



Department  
of Energy &  
Climate Change

# Energy Companies Obligation (ECO) Customer Journey

**Technical Report**

December 2014

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Any enquiries regarding this publication should be sent to us at [HouseholdEnergyEfficiencyResearch@decc.gsi.gov.uk](mailto:HouseholdEnergyEfficiencyResearch@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).

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# Glossary of Terms and Acronyms

This Technical Report uses the following terms and acronyms:

<b>CERO</b>	Carbon Emission Reduction Obligation
<b>CSCO</b>	Carbon Saving Community Obligation
<b>CWI</b>	Cavity wall insulation
<b>DECC</b>	Department of Energy and Climate Change
<b>ECO</b>	Energy Companies Obligation
<b>GD Assessment</b>	Green Deal Assessment
<b>GD</b>	Green Deal
<b>HHCRO</b>	The Home Heating Cost Reduction Obligation, or Affordable Warmth
<b>Ofgem</b>	The Office of Gas and Electricity Markets
<b>SWI</b>	Solid wall insulation



# 1. Overview of the study

- 1.1. In September 2013, ICF International, working with GfK NOP, was commissioned by DECC to carry out research with households that had received ECO-funded installations in September 2013. This study forms part of the evaluation of the Green Deal and Energy Companies Obligation (ECO) programme that is being led by ICF International.
- 1.2. The aim of this study was to carry out research into the experiences of consumers who have had energy efficiency measures installed through ECO. It was tasked with evaluating consumers' experiences at each of the key stages of the ECO customer journey.
- 1.3. This study involved a mixture of quantitative and qualitative research with households that received ECO-funded installations in September 2013:
  - The primary methodology employed for this study was quantitative research, which was chosen because the main subject matter – the 'customer journey' under ECO – required a breadth of information in order to best capture the range of customer experiences;
  - The study also included a smaller piece of qualitative research designed to explore ECO customer journeys in more detail, for example reasons for levels of satisfaction or dissatisfaction across different elements of the sales and installation service under ECO.
- 1.4. The primary research was conducted by GfK NOP. Both the qualitative and quantitative research was based upon data on the number of measures installed under ECO and registered in September 2013 (and validated) by Ofgem. These data provided the population from which a sample of households was drawn for the quantitative survey and the qualitative research<sup>1</sup>.
- 1.5. This Technical Report provides information about the design and delivery of the study, and should be read alongside the analytical report and the research instruments used<sup>2</sup>.

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<sup>1</sup> It is important to note that information about measures installed under ECO is at a lag of a one month due to the time taken for information to be reported and verified. The survey of ECO beneficiaries was undertaken during the period 30 November to 24 December 2013 following the completion of validation checks by Ofgem

<sup>2</sup> Both available: <https://www.gov.uk/government/publications/energy-companies-obligation-eco-customer-journey-research>

## 2. Quantitative survey

### Drawing the sample

- 2.1. The population of interest for the quantitative survey consisted of households that had had an ECO installation lodged on the Ofgem Register in September 2013.
- 2.2. At the time of fieldwork (November and December 2013), there was another study also in the field, carrying out primary research with households that had had a Green Deal Assessment<sup>3</sup>. In order to avoid contacting households twice (since some ECO households had had Green Deal Assessments), the sampling frame was de-duplicated against households selected to be included in other elements of the evaluation.
- 2.3. The sampling frame was also de-duplicated against:
  - Households selected to be included in qualitative elements of the study (see Chapter 3)
  - Duplicate households within the Ofgem file (where more than one ECO measure was installed in the same property), in order to avoid contacting the same household more than once
- 2.4. The quantitative sample had two elements:
  - A *'main' representative sample of households which had ECO-funded installations in September 2013*. It was decided that the survey would look at the ECO customer journey as a single experience, rather than splitting it into three surveys exploring the three ECO obligations (Affordable Warmth, CERO and CSCO) separately. The goal of the study was to draw conclusions about the ECO customer journey rather than journeys under separate obligations, and for practical reasons relating to the need to generate clusters of households to facilitate survey fieldwork it was not feasible to treat each obligation in isolation.
  - A survey *'booster' sample of households that had received solid wall insulation (SWI) in September 2013*. Installation of SWI is important from a policy perspective as the measure is important to the achievement of ECO targets, but is relatively expensive and, at the point in time when the sample was being drawn, there had been relatively few installations of SWI across the ECO programme. The ECO database included 6.5% of households who had had SWI installed in September 2013, so a representative sample of 500 households was anticipated to yield around 30 surveys with SWI households. Because this was felt to be too small for separate analysis, a boost sample of SWI households was also designed.
- 2.5. A small number of households had only had low value improvements installed. Because of the lower involvement levels of these decisions and installations, the 213 households which had only had one of the following measures installed were excluded from the sample universe: draught proofing; hot water cylinder insulation; heating controls; and boiler repair only (as opposed to a new/ replacement boiler).

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<sup>3</sup> GfK NOP for DECC. Green Deal customer journey survey: summary report - quantitative survey wave 1. Available at: <https://www.gov.uk/government/publications/green-deal-customer-journey-survey-summary-report-quantitative-survey-wave-1>

## The main sample

- 2.6. Following de-duplication, the sampling frame was examined to establish which addresses could form part of viable clusters for fieldwork. Viable clusters were defined as having 10+ addresses within a single postcode sector: in September 2013 this comprised 32,946 addresses from the universe of 49,925 addresses, equating to 66% of the universe.
- 2.7. All clusterable addresses were listed and stratified by the following variables in the order shown:
- Region
  - Measure installed<sup>4</sup>
  - Obligation (HHCRO; CSCO; CERO)
  - Urbanity (urban; mixed urban/ rural & rural)<sup>5</sup>
  - Tenure (owner occupier; social tenant; private tenant; other)
  - Property type (non-flat; flat)
  - Route (GDAR; Chartered Surveyors Report (CSR); other)
- 2.8. Following stratification, 90 starting addresses were drawn at random. These formed the starting addresses for each sampling point. A 1 in n sample of the other addresses within that sector was drawn, and these formed the selected sample of addresses. The profiles of these are shown in Figure 2.1 and compared with the profile of the universe (ECO installations completed in September 2013) and the profile of all clusterable addresses (that is postcode sectors containing 10+ addresses).
- 2.9. The profiles were felt to form a close match to the profile of the universe, though slightly over-represented urban areas (75% of sampled addresses were in urban areas, compared with 68% of the sample universe). The profile of selected addresses was agreed by DECC in advance of fieldwork starting.

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<sup>4</sup> A large number of measures were shown in the Ofgem database, but for the purposes of stratification and weighting, the following categories were used: these are the most common measures installed: New boiler, CWI, Loft insulation, Solid Wall insulation and Other measure. Where households had multiple measures installed, a 'main measure' was selected to allow measure type to be used as a stratification and weighting variable. The prioritisation was in the following order: SWI; CWI; boiler; loft insulation; other.

<sup>5</sup> Urban areas are defined as those in which the population density is greater than 7 persons per hectare, Mixed urban/rural (or suburban) areas are defined as those in which the population density is greater than 1.5 persons per hectare but less than 7 and rural areas are defined as those in which the population density was less than 1.5 persons per hectare.

**Figure 2.1: Main sample: profile of sample universe, clusterable addresses and sampled addresses**

Description	Universe		Clusterable addresses		Sampled addresses		
	Number of addresses	% of total	Number of addresses	% of total	Number of addresses	% of total	
Region	East Anglia	1085	2%	553	2%	10	1%
	East Midlands	3093	6%	1785	5%	50	6%
	Greater London	3121	6%	1926	6%	60	7%
	North	3633	7%	2588	8%	70	8%
	North West	10404	21%	7552	23%	200	22%
	Scotland	5498	11%	4031	12%	110	12%
	South East (excl. London)	5275	11%	2512	8%	70	8%
	South West	2894	6%	1202	4%	30	3%
	Wales	2933	6%	1948	6%	60	7%
	West Midlands	6561	13%	5112	16%	140	16%
	Yorkshire & Humberside	5428	11%	3737	11%	100	11%
Urbanity	Urban	33954	68%	24853	75%	680	75%
	Mixed urban/rural and rural	15971	32%	8093	25%	220	25%
Core city <sup>6</sup>	Yes	14226	28%	10336	32%	240	27%
	No	35699	72%	22160	68%	660	73%
Pioneer Places <sup>7</sup>	Yes	12368	25%	6764	21%	220	24%
	No	37557	75%	26182	79%	680	76%

<sup>6</sup> In 2012 eight cities across England were awarded funding of around £13 million to help them kick-start the Green Deal in their regions. The cities also sought matching funding and/or providing direct support themselves. The focus of the Core Cities was upon raising awareness of the Green Deal through community engagement and show homes, and providing support to local supply chains including trained Green Deal advisors and registered installers

<sup>7</sup> Further information about Pioneer Places is available at <https://www.gov.uk/decc-local-authority-competition>

Description		Universe		Clusterable addresses		Sampled addresses	
		Number of addresses	% of total	Number of addresses	% of total	Number of addresses	% of total
Tenure	Owner Occupied	37121	74%	23286	71%	641	71%
	Private Rented Sector	8245	17%	5812	18%	153	17%
	Social Housing (RSL)	3631	7%	3173	10%	94	10%
	Unknown	928	2%	675	2%	12	1%
Property type	Flats	7461	15%	6328	19%	127	14%
	Non-Flats	42464	85%	26618	81%	773	86%
Obligation	CERO	17896	36%	13117	40%	357	40%
	CSCO	7676	15%	5584	17%	152	17%
	HHCRO	24260	49%	14183	43%	390	43%
ECO route	GDAR	19552	39%	14530	44%	389	43%
	CSR	7226	14%	4869	15%	135	15%
	Other	23147	46%	13547	41%	376	42%
Measure installed	SWI	3274	7%	3043	9%	88	10%
	Cavity Wall Insulation (CWI)	18134	36%	12493	38%	350	39%
	New Boiler	21670	43%	13015	40%	356	40%
	Loft Insulation	6706	13%	4313	13%	106	12%
	Other	141	<1/2%	82	<1/2%	0	0
<b>TOTAL</b>		<b>49925</b>	<b>100%</b>	<b>32946</b>	<b>100%</b>	<b>900</b>	<b>100%</b>

## The SWI boost

- 2.10. The sample for the SWI boost was drawn in the same way as the main sample. The SWI boost sample was drawn after the main sample, and addresses from the main sample were removed from the sampling frame for the SWI boost. In order to achieve a further 100 surveys with households which had had SWI installed, a sample of 200 addresses was drawn. This equated to 20 sampling points each consisting of 10 addresses.
- 2.11. All addresses which had had SWI installed were listed and examined to understand whether they were 'clusterable' (i.e. in postcode sectors containing 10+ addresses which had had SWI installed). Of the 2,955 addresses which had had SWI installed in September 2013, 2,621 were clusterable: which equates to 89% of the SWI installations universe.
- 2.12. All clusterable addresses were listed and stratified by the same variables as the main sample (with the obvious exception of measure type), and in the same order. Following stratification, 20 starting addresses were drawn at random, and these formed the basis of the sampling points. A further 9 households which had had SWI within each sector were selected at random to form the researcher assignment of 10 addresses. Checks were made to ensure that there was no more than one researcher assignment in a single postcode sector.
- 2.13. Profiles of the SWI sample universe, clusterable addresses and sampled addresses are shown in Figure 2.2. Once again, the profile of sampled addresses provided a good match with the universe, though slightly over-represented owner occupied properties (69% of sampled addresses were owner occupied, compared with 60% of the universe) and properties which were not flats (95% of sampled addresses, 91% of the universe).
- 2.14. The profile of addresses selected for the SWI boost was signed off by DECC in advance of fieldwork starting.

**Figure 2.2: SWI boost: profile of sample universe, clusterable addresses and sampled addresses**

Description	Universe		Clusterable addresses		Sampled addresses		
	Number of addresses	% of total	Number of addresses	% of total	Number of addresses	% of total	
Region	East Anglia	81	3%	81	3%	10	5%
	East Midlands	311	11%	272	10%	20	10%
	Greater London	4	<1/2%	0	0%	0	0%
	North	403	14%	382	15%	30	15%
	North West	426	14%	393	15%	30	15%
	Scotland	368	12%	325	12%	20	10%
	South East (excl. London)	106	4%	103	4%	10	5%
	South West	104	4%	78	3%	10	5%

Description		Universe		Clusterable addresses		Sampled addresses	
		Number of addresses	% of total	Number of addresses	% of total	Number of addresses	% of total
	Wales	306	10%	277	11%	20	10%
	West Midlands	417	14%	357	14%	30	15%
	Yorkshire & Humberside	429	15%	353	13%	20	10%
Urbanity	Urban	1778	60%	1548	59%	120	60%
	Mixed urban/rural	1177	40%	1073	41%	80	40%
Core city	Yes	572	19%	467	18%	40	20%
	No	2383	81%	2154	82%	160	80%
Pioneer Places	Yes	710	24%	661	25%	50	25%
	No	2245	76%	1960	75%	150	75%
Tenure	Owner Occupied	1762	60%	1512	58%	138	69%
	Private Rented Sector	84	3%	62	2%	8	4%
	Social Housing (RSL)	1078	36%	1022	39%	54	27%
	Unknown	31	1%	25	1%	0	0%
Property type	Flats	262	9%	254	10%	10	5%
	Non-Flats	2693	91%	2367	90%	190	95%
Obligation	CERO	2834	96%	2536	97%	190	95%
	CSCO	112	4%	79	3%	10	5%
	HHCRO	2	<1/2%	0	0%	0	0%
ECO route	GDAR	2371	80%	2156	82%	154	77%
	CSR	582	20%	465	18%	46	23%
	Other	2	<1/2%	0	0%	0	0%
<b>TOTAL</b>		<b>2955</b>	<b>100%</b>	<b>2621</b>	<b>100%</b>	<b>200</b>	<b>100%</b>

## Fieldwork

### Qualitative research input into initial questionnaire design

- 2.15. Qualitative research with ECO households was undertaken before and after the quantitative survey (See Chapter 3 for a description of the qualitative research methodology). A total of eight interviews were carried out with households prior to the commencement of quantitative research. Headline findings and interviewer feedback from these eight interviews were used to inform the development of the questionnaire for the quantitative survey of ECO households.

### Cognitive pilot

- 2.16. Once the questionnaire had been developed and agreed with DECC, a small cognitive pilot was carried out by the GfK NOP quantitative research team. These surveys were conducted by telephone between 18 and 20 November 2013 with 12 respondents to ensure the questionnaire was fit for purpose.

### Mainstage fieldwork

- 2.17. The survey process was based on the model tested in the Green Deal Assessment research<sup>8</sup>, with respondents given a choice of completing the survey online by themselves or having a researcher come to their home and conduct a face-to-face facilitated on-line survey. This approach was selected due to the limitations in the sampling frame. While the Ofgem database that was the basis for the sample contained a complete record of households receiving ECO measures within September 2013, the file contained addresses only and did not include names or telephone numbers. The lack of additional information available in the sample file therefore restricted the choice of sample design:
- A postal survey would have been feasible and all addresses in the file could be covered. However, response rates were likely to be low (around 10% even if incentives are paid, based on GfK NOP's experience of similar surveys) which would introduce significant non-response bias. In addition, because of the different 'routes' into ECO, the routing would need to be complex, which would be unsuitable for a postal survey questionnaire, and would be likely to result in poor quality and/or missing data;
  - The lack of names on the (Energy Performance Certificate) EPC register (which GfK NOP could have accessed, and which would contain information on any household that had an EPC lodged) meant that telephone number matching would be very inefficient. A test match was conducted in the run up to the first wave of the Green Deal Assessments Survey undertaken by GfK NOP for DECC, and only 9% of addresses could be matched. Even with a high response rate to a telephone survey (e.g. 50%), this would still mean that coverage would be extremely low (less than 5%). Quantifying the extent to which this non-coverage would introduce biases in response would also have been difficult, and it would have been likely that some groups would be much less likely to be included in the final sample because of these issues (e.g. younger people who are less likely to have a listed landline phone, tenants);

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<sup>8</sup> Consisting of successive 'waves' of research with households that had had Green Deal assessments. See <https://www.gov.uk/government/collections/green-deal-assessments-research>

- All addresses could be written to and invited to participate in an online survey. However, GfK NOP's experience shows that response rates would be likely to be low (around 10% if incentives are paid) which would again introduce non-response bias;
- A face-to-face survey could potentially have covered all addresses, though the cost per survey for a face to face survey would have been high, so this did not provide a cost effective solution.

2.18. In light of these considerations, the survey employed a hybrid online/ face-to-face approach<sup>9</sup>. The first contact with sampled households was via an advance letter which was used to introduce the survey and to invite respondents to complete the survey online (see Annex 1 for a copy). Non-responders to this online survey were contacted by a face-to-face researcher with a view to securing an appointment. As well as keeping costs per survey low by attempting the lowest cost method first, this mixed method design also provided a range of response methods and therefore enabled some groups who may be less likely to respond to a face-to-face survey to participate (e.g. shift workers, young people who are more internet confident and more likely to be out and about when the researcher calls). To reduce the impact of mode effects, the questionnaires used were exactly the same, with face-to-face surveys being self-completed by respondents on researcher's laptops rather than being administered by GfK NOP researchers.

2.19. DECC noted that vulnerable groups would be prevalent in the sample of ECO households, and additional care needed to be taken to ensure that as many as possible felt able to participate. In terms of reaching this group to complete a survey, the research team did not encounter any additional issues which could not be addressed through usual fieldwork procedures (i.e. minimum of three calls, on a range of different days of the week and at different times of the day). The project only employed researchers who were experienced in random probability fieldwork.

2.20. In addition, the following steps were taken to enable the survey process for vulnerable groups:

- Large print copies of the advance letter were available for those who requested it;
- The questionnaire was checked so that it was accessible to the widest range of respondents. Care was taken to ensure that language was clear, unambiguous and as simple as possible;
- If respondents had issues preventing them from engaging with the advance letter and/or online survey (e.g. literacy issues, poor eyesight, lack of internet access or internet confidence), the presence of a researcher encouraged them to participate;
- The researcher could assist by explaining the purpose of the survey and how the respondent can participate;
- The survey introduction and advance letter were purposely designed to not mention ECO, Green Deal or any related policy area, obligation, etc. Instead, the letter and introduction were personalised to the respondent and simplified to say that the survey was about their experience in having the specific energy saving home improvements installed (e.g. having loft insulation installed in September 2013). It was not assumed that respondents had any prior knowledge of the policy or the organisations involved, not least because for some vulnerable groups mentions of

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<sup>9</sup> This replicated the methodology used as part of surveys of households that had received Green Deal assessments

the policy areas might be off-putting. Throughout, the researcher was on hand to provide assistance and motivate respondents to participate;

- The availability of a £10 gift voucher incentive also helped to secure response from these vulnerable groups;
- The researcher carried a laptop which contained the full questionnaire, so those who did not have internet access could still complete the survey;
- Those who did not feel able to complete the survey online or by self-completion on the researcher’s laptop could request that the researcher administer the questionnaire for them. This could range from offering assistance in how to complete the survey (i.e. how to use the touch screen computer), through to reading out the questions/answers and administering the survey on the respondent’s behalf (e.g. if the respondent had poor eyesight and/or lower levels of literacy). Researchers were briefed to be prepared for all eventualities and are used to offering assistance to respondents of all abilities;
- Many of the researchers had previously completed disability confidence training to enable them to provide a comfortable survey environment for people who are disabled or who have additional needs to complete the survey;
- Additional time was built into the surveying assignment to enable researchers to provide this additional assistance if needed;
- If researchers encountered respondents who did not have English as a first language, they first attempted to secure the help of an interpreter within the household (aged 18+) who could assist with the survey. If this was not possible, the researcher was asked to make an appointment to return with a bilingual researcher, or for an appropriate language researcher to interpret by telephone. In the event, no households requested or took up this option;
- Researchers were asked to contact their area manager and/or the executive team if they had any specific queries about their assignment or how to maximise response rates amongst this group with additional needs.

2.21. Figure 2.3 summarises the number of surveys completed as part of the main and SWI boost surveys, and shows the response rates.

**Figure 2.3: Completed surveys and response rates for the main and SWI boost surveys**

	Main survey	SWI boost
Completed surveys...	468	103
...of which online	58	14
...of which face-to-face	410	89
Eligible sample#	872	181
(Adjusted) response rate	54%	57%

# After inaccurate and ineligible addresses were removed from the sample

2.22. In total, 571 surveys were achieved, broken down as follows:

- 468 surveys with households as part of the main survey
- 103 surveys with households as part of the SWI boost

2.23. The final mean average survey length was 31 minutes.

### Questionnaire implementation

2.24. The research instrument used has been published separately<sup>10</sup>.

2.25. Some households had more than one ECO measure installed in the reference month (September 2013). To enable the research team to manage survey length, a decision was taken to only follow up on one measure or group of linked measures in the survey. In just over 8,000 households (16% of all in the September 2013 sample file), more than one measure was installed, which would have meant that around 80 of the achieved surveys would be with a household which had had more than one measure installed.

2.26. The distribution of these multiple measures is shown in Figure 2.4. Following discussion with DECC on the relevant priorities, a decision was taken on which measures should be prioritised for each combination, and how these should be referred to in the questionnaire. In the case of households which had had more than one measure installed, but where one of the measures was not a priority, an additional question was added to the questionnaire (question H10) which invited comments on the other measures which were not followed up in detail in the questionnaire.

2.27. Although the survey was not conceived to be longitudinal in nature, questions at the end of the questionnaire asked for permission to re-contact, as well as for data linkage for statistical and research purposes. This approach was in line with data protection protocols, and was cleared by DECC, ICF and by GfK NOP's Director of Information Security.

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<sup>10</sup> Research instruments available at: <https://www.gov.uk/government/publications/energy-companies-obligation-eco-customer-journey-research>

**Figure 2.4: Measure prioritisation in questionnaire**

Measure	Number of cases in sample	Priority measure	Referred to in questionnaire as...
New boiler + Heating controls	3888	Both	New boiler and heating controls
CWI+ Loft insulation	3481	Both	CWI and loft insulation
Draught proofing + SWI	144	SWI	SWI
Loft insulation + SWI	220	SWI	SWI
New boiler + Loft insulation	67	New boiler	New boiler
CWI + Draught proofing	81	CWI	CWI
Loft insulation + New boiler	47	New boiler	New boiler
New boiler + CWI	36	CWI	CWI
Loft insulation + Hot water cylinder insulation	16	Loft insulation	Loft insulation
Hot water cylinder insulation + SWI	14	SWI	SWI
SWI + CWI	15	SWI	SWI
Flat roof insulation + SWI	8	SWI	SWI
New boiler + SWI	5	SWI	SWI
Loft insulation + Draught proofing	5	Loft insulation	Loft insulation
New boiler + Draught proofing	2	New boiler	New boiler
CWI + Hot water cylinder insulation	2	CWI	CWI
SWI + New boiler	1	SWI	SWI
Room in roof insulation + SWI	1	SWI	SWI
Floor insulation + SWI	1	SWI	SWI
Hot water cylinder insulation + CWI	1	CWI	CWI

## Data processing and analysis

- 2.28. The data processing resulted in the production of two datasets:
- A 'main' dataset which was a representative sample of households which had had an ECO installation in September 2013
  - A sample of households which had had SWI installed in the same time period. This included 63 households which had had SWI installed taken from the 'main sample', which were combined with the 103 surveys from the SWI boost to provide a SWI sample of 166 surveys. The SWI boost surveys were not added in with the 'main' sample, as to do so would have a significant negative impact on the effective sample size for the survey: reducing it to 67.8% of the achieved sample, or 387 surveys.

### Coding

- 2.29. The questionnaire contained a number of open-ended questions and questions which included 'other' answers which required coding. In order to get the most out of these open responses codeframes were developed by executives working on the project with reference to the objectives of the question.
- 2.30. GfK NOP's team of experienced in-house coders were fully briefed by project executives about the objectives of each individual question in advance of starting work.

### Post-survey weighting

#### Main sample

- 2.31. The profile of respondents surveyed in the main sample was examined in order to assess the extent to which weighting was required to correct for any minor differences between the surveyed sample and the sample universe.
- 2.32. As shown in Figure 2.5, the surveyed sample was a fairly close match to the universe, with the following notable differences:
- By region, there were fewer surveys achieved in the South East (7% of the achieved sample compared with 11% in the universe) and South West (3% of the achieved sample compared with 6% in the universe), and more surveys achieved in the West Midlands (18% of the achieved sample compared with 13% in the universe)
  - A lower proportion of flats (8% of the achieved sample compared with 15% in the universe)
  - Some differences by main measure installed:
    - SWI (13% of the achieved sample compared with 7% in the universe)
    - CWI (32% of the achieved sample compared with 36% in the universe)
    - Loft insulation (10% of the achieved sample compared with 13% in the universe)

**Figure 2.5: Profile of the main sample universe and the achieved main sample**

Description	Universe		Achieved sample		
	Number of addresses	% of total	Number of addresses	% of total	
Region	East Anglia	1085	2%	8	2%
	East Midlands	3093	6%	27	6%
	Greater London	3121	6%	24	5%
	North	3633	7%	43	9%
	North West	10404	21%	97	21%
	Scotland	5498	11%	52	11%
	South East (excl. London)	5275	11%	35	7%
	South West	2894	6%	13	3%
	Wales	2933	6%	27	6%
	West Midlands	6561	13%	86	18%
	Yorkshire & Humberside	5428	11%	56	12%
Urbanity	Urban	33954	68%	346	73%
	Mixed urban/rural	15971	32%	122	27%
Tenure	Owner Occupied	37121	74%	344	74%
	Private Rented Sector	8245	17%	73	16%
	Social Housing (RSL)	3631	7%	47	10%
	Unknown	928	2%	4	1%
Property type	Flats	7461	15%	39	8%
	Non-Flats	42464	85%	429	92%
Obligation	CERO	17896	36%	170	36%
	CSCO	7676	15%	77	16%
	HHCRO	24260	49%	220	47%
ECO route	GDAR	7226	14%	67	14%
	CSR	19552	39%	189	40%

Description	Universe		Achieved sample		
	Number of addresses	% of total	Number of addresses	% of total	
	Other	23147	46%	212	45%
Measure	SWI	3274	7%	63	13%
	CWI	18134	36%	152	32%
	New Boiler	21670	43%	204	44%
	Loft Insulation	6706	13%	49	10%
	Other	141	<1/2%	0	0%
<b>TOTAL</b>		<b>49925</b>	<b>100%</b>	<b>468</b>	<b>1005</b>

2.33. In order to correct for these minor differences, data were weighted by the seven stratification variables, in the following order:

- Region
- Main measure
- Obligation (HHCRO; CSCO; CERO)
- Urbanity (urban; mixed urban/ rural & rural)
- Tenure (owner occupier; social tenant; private tenant)
- Property type (non-flat; flat)
- Route (GDAR; Chartered Surveyors Report (CSR); other)

2.34. The effective sample size associated with this weighting was 80.7% of the total sample, or 378 respondents. The effective sample size describes the effect of the weighting on the accuracy of survey estimates. The effective sample size is dependent upon the size of weights applied to respondents: the more the weights deviate from 1, the smaller the effective sample size and the less accurate estimates will be.

### SWI sample

2.35. The design of the SWI sample followed the approach used for the main sample: the profile of respondents surveyed in the SWI sample was examined in order to assess the extent to which weighting was required to correct for any minor differences between the surveyed sample and the sample universe (Figure 2.6). Figure 2.6 shows the profile of the universe of households which have had SWI installed in September 2013, and compares this with the profile of respondents in the SWI boost sample and the SWI sample: the SWI sample comprises households which had had SWI installed in the 'main' sample, and those surveyed as part of the SWI boost.

2.36. Given the smaller sample size of the SWI sample, it is unsurprising that there are more differences between the universe and the surveyed sample: in particular related to an

over-representation of addresses in the South East (12% of all addresses in the SWI sample, compared with 4% of the universe) and an over-representation of households in mixed urban/rural areas (49% in the SWI sample, compared with 40% in the universe).

**Figure 2.6: Profile of the SWI boost universe and the achieved SWI boost sample**

Description	Universe		Achieved sample (SWI boost)		Achieved SWI sample (SWI boost + SWI households from main sample)		
	Number of addresses	% of total	Number of addresses	% of total	Number of addresses	% of total	
Region	East Anglia	81	3%	6	6%	8	5%
	East Midlands	311	11%	14	14%	16	10%
	Greater London	4	<1/2%	0	0%	0	0%
	North	403	14%	10	10%	17	10%
	North West	426	14%	13	13%	16	10%
	Scotland	368	12%	9	9%	19	11%
	South East (excl. London)	106	4%	7	7%	20	12%
	South West	104	4%	5	5%	10	6%
	Wales	306	10%	11	11%	14	8%
	West Midlands	417	14%	14	14%	21	13%
	Yorkshire & Humberside	429	15%	14	14%	25	15%
Urbanity	Urban	1778	60%	57	55%	84	51%
	Mixed urban/rural	1177	40%	46	45%	82	49%
Tenure	Owner Occupied	1762	60%	78	76%	118	71%
	Private Rented Sector	84	3%	3	3%	13	8%
	Social Housing (RSL)	1078	36%	22	21%	35	21%
	Unknown	31	1%	0	0%	0	0%
Property	Flats	262	9%	1	1%	1	1%

Description		Universe		Achieved sample (SWI boost)		Achieved SWI sample (SWI boost + SWI households from main sample)	
		Number of addresses	% of total	Number of addresses	% of total	Number of addresses	% of total
type	Non-Flats	2693	91%	102	99%	165	99%
Obligation	CERO	2834	96%	98	95%	160	96%
	CSCO	112	4%	5	5%	5	3%
	HHCRO	2	<1/2%	0	0%	0	0%
ECO route	GDAR	2371	80%	74	72%	119	72%
	CSR	582	20%	29	28%	47	28%
	Other	2	<1/2%	0	0%	0	0%
<b>TOTAL</b>		<b>2955</b>	<b>100%</b>	<b>103</b>	<b>100%</b>	<b>166</b>	<b>100%</b>

2.37. Because only one survey was conducted in a flat which had had SWI installed, it was not possible to weight the achieved sample by property type. Weights were instead applied by the other stratification variables, in the order shown below:

- Region
- Obligation (HHCRO; CSCO; CERO)
- Urbanity (urban; mixed urban/ rural & rural)
- Tenure (owner occupier; social tenant; private tenant)
- Route (GDAR; Chartered Surveyors Report (CSR); other)

2.38. The impact of this weighting delivered an effective sample size of 65.3% or 108 surveys, which exceeded the project requirements for the numbers required for SWI households (100 surveys) even when the effects of weighting were accounted for.

### Data analysis and reporting conventions

2.39. Data tables were produced that presented weighted responses to all questions. Cross-tabulations were carried out in order to sub-group analysis against selected key variables:

- Gender of respondent
- Age of respondent
- Ethnicity of respondent
- Whether the respondent had a long standing illness and/or disability

## Quantitative survey

- The region within which the household lived
- Whether the household was located in an urban or mixed urban/ rural area
- The tenure of the household
- The property type of the household
- The age of the property
- The method through which the household paid for energy
- The main fuel type used to heat the home
- The main measures installed under ECO
- The ECO Obligation through which the household received an installation
- Whether the household had a Green Deal Assessment or Chartered Surveyors' visit<sup>11</sup>
- Whether the household paid towards the cost of the ECO installation
- The duration of the pre-installation visit
- Whether the household was re-contacted after the installation
- The main source of information that households used to get more information about having a measure installed
- Whether the household received and/or looked at written information following the pre-installation visit
- Household income
- Whether the household received benefits
- How well the household was keeping up with energy bills
- The 'Green Deal segments' of the household<sup>12</sup>
- The household composition
- Whether the household had any negative comments about the installation
- Whether the household reported post-installation benefits

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<sup>11</sup> Data on whether households had received a GD assessment, Chartered Surveyor's visit or neither of these (note that this category did not distinguish between did not receive an assessment and received an assessment that was neither a GD assessment nor a Chartered Surveyor's visit) was obtained from the sample information, and was used as part of the cross-break analysis in order to explore whether the type of visit affected households' ECO customer journey

<sup>12</sup> As part of a programme of work relating to the Green Deal, in 2012 GfK NOP carried out research for DECC to explore different households' attitudes to energy efficiency measures. This work led to the creation of a 'segmentation' of households, based on their household characteristics, their attitudes towards energy efficiency installations, their willingness to pay for measures, and their motivations (e.g. whether they were driven by a wish to reduce household bills). See GfK NOP and Kantar Media Research for DECC (November 2012) Green Deal Segmentation: Report of a Segmentation of Owner Occupiers and Private Rented Tenants in Great Britain; available at [https://www.gov.uk/government/uploads/system/uploads/attachment\\_data/file/49750/Green\\_Deal\\_segmentation\\_-\\_research\\_report.pdf](https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/49750/Green_Deal_segmentation_-_research_report.pdf)

- Whether the household was thinking about further energy efficiency installations

2.40. All reporting of survey analysis followed the following conventions:

- All reported data are weighted, and all base sizes quoted in the report are unweighted
- All differences between groups and within sub-groups that are commented on in the analysis are statistically significant at the 95% confidence level
- Significant differences between the main and SWI samples are indicated by arrows (↑↓) within charts
- ‘Don’t know’ and ‘refused’ answers have been omitted from the charts except where they are relevant
- Where households are described as ‘respondents’, this indicates that evidence was generated through the quantitative survey

### Limitations of the quantitative research

- 2.41. Research was conducted with households that had received ECO-funded installations in September 2013. In September 2013, data<sup>13</sup> indicate that a total of 58,966 measures were installed under ECO, of which half (49%) were installed under Affordable Warmth, 36% under CERO, and 15% under CSCO. The relative balance between obligations changed somewhat subsequent to completion of research: as at July 2014<sup>14</sup> (over the lifetime of the ECO programme), 40% of installations had taken place under Affordable Warmth, 40% under CERO, and 20% under CSCO. The quantitative survey thus took place at a point in time when Affordable Warmth customers made up a greater proportion of ECO households than is now the case. Affordable Warmth households have a specific profile, reflecting the eligibility criteria associated with the obligation (e.g. receipt of benefits), and the nature of Affordable Warmth installations (boilers made up 71% of all Affordable Warmth installations as at July 2014, compared to 28% of all ECO installations). Readers should thus note that findings in respect of the ECO population as a whole are ‘skewed’ towards Affordable Warmth installations to a greater extent than is currently the case, and are thus not entirely comparable with lifetime of the programme.
- 2.42. Readers should also note that the sample included just 77 households that had had measures installed under the CSCO obligation (since this reflected the CSCO share of all installations carried out in September 2013). Results for CSCO households should thus be treated with some caution given the low base size and relatively wide confidence intervals (see below).

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<sup>13</sup> DECC (23 September 2014) Domestic Green Deal and Energy Company Obligation in Great Britain, Monthly report

<sup>14</sup> *Ibid.*

## Confidence intervals

- 2.43. A confidence interval is a measure of the range within which it is probable that a population value lies. The wider the confidence interval, the more variation there is in an estimate of the population value. It is typical to calculate confidence intervals using a 95% confidence level. This means that we are 95% certain that the population value lies within the confidence interval (i.e. that if we drew 100 samples from the population and asked the same question, in 95 of these 100 samples, their response to the question would lie within the range of the confidence interval).
- 2.44. Figure 2.7 shows the confidence intervals for a selection of sample sizes for a range of survey estimates (e.g. percentages of survey respondents). For example, if 468 ECO households answered a yes/no question and 50% said 'yes', we can be 95% certain that between 45.5% and 55.5% of all ECO households in the universe would have answered 'yes'. As this table demonstrates, confidence intervals narrow (meaning greater precision about the true population value) when the sample size increases and/or where responses are more 'polarised' (i.e. where a high/low proportion of survey respondents provide a particular response).
- 2.45. Note that in several places within the main report, sub-group analysis was undertaken. Some of these sub-groups are shown in Figure 2.7 (e.g. differentiated between the three obligations that make up ECO). In these cases the base sizes are lower than the total sample size of 468 households, and the confidence intervals are wider. This means that there is slightly less precision about the true population value. Any small differences in the data where base sizes are low should thus be treated with caution, though throughout the main report only statistically significant differences have been noted in the text.

**Figure 2.7: Confidence intervals for the quantitative survey (expressed as +/- %) for a selection of samples and survey responses (percentages)**

Type of actor	Sample size	Confidence intervals (+/-%) for selected survey responses		
		10% / 90%	30% / 70%	50% / 50%
All ECO households	468	2.7	4.2	4.5
SWI households	166	4.6	7.0	7.6
Affordable Warmth households	220	4.0	6.1	6.6
CSCO households	77	6.7	10.2	11.2
CERO households	171	4.5	6.9	7.5

## 3. Qualitative research

### Overview

- 3.1. Qualitative interviews were undertaken with a purposively-sampled selection of individuals from households that had had ECO measures installed during September 2013. The focus of the qualitative research was on understanding the ECO Customer Journey, and to explore customers' choices, decisions and experiences of the ECO programme. A face-to-face depth interview approach met the need for a detailed, context-rich and holistic understanding of the energy efficiency measure that households had installed under ECO, and their post-installation experience(s).
- 3.2. In particular, the qualitative interviews were designed to collect evidence to enable the study team to:
  - Understand the ECO customer journey
  - Identify the key stages / specific elements of the customer journey, including initial expectations and intentions and changes in these over time
  - Understand what happens at each stage of the customer journey
  - Understand motivations and barriers for different behaviours during the customer journey
  - Identify trigger / drop-out points in the customer journey, and reasons for this including if done by landlord or tenant
  - Identify changes in intentions and actions and reasons for this
  - Explore the role of other influences (e.g. marketing, PR, financial and household situation) in the customer journey and on customer behaviour
  - Understand how customers experience the ECO customer journey
  - Inform the design of the quantitative questionnaire

### Sample design

- 3.3. Qualitative interviews were undertaken with a purposively-sampled selection of individuals from households that had had ECO measures installed during September 2013. The sample was designed to ensure coverage of a range of individual/ household characteristics (e.g. a mix of ECO obligations, interviewee ages), and so minimum interview numbers were allocated to selected interviewee characteristics (see Figure 3.1 for details).
- 3.4. In total, two qualitative interview samples were drawn, in order to ensure a range of customer experiences:
  - Contacts who had been identified during previous GD Assessments research<sup>15</sup> (in order to ensure that the qualitative sample included households that had had a GD

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<sup>15</sup> Consisting of successive 'waves' of research with households that had had Green Deal assessments. See <https://www.gov.uk/government/collections/green-deal-assessments-research>

Assessment, and had decided to have an ECO installation following their assessment);

- A sample of households was obtained from a database of customers who had an ECO-funded installation recorded with Ofgem in September 2013. As a number of projects were running concurrently and making use of the Ofgem September data, including the quantitative research, a process of de-duplication took place. The data to be used for qualitative sampling were selected first, and the sample file was subsequently de-duplicated against this for use in the quantitative research.

## Recruitment

- 3.5. A letter was sent to all potential participants, providing them with an opportunity to opt out of the research (see Annex 2 for a copy of the advance letter). Although the Ofgem database did not contain telephone numbers, these were obtained via a process of number-matching whereby public sources were used to obtain telephone numbers based on name and address data. Potential participants were then contacted by telephone and a set of screening questions was asked to establish the participant's suitability to take part according to the agreed sample specification (see above). Assuming the household 'passed' the screener, an appointment was made, confirmed by letter (with a further option to opt out). Participants were reminded of the appointment 24 hours in advance. A £40 incentive was paid to participants.

## Overview of achieved sample

- 3.6. In total, 28 interviews were completed<sup>16</sup>. As shown in Figure 3.1, it was not always possible to achieve the minimum target number of interviews across the selected interviewee characteristics. This was because it was necessary to carry out interviews in geographical clusters to reduce travel time between interviews<sup>17</sup>, and for interviewee characteristics that were relatively rare (e.g. households that held negative views of their ECO experiences, households with SWI installed), it was not possible to identify and secure interviews with households during the fieldwork period in the selected clusters.

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<sup>16</sup> Consisting of 20 interviews from the Ofgem household sample and 8 interviews from the sample of contacts from previous research.

<sup>17</sup> Interviews were carried out in London (11 interviews), Leigh (1 interview), Leeds (3 interviews), Birmingham (8 interviews) and Manchester (5 interviews)

**Figure 3.1: Characteristics of the target and achieved samples of qualitative interviews**

Sample characteristics	Sample categories	Minimum intended sample	Achieved sample (no. interviewed)
Interviewee age	18-44	8	6
	45+	8	22
ECO obligation under which measure was installed <sup>^</sup>	Affordable Warmth	6	8
	CERO	6	5
	CSCO	6	7
Individuals' tenure type	Owner occupier	3	23
	Private renter	3	2
	Council renter	3	3
Measure installed under ECO	New boiler	To achieve a spread across the measures	10
	Loft insulation		13
	Cavity wall insulation		4
	Solid wall insulation		1
House type	Flat	3	3
	Detached house	3	2
	Semi-detached house	3	11
	Terraced house	3	12
Satisfaction with ECO experience <sup>#</sup>	Very positive	To achieve a spread across positive or neutral experiences	13
	Quite positive		12
	Neither positive/negative		0
	Quite negative	3	1
	Very negative	3	2
Interviewee gender	Male	8	11
	Female	8	17
Interviewee ethnicity	White or white British	To achieve a spread across ethnicities	21
	Black or black British		1
	Asian or Asian British		6
Children under 16 years in household?	Yes	8	10
	No	8	18

**# Note: this was determined as part of a screener during interview set-up; <sup>^</sup> for the 8 households sampled from previous assessments research, the obligation was not known**

## Fieldwork

- 3.7. Qualitative interviews were carried out in-home by staff from GfK NOP between 4 and 28 November 2013. Each interview lasted for around an hour in length. Interviewees were asked whether they were happy for the interviews to be recorded and were reassured that the audio recordings would be stored securely and treated in confidence and would only be accessible to staff from the research team who were working on this study. None of the interviewees opted out of recordings, so all interviews were recorded.
- 3.8. The interviews used a semi-structured interview guide<sup>18</sup>. All interviewees were asked about:
- Their opinions on home energy efficiency, and whether they had ever installed energy efficiency improvements
  - Their awareness and understanding of ECO, and of other government initiatives (including the Green Deal)
  - Their experiences of each stage of the ECO customer journey, from initial contact through to installation. At each stage, questions probed the details of their experience, and how they felt about the process
  - ECO installations, including any dissatisfaction with the installation process, and the impacts of having had a measure installed under ECO
- 3.9. The exact flow and question wording was also tailored by the interviewer to best fit the pattern of the interview and the responses of the interviewee.

## Analysis of qualitative data

- 3.10. Interviews were recorded and, on completion of the qualitative interviews, the findings were discussed amongst the team of qualitative interviewers in order to help identify key trends and themes from the interviews. In addition, the headline findings and interviewer feedback from the first eight qualitative interviews were used to inform the development of fieldwork approaches and research tools for the quantitative survey of ECO households.
- 3.11. Analysis was conducted by each researcher listening back to recordings of their own interviews, and taking detailed notes. A framework approach was applied by ICF and GfK NOP in order to undertake thematic analysis of qualitative data, based primarily on between-case analysis (i.e. examination of patterns of responses across questions, and whether this varied depending on the characteristics of interviewees, such as the type of measure installed and their backgrounds). Themes were structured around the stages of the customer journey (initial engagement, motivations to proceed, pre-installation assessments or visits, post-assessment actions, households' installation experiences, and households' post-installation experiences).
- 3.12. Cross-cutting topics included various background characteristics: specifically the measure that households had installed under ECO, the obligation that the measure fell within, and various demographic (e.g. gender, age) and house (e.g. housing type, tenure) characteristics. This approach to qualitative data analysis allowed the responses to particular topics to be grounded in interviewees' own accounts, whilst also enabling analysis of the key research themes. Relevant direct quotations were also

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<sup>18</sup> Research instruments available at: <https://www.gov.uk/government/publications/energy-companies-obligation-eco-customer-journey-research>

included in the framework and have been used in the main report to help to illustrate key points and perspectives.

- 3.13. Where households are described in the main report as 'interviewees', this indicates that evidence was generated through qualitative research.

### Limitations of the qualitative research

- 3.14. As Figure 3.1 indicates, within the fieldwork period it was only possible to carry out a single interview with a household that had had SWI installed, and with a household that had had a negative experience of ECO. Due to the small sample size, it was thus not possible to undertake thematic analysis of households' experiences of SWI installation, or to explore in depth the reasons for a negative experience of ECO (though note that the results of these interviews were still included within the wider analysis of qualitative data).
- 3.15. Furthermore, it should be noted that ECO was a relatively 'passive' experience for many households. This could be because the process was entirely arranged by a landlord, for example, or because, even though it was the households' decision to participate, the offer of free support meant that there was often little in the way of choice exhibited. For these reasons, in some cases there were limits to the extent to which qualitative research could explore the decision-making processes underlying households' ECO customer journey.

# Annex 1: Quantitative survey advance letter



Department  
of Energy &  
Climate Change



Date 28<sup>th</sup> November 2013

Dear householder

## **ENERGY SAVING MEASURES – HAVE YOUR SAY**

I am writing to ask for your help **and to offer you a £10 gift voucher to say thank you.**

I understand that your household had <MEASURES> installed for free or at a reduced price recently. We would like to know your views and experiences of having this work done.

The Department of Energy and Climate Change (DECC) is the Government department responsible for household energy efficiency. DECC has asked an independent research company called GfK NOP to conduct a survey of households which have had energy saving improvements installed recently.

Your address has been chosen at random from a list of such households and we would like to ask for some information about the work that was done, and other related topics. Please note that even if the work was arranged by someone else, e.g. your landlord or housing association, we would still like to hear from you. The survey should take no more than 30 minutes to complete, and as a thank you for taking part we will send you a **£10 gift voucher.**

You can take part in one of two ways:

You can visit <https://www.surveys.com/GDECO> (by typing the full web address into your browser) and when prompted, please enter your ID <ID> and password <Password> - this will take you to the survey. The online survey will be available to complete **from Saturday 30<sup>th</sup> November.**

Your voucher will be sent to you in the post after you complete the survey.

An interviewer will visit your address to invite you to take part in the survey. He/she will make an appointment to return at a more convenient time if you're unable to do it when they first call.

Your responses will be treated in the strictest of confidence and in line with the Data Protection Act. They will not be passed to the organisation(s) that arranged or installed the energy saving/energy efficiency improvement, and you will not be contacted again without permission.

If you have any more questions about the research, you can ask the interviewer when they call or you can contact GfK NOP by email at [REDACTED] or on [REDACTED]. If you have any concerns or want to contact an official at DECC you can contact [REDACTED] at [REDACTED] or on [REDACTED].

I hope that your household will be able to take part. The information from this research will be a valuable input to services for households in Britain, and we will use it to try to improve household energy efficiency for all.

**Thank you in advance for your help.**

Yours sincerely,

[REDACTED]

# Annex 2: Qualitative interview advance letter



Department  
of Energy &  
Climate Change



Date 24/10/13

Dear householder

## RESEARCH STUDY

I am writing to ask for your help with a research study. I understand that recently you had some energy saving/energy efficiency improvements installed in your home. We are keen to speak to you about your experience of having this improvement work done and may contact you by telephone to see if you may be eligible to take part in our research study.

### What is the research study about?

The Department of Energy and Climate Change (DECC) is the Government department responsible for household energy efficiency. DECC has asked an independent research company called GfK NOP to conduct interviews with households who have had an installation, in the last few months to gather their views and opinions of this. Your address has been chosen at random from a list of such households.

### What will it involve?

Our researchers may telephone you and ask a few questions to see whether you may be eligible to take part in the study. If eligible, we may agree a time for one of our researchers to visit you in your home to conduct an interview with you lasting for one hour, or we may contact you to take part in a shorter telephone interview lasting 30 minutes. The topic of the interview would be your experiences of having the installation, and your views and opinions of this. **If chosen to be involved in the interview in your home, you would receive £40 cash as a thank you for taking part in the interview.** If chosen to take part in the 30 minute telephone interview you would receive £40 in vouchers. This payment is non-taxable.

### What happens next?

If you would prefer **not** to be contacted to be invited to take part in an interview, please call us on [REDACTED] or email us at [REDACTED] to opt out. If you are happy for us to contact you, please ignore this letter and we will be in touch with you via telephone to see if you are eligible to take part.

Should you take part in the research, your responses will be treated in the strictest of confidence and in line with the Data Protection Act. They will not be passed to your assessor or installer, and you will not be contacted again without permission.

If you have any more questions about the research, you can ask the interviewer when they call or you can contact GfK NOP by email at [REDACTED] or on [REDACTED]. If you have any concerns or want to contact an official at DECC you can email or call [REDACTED] at [REDACTED] or on [REDACTED].

I hope that your household will be able to take part. This research is essential for the Government to learn about how best to support households in Britain to achieve greater energy efficiency.

**Thank you in advance for your help.**

Yours sincerely,

[REDACTED]

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Department of Energy & Climate Change  
3 Whitehall Place  
London SW1A 2AW  
[www.gov.uk/decc](http://www.gov.uk/decc)  
URN 14D/474