



Department
of Energy &
Climate Change

Green Deal Assessments Research

Research report from Waves 1, 2 and 3, and the Wave 1 follow up survey

January 2014

Table of contents

EXECUTIVE SUMMARY	2
CONTENTS	2
BACKGROUND AND OBJECTIVES	2
METHODOLOGY AND SAMPLING	2
PROFILE OF HOUSEHOLDS HAVING A GREEN DEAL ASSESSMENT	3
THE ASSESSMENT EXPERIENCE	4
POST ASSESSMENT: ACTIONS AND INTENTIONS.....	6
CHANGES IN INTENTIONS AND ACTIONS	7
THE INSTALLATION EXPERIENCE	8
OVERALL CONCLUSIONS	9
BACKGROUND AND OBJECTIVES	11
BACKGROUND TO THE RESEARCH	11
SURVEY METHODOLOGY AND SAMPLING	13
REPORTING CONVENTIONS.....	14
QUALITATIVE DEPTH INTERVIEWS.....	15
GREEN DEAL ASSESSMENT SURVEY	17
PROFILE OF THOSE HAVING AN ASSESSMENT	17
OVERVIEW OF SAMPLE PROFILE.....	17
PROFILE OF THOSE HAVING A GREEN DEAL ASSESSMENT BY GREEN DEAL SEGMENT	19
THE ASSESSMENT EXPERIENCE	21
REASONS FOR HAVING A GREEN DEAL ASSESSMENT	21
PAYING FOR THE GREEN DEAL ASSESSMENT.....	27
RECEIPT OF THE GREEN DEAL ADVICE REPORT (GDAR).....	28
SATISFACTION WITH FINDING AN ASSESSOR AND MAKING AN APPOINTMENT	32
CLARITY OF THE ASSESSMENT.....	34
OVERALL VIEWS OF THE ASSESSMENT	37
REASONS FOR DISSATISFACTION WITH THE ASSESSMENT	39
POST ASSESSMENT: ACTIONS AND INTENTIONS	44
RECOMMENDED MEASURES.....	44
ACTIONS TAKEN.....	47
RECOMMENDED SELECTED MEASURES – THE CUSTOMER JOURNEY	51
SHOPPING AROUND FOR INSTALLERS	52
FINANCING INSTALLATIONS.....	53
FOLLOW UP SURVEY	63
BACKGROUND AND OBJECTIVES	63
SAMPLE AND METHODS	63
IMPORTANT NOTE ON THE FINDINGS	64
PROFILE OF THOSE INTERVIEWED	64
INTENTIONS AND ACTIONS	65
CHANGES IN INTENTIONS AND ACTIONS	69
CONCLUSIONS (AND NEXT STEPS)	83

Executive summary

Contents

- Background and objectives: page 2
- Methodology and sampling: pages 2-3
- Profile of households having a Green Deal assessment: pages 3-4
- The assessment experience: pages 4-6
- Post assessment actions and intentions: pages 6-7
- Changes in actions and intentions: page 7-8
- The installation experience: page 8
- Overall conclusions: page 8-9

Background and objectives

The Green Deal was launched by the Government on 28th January 2013 and aims to reduce carbon emissions and improve domestic energy efficiency in Great Britain. As well as providing opportunities for households to find out how to make their homes more energy efficient through Green Deal assessments, the Green Deal also offers a new way to pay for energy saving home improvements through electricity bills.

GfK NOP was commissioned by DECC to conduct research with a sample of households which had had Green Deal assessments. The research was commissioned in order to find out more about the assessment experience, and to explore what households have done and plan to do since having the assessment. Three waves of research were conducted:

- Wave 1: Households which had had an assessment between launch - 31st March 2013
- Wave 2: Households which had had an assessment between 1st April - 30th June 2013
- Wave 3: with households having an assessment between 1st July - 30th September 2013

In September 2013, GfK NOP was commissioned to conduct a follow up survey of assessment customers from Wave 1 of the research which aimed to assess whether intentions turn into actions, motivations for taking action after the assessment and experiences of installation amongst those who had measures installed.

Summary findings for each survey have already been published. This report contains more detailed analysis and a synthesis of findings. The summary findings can be found at <https://www.gov.uk/government/collections/green-deal-assessments-research>

Methodology and sampling

For full details of all methodologies, sampling and weighting, please refer to the technical report (forthcoming) <https://www.gov.uk/government/collections/green-deal-assessments-research>

Assessment Surveys

For each wave of research GfK NOP drew a random sample of 900 addresses which had had a Green Deal assessment in the time periods shown above. A mixed-mode interviewing approach was used whereby respondents were able to complete the survey either online or face-to-face:

- Wave 1 fieldwork was conducted between 26th April and 2nd June 2013. 507 households took part in the research, equating to a response rate of 56%.
- Wave 2 took place between 26th July and 26th August 2013. 499 households took part in the research, a response rate of 55%.
- Wave 3 took place between 29th October and 1st December 2013: 500 households took part in the research, a response rate of 56%.

At each wave, data were weighted to the known profile of all households which received a Green Deal assessment in the corresponding sampling periods using the following characteristics: region, property type and tenure. Results included in this report are based on weighted data.

GfK NOP conducted 28 qualitative depth interviews with households which had had a Green Deal assessment in September. These depth interviews took place in November and December 2013 and were carried out in London, Leeds, Birmingham and Manchester. Each interview lasted around 1 hour and took place at the participant's home.

Wave 1 follow up

The survey sought to follow up the 338 Wave 1 respondents who gave permission to be recontacted and provided a telephone number. A total of 190 households participated in the research, which represents a 60% response rate. Reflecting the sample for the Wave 1 Assessment Survey, the sample covered England and Wales only.

Data were weighted to the known profile of all households which received a Green Deal assessment in January-March 2013 using the following characteristics: region, property type and tenure. Results included in this report are based on weighted data.

Because the objective of this element of the research was to see if intentions turned into actions and to gather further evidence on the customer experience, the study did not aim to be representative of the whole assessment population. Findings should be treated as indicative and caution should be exercised with how results are used. Results from this survey should not be used to extrapolate to the number of households installing measures or installing individual measures. However, the findings do add value over and above the assessments research as they allow us to follow up on households and see if intentions have turned into actions.

Profile of households having a Green Deal assessment

In 2012 GfK NOP and DECC developed the Green Deal segmentation¹ in order to understand which key groups exist in relation to potential demand for the Green Deal, what their motivations and barriers are, and which communications channels might best be used to reach them. The chart below shows the segment profile of households interviewed in all waves of the Green Deal assessment survey against the profile from the latest wave of the Green Deal Household Tracker Survey², which was conducted in March 2013.

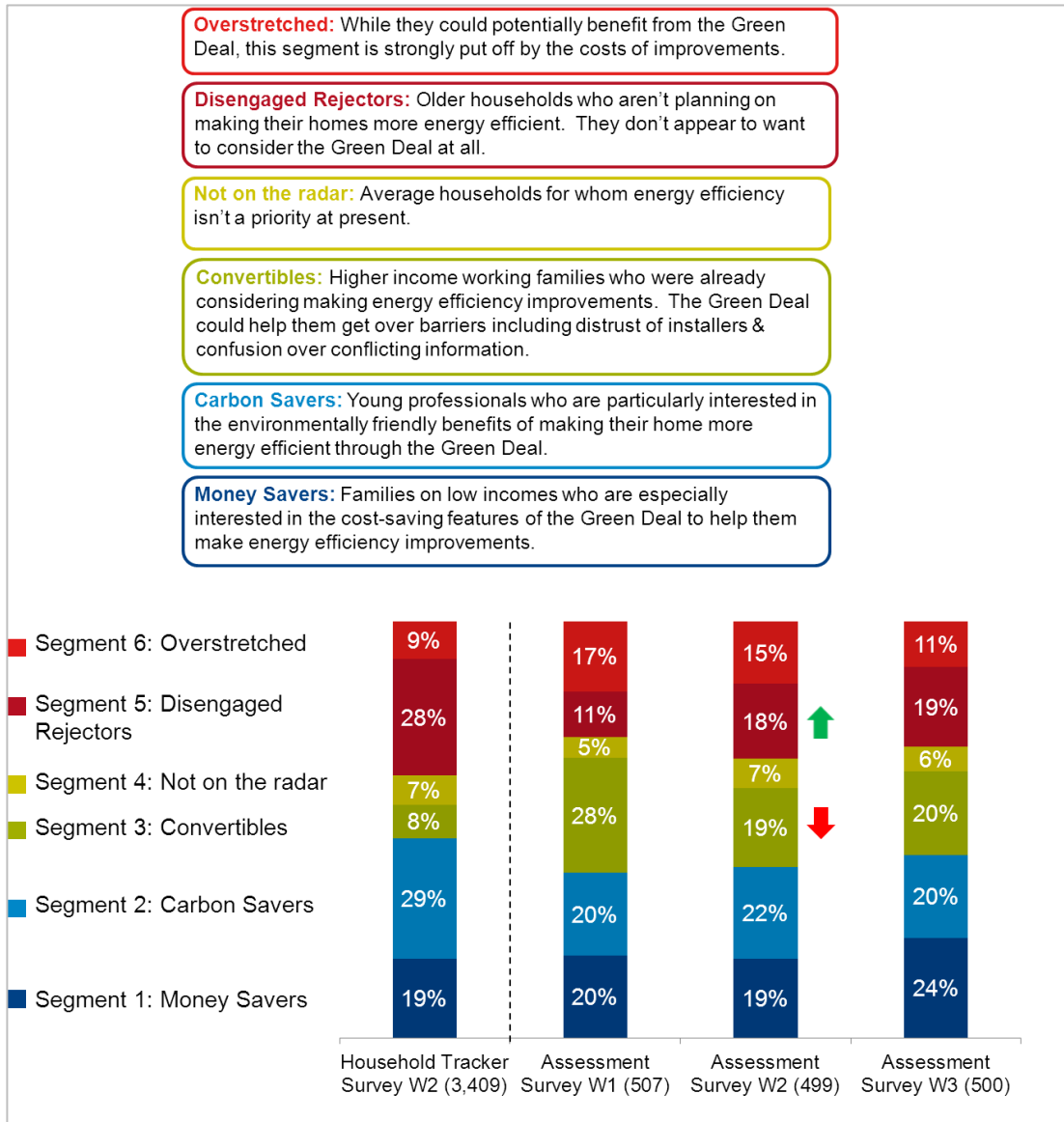
All three waves of the Green Deal Assessment Survey contained a significantly higher proportion of households in the Convertibles segment, which reflects their segment profile as households

¹ Detailed information about the Green Deal segments can be found at https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/49750/Green_Deal_segmentation_-_research_report.pdf

² For more details about the Green Deal Household Tracker Survey see: <https://www.gov.uk/government/publications/green-deal-household-tracker-survey-waves-1-and-2-report>

that have had a Green Deal assessment. In contrast, there were fewer households in the Carbon Savers segment (who are more likely than average to be tenants) and Disengaged Rejectors segment. Though the proportion of the latter in the overall sample has increased since Wave 1, this may be because people in this group are more likely than average to have had measures installed for free and therefore be ECO customers.

Chart A: Profile of Green Deal segments



The assessment experience

Sources of awareness of Green Deal assessments: At all waves, direct marketing was a key source of awareness. Cold calling/door-to-door sales increased from 19% at Waves 1 and 2 to 35% at Wave 3, while the proportion who said they had received a leaflet through their door remained fairly stable over time (16-17% across all waves). Many qualitative participants described a passive experience in finding out about and arranging for a Green Deal assessment. These participants had experienced cold calling at the door or over the telephone where they had agreed to arrange an assessment.

Motivations for having an assessment: The most common motivations for having a Green Deal assessment have been fairly consistent over time: wanting to save money on energy bills (68% at Wave 1, 61% at Wave 2, 63% at Wave 3), closely followed by the assessments being free (60% at Wave 1, 58% at Wave 2, 56% at Wave 3). These motivations were echoed by qualitative participants who were interested in having a free assessment to find out how to save money on energy bills whilst making their home warmer and more comfortable.

Paying for an assessment: In all waves, around four fifths said that they did not pay for their Green Deal assessment (85% at Wave 1, 80% at Wave 2, 84% at Wave 3). The majority said that the company that carried out their assessment did not charge them a fee, and the proportion saying this has increased over time (59% at Wave 1, 63% at Wave 2, 69% at Wave 3). However, the proportion saying that the fee was paid in full by their landlord, local authority, housing association or another organisation; has fallen from 26% at Wave 1, 17% at Wave 2 to 15% at Wave 3. Around one in ten at all waves (8% at Wave 1, 12% at Wave 2, 8% at Wave 3) had paid for the assessment in full themselves.

Accessibility of assessments: The majority of consumers who had had an assessment were satisfied with how long they had to wait for an appointment (74% at Wave 3) and the ease of finding an assessor (63% at Wave 3). These findings were unchanged over time.

Receiving a Green Deal Advice Report: The proportion of households who had received their Green Deal Advice Report has declined significantly over time. 64% of households said they had received their Advice Report when they were interviewed at Wave 1, but this fell to 54% by Wave 2 and 44% by Wave 3. While around one in ten said that the report was sent to their landlord, local authority or housing association and not seen (9% at Wave 3), around one in ten of respondents said they had not received their report, but were expecting to do so (10% at Wave 3).³ Whilst some qualitative participants had received or were waiting to receive a Green Deal Advice Report others had not heard of it and were not expecting to receive one.

Clarity of advice: Households were asked which things were made clear to them in either the Green Deal Assessment Report or in discussion with the assessor. At Wave 3: 77% said it was clear which energy saving improvements were recommended during the assessment (similar to previous waves), 72% said it was clear what the improvements would entail (maintaining the increase seen at Wave 2 of 74% from 64% at Wave 1), 70% said the next steps were clear (maintaining the increase at Wave 2 (73%) up from 61% at Wave 1), and 66% said the costs of the improvements were clear (previously 67% at Wave 2 up from 59% at Wave 1).

