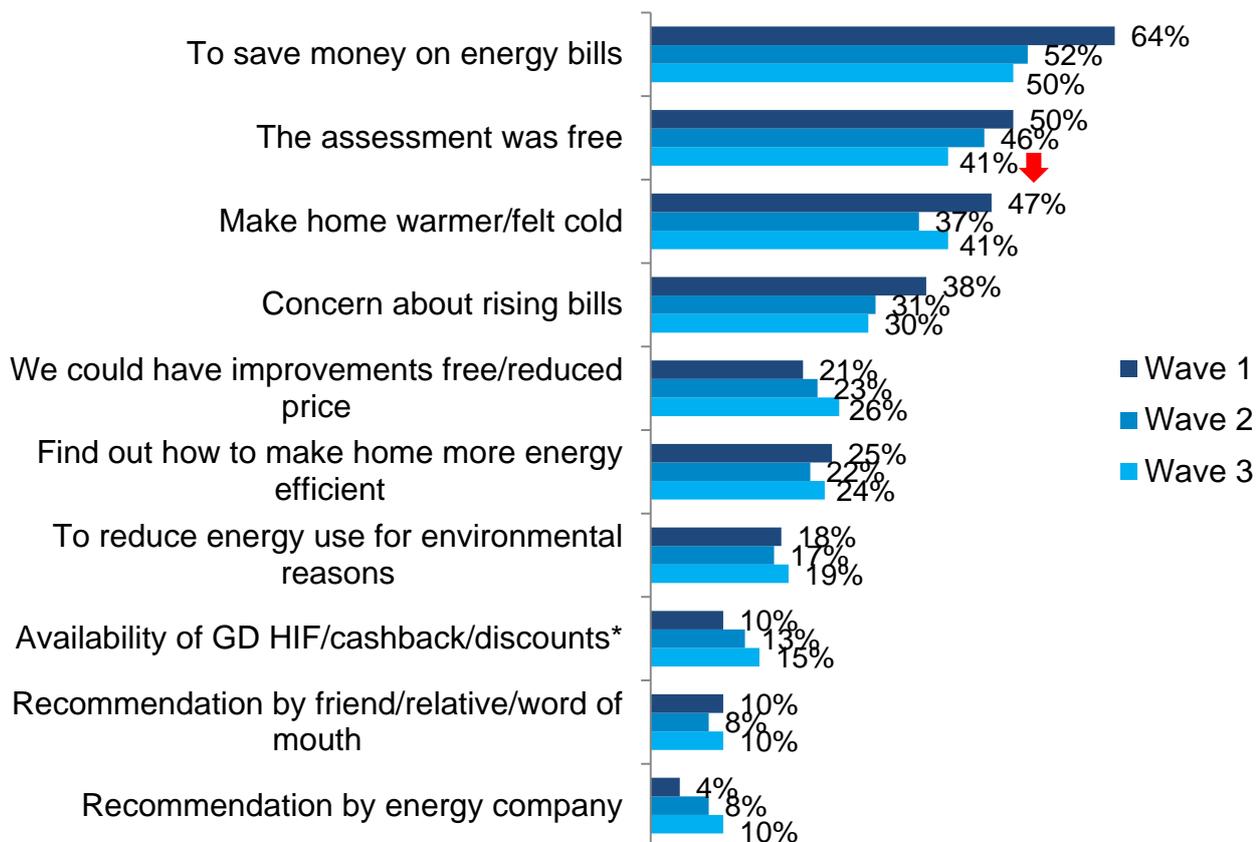
Households were also motivated by making improvements for free/at a reduced price (26%), energy efficiency (24%) and environmental concerns (19%).

Figure 1 shows that the ranking of the motivations were broadly similar across the three waves, although the proportions mentioning each of the top four motivations have dropped significantly since wave one.

³ 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.

⁴ Advertising/news sources include: advert in newspaper/magazine, advert online, poster, 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, two and three comparison of all reasons mentioned by 10% or more at wave three)



Base: All who had a say in whether or not the assessment took place (wave one: 358; wave two: 841; wave three: 819)

*In order to reflect the introduction of the Green Deal Home Improvement fund the wave 3 questionnaire gave respondents the opportunity to select “Availability of the Green Deal Home Improvement Fund/other cashback schemes/discounts to make improvements”. In previous waves, the code had been “Availability of cashback schemes/discounts to make improvements”.

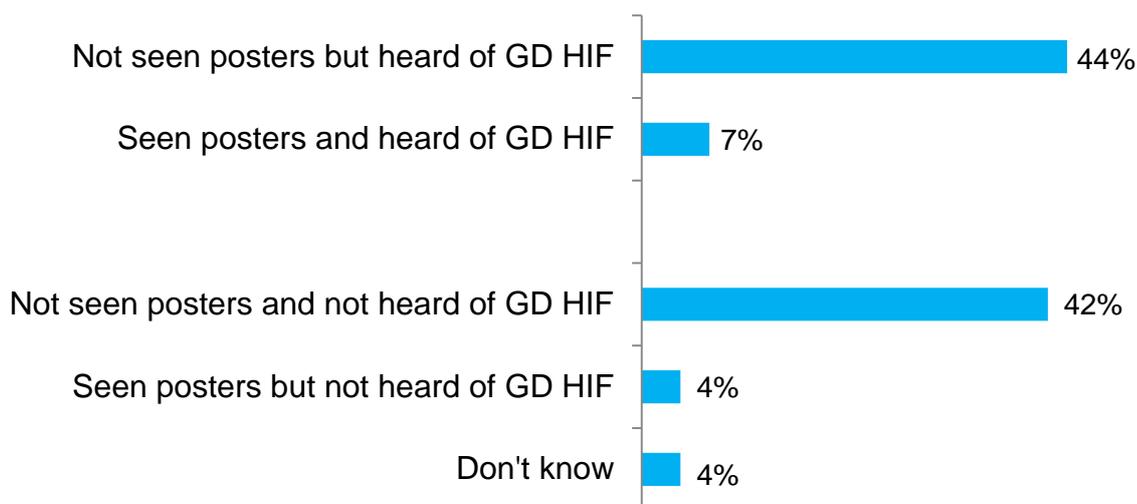
Awareness and impact of the Green Deal Home Improvement Fund

The Green Deal Home Improvement Fund (HIF) was announced at the start of May 2014 and was available to households throughout June and July. The fund enabled households in England and Wales to get up to £7,600 money back to offset the cost of having energy saving improvements such as solid wall insulation and new heating systems installed.

As wave three of the survey was conducted amongst those households which had a Green Deal assessment in April-June 2014 the questionnaire included some new questions which were designed to measure awareness of the Green Deal Home Improvement Fund (HIF).

Respondents were shown copies of HIF adverts and were asked whether they had seen them or had heard of HIF in some other way. Half (50%) reported that they had heard of HIF, while 46% reported that they were not aware of it.

Figure 2: Awareness of Green Deal HIF (wave three only)



Base: All respondents (wave three: 904)

Those who had heard of HIF⁵ were asked when they found out about it; half of those who were aware of HIF (50%) reported that they had heard of it before they had their assessment. A quarter (27%) reported that they became aware of HIF during their assessment and a further 10% only became aware of HIF after having their assessment (12% said they could not remember when they became aware of HIF and 1% gave an 'other' answer).

Analysis of this data by month of assessment shows that 50% of those households which reported having heard of HIF and had their assessment in April⁶ claimed to have heard of the scheme before their assessment and a further 24% said it was mentioned during their assessment. As the scheme was not announced until May (and not available to customers until June) this discrepancy may be the result of recall issues amongst respondents or confusion around Green Deal "cashback" and the "Home Improvement Fund", both of which were Green Deal incentive schemes offering cashback.

Those who reported having heard of HIF prior to their assessment⁷ were asked how important the availability of HIF was in their decision to have a Green Deal Assessment. Findings suggest that the introduction of HIF in June 2014 encouraged a significant number of households to book a Green Deal Assessment. Eighty per cent (equivalent to 20% of the total sample) reported that the availability of HIF was important – 56% (equivalent to 14% of the total sample) reported that they would not have had their assessment without it; in comparison just 6% of those who reported having heard of HIF prior to their assessment said that it made no difference at all to their decision. Again, we must note that these findings are subject to some recall issues and possible confusion of Green Deal cashback scheme with HIF as 14% of all households which had their assessments in April⁸ claimed that they would not have had it if the HIF was not available.

⁵ Base: 447

⁶ Base: 134

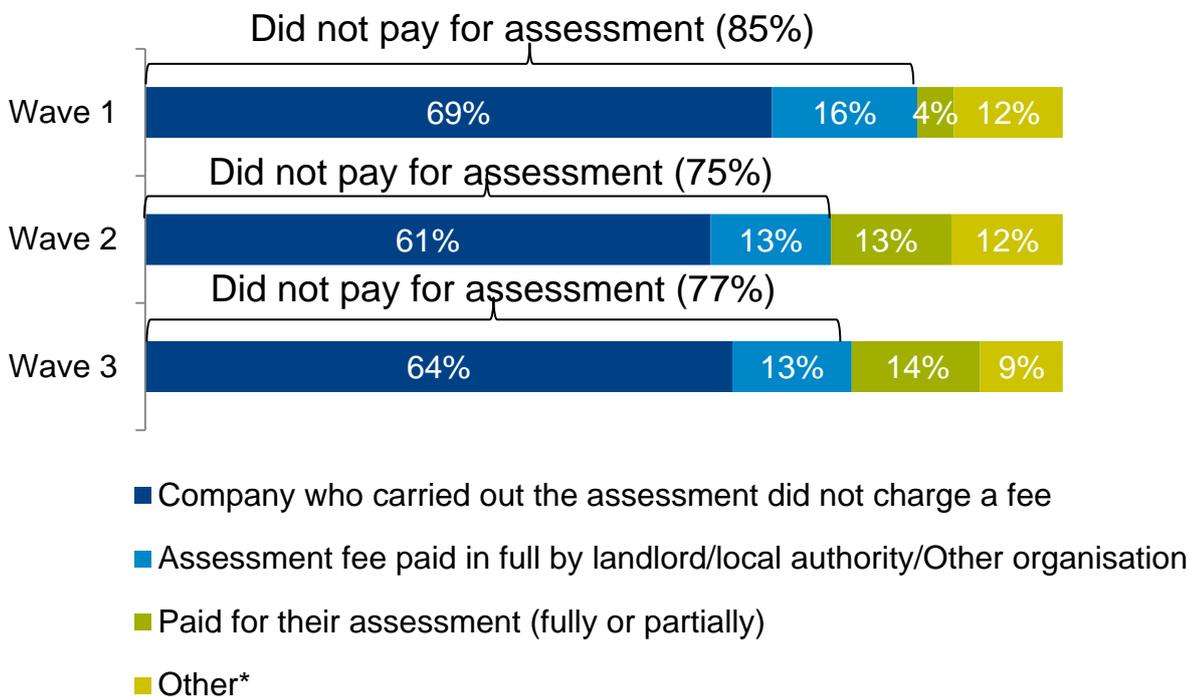
⁷ Base: 212

⁸ Base: 258

Paying for a Green Deal Assessment

As with wave two, three quarters of households (77%) did not pay to have a Green Deal Assessment. The proportion reporting this was considerably higher in wave one (85%). Findings from wave three confirm a shift towards a greater proportion of households paying towards their assessment as previously observed in wave two. Figure 3 shows the full breakdown of findings from this question⁹.

Figure 3: Methods used to pay for Green Deal Assessments



Base: All respondents (wave one: 439; wave two: 946; wave three: 904)

*Other category includes those who answered 'Don't know' and those giving 'Other' responses.

Findings from wave three suggest that those households which had heard of the Green Deal Home Improvement Fund before having their assessment¹⁰ were significantly more likely to pay for their assessment than those who had not heard of the scheme¹¹ (22% compared with 8%). Similarly, one in five of the households (21%) which claimed that they would not have had their assessment if the Home Improvement Fund was unavailable¹² also paid for their assessment.

⁹ Households installing energy saving measures under the Green Deal Home Improvement Fund were able to apply for a refund of up to £100 on their Green Deal Assessment fee. Respondents were able to select a response "Paid assessment fee in full, but the fee will be refunded if improvements are made" at this question, which is included in the 'Paid for their assessment' category.

¹⁰ Base: 212

¹¹ Base: 457

¹² Base: 119

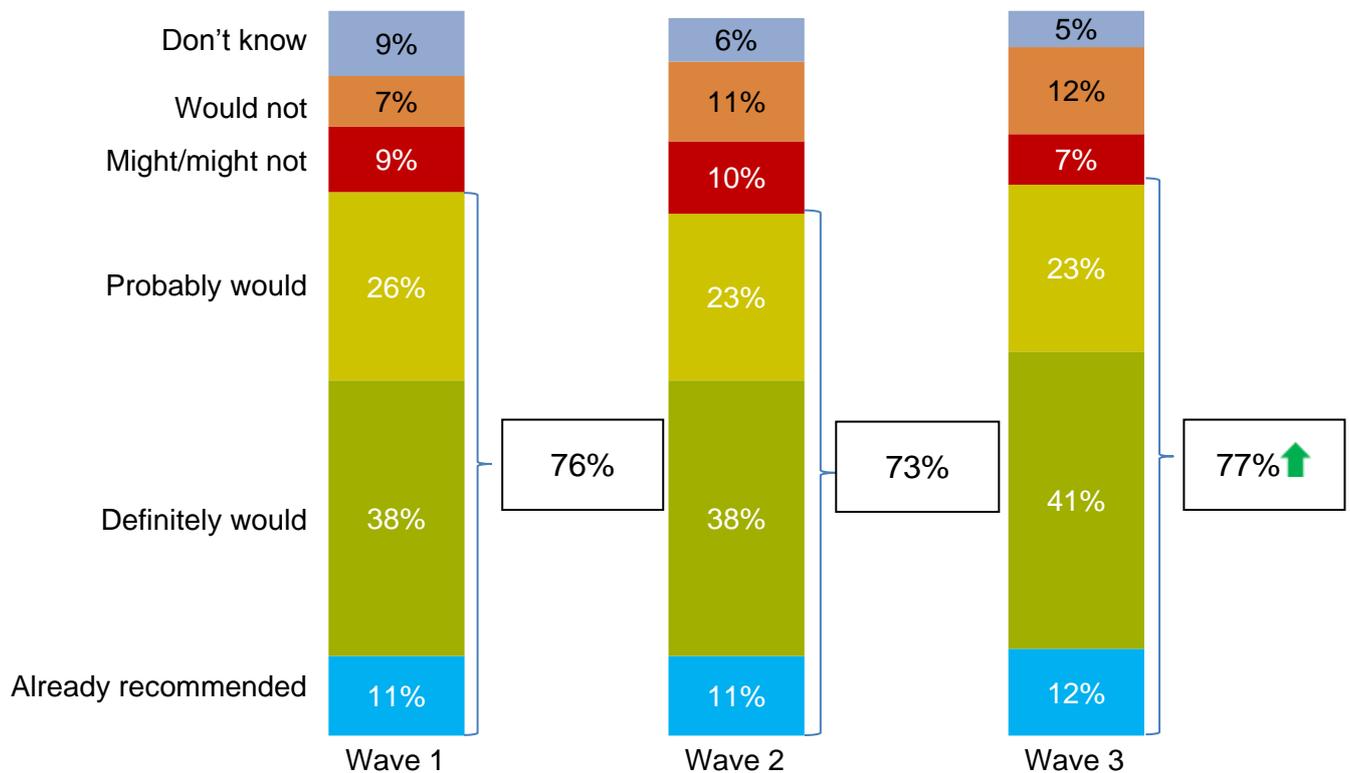
The assessment experience

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

- The vast majority of households were satisfied with the professionalism of the assessor (85%), with only 6% saying they were dissatisfied. The remainder either said they were neither satisfied nor dissatisfied (7%) or said don't know (2%);
- Four in five households (80%) were satisfied with the thoroughness of the assessment, 7% said they were neither satisfied nor dissatisfied and 5% said don't know. Just 8% were dissatisfied;
- The majority (70%) reported that their assessment lasted up to an hour, with one in ten (10%) reporting an assessment lasting less than 20 minutes. In comparison, a quarter (26%) said it lasted for more than an hour.
- Four in five households (81%) said they were confident in the recommendations made by the assessor; 11% said they were not confident.
- Seven in ten (72%) households 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 (rising to 29% amongst those households which paid for their assessment¹³). Nine per cent stated that they did not know.
- Findings from across the three waves suggest that satisfaction with the different elements of the assessment leads to considerable word of mouth recommendations: Figure 4 shows that, as in the previous waves, 12% had already recommended the assessments to their friends and family and a further 64% said they definitely or probably would make a recommendation. A significant increase in the proportion of households saying they would not recommend an assessment to friends and family was observed in wave two and was maintained in wave three. Digging deeper, it can be seen that this was primarily driven by the increase between waves one and two in the proportion of households which paid for their assessment, given that those that paid were significantly less likely to recommend a Green Deal Assessment to friends and family (21% of these households said they would not recommended an assessment to friends and family in wave two and 33% in wave three).

¹³ Base: 129

Figure 4: Likelihood of recommending Green Deal Assessments to family and friends (All waves comparison)



Base: All respondents (wave one: 439; wave two: 946; wave three: 904)

The 14% of households which paid for their assessment¹⁴ were asked whether they were satisfied with their assessment in terms of value for money. Half (50%) were satisfied in this regard, but 33% were dissatisfied. One in ten (10%) were neither satisfied nor dissatisfied and a similar proportion said don't know (7%). These findings are in line with those observed in wave two.

Analysis of the other satisfaction measures by whether or not a household paid for their assessment suggests that those who paid tended to be less satisfied overall and, as Table 1 shows, there were a number of significant differences between the two groups.

¹⁴ Base: 129

Table 1: The assessment experience: comparison of those who paid for their assessment against those who did not

| | Paid for assessment | Did not pay for assessment |
|--|---------------------|----------------------------|
| Base: | 129 | 697 |
| | % | % |
| Satisfied with the professionalism of the assessor | 81 | 87 |
| Satisfied with the thoroughness of the assessment | 75 | 83↑ |
| Confident in the recommendations made by the assessor | 77 | 83↑ |
| Felt that the assessment was useful in helping them to understand what they can do to make their homes more energy efficient | 70 | 73 |
| Would recommend/already recommended Green Deal assessments to family or friends | 54 | 82↑ |

Green Deal Advice Report

At wave three 43% of households had received their Green Deal Advice Report, this is significantly higher than in wave two (37%) but in line with wave one (43%).

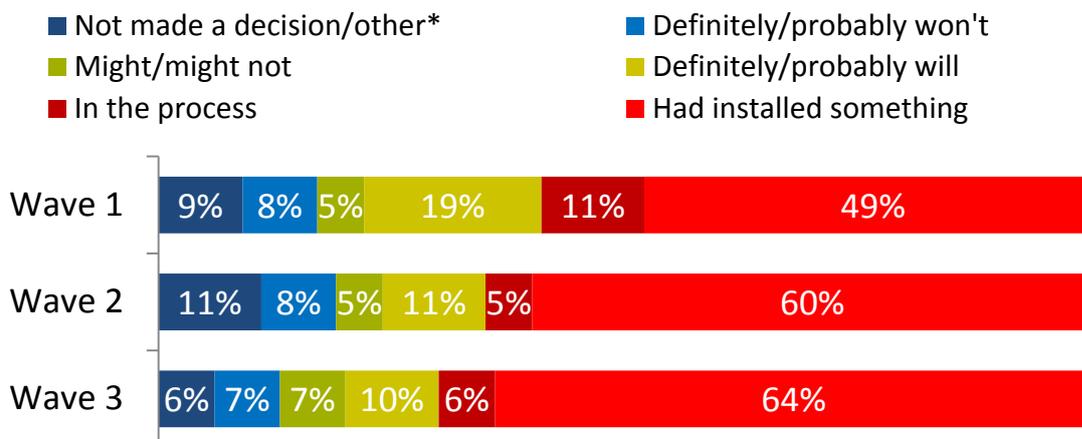
Around two in five (39%) had not received a copy of their advice report: of these 5% claimed to have seen a copy during the assessment, 27% had not seen a copy at all and 6% stated that it had been sent directly to a landlord/housing association/other organisation. The remaining 18% of households did not know, or were not sure, whether they had received their report.

Post-assessment actions and intentions

In all three waves, around four in five households reported 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 (81% in wave 3, 76% in wave 2 and 78% in wave 1).

In wave three, 64% of households had installed at least one measure. While this is not significantly higher than the level observed in wave two, it is considerably higher than in wave one (+15 percentage points).

Figure 5: The furthest point in the Green Deal customer journey that respondents had reached (all waves comparison)



Base: All respondents (wave one: 439; wave two: 946; wave three: 904)

* 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.

In comparing responses from wave one to those from waves two and three, it should be noted that the wave one 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 wave two and wave three (which both covered a 3 month period). However, it should also be noted that 60% of households which had their assessment in June (the final month covered in wave three) had installed something, which is significantly higher than the 49% which was observed in wave one.

Paying for improvements

Households were asked how they had paid for their improvements; they were prompted with a number of different payment options and were able to choose more than one response. Findings from all three waves of the survey indicated that two thirds or more of households that had installed a core¹⁵ energy saving improvement were funded fully or partially by a third party (76% of households that had installed a core measure in wave three, 67% in wave two and 62% in wave one¹⁶).

¹⁵ Core energy saving improvements 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

¹⁶ Base: W1: 204; W2: 568; W3: 537

Households that claimed to have had third party funding said that it came from other Green Deal providers (that are not energy companies¹⁷) (13%), the local authority (12%) and the Energy Company Obligation (23%), that is energy companies delivering energy saving improvements for free under the obligation. Nineteen per cent said the measure was free (that is, it was paid for by a third party but they did not know exactly who), 7% said that their landlord paid and 6% said their Housing Association paid.

In addition, 18% mentioned paying towards the installation of energy saving improvements through the Green Deal finance scheme, cashback or HIF and 20% self-financed the improvements.

The installation experience

Satisfaction levels amongst those households which have had energy saving improvements installed¹⁸ 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 (90%)
- How long they had to wait for an appointment (89%)
- The professionalism of the installer (88%)
- The quality of the installer's work (86%)
- How clean and tidy the property was left after the installation (88%)
- The quality of the improvement installed (84%)

Ten per cent of households which have had energy saving improvements installed reported an issue or problem with the installation. This differed considerably by type of measure; for example, issues or problems were reported in relation to 18% of solid wall insulation installations¹⁹, while issues or problems were reported in relation to just 6% of loft insulation installations²⁰.

Of those who had had a core energy saving improvement installed, 85% said they had either already recommended having the measure installed to family and friends or would recommend it to them in future. A similar proportion of all respondents said they had either already recommended making energy saving home improvements in general or would recommend doing so in future (78%).

¹⁷ 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.

¹⁸ Base: Households that had had an energy saving improvement installed by a company (532)

¹⁹ NOTE: Low base size (Base: 55)

²⁰ Base: 290

Technical notes

The results shown here are based on 904 interviews conducted with a clustered sample of households which had a Green Deal Assessment between the start of April and end of June 2014. Fieldwork was conducted between 8 August and 7 September 2014 by GfK NOP, 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 within the time available for fieldwork), meaning that 35% of 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. In total 1,800 letters were sent and 904 completed the survey, giving an unadjusted response rate of 50%. Responses were split between online completion (182) and CAPI completion on the interviewer's laptop (722).

The average interview length was 33 minutes.

The profile of those interviewed looked similar to that of all households which had a Green Deal Assessment during April-June 2014 (the "universe"). Where there were discrepancies between the profile of those interviewed and that of the universe the data were weighted to the known profile of all households which received a Green Deal Assessment in April to June 2014 by region, property type, tenure, urbanity and energy band (EPC rating).

Analysis was undertaken on the data using statistical tests to determine 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.

Please refer to the full technical report at <https://www.gov.uk/government/publications/green-deal-customer-journey-survey-summary-report-quantitative-survey-wave-3> further details.

Confidence intervals

Surveys are conducted because it is much more practical and cost effective than interviewing an entire population. However, we need to know how close our survey estimates are to the 'true' figures if we had interviewed the entire population. Confidence intervals are a statistical device which allows us, using our survey results, to estimate the variation that might be anticipated because a sample rather than an entire population was interviewed. This is essentially a range where the true (overall population) value is likely to sit. In general, the larger the sample, the more sure we can be of the accuracy of our survey estimates, though subject to diminishing returns at larger sample sizes. In other words, if we were to conduct the same

survey again we would be more likely to get a similar result if we had a large sample than a smaller sample.

Note that, strictly speaking, analysis of sampling error in this way should only be applied to random probability surveys. However it is generally accepted that confidence intervals can be applied to surveys such as this which use different sampling schemes as a guide.

The table below indicates the confidence intervals associated with each wave of the survey for various survey estimates (calculated based on the effective sample size²¹ at each wave). When calculating confidence intervals, we typically use a 95% confidence interval. This means that we can be 95% sure that the survey estimate reflects the true figure for the entire population.

Table 2: Confidence intervals for waves one to three

| Wave | Sample size | Survey response | | |
|-------------------|-------------|-----------------|-----------|-----------|
| | | 10% / 90% | 30% / 70% | 50% / 50% |
| Wave One | 439 | 3.3 | 5.0 | 5.4 |
| Wave Two | 946 | 2.0 | 3.0 | 3.3 |
| Wave Three | 904 | 2.1 | 3.1 | 3.4 |

The table shows that at wave three for example (with a total sample size of 904), the confidence interval for a 50% response would be up to $\pm 3.4\%$. This means that if the survey found that 50% of respondents held a certain view, we could be 95% sure that the true proportion of people in the (overall) population who hold that view would be between 46.6% and 53.4%.

Table 3 below shows the confidence intervals for a range of sub-group sizes between 100 and 500 at waves two and three.

Table 3: Confidence intervals for various sub-group sizes (waves two and three)

| Sub-group size | Survey response | | |
|----------------|-----------------|-----------|-----------|
| | 10% / 90% | 30% / 70% | 50% / 50% |
| 100 | 6.2 | 9.4 | 10.3 |
| 200 | 4.4 | 6.7 | 7.3 |
| 300 | 3.6 | 5.4 | 5.9 |
| 400 | 3.1 | 4.7 | 5.1 |
| 500 | 2.8 | 4.2 | 4.6 |

²¹ The effective sample size describes the effect of the weighting on the accuracy of survey estimates. It is dependent upon the size of weights applied to respondents: the more the weights deviate from 1, the smaller the effective sample size. (Effective sample sizes: wave one (325); wave two (870); wave three (820))

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