Though the surveys found that clarity of advice was positive, the qualitative research showed some areas that are not working as well. Participants stated they understood that the next steps were that they would need to source quotes but they had hoped for some guidance on how and where to source these. They also expressed some concern over the lack of tailored advice for the individual property and guidance on next steps detailed in the Green Deal Advice Report. The ranges of estimated costs were also felt to lack usability, with participants noting that it was difficult to gauge what real costs would be.

Overall satisfaction with the assessment: At all waves, the assessment itself was rated as useful in helping customers to understand how to make their home more energy efficient (79% at Wave 3). Consumer confidence in the recommendations made by the assessor was also high

³ 10% had not seen a copy and where not expecting to receive one, 6% said they saw a copy during the assessment and 16% said don't know/not sure.

(78% at Wave 3), and the likelihood of recommending a Green Deal assessment to friends and family also increased significantly from Wave 1 (up from 64% at Wave 1, 72% at Wave 2, to 76% at Wave 3).

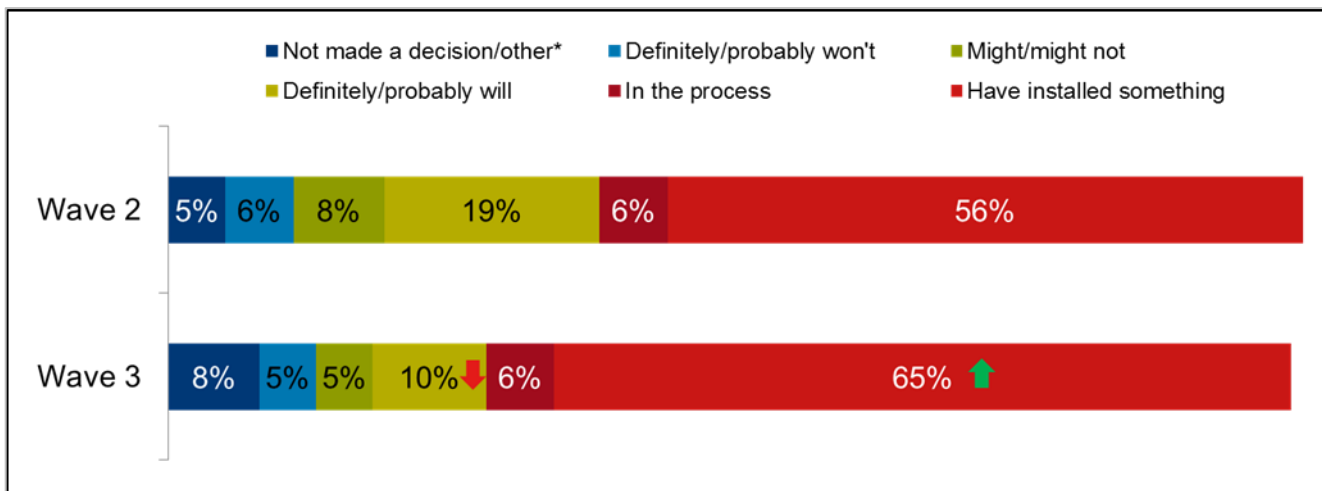
Qualitative participants described mixed satisfaction with the assessment. Overall participants felt that the assessor was professional and friendly. Generally they saw the assessment experience as positive and perceived the assessment to be thorough. However, some felt that the assessment was too generic for their property.

Post assessment: actions and intentions

All households were asked what they had done or intended to do after their assessment. Only Waves 2 and 3 are shown below because Wave 1 data are not comparable (only those who had received their Green Deal Advice Report were asked the question).

The proportion who said they had installed at least one measure increased over time, from 56% at Wave 2 to 65% at Wave 3, while a further 6% said they were in the process of installing measures. There was an associated decline in the proportion saying they definitely/probably will install measures (falling from 19% at Wave 2 to 10% by Wave 3).

Chart B: Waves 2 and 3 Post assessment actions and intentions (most action taken)



* Option only available to those that had not received their Green Deal Advice Report

The increase in the proportion who said they had installed measures was almost entirely made up of people who had had measures installed funded by third parties: the proportion (of all households) who had installed at least one measure funded by third parties increased from 31% at Wave 2 to 43% at Wave 3. This shows that the increase in those claiming to have installed something between Waves 2 and 3 (56% to 65%) is down to third party funding. The proportion saying they had installed measures which were fully or partly self-funded remained the same.

The proportion of recommended measures which had been installed also increased significantly, rising from 28% at Wave 2 to 37% at Wave 3. This is all the measures recommend as part of Green Deal assessments and is different to the figure in the above paragraph as households are often recommended more than one measure.

Installing measures: For 59% of households that had installed a selected measure at Wave 3, the same company that carried out the Green Deal assessment was also responsible for the installation. A further 15% said another company recommended by the assessment company had carried out the work. Responses were consistent at Wave 2. Only 6% of those who had installed a measure at Wave 3 said they had got more than one quote for the work.

Paying for installed measures: Households that had installed measures were asked how they had financed the installations. Responses (shown as a % of installations) given were broadly consistent over time. The most common funding source mentioned by those who had had something installed was for an energy company to have paid in full or in part (22% at Wave 3, 19% at Wave 2), whilst 16% at Wave 3 (13% at Wave 2) said that the local authority had paid and around one in ten (13% at Wave 3) said that the measure had been financed by a Green Deal provider/installer other than the energy company. One in ten (14% at Wave 2 and 11% at Wave 3) said that they had paid in full or in part from savings or regular income. While around one in ten (9% Wave 3, 13% Wave 2) said they had used the Green Deal cashback scheme to (part) finance measures, no respondents said they used Green Deal finance.

Amongst those that had installed something but not used either the Green Deal Finance or cashback scheme, the main reasons given were that the costs were covered by someone else (41% at Wave 3) or that Green Deal finance options were not suggested (17% at Wave 3, down from 27% at Wave 2).

Overall, at Wave 3 20% of those who had installed at least one selected measure mentioned some form of self-financing (savings/regular income, loans from bank/building society, loans from installers/providers, mortgage extension or other finance), whilst 70% said that a measure had been paid for fully or partially by any third party, including grants and subsidies (local authority, housing association, landlord, energy company, other Green Deal provider/installer, government scheme/grant, free). These figures were very similar to those seen at Wave 2 (21% and 60% respectively).

Within the self-finance options, paying from savings/regular income or a loan or finance through an installer or provider were most commonly mentioned. The specific self-finance methods mentioned by respondents were:

- Savings/regular income: 14% at Wave 2, 11% at Wave 3
- Loan/finance through installer/provider: 5% at Wave 2, 4% at Wave 3
- Loan from bank/building society: 2% at Wave 2, 2% at Wave 3
- Other finance (credit card, high street loan): 1% at Wave 2, rising slightly to 4% at Wave 3
- Mortgage extension: 1 person (<1/2%) at Wave 2, no-one at Wave 3

Changes in intentions and actions

Post assessment actions and intentions: More than half (51%) of households in the follow up survey had installed at least one of the measures they were recommended at the time of the 2nd interview (9-10 months after their assessment). Five per cent were in the process of installing and 19% said they intended to install a measure. In total, 24% of *all* recommended measures had been installed.

Changes in intentions and actions: Amongst those who were asked about their intentions and actions at both the initial interview and the follow up there was an increase in the proportion of households who had at least one measure installed (up from 24% to 51%). 24% of

households had acted after 2-3 months and a further 27% went on to install something after 9-10 months.

The vast majority of measures that were in the process of being installed at Wave 1 had been installed by the time of the follow up. For those measures that were intended to be installed at Wave 1, the most were still intended to be installed, though some progressed to installation. Of the measures which respondents said 'might or might not' be installed at Wave 1, most were associated with similar or lesser intentions at the time of the follow up. Fewer were associated with higher intentions and fewer still had progressed to installation. Of the respondents who said they definitely/probably would not install measures at Wave 1, few had changed their intentions. Of those who did change, a small number had gone on to install a measure.

Reasons for changes in intentions: Amongst those with more intention to install at the follow up interview, motivations for changing their mind included wanting to save money on energy bills and wanting a warmer and more comfortable home.

Amongst those who had not changed their intentions the main reasons were not having had enough time to think about it and needing to carry out other work to their property first.

The installation experience

Reasons for installing: The main motivations for having measures installed were because it was free/paid for by someone else, wanting to have warmer and more comfortable homes and wanting to save money on energy bills.

Paying for measures: Half of respondents said that the measure was paid for by the local authority, while a quarter (24%) said that they had paid from savings or regular income. Overall, 66% said that the work was financed only by a third party (for example an energy company, local council or landlord). Those who had installed measures since the Wave 1 interview were slightly more likely to have had the measure financed through a third party (72%, compared with 50% of those who had installed before Wave 1), and slightly less likely to have financed through savings or regular income (20%, compared with 36% of those installing earlier).

Qualitative participants that had installed a measure following a Green Deal assessment had either had something installed under the Energy Company Obligation at no cost to themselves or had self-financed.

Satisfaction with the installation experience: Over four fifths of those who had had a measure installed by an organisation said that they were satisfied with most aspects of the installation. Around nine in ten (87%) were satisfied with the quality of the measure installed and 84% were satisfied with how long they had to wait to have the measure installed. The lowest level of satisfaction was found in relation to how clean and tidy the property was left after the installation (71%). Qualitative participants were largely positive about their installation experience with many noting the work was professional, clean and tidy. Where work and installation had been checked by the organisation participants felt reassured about the professional standard of the installation.

Satisfaction with the installed measure: Three quarters (77%) of those who had a measure installed had had no issues or problems with it since it was installed, although 20% had had issues or problems.

Around nine in ten (88%) of those who had installed a measure said they would recommend having it installed to friends and family. The level of endorsement of the individual installers that had carried out the work was considerably lower though (68%).

Overall Conclusions

Raising awareness: Direct marketing was shown to become an important source of awareness of Green Deal assessments over time, including cold calling, door to door sales and letters or leaflet through doors. This reflects the market-led nature of the policy.

Motivations: Motivations for having an assessment were very similar to motivations for having measures installed. Wanting a warmer, more comfortable home and saving money on energy bills were the main reasons cited, even amongst those who had assessments conducted and measures installed for free. These may be the most motivating messages for future marketing.

Paying for an assessment: The majority of respondents at all waves said that they did not pay for their Green Deal assessment. Only around one in ten had done so across all waves.

Green Deal Advice Reports: Almost half of respondents said that they had not received their Green Deal Advice Report, and the proportion who had received it declined wave upon wave. While for some this was because the report was sent to their landlord, local authority or housing association, a similar proportion (around one in ten) said that they were expecting a report but had not received it⁴. The research suggested that the advice conveyed through the Green Deal assessment visit and Green Deal Advice Report were positively viewed. While the qualitative research suggested some potential improvements to the report, some of those who had not received their report said that they would have found it useful. For example where a Green Deal assessment is conducted as a way to accessing ECO funding and an Advice Report is not provided (as happened in some cases in the qualitative research), this may be a missed opportunity, as the broader behavioural advice appeared to be generally welcomed.

Post assessment actions and intentions: Overall, the research **estimated** that, of the 76,648⁵ households which had had a Green Deal assessment between launch and September 2013, between 58,000 and 64,000 households had installed at least one measure, were in the process of installing one or definitely/probably intended to install a measure. Within this, between 42,000 and 50,000 households had already installed at least one measure, between 3,000 and 6,000 were in the process and 9,000 and 14,000 intended to install⁶.

Installation experience: In general views of the installation experience, quality of installation and of measures were positive. Where qualitative respondents received follow up contact after the installation, this was viewed as reassuring.

⁴ Other responses included seen a copy on assessors laptop at the time of assessment, not seen a copy and not expecting to receive one and don't know/not sure

⁵ It should be noted that the sample included households which had had a Green Deal assessment which was lodged within the relevant quarter. A small number of assessments were lodged outside of the relevant quarter, but these were excluded from the sample. This can explain the differences between the figure presented here and the Green Deal and ECO Official Statistics. Further detail is provided in the technical report.

⁶ For further information on how these estimates are calculated see the technical report. The numbers do not add up due to the nature of the methodological approach. The numbers for installed, in the process and intend to install are smaller and therefore have wider confidence intervals. This leads to a wider range for the estimates. Also explained in technical report.

Next steps

Further research with households that have had a Green Deal assessment is planned, as part of a wider programme of research evaluating the Green Deal.

Background and objectives

The Green Deal was launched by the Government on 28th January 2013 and aims to reduce carbon emissions and improve domestic and non-domestic energy efficiency in Great Britain, by offering a new way to pay for energy saving home improvements through electricity bills. Addressing fuel poverty is also a key objective of the scheme.

The first step in the Green Deal process involves a Green Deal Assessor coming to the home, talking to the owner/occupier about their energy use and seeing if they can benefit from making energy efficiency improvements to their property.

The main output from this process is that a Green Deal Advice Report (using information from an Energy Performance Certificate and Occupancy Assessment) which is produced when data is lodged on a national register. This process allows the householder to see which energy efficiency measures have been recommended and understand the potential costs and savings⁷.

The Energy Companies Obligation (ECO) is an energy efficiency programme that was introduced into Great Britain at the beginning of 2013. It replaces two previous schemes, the Carbon Emissions Reduction Target (CERT) and the Community Energy Saving Programme (CESP). ECO places legal obligations on the larger energy suppliers to deliver energy efficiency measures to domestic energy users. It operates alongside the [Green Deal](#) and is intended to provide additional support in the domestic sector, with a particular focus on vulnerable consumer groups and hard-to-treat homes. Though this research focused on assessments undertaken for the purposes of the Green Deal, it is important to note that using a Green Deal assessment is one of the routes that energy companies can use to deliver ECO⁸.

A large amount of early market activity has been driven by the ECO. Energy companies are using the Green Deal assessment route to deliver ECO. This means they are carrying out Green Deal assessments, installing energy saving measures and putting the benefits delivered by those measures towards their carbon targets. The Green Deal and ECO were designed to work together and there is significant overlap between them. The reader should bear this in mind when observing findings in this report.

Background to the research

In April 2013, GfK NOP was commissioned by DECC to conduct research with a sample of 'early adopter' households which had a Green Deal assessment by 31st March 2013 (referred to as Wave 1 throughout the report). The research was commissioned in order to find out more about the assessment experience, and to explore what households have done and plan to do since having the assessment.

Subsequent 'waves' of research were commissioned to repeat the survey amongst households which had an assessment between 1st April and 30th June 2013 (Wave 2), and households which had an assessment between 1st July and 30th September (Wave 3). A follow up survey of

⁷ Detailed information about the Green Deal process can be found at <https://www.gov.uk/getting-a-green-deal-information-for-householders-and-landlords#getting-your-home-assessed>

⁸ <https://www.ofgem.gov.uk/publications-and-updates/energy-companies-obligation-eco-guidance-suppliers-version-1.1>

Wave 1 respondents who had agreed to be recontacted was commissioned by DECC in September 2013, to find out more about customers' experiences and what, if anything, had changed since the initial interview. Summary findings for each survey have been published at <https://www.gov.uk/government/collections/green-deal-assessments-research>. Additionally 28 in depth interviews were carried out with households that have had a Green Deal assessment (in September).

Objectives of the research

The key objective of this programme of research is to provide early evidence from households' experiences of having a Green Deal assessment including:

- How they heard about Green Deal assessments
- Reasons for having a Green Deal assessment
- Whether the household paid to have an assessment
- The clarity and usefulness of the recommendations made by the assessment
- Overall satisfaction with the assessment and likelihood to recommend to others, including any reasons for dissatisfaction
- What households have done or intend to do since having the assessment (whether installed any recommended energy saving measures)
- Barriers to installation
- Finance

In addition, the research is required to understand how these measures, and the profile of 'early adopter' households vary by key demographics, geographic and situational factors, as well as by the Green Deal segments which GfK NOP developed as part of a previous research project in 2012 (see sample profile by Green Deal segment⁹).

In September 2013, GfK NOP was commissioned to conduct a **follow up survey** of assessment customers which additionally aimed to assess:

- Whether intentions which were stated in the assessment survey turn into actions
- The post-assessment intentions and actions of the customers who had not received their Green Deal Advice Report at the time they were first interviewed
- Motivations for taking action after the assessment, and barriers to taking action
- Experiences of installation amongst those who had taken action after the assessment

Further, the study aimed to test potential methods for follow up research amongst assessment customers, including understanding potential response rates, developing question sets, and assessing the levels of recall of experiences after the assessment.

Only customers from Wave 1 of the Assessment Survey were followed up: these customers had their assessment in January – March 2013, and follow up interviews were conducted in November-December 2013 (approximately 9-10 months after the Green Deal assessment). The decision was taken to follow up only Wave 1 customers because the 9-10 month period was felt to be sufficient to give customers time to take action.

⁹ https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/49750/Green_Deal_segmentation_-_research_report.pdf

Survey methodology and sampling

The methods used to sample and undertake the surveys are summarised below.

Assessment Survey

GfK NOP drew the samples for each wave from a list of households which had had a Green Deal assessment conducted between launch and the end of March 2013 (for Wave 1) and between 1st April, 30th June 2013 for Wave 2 and 1st of July to 30th of September for Wave 3¹⁰.

The data provided contained addresses of the households that had an assessment, but no names or contact details. Matching addresses to phone numbers only obtained contact details for 9%, leaving only a face to face or online interviewing approach possible. It was decided that a mixed mode approach would be used, with households being offered the chance to take part in an online survey and face to face interviews used for those that had not taken part in this.

GfK NOP analysed the address files in order to create efficient 'clusters' from which to draw the samples. For the purposes of fieldwork efficiency, cost, practicality and timings, clusters were formed from addresses which were sufficiently close to other addresses. As a result, some households were excluded from the sampling frame because they were not able to be clustered.

In order to draw a representative sample in all three surveys, all potential 'eligible' addresses were stratified by Region, Core City¹¹ vs. Non-Core City, Urbanity, Tenure, Property Type and Energy Performance Certificate (EPC) rating. Following stratification, a random sample of 900 addresses across 90 interviewing points was selected at each wave of the survey.

A mixed-mode interviewing approach was used whereby respondents were able to complete the survey either online or face-to-face. Households were sent an advance letter to introduce the survey and to invite them to complete the survey online¹². Respondents were offered a conditional £10 high street voucher for their participation. Following a short 'online only' fieldwork period of four days, GfK NOP's face-to-face interviewers began calling at sampled addresses that hadn't completed the survey online. To reduce the impact of mode effects the questionnaires were exactly the same, with face-to-face interviews being self-completed by respondents rather than administered by the interviewer.

- Wave 1 fieldwork was conducted between 26th April and 2nd June 2013: 507 households took part in the research (123 online interviews and 384 face-to-face interviews), equating to a response rate of 56%.
- Wave 2 was conducted between 26th July and 26th August 2013: 499 households took part in the research (114 online interviews and 385 face-to-face interviews), a response rate of 55%.

¹⁰ The sample was provided by DECC and included permission to contact households for research purposes

¹¹ 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 provided direct support themselves. The focus of the Core Cities is 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. See <https://www.gov.uk/local-authorities-and-the-green-deal>

¹² Data protection rules meant that first contact with Green Deal customers had to be by letter. The database did not include telephone numbers, and only around a third of addresses could be matched to a telephone number using published listings, so first contact by telephone was not possible. No email addresses were included on the database.

- Wave 3 fieldwork was conducted between 29th October and 1st December 2013: 500 households took part in the research (85 online interviews and 415 face-to-face interviews), equating to a response rate of 56%.

At each wave, data were weighted to the known profile of all households which received a Green Deal assessment in the corresponding sampling periods using the following characteristics: region, property type and tenure, as these are the core variables of interest. Results included in this report are based on weighted data.

Telephone follow up survey

Of the 507 households interviewed in the Wave 1 survey, 338 gave permission to be recontacted and provided a telephone number. All 338 households were sent an advance letter before being contacted to participate in a telephone interview. Interviews were conducted by experienced members of GfK NOP's Telephone Interviewing Service (TIS), who were personally briefed by researchers before starting work.

Multiple calls were made in an attempt to contact households, with calls made at different times of the day and on different days of the week. Respondents were offered £5 in High Street Vouchers for taking part, to encourage response, and the average interview length was 11 minutes.

Of the 338 leads available for the survey, 12 provided incorrect telephone numbers or had moved house since the initial survey, thus leaving an effective sample of 326. A total of 190 households participated in the research, which represents a 60% response rate. Reflecting the sample for the Wave 1 assessment survey, the sample covered England and Wales only.

Data were weighted to the known profile of all households which received a Green Deal assessment in January-March 2013 using the following characteristics: region, property type and tenure. Results included in this report are based on weighted data.

Copies of the survey questionnaires are available at <https://www.gov.uk/government/collections/green-deal-assessments-research>

Reporting conventions

This report provides findings from the three Waves 1, 2 and 3 of the Green Deal assessment surveys, plus the Wave 1 telephone follow up survey. Throughout the report, statistically significant differences between waves and by sub-group are commented on. This means that any differences between results are likely to be down to an actual difference, 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.
- All base sizes quoted in the report are unweighted.
- A finding of less than 0.5% but greater than zero is indicated by an asterisk (*).
- Significant differences between waves are indicated by arrows (↑↓) within charts.

Additional notes on interpreting the telephone follow up survey findings

Because the objective of this particular element of the research was to see if intentions turned into actions and to gather further evidence on the customer experience, the study did not aim to be representative of the whole assessment population.

Only households that had received their Green Deal Advice Report been asked about their actions and intentions in the initial (Wave 1) survey. Of the 507 households that took part in Wave 1 of the research, 285 had received their advice report, 194 of these gave permission to be re-contacted and 114 completed a follow up interview. Therefore the number of households with whom to research follow up actions and intentions is fairly low: findings should be treated as indicative and caution should be exercised with how results are used. This means that results from this survey should not be used to extrapolate to the number of households installing measures or installing individual measures. However, the findings do add value over and above the assessments research as they allow us to follow up on households and see if intentions have turned into actions (as well as evidence on the installation experience).

While the survey response rate is fairly high for a study of this type, the fact that only a fifth of those who were originally sampled to participate in the Wave 1 research went on to complete both the Wave 1 and follow up surveys should be noted.

In addition, small base sizes limit opportunities for sub-group analysis, so we do not look in detail at patterns of response by demographics, region, etc. in this report. In some cases, where results are shown broken down into sub-groups, raw figures are shown rather than percentages.

Unless otherwise specified all base sizes quoted in the report are unweighted.

Qualitative depth interviews

As part of the wider Green Deal evaluation research programme, GfK NOP was also commissioned by DECC to conduct qualitative research with households which had a Green Deal assessment. The aim of this qualitative research was to gather further detailed insight into the assessment experience, in particular to:

- Understand motivations and barriers to embarking on a Green Deal assessment.
- Understand the assessment experience.
- Identify motivations and barriers to intended actions and decisions.
- Understand experiences of dealing with assessors, installers and financial incentives and the impact these have on decision making processes.
- Identify other sources of influence (e.g. marketing, financial and household situation and understanding of the Green Deal Advice Report).
- Explore impact on energy saving behaviours.

The qualitative research took place in November and December 2013 and comprised 28 depth interviews. Each lasted around 1 hour and took place at the participant's home. The sample for these depth interviews was drawn from a variety of sources to enable inclusion of a range of different experiences and attitudes.

- Eight depth interviews were sourced from Wave 2 of the assessment survey sample who had had their Green Deal assessment in July-August 2013. This provided a time lapse between assessment and research interview enabling the research to explore decision making process for implementing measures following the assessment.

- 16 depth interviews were sourced from EPC data provided by DECC which focused on those who had had a Green Deal assessment during September 2013 and therefore provided a more recent assessment experience.
- Four depth interviews were sourced from respondents completing the Wave 3 Assessment Survey and purposively sought to include those who had proactively sought and arranged a Green Deal assessment to ensure proactive views were included in the qualitative sample.

All depth interviews were carried out in London, Leeds, Birmingham and Manchester. The qualitative sample included a range of demographics as shown below. Owner occupiers were over-represented within the sample to enable us to capture the broad range of their experiences.

Gender	16 x male 12 x female
Age	All aged 18+ years
Tenure	25 x owner occupier 3 x council tenant
Accommodation type	5 x flat 3 x detached house 5 x semi-detached house 15 x terraced house
Children	8 x with children under 16 years in the household

Findings from these qualitative depth interviews are detailed throughout the report to elucidate on the quantitative research findings. In line with data protection and industry standards, all quotes and case studies are anonymised.

Green Deal Assessment Survey

Profile of those having an assessment

This section of the report looks at the profile of households which had a Green Deal assessment up until the end of September 2013.

Overview of sample profile

DECC has released Official Statistics on the profiles of households having a Green Deal assessment up to the end of September 2013¹³. This data formed the overall sampling frame for the waves 1, 2 and 3 of the assessments research. Third quarterly Green Deal and Energy Company Obligation (ECO) statistical release¹⁴ showed that a total of 85,178 Green Deal assessments were lodged up to 30th September.

Table 1 below shows the profile of households which had a Green Deal assessment and the profile of households interviewed at each wave of the assessment survey (labelled as achieved sample). There were a number of changes observed in the profiles of those having a Green Deal assessment in the period covered by Wave 1 (January to March, shortly after the launch of the Green Deal), and Wave 2 and 3 (April to June and July to September). These changes reflect changes in the market for Green Deal assessments.

¹³ It should be noted that the sample included households which had had a Green Deal assessment which was lodged within the relevant quarter. A small number of assessments were lodged outside of the relevant quarter, but these were excluded from the sample. Further detail is provided in the technical report.

¹⁴ Available at https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/243865/Final_Statistical_Release_-_Green_Deal_and_Energy_Company_Obligation_in_Great_Britain_Q2_2013.pdf

Table 1: Sample profile comparison: Waves 1, 2 and 3

	Wave 1 (Jan-Mar 2013 assessment)		Wave 2 (Apr-Jun 2013 assessment)		Wave 3 (Jul-Sep 2013 assessment)	
	Total population	Achieved sample	Total population	Achieved sample	Total population	Achieved sample
Number	9,224	507	30,380	499	37,044	500
	%	%	%	%	%	%
Urbanity¹⁵						
Urban	56	61	65	63	61	65
Mixed urban/rural	31	27	25	26	27	25
Rural	13	12	10	11	12	10
Tenure						
Owner-occupied	83	67	75	68	76	68
Tenant	15	33	24	32	24	32
Unknown	2	-	*	-	*	-
Property type						
House/bungalow	92	88	86	84	87	89
Flat	8	12	14	16	13	11
Energy rating						
A-D	64	66	66	72	64	69
E-G	36	34	34	28	36	31

At all waves, biases in the profile of the achieved sample were corrected by weighting back to the profile of the total population, as described in the technical report. Only weighted data are shown in the remainder of this report.

¹⁵ Urban/rural classifications are assigned as follows: Urban – Includes Metropolitan County constituencies and all urban constituencies in which the population density is greater than 7 persons per hectare, Mixed urban/rural - Constituencies, consisting of a mixture of urban and rural local authority areas, in which the population is greater than 1.5 and less than 7 persons per hectare and Rural - Constituencies, consisting of a mixture of urban and rural local authority areas, in which the population density is less than 1.5 persons per hectare

Profile of those having a Green Deal assessment by Green Deal segment

In 2012 GfK NOP and DECC developed the Green Deal segmentation¹⁶ in order to understand which key groups exist in relation to potential demand for the Green Deal, what their motivations and barriers are, and which communications channels might best be used to reach them. The segmentation was primarily developed to help DECC develop communications and messages for the Green Deal but it was also felt that the segments would provide powerful analysis if used in subsequent Green Deal research. A brief overview of the segments is shown in Chart 1 below.

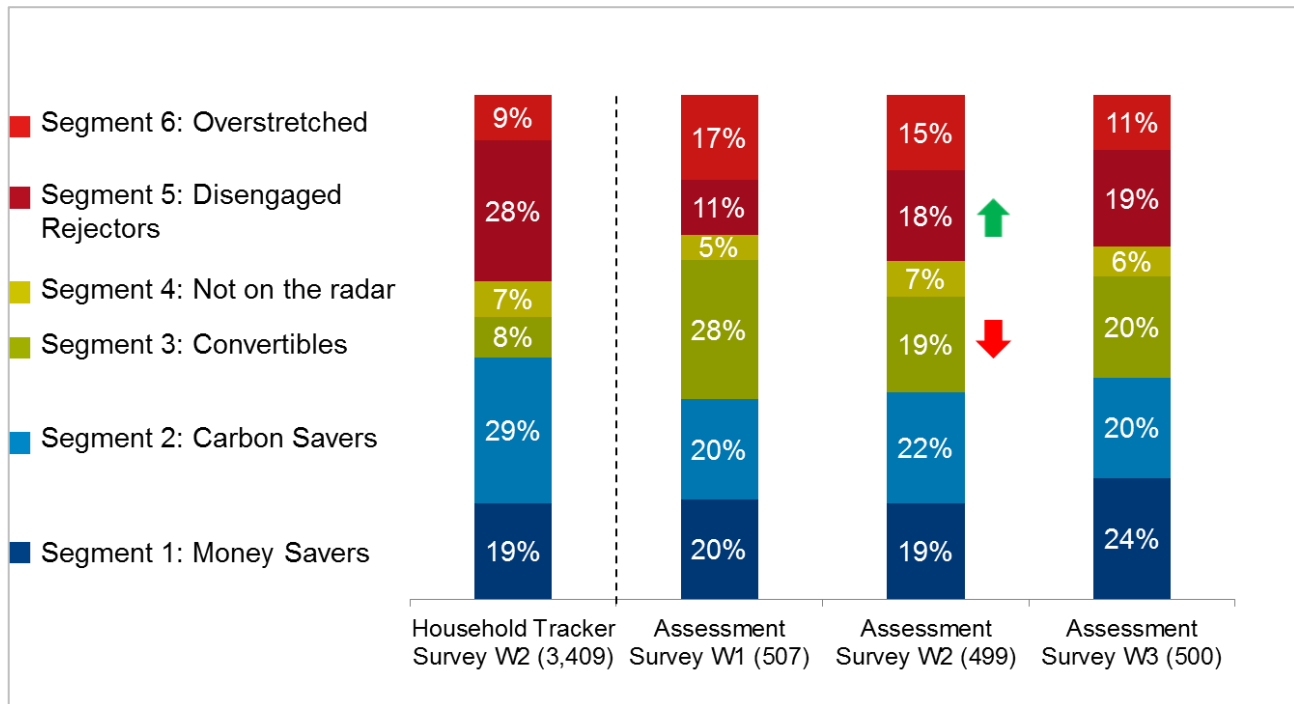
Chart 1: Overview of Green Deal segments

<p>Overstretched: While they could potentially benefit from the Green Deal, this segment is strongly put off by the costs of improvements.</p>
<p>Disengaged Rejectors: Older households who aren't planning on making their homes more energy efficient. They don't appear to want to consider the Green Deal at all.</p>
<p>Not on the radar: Average households for whom energy efficiency isn't a priority at present.</p>
<p>Convertibles: Higher income working families who were already considering making energy efficiency improvements. The Green Deal could help them get over barriers including distrust of installers & confusion over conflicting information.</p>
<p>Carbon Savers: Young professionals who are particularly interested in the environmentally friendly benefits of making their home more energy efficient through the Green Deal.</p>
<p>Money Savers: Families on low incomes who are especially interested in the cost-saving features of the Green Deal to help them make energy efficiency improvements.</p>

Although the segmentation was originally developed amongst owner occupiers and private rented tenants only, it has subsequently been applied as part of the Green Deal Household Tracker Survey¹⁷, which also includes social housing tenants. Chart 2 shows the segment profile of households interviewed at each wave of the Green Deal Assessment Survey against the profile from the Household Tracker Survey (HTS), which was conducted amongst a representative sample of householders/ those responsible for making decisions about their home aged 18+ in Great Britain in March 2013.

¹⁶ Detailed information about the Green Deal segments can be found at https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/49750/Green_Deal_segmentation_-_research_report.pdf

¹⁷ For more details about the Green Deal Household Tracker Survey see: <https://www.gov.uk/government/publications/green-deal-household-tracker-survey-waves-1-and-2-report>

Chart 2: Segment profile of Green Deal Assessment Survey

Significant differences between waves are indicated by arrows (↑↓)

As shown by Chart 2 above, there were a number of differences in the segment profiles between the Household Tracker Survey and the Green Deal Assessment Surveys.

All three waves of the assessment survey contained a significantly higher proportion of households in the Convertibles segment (28% at Wave 1, 19% at Wave 2 and 20% at Wave 3, compared with 8% in the Household Tracker Survey). Convertibles are the segment most likely to already be considering making any energy saving improvements (indeed, 85% at Wave 2 and 93% at Wave 3 were already thinking about making at least one improvement before their Green Deal assessment) and therefore it is not unexpected to observe a higher than average proportion of Convertibles, and in particular, high levels of early adoption at Wave 1.

Disengaged Rejectors are characterised as being much older than average with lower than average incomes and specifically with little interest in making their homes more energy efficient. It is therefore unsurprising that there was a significantly lower proportion of Disengaged Rejectors at each wave (11% at Wave 1, 18% at Wave 2 and 19% at Wave 3), compared with the Household Tracker Survey (28%). However, it is interesting to note the increase in the proportion of Disengaged Rejectors from 11% to 18% between waves 1 and 2, which, given the age and income profile of the segment, may be driven by assessments being conducted as part of the Energy Company Obligation amongst this group.

In addition, there were significantly lower proportions of households in the Carbon Savers segment (20% at Wave 1, 22% at Wave 2 and 20% at Wave 3) compared with the Household Tracker Survey (29%). Carbon Savers tend not to be that worried about the costs of making energy efficiency improvements, but are also the segment most likely to say they are not planning on staying at their current property that long – indeed, Carbon Savers were more likely than average at each wave to be tenants (25% compared with 17% on average at Wave 1, 30% compared with 24% on average at Wave 2 and 31% compared with 24% on average at Wave 3).

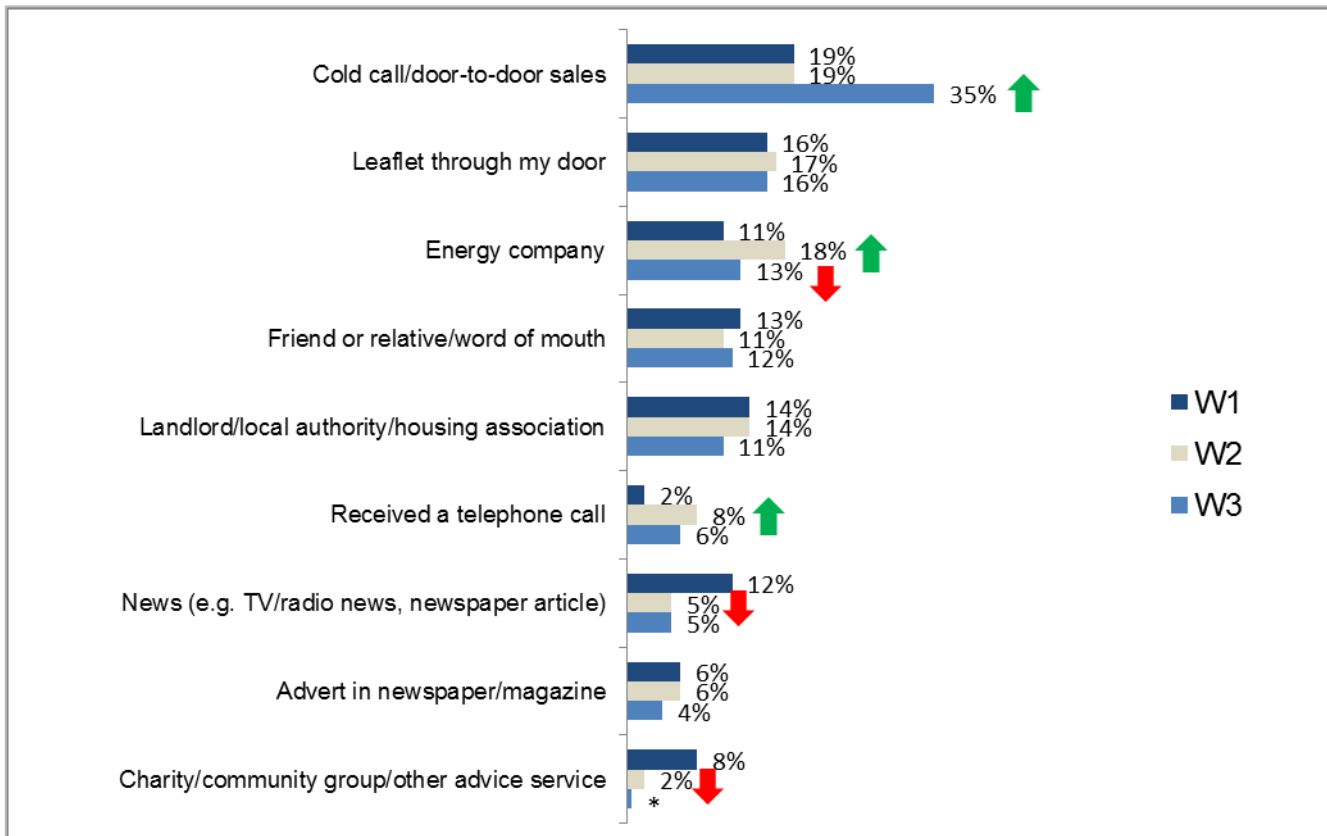
The assessment experience

This section of the report looks at the overall assessment experience. This includes how households heard about Green Deal assessments and their reasons for having had an assessment. It also discusses whether households had received their assessment report at the time of interview, as well as whether or not they paid a fee to have the assessment. Furthermore it looks at levels of satisfaction with different aspects of the Green Deal assessment, as well as discussing levels of overall satisfaction, usefulness and likelihood to recommend an assessment.

Reasons for having a Green Deal assessment

All households were asked how they heard about Green Deal assessments. Chart 3 shows that direct marketing was a key source of awareness at all three waves of research but particularly at Wave 3: 35% heard about Green Deal assessments from cold calling/door-to-door sales at Wave 3 (up from 19% in each of the first two waves), In addition, 16% heard following receipt of a leaflet through their door, similar to the levels in previous waves (16% mentioned this at Wave 1, 17% at Wave 2). The increase in the proportions of households mentioning cold calling/door-to-door sales from 19% at Waves 1 and 2 to 35% to Wave 3 suggests there may have been an increase in this type of activity by energy companies and their sub-contractors due to ECO. Energy companies were also an important source of awareness at all three waves, mentioned by 13% of households at Wave 3, alongside friends/relatives/word of mouth (12% at Wave 3) and landlord/local authority/housing association (11% at Wave 3).

Most other sources stayed the same between waves, though interestingly, after Wave 1 there was a significant fall in the proportion finding out about Green Deal through the news or from charities/community groups/advice services. This may reflect the fact that there was significant media activity following the launch of the Green Deal, but this may have declined since.

Chart 3: How households heard about Green Deal assessments

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

Chart shows all responses given by 5% or more of households at any one of Waves 1, 2 or 3

Significant differences between waves are indicated by arrows (↑↓)

There were a number of notable differences in sources of awareness based on tenure:

- Unsurprisingly, in all waves tenants were more likely to have found out about Green Deal assessments from their landlord, local authority or housing association (30% at Wave 3 vs 5% of owner occupiers). Patterns in response were similar at previous waves. However, at Wave 3 there was, for the first time, a significant difference in the response given by social and private tenants: 40% of social tenants said they had found out from their landlord/local authority/housing association, compared with 20% of private tenants. This pattern was not observed at previous waves.
- At Wave 3, both owner occupiers (38%) and private tenants (38%) were more likely than social tenants (16%) to say they had heard about assessments through cold calling or door to door sales: this difference was not observed in previous waves, and may suggest that less cold calling is now taking place amongst social tenants. Over time, there has been a strong increase in the proportion of all respondents finding out about Green Deal assessments from cold calling, but this is mainly driven by an increase amongst owner occupiers: the proportions of private and social tenants finding out through this route has remained fairly stable over time.
- Owner occupiers were more likely than other groups to say they heard from an energy company (14% compared with 4% social tenants and 12% private tenants at Wave 3). Similar patterns were observed at previous waves.

- Owner occupiers were more likely than social tenants to say they heard about the assessments from a friend or relative / via word of mouth (14% compared with 5%), another difference which had also been observed at the previous two waves (15% vs 3% at Wave 1, 12% vs 5% at Wave 2)
- Looking at differences by the segments, there were few significant differences overall in the ways the segments reported having heard about Green Deal assessments, but Disengaged Rejectors were less likely than other segments generally to mention cold calls or door-to-door sales, and more likely than other segments generally to say they only heard after an assessment was arranged by a third party, or that they couldn't remember how they heard. This may reflect the differences in the segments' tenure, as Disengaged Rejectors are the most likely segment to be social tenants.

Many qualitative participants described a passive experience in finding out about, and arranging for a Green Deal assessment. These participants had typically found out about the Green Deal by cold calling either at the door or over the telephone. Others had been approached by energy suppliers working in the house or construction companies working in the area as described in the case study below.

Male, London, Owner Occupier Mr A first became aware of moves being taken towards greater energy efficiency early in 2013, when he and his wife attended a residents' association meeting:

"We had a guy who came over there to talk about energy efficiency and green - that enlightened us to know what is really good about it and what we can do as parents in the first place ... I became quite interested and said I would like to know more."

Following this meeting, someone from the construction company currently at work on renovation of the council estate came and knocked on the door to speak to them about energy efficiency. Mr A was not at home at the time, so he spoke to his wife and son and left them with a leaflet.

This person called back at the house later for a brief chat and offered a free Green Deal assessment. The man would have done the assessment there and then, but an appointment was made for 2-3 days later to suit Mr A's diary. He was very concerned about the cost of energy and so was keen to find out about any measures that might help:

"He made an appointment to inspect the whole place ... He was going around from door to door... I said 'Okay, anything to help with energy and I will be interested. For curiosity's sake, let me hear what you have got' ... I wanted to know what this was all about, and if we can get any help from anywhere else or any advice or any technical know-how about how to save energy."

A couple of qualitative participants had been informed about the Green Deal by their landlord or Housing Association. These participants had a similarly passive experience.

"They [the Housing Association] just wrote to us saying "This work is being done. Can we come into your property and have a look?" and I was like no problem."

Female, London, Social Tenant

Across the qualitative research some participants described a more active role in arranging for a Green Deal assessment. These participants had come across information about Green Deal assessments and followed this up to arrange an assessment. Most described coming across information from their council, or a specific company or energy supplier. They had then contacted that specific organisation to arrange an assessment and had not considered shopping around to find out who else could provide an assessment.

“A letter was received from [energy supplier] and would I like it? So I phoned in and a representative came down to see if we qualified for it...it was an assessment visit. Would you like to partake in an assessment visit by one of our people to assess whether your insulation is up to scratch in the loft and whether you want insulation in your walls and your water tanks etc., that kind of thing.”

Female, Manchester, Owner Occupier

Others had come across information for a specific company or energy supplier offering Green Deal assessments at an information stand at a local supermarket or in an article in a local newspaper as described in the case study below.

Female, Midlands, Owner Occupier

The first time Ms B heard about Green Deal was through an article in a paper – The Voice – which is a national newspaper. The article included one person’s experience of Green Deal which had been a positive one, and this was a major prompt for Ms B to find out more. Also, the person featured in the article lived in an area local to Ms B, this was another motivation for finding out about Green Deal – *“it was a story about how good it was and how it reduces his bills...they came and fixed things up and it more or less halved his bill”*.

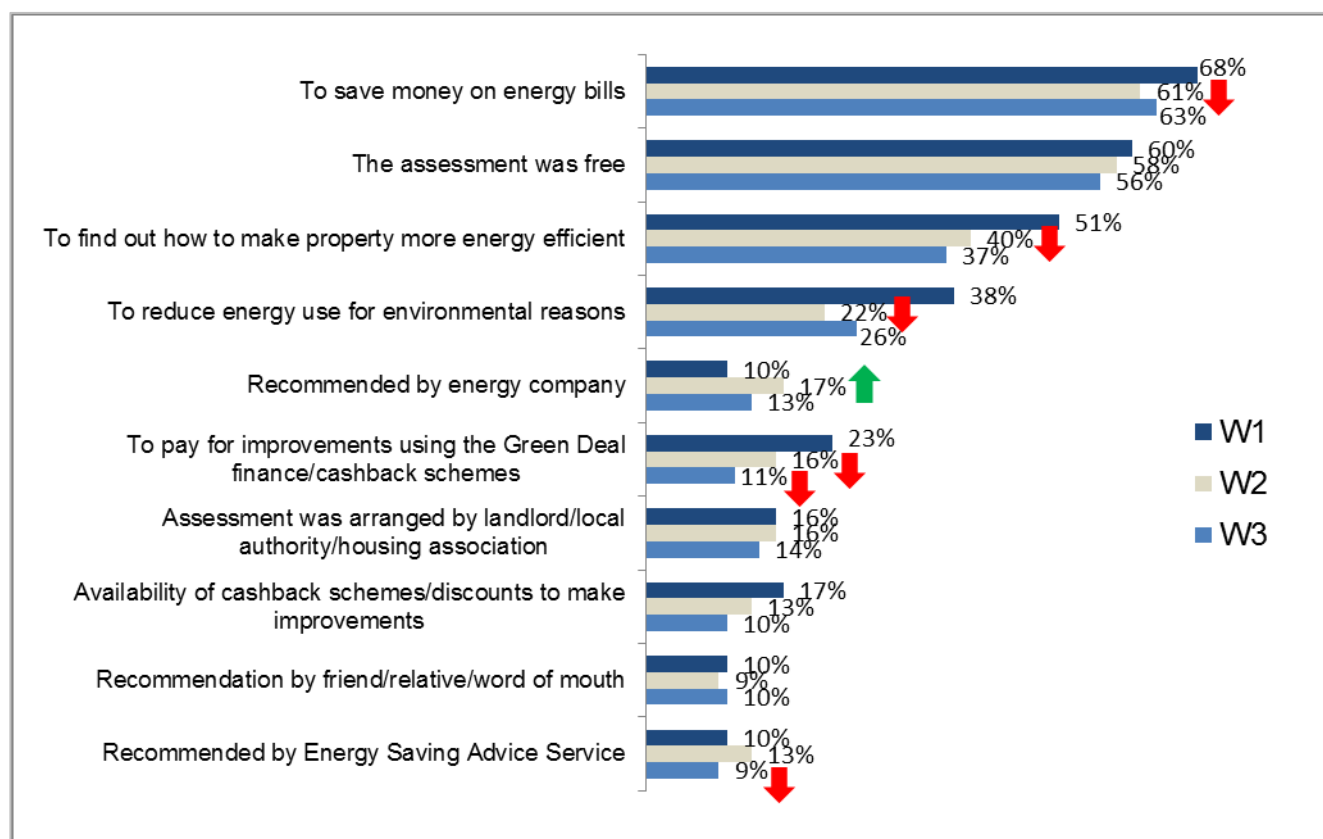
The potential financial benefits, in particular the chance to reduce energy bills, were a key driver behind Ms B’s decision to actively engage with Green Deal. The article included a phone number, so Ms B called the number and arranged for an assessor to visit her property.

The assessment process was *“very thorough”* and the Green Deal Advice Report included a range of measures which Ms B considered to be appropriate in the context of the assessment.

The survey also asked all households the reasons why they had a Green Deal assessment. As shown by Chart 4 (below), saving money on energy bills was consistently the most common reason given for having a Green Deal assessment (63% at Wave 3), followed by the assessments being free (56% at Wave 3).

While wanting to save money on energy bills was the most commonly mentioned reason for having a Green Deal assessment, the proportion saying this has declined somewhat over time (from 68% at Wave 1 to 63% at Wave 3). There have also been declines in the proportions saying that they had an assessment to find out how to make their property more energy efficient, and to reduce energy use for environmental reasons. The proportion mentioning that they had had an assessment to enable them to pay for improvements using the Green Deal finance/cashback scheme has also declined significantly (from 23% at Wave 1 to 11% at Wave 3).

Chart 4: Reasons for having a Green Deal assessment



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

Chart shows all responses given 10% of more of households at any one of Waves 1, 2 or 3
Significant differences between waves are indicated by arrows (↑ ↓)

Taken together, patterns in response suggest that the average number of reasons for having an assessment given have declined over time, from 3.2 reasons at Wave 1 to 2.8 at Wave 2 and 2.7 at Wave 3. This suggests that the number of motivations for having a Green Deal assessment is declining over time, with more people saying that they are having an assessment for a single reason (29% gave a single reason at Wave 3, up from 23% at Wave 2 and 21% at Wave 1).

There were similar differences in response by tenure across waves:

- It is unsurprising to note that tenants were more likely than owner occupiers to say that the assessment had been arranged by their landlord, local authority, housing association or another organisation (48% social tenants, 29% private tenants, 6% owner occupiers at Wave 3), though there has been a decline over time in the proportion of social tenants saying that this was a reason for having an assessment (66% at Wave 1, 38% Wave 2, 48% Wave 3). The proportion of private tenants saying that they had an assessment because it was arranged by their landlord has remained largely unchanged over time (36% Wave 1, 36% Wave 2, 29% Wave 3).
- By contrast, owner occupiers were more likely (than both private and social tenants at Wave 1 / than social tenants only at Wave 2 and Wave 3) to say they had had an assessment for

energy saving or finance-related reasons including the following. Patterns in response remained unchanged over time:

- To save money on energy bills
- Because the assessment was free
- To find out how to make their property more energy efficient
- To pay for improvements using the Green Deal finance/cashback schemes
- Availability of cashback schemes/discounts to make improvements.

Across the qualitative research similar reasons for having a Green Deal assessment were cited by participants.

Finding out how to save money was a specific motivation for many often tightly bound with the desire for a warmer and more comfortable home. The case study below describes one example of saving money as a key motivation for having an assessment, and also highlights the positive influence of a previous energy saving measure installation.

Female, London, Owner Occupier

Ms C is a freelancer working from home, so she is in for quite a lot of the day. She was already interested in making changes that would contain energy costs when she heard about Green Deal at the beginning of 2013, through a number of different sources – newspapers and radio, and then a local council magazine and leaflet:

“I think I heard about it on the news and then read about it. I think fairly soon this leaflet came through the door about having the assessments done for free ... You start hearing about it on the news and then a leaflet comes through and you think ‘Oh well, I might as well have an assessment done’.”

She describes her main motivation for having the Green Deal assessment done as finding out how to save herself money. She participated in a previous publicly funded energy saving scheme about a decade ago, when draught-proofing was fitted free of charge to her doors, windows and letter box:

“[My motivation was] to save money - so to be more efficient, to feel more comfortable, warmer ... As one small householder, how much difference is it making to the overall picture? It is probably a drop in the ocean. But then if I can help myself and help the environment at the same time then that is more to the good really.”

The qualitative research also included those who had chosen to have a Green Deal assessment simply because it was free as described in the case study below.

Male, Midlands, Owner Occupier

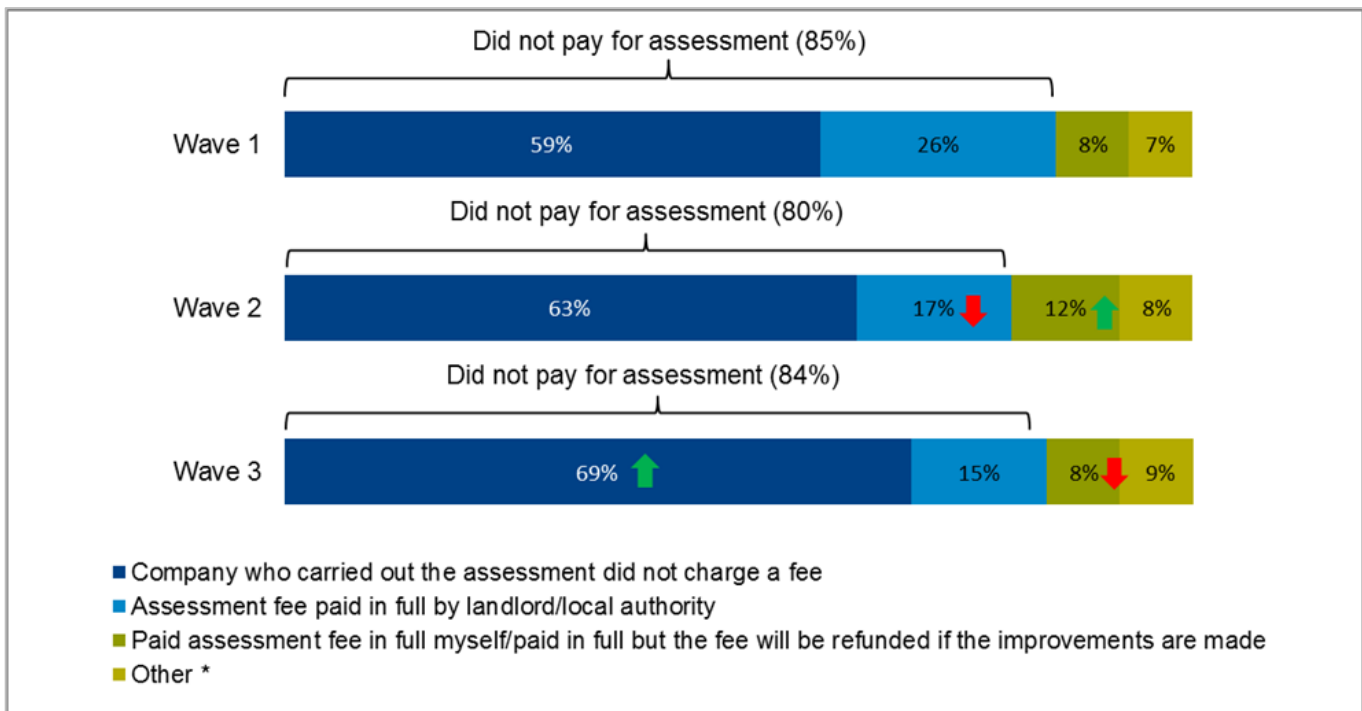
Mr D first became aware of Green Deal when he saw a stand in his local supermarket promoting it. He approached the people on the stand and they asked him if he wanted to have his house insulated or his boiler changed. The priority for Mr D as far as energy efficiency in the home was concerned was solid wall insulation, so he discussed this option with the representatives and they confirmed this measure was also available.

The main motivation Mr D cited for engaging with the people on the stand was because they were offering to undertake the Green Deal assessment free of charge: *“Usually there is a charge like £150 or something but on this occasion they said I could have it free of charge and I can have solid wall insulation through them”*. At this stage, Mr D was not aware that he would have to pay for any measures undertaken following the Green Deal assessment.

After a considerable wait of around two months, Mr D received a phone call and a Green Deal assessment visit was arranged and undertaken. The assessment and resultant Green Deal Advice Report were seen as very useful.

Paying for the Green Deal assessment

When asked how their assessment was paid for, 69% of households at Wave 3 said that the company that carried out their assessment did not charge a fee; 15% said that the assessment fee was paid in full by their landlord/local authority/housing association: so 84% had not paid for their assessment. While the proportion saying that no fee was paid for the assessment remained largely unchanged over time (85% Wave 1, 80% Wave 2), the balance of who paid for the assessment has changed, with proportionately more saying that the assessment company did not charge a fee, and proportionately fewer saying that the fee was paid in full by their landlord, local authority, housing association or another organisation (Chart 5).

Chart 5: How paid for the Green Deal assessment

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

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

Significant differences between waves are indicated by arrows (↑ ↓)

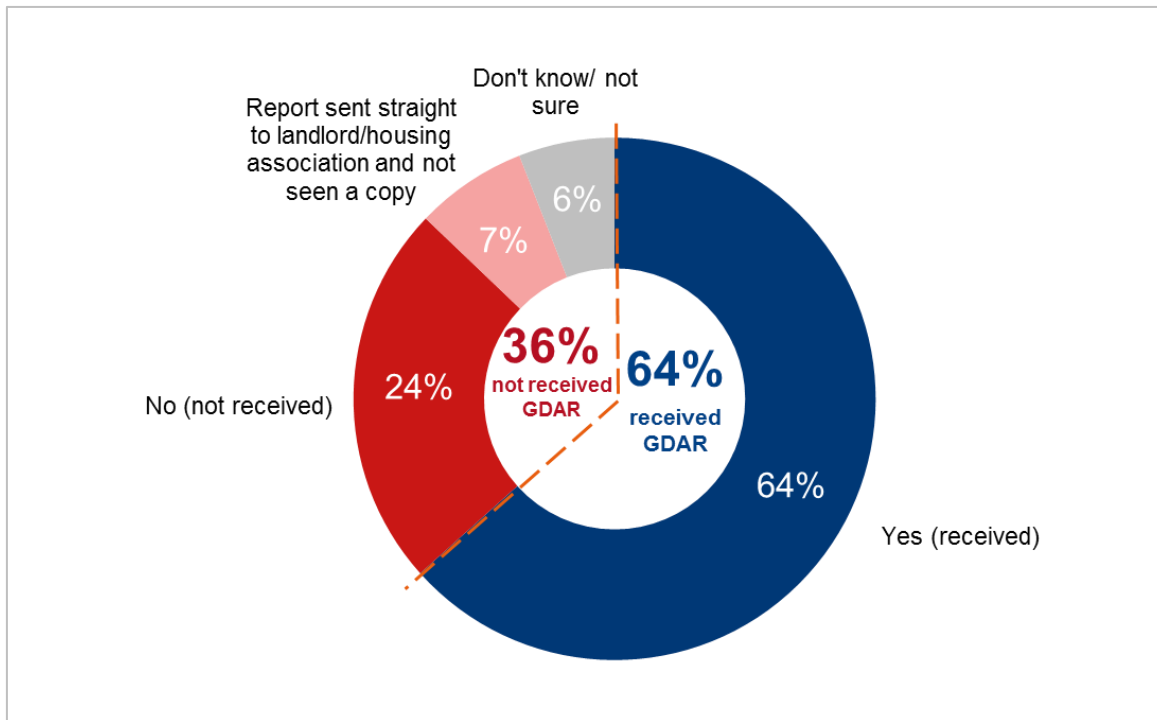
Eight per cent had paid the full amount themselves at Wave 1 (including three per cent saying the fee would be refunded if energy saving improvements were made); at Wave 2, this proportion increased significantly to 12% but fell back to eight per cent at Wave 3.

Perhaps unsurprisingly, social tenants were more likely than average to have had their assessment fee paid for in full by their landlord, local authority, housing association or another organisation, though the proportion saying this has declined over time (55% at Wave 1, 40% at Wave 2 and 41% at Wave 3). However, it is notable that no social tenants reported having paid a fee in full at any Wave.

The only significant differences by segment were that Disengaged Rejectors and Carbon Savers were more likely than average to say the assessment fee had been paid in full by their landlord/local authority/other organisation (21% and 20% compared with 15% at Wave 3) which is consistent with their higher level of reporting that the assessment had been carried out at the request of the landlord or other third party, and the higher penetration of social tenants in these segments.

Receipt of the Green Deal Advice Report (GDAR)

At Wave 1, 64% of households said they had received their Green Deal Advice Report, 7% said it was sent directly to a landlord/housing association/other organisation, 24% said they had not received it and 6% said they do not know or were not sure (Chart 6).

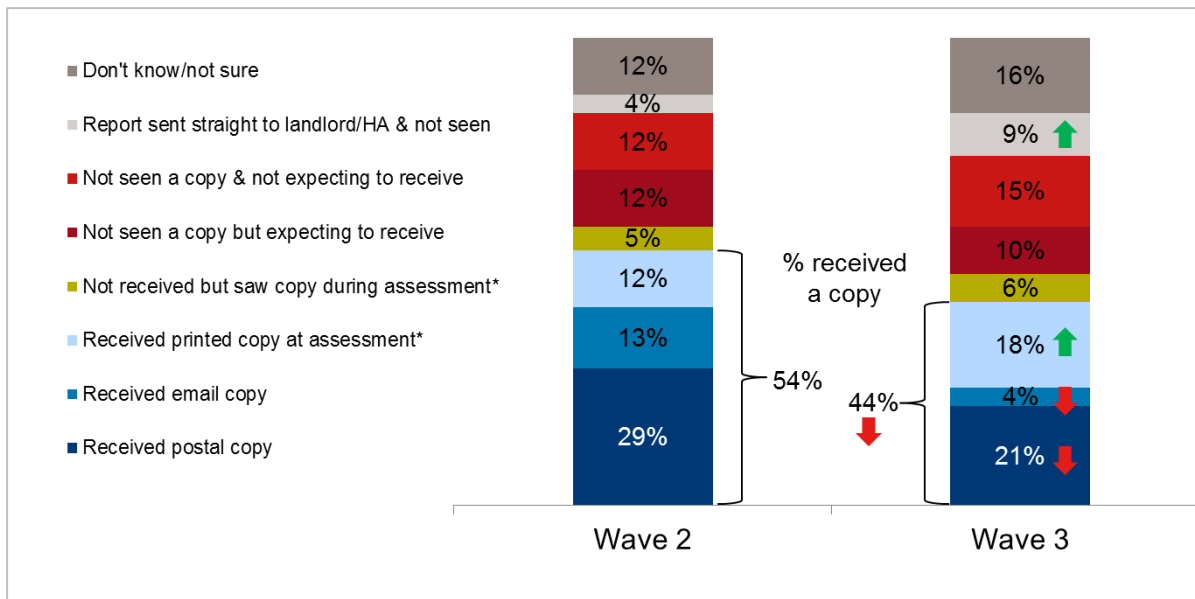
Chart 6: Wave 1: Receipt of the Green Deal Advice Report (GDAR) in Wave 1

Base: All (Wave 1: 507)

This question was amended after Wave 1 in order to understand whether those who had not received their Green Deal Advice Report had at least seen a copy or expected to see a copy. Comparisons between waves should therefore be treated with caution and results are shown separately below.

At Wave 2, 54% of households said they had received their Green Deal Advice Report, but this had declined to 44% by Wave 3. There was a corresponding increase between Waves 2 and 3 in the proportions saying that the Advice Report was sent straight to their landlord/Housing Association and not seen (4% Wave 2, 9% Wave 3). This is despite the fact that there has not been an increase in the proportion of tenants in the sample overall (around a third were tenants at each wave) (Chart 7).

At both waves around one in ten said that they had not seen their Green Deal Advice Report, but were expecting to do so (12% Wave 2, 10% Wave 3).

Chart 7: Wave 2 and Wave 3: Receipt of the Green Deal Advice Report (GDAR)

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

Comparisons with Wave 1 should be treated with caution due to the question change between Waves 1 and 2 (and therefore percentages for Wave 1 are not given). However, at all waves owner occupiers were significantly more likely to have received a Green Deal Advice Report than tenants, with tenants more likely at all waves to report that the report had been sent directly to their landlord, housing association or other organisation without them seeing a copy.

- At Wave 2 62% of owner occupiers had received a copy compared with 32% of tenants, whilst 11% of tenants said that the report had been sent directly to their landlord, housing association or other organisation without them seeing a copy compared with just 1% of owner occupiers.
- At Wave 3, the figures were broadly similar: 50% of owner occupiers had received a copy compared with 26% of tenants, whilst 19% of tenants said that the report had been sent directly to their landlord, housing association or other organisation without them seeing a copy compared with just 5% of owner occupiers.

Overall, 5% of households at Wave 1 said that they had had a Green Deal assessment because it had been arranged by their landlord, local authority, housing association or other organisation *and* the report had been sent straight to their landlord, housing association or other organisation. At Wave 2 the proportion was 2% and at Wave 3 it was 3% (although the change in the way the Green Deal Advice Report question should again be noted). Because these households would have had very limited (if any) involvement in the assessment and subsequent decision-making process, they were not asked any further questions about their satisfaction with the assessment process, nor their post-assessment intentions to install any energy saving measures at Wave 1. The remainder of the quantitative findings in this chapter therefore focus on those who were involved in the Green Deal assessment process, i.e. excluding those whose assessment was arranged by their landlord/housing association *and* their Green Deal Advice Report was sent directly to their landlord/housing association (equating to 460 respondents at Wave 1, 483 at Wave 2 and 477 and Wave 3).

Across the qualitative research there were mixed experiences of the Green Deal Advice Report. Whilst some had received a report or were waiting to receive it, others simply had not heard of it, and were not expecting to receive one as described in the case study below.

Male, Manchester, Owner Occupier

Mr E heard about Green Deal through leaflets or letters that came with his energy bill. He was offered a free Green Deal assessment in the context of an offer from his energy supplier to have loft insulation installed free of charge:

“A letter was received from [Energy Supplier] and would I like it [loft insulation]? So I phoned in and a representative came down to see if we qualified for it ... It was an assessment visit. ‘Would you like to partake in an assessment visit by one of our people, to assess whether your insulation is up to scratch in the loft and whether you want insulation in your walls and water tanks, etcetera?’ – that kind of thing.”

Mr E understood the assessment to be about checking the current loft insulation and confirming that it could be enhanced. Mr E noted that the assessor went around the house taking measurements and assumed that this was related to identifying the appropriate level of loft insulation for the home.

“He would have to justify what he found here to [Energy Supplier] that we could have free insulation – that is the view I put to it ... We only wanted roof insulation and he said he would bring it up to 10” ... I think we only had 2” ... He came on time, he did what he had to do – he measured up. He told us exactly what was going to happen and we chose the date. Then off he went. He was very, very good.”

He had neither expected nor saw any need for a Green Deal Advice Report – so he hadn't received one and hadn't chased for it:

“Did we need one? Because all that had been satisfied, hadn't it? Draught-proofing – he said you've done that. Replacing single-glazing windows – that has been done. Internal wall insulation we didn't want.”

Across the qualitative research many participants did not recall receiving a Green Deal Advice Report. Whilst some simply were not expecting to receive one, those who were often commented that it lacked the detail and advice they had hoped for. The key concern amongst participants was the lack of tailored advice for the individual property and guidance on next steps.

“Was it worth the money? I would say no. Having thought about it I think what's come out of it is you can save by insulating and getting a new boiler which I kind of know anyway. There was nothing there that I guess pointed you in the right direction because that wasn't their role. Their role was to do the assessment. What would have been nice was if they said right this is the assessment now let's go in this direction, we can point you towards this person for the funding, we can point you towards this person who we know will give you a fair price to do the work and we're here if you've got any questions or if you need help with this.”

Male, Midlands, Owner Occupier

“I think the estimated costs were, what’s the word, they were a bit unclear, they didn’t make things clear I mean between £4,000 and £14,000, that’s a heck of a difference...I don’t think I was expecting a formal quote but I think probably what I was looking for was an estimated cost for my house whereas that is an estimated cost for anywhere between a one bedroom flat and a five bedroom house so I think if the estimated costs on there had been more specific to my house”.

Male, Midlands, Owner Occupier

Participants who did not recall receiving a Green Deal Advice Report were shown an example and while a few echoed similar concerns to those shown above, some were interested to see the information contained and commented that it would have raised further information and ideas for saving energy in their household.

“I think it would be interesting, yes. There is a lot of things here. For me the floor insulation was one you have not given thought to but it is an important thing. There are some quite good facts and figures on this. It is interesting. That is very good. Lots of information on it”.

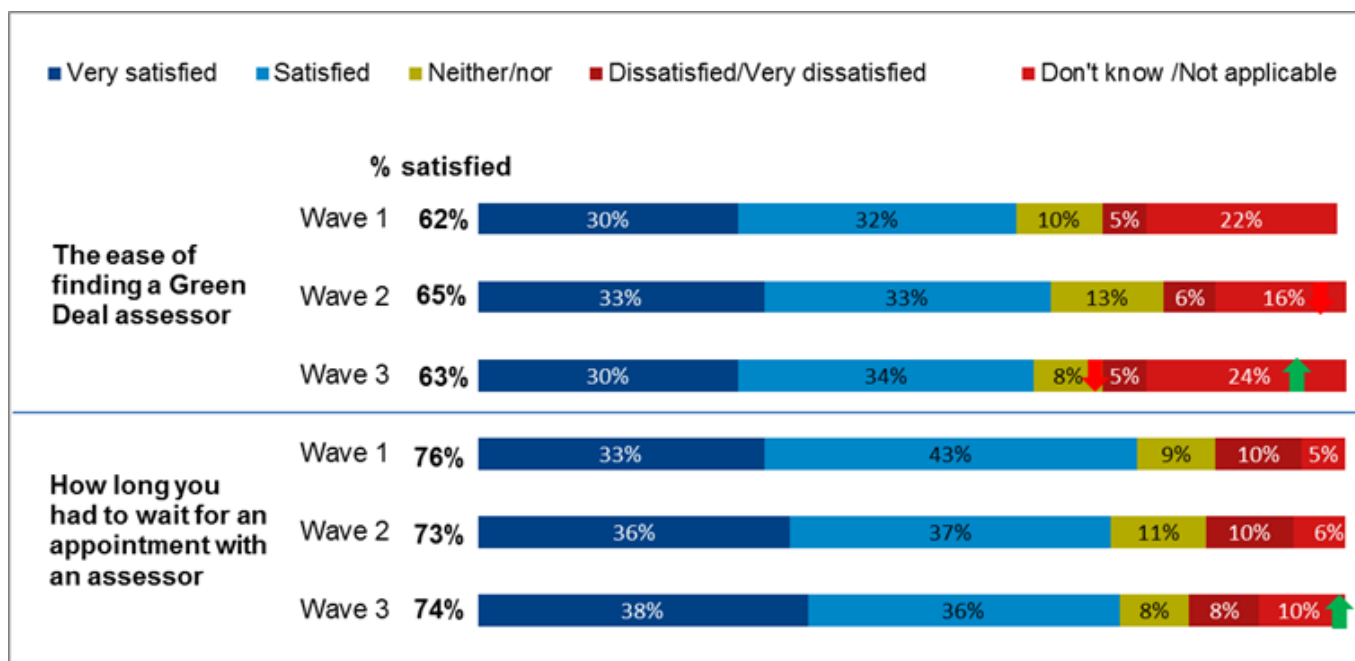
Female, Manchester, Owner Occupier

Satisfaction with finding an assessor and making an appointment

All households who were involved in the Green Deal assessment process were asked (on a five-point scale) how satisfied or dissatisfied they were with the following aspects of arranging an assessment:

- The ease of finding a Green Deal assessor
- How long they had to wait for an appointment with an assessor

Chart 8 shows the responses to these two statements. Levels of satisfaction and dissatisfaction were very similar at all three waves for both the ease of finding a Green Deal assessor (62% satisfied at Wave 1, 65% at Wave 2, 63% at Wave 3) and the length of time households had to wait for an appointment (76% satisfied at Wave 1, 73% at Wave 2, 74% at Wave 3).

Chart 8: Satisfaction with finding an assessor and making an appointment

Base: All households involved in the Green Deal assessment process (Wave 1: 460; Wave 2: 483; Wave 3: 477)

NOTE: 'Dissatisfied' and 'Very dissatisfied' responses have been combined in the chart due to low individual percentages. Households were able to answer 'not applicable' if for example the assessment was booked for them

Significant differences between waves are indicated by arrows ( )

Across the qualitative research many participants had directly contacted a specific Green Deal assessor following a cold call, receipt of a letter or leaflet, or from a telephone number provided in a local newspaper article. In these cases they went directly to the relevant supplier and usually found it simple to arrange a time and date for an assessment. However, where participants themselves sought to find a Green Deal assessor, some encountered problems, as illustrated by the case study below.

Male, Midlands, Owner Occupier

For Mr F, finding a locally-based provider was an important part of the assessment arrangement. Once he had decided to opt for a Green Deal assessment, he visited the Green Deal website to search for companies who were local to him. From the list of potential companies, Mr F found it difficult to distinguish between national and local companies: *"The frustrating thing for me was not being able to tell where these people were [located]"*.

In addition to wanting a company that was located locally, he also wanted to go with a smaller company rather than a national one, *"I wanted a local provider. What I didn't want is to find out I'd been dealt with by...one of the big boys"*.

The cost of the assessment was not a significant factor in Mr F's choice of provider. He paid around £180 for the assessment to be done by a small, locally-based firm. With regard to how this cost compared with other providers, *"they weren't the cheapest but they were in a band of*

price at the lower end” with prices he had seen ranging from £150 to about £300.

Mr F was pleased with the assessment, in his opinion it was thorough, accurate and professionally done. The resultant Green Deal Advice Report was seen as comprehensive and useful.

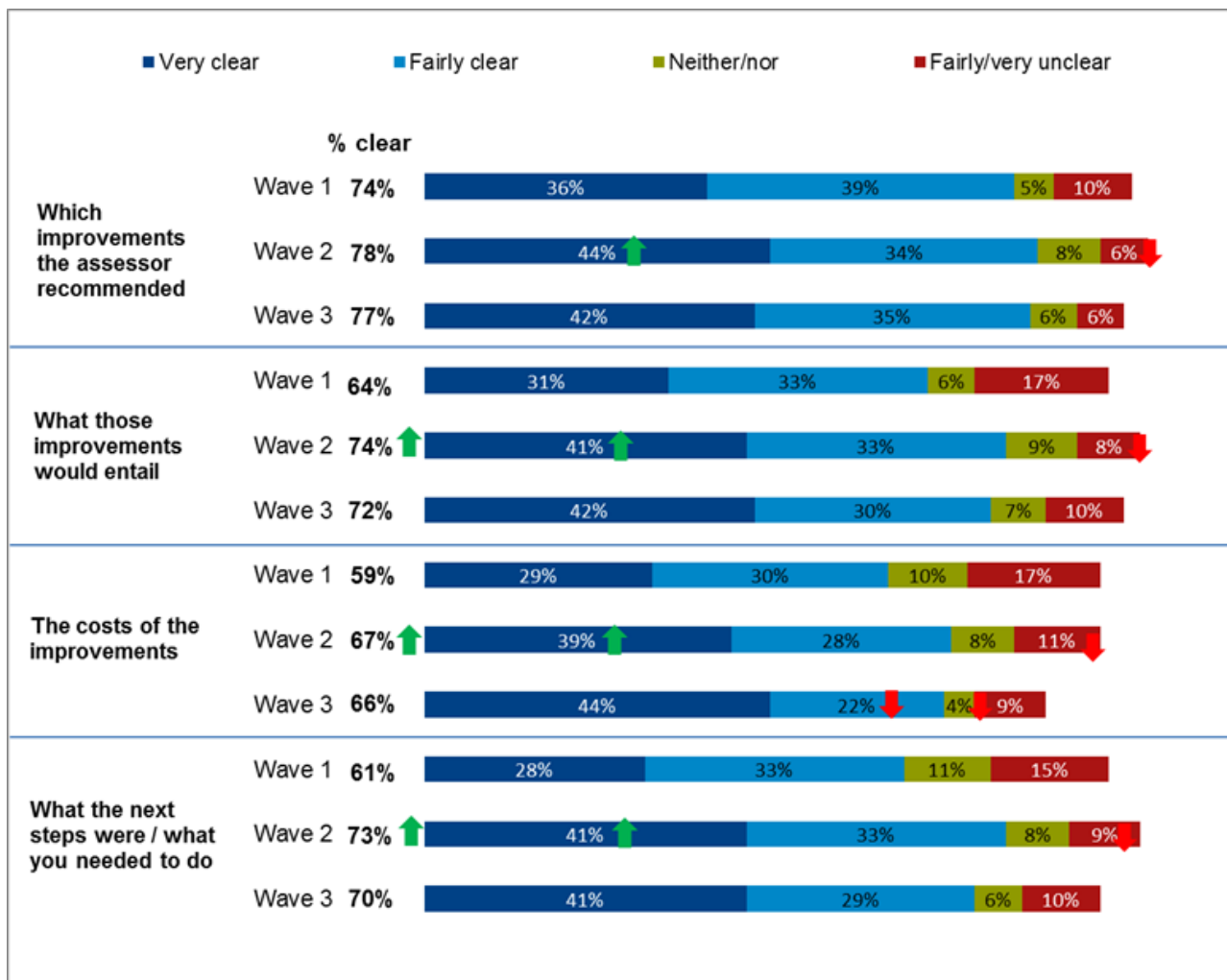
Clarity of the assessment

All households who were involved in the Green Deal assessment process were asked how clear each of the following things were made to them (using a five-point scale ranging from ‘very clear’ to ‘very unclear’):

- Which energy saving improvements the assessor recommended
- What these improvements would entail (e.g. how they would be installed)
- The costs of the improvements
- What the next steps were/what you needed to do next

Chart 9 shows the responses given for each statement at each of the three waves. The clearest aspect of the assessment (out of the four items asked about) was which energy saving improvements the assessor recommended: 74% of households said this was made very or fairly clear to them at Wave 1, 78% at Wave 2, 77% at Wave 3. The three remaining aspects (what the improvements entail, what the next steps are and the costs involved) were described as very or fairly clear by 72%, 70% and 66% respectively at Wave 3. These three all saw significant increases between Wave 1 and 2 in the proportion saying that these had been made clear to them, which were eroded at Wave 3, though the changes between Wave 2 and Wave 3 were not significant. The increases between Wave 1 and Wave 3 in the proportions of households describing what the improvements would entail and what the next steps were as very or fairly clear remained significant.

Chart 9: Perceived clarity of the assessment



Base: All households involved in the Green Deal assessment process (Wave 1: 460; Wave 2: 483; Wave 3: 477)

NOTE: Chart does not include 'Don't know' and 'Not discussed at all' responses. 'Fairly unclear' and 'Very unclear' responses have been combined in the chart due to low individual percentages.

Significant differences between waves are indicated by arrows (↑↓)

At all three waves of the survey, social tenants in particular were more likely than owner occupiers to say that each of these things had not been discussed, and less likely to say that the information was clear, again reflecting the lower involvement that this group appeared to have in the process overall.

There were no other consistent patterns in perceived clarity of the information discussed in the assessment by segment or other demographics.

A small number of respondents in the qualitative research did not find *all* elements of the assessment and/or Green Deal Advice Report clear, and some suggestions for improvement were made which are shown below.

These tended to focus on not understanding what the assessment process was and why certain measurements or questions were asked during the visit.

“I didn’t really know what was going on to be honest. All I knew is that he said that I qualify for a grant which means that I could improve my house for very little cost and it would make it a lot warmer”.

Male, Midlands, Owner Occupier

This was particularly the case where there was little discussion or interaction between the assessor and the customer as described in the case study below.

Female, Leeds, Owner Occupier

Ms G had a Green Deal assessment arranged through her energy provider. An assessor came and spent time going all round the house collecting data, but without entering into conversation with her or offering any advice:

“I was quite surprised – he was measuring, he was just off on his own ... He just came back and asked me ‘where is this?’ and ‘what is that?’ and just general questions - ‘where’s so and so?’ - and he was just measuring and doing his own thing. He asked me to get out some recent gas bills, and was it my rates as well? ... He just went everywhere, but I didn’t go with him so I didn’t see what he was doing.”

The surveyor appeared to her to be very efficient, but there was no explanation of what he was looking at, and he made no recommendations nor any mention of Green Deal or of finance:

“As I say, the first time I was aware of Green Deal was when he sent his report and [Green Deal] was on there. I could be wrong, but all I can remember was thinking ‘What’s Green Deal? It’s got Green Deal all over it’ – and then I was like ‘Oh, that was what that guy was doing with all those measurements – he’d rated the house with everything he’d been measuring in this chart.”

She says she hasn’t read half the Green Deal Advice Report, which has been put to one side, though she does remember seeing his estimation of her energy usage because she’s sure that that’s wrong:

“I’ve just put it on my pile, telling myself I must put it somewhere safe. Because I think it did say I had to keep it for if ever the house was taken over by somebody else - it was for them to see ... But that was in the letter, he didn’t say any of that to me. The general chat was just about he’d send me his report once he’d done it ... he was on the move all the time ... he never sat down once and he was off!”

This case study also demonstrates the lack of explanation that a few participants felt they had received regarding what the next steps would be following their assessment. In some instances the Green Deal Advice Report was not expected, and when it was received they felt that it did not clearly convey its content. In these instances customers typically disengaged from the Green Deal process.

Other participants had assumed that the assessment would in itself generate a quote to have any measures installed. When it became clear that the assessment process would not provide a quote there was some surprise and disappointment.

“I presumed you’d have your assessment done, they would talk you through the getting the grant and getting the work done and it would be one point of contact. I then found out, no that company does the assessment, you then have to go looking for a provider

and then when we got the provider they then just point you in the direction of getting the money, they don't walk you through it, they don't say look we'll see if we can get the money, the grant and do the work, it's just so disjointed it's ridiculous".

Male, Midlands, Owner occupier

Again, this experience often resulted in the customer disengaging with the Green Deal process.

Overall views of the assessment

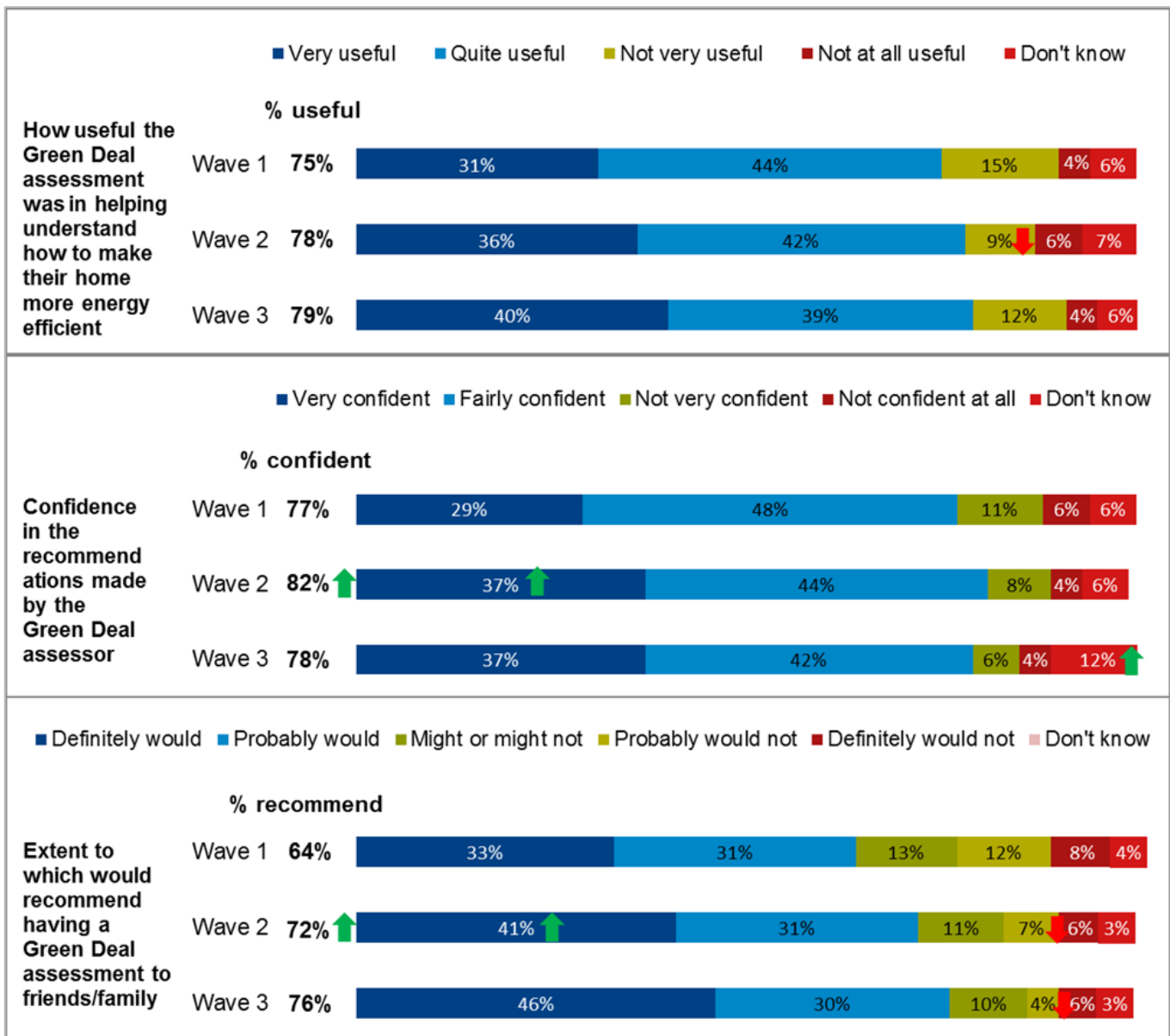
All households who were involved in the Green Deal assessment process were asked the following about their overall view of their Green Deal assessment:

- How useful the Green Deal assessment was in helping them to understand what they can do to make their home more energy efficient (using a four-point scale ranging from 'very useful' to 'not at all useful')
- How confident they were in the recommendations made to them by the Green Deal assessor (using a four-point scale ranging from 'very confident' to 'not confident at all')
- The extent to which they would recommend having a Green Deal assessment to friends or family (using a five-point scale ranging from 'definitely would' to 'definitely would not')

Chart 10 summarises the findings and shows that overall:

- 75% found the assessment very or fairly useful at Wave 1, 78% at Wave 2, 79% at Wave 3
- The proportion very or fairly confident in the recommendations made by the assessor rose significantly from 77% at Wave 1 to 82% at Wave 2, but fell back to 78% at Wave 3
- The proportion saying they definitely or probably would recommend having an assessment to friends or family also rose significantly from 64% at Wave 1 to 72% at Wave 2. At Wave 3 the proportion that would recommend having an assessment stood at 76% but this did not represent a significant change since Wave 2.

Chart 10: Overall views on the assessment



Base: All households involved in the Green Deal assessment process (Wave 1: 460; Wave 2: 483; Wave 3: 477)
Significant differences between waves are indicated by arrows (↑ ↓)

There were no patterns of difference by tenure on these questions which were consistent across all three waves, and levels of confidence in the recommendations made by the assessor did not vary significantly by tenure at Waves 2 or 3. At Wave 3, both owner occupiers and private tenants were more likely than social tenants to say the assessment was very or fairly useful in helping them understand how to make their home more energy efficient (79% and 87% compared with 66%), and owner occupiers were more likely than social tenants to say they would recommend having a Green Deal assessment (78% compared with 65%).

There were also few patterns of difference by segment on these questions which were consistent across all three waves. However, at both Waves 2 and 3 Carbon Savers were more likely than average to say they would recommend having a Green Deal assessment (84% vs 76% on average at Wave 3).

Diverse experiences of the Green Deal assessment were reported by qualitative participants. Across the qualitative sample, assessments lasted for different lengths of time ranging from between 20 and 180 minutes.

Overall, qualitative participants considered their Green Deal assessor to be independent and polite. Participants felt reassured about the assessment process where it was considered thorough and assessors were knowledgeable as described in the quotes below.

“The assessment was excellent; the guy doing it was excellent. He was here for three hours...he went round all the rooms, he measured them, checking the walls, checking the windows, the double glazing, up in the loft taking photos”.

Male, Midlands, Owner occupier

“[It was] very good...they had a proper camera system...they put a flexible camera inside [the cavity wall] and took the picture from inside of the cavity.”

Male, London, Owner Occupier

“He was asking me certain questions and writing notes down. He seemed thorough and right...everything was right. I was not unimpressed. I was happy with everything.”

Female, Manchester, Owner Occupier

“He had an iPad and he took the details. We went through that and I read everything and asked some of the questions that he was asking. He went to check the boiler. He briefed me a little bit about new types of boilers which are more energy efficient... [he was] very clear. He was able to elaborate on any question that I asked.”

Male, London, Owner Occupier

Reasons for dissatisfaction with the assessment

In line with the above, dissatisfaction with the assessment also fell between Wave 1 and Wave 2, and remained at the lower level at Wave 3:

- 20% found the assessment not very or not at all useful at Wave 1; this fell significantly to 15% at Wave 2 and remained at 15% at Wave 3
- 17% were not confident in the recommendations made by the assessor at Wave 1; this fell significantly to 12% at Wave 2 and remained at the lower level at Wave 3 (10%)
- 20% said they would not recommend having a Green Deal assessment to friends/family at Wave 1; this fell significantly to 13% at Wave 2; at Wave 3 10% said they would not recommend it

As a result, the proportion that gave a negative response to any of these three questions also fell significantly, from 30% at Wave 1 to 21% at Wave 2, then stabilized between Wave 2 and Wave 3 with a figure of 20%. There were very few consistent differences observed in terms of the characteristics of households more likely to register any dissatisfaction with the assessment and the overall sample at each wave. However, the following trends were observed:

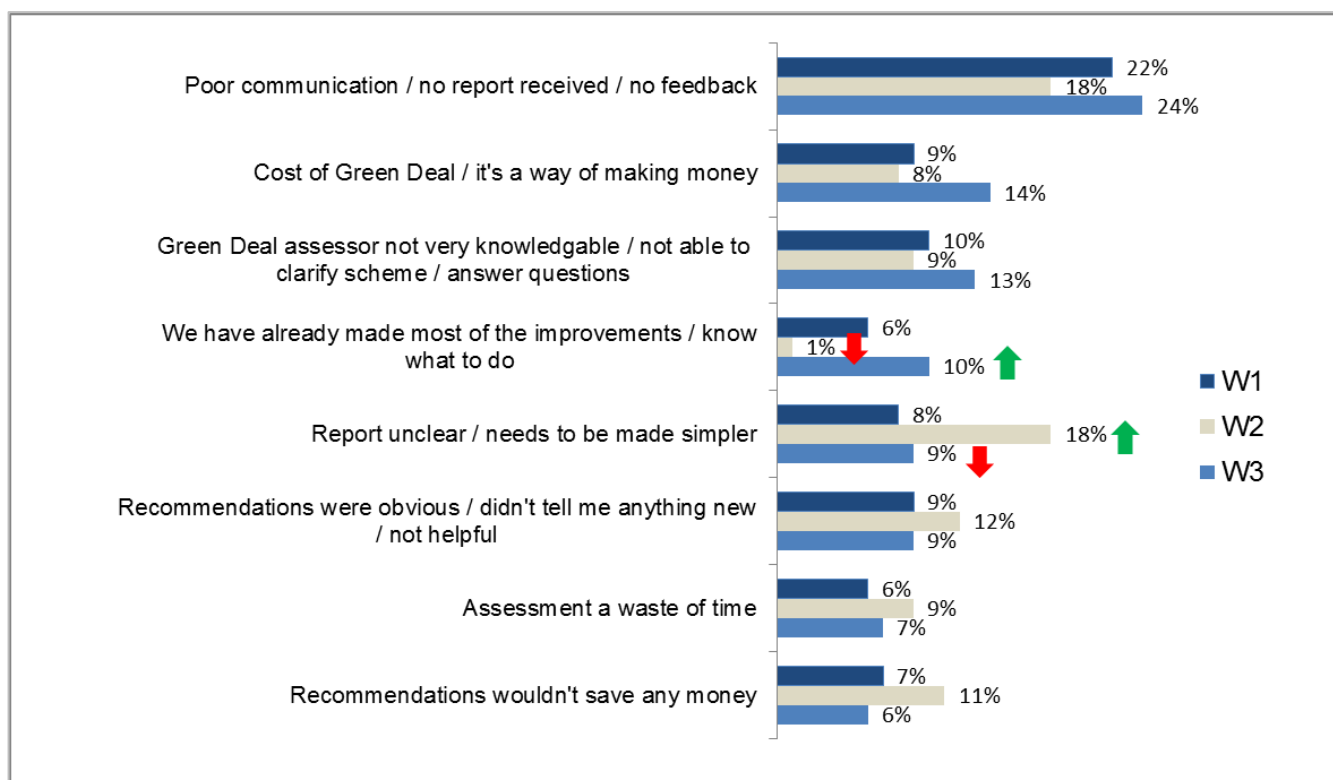
- Those that had paid for the assessment in full themselves were more likely to give any negative response than those that had not paid in full (29% compared with 19% at Wave 3)

- Households that had installed or were in the process of installing at least one of the energy saving measures recommended to them by their Green Deal assessment report were less likely to give any negative response than those who hadn't yet installed or started to install a measure (12% compared with 40% at Wave 3)
- Despite the fact that households that had not received their Green Deal assessment report were more likely to give any negative response at Wave 3 (24% compared with 14% that had received their report), no similar differences were observed at either Wave 1 or Wave 2.

Households that gave a negative response to any of the three statements (did not find the assessment useful, were not confident in the recommendations made to them or would not recommend having an assessment) were asked an open question to collect their reasons for dissatisfaction. This meant they were able to type their answer in full in their own words; the responses were subsequently analysed and categorised into similar themes. Chart 11 shows the main reasons given in response.

At all three waves, the main reason given for a negative response related to poor communication/feedback or not having received a Green Deal Assessment Report (stated by 22% of those dissatisfied at Wave 1, 18% of those dissatisfied at Wave 2 and 24% of those dissatisfied at Wave 3). At Wave 2 18% also felt that the report was unclear or needed to be made simpler (a significant increase from 8% at Wave 1) but the proportion making this criticism fell back to 9% at Wave 3 which was similar to the Wave 1 level. This was one of only two significant differences between Wave 2 and Wave 3; the other one was that the proportion of dissatisfied households saying that they had already made most of the improvements or knew what to do went up from 1% at Wave 2 to 10% by Wave 3.

Chart 11: Reasons for any dissatisfaction with the assessment



Base: All who said either that they did not find the assessment useful, were not confident in the recommendations made to them or would not recommend having an assessment (Wave 1: 137; Wave 2: 99; Wave 3: 90). Chart shows all responses given by 7% or more of at any one of Waves 1, 2 or 3. Significant differences between waves are indicated by arrows (↑ ↓).

The qualitative research found that satisfaction with the assessment was largely driven by individual expectations of what the assessment would involve as well as how clear the actual process was to the participant. Mis-matched expectation and actual experience resulted in dissatisfaction.

Some expected a thorough survey of their home and were dissatisfied when they received a short assessment.

"[The assessment lasted]... Just about twenty to twenty five minutes...I was expecting them to drill the holes and all that, that is the only way they can find out if you have got damp or what is wrong with your property or whatsoever. You know, they didn't do nothing like that. I wasn't that happy with them to tell you the truth...I said, do you know I have wasted my time".

Female, Midlands, Housing Association tenant

Others had expected more information and advice than they felt they had received. For these participants it was clear that the assessment and following Green Deal Advice Report lacked the level of tailored advice that they had hoped for.

The case study below describes how one participant whilst positive about the assessment experience felt that it lacked detail or new information.

Female, London, Owner Occupier

Ms H booked a free Green Deal assessment appointment for herself in early 2013 via a website, the details of which she found on a leaflet from the local council. The assessor came to conduct the assessment at the appointed time about 2 weeks later. This took approximately an hour, and comprised a balance of both data-gathering and advice-giving:

“I think she came here and asked various questions. I think I had to have my energy bills ... and then she had a look around and did some measurements. Then she talked about the various possibilities that might be open to me.”

The assessment was perceived as systematic, thorough and independent, and different installation options were explained as well as finance and subsidies – e.g. secondary glazing as an alternative to double-glazing. Ms H had been open-minded about what recommendations for energy-saving measures might arise from it, and did gain some new information from the meeting, though there was less information about solar energy and interest rates:

“I suppose I hoped to get some advice about what would be the best improvements to make. I think I got a fairly clear picture from her, excepting the solar [panel] side of things ... I felt that [Green Deal finance] was a fairly new thing ... She didn't know, not through her own fault but because the information wasn't available to her - I mean in terms of interest rates and things.

Whilst the assessment covered a range of potential measure that participant felt that she already knew about most of these.

“In terms of the loft and the windows, I probably knew in a way already; the wall insulation was new information in a way that I hadn't really considered before ...”

The next case study further highlights concerns that the Green Deal assessment was felt to lack tailored advice, with this participant finding the process and advice too generic.

Male, London, Owner Occupier

Mr I was interested in having a Green Deal assessment particularly focussing on energy efficiency as an ongoing concern for him. He and his wife live in a 1930s house with original period features - oak-panelled walls and parquet floors, and metal casement windows with curved glass - which they feel would be a shame to destroy. However, they are keen to achieve better energy efficiency than the current coal-effect gas fire and electric radiators and immersion heater:

“It's getting sort of more and more important from an energy cost point of view ... So anything I can do in that respect, that's sensible and practical to do, I'll do. Which obviously this scheme seemed like something worth pursuing, to see if I could get some ideas for what to do, and how to do it, and what would be cost-effective.”

Mr I was very disappointed by the Green Deal Advice Report he received, however – it made generic recommendations including gas boiler ‘replacement’, while the key fact of not having any

gas-fired central heating did not figure at all:

“If I asked a question then [the assessor] would sort of give an answer. But my general impression was that I don't think he actually knew a great deal about the practicality of improvements that could be made ... I got the impression that the assessment was all based around a typical house ... We're not a typical household ... and that seemed to throw him a bit, because ... he couldn't answer some of the questions on his questionnaire... It was really just a fact-finding mission, and ticking the boxes. Check sheets.”

Many participants across the qualitative research perceptually aligned the Green Deal with other government energy initiatives that had in the past provided grants or free measures. With this in mind, there was often an expectation that a Green Deal assessment would result in information about how to receive a grant or partial grant for a measure. This mis-matched expectation often resulted in a negative view of the assessment as outlined in the case study below.

Male, Midlands, Owner Occupier

Mr J had already taken steps to improve the energy efficiency of his home. In recent years the loft had been insulated and cavity wall insulation added. However, the house had no central heating system, and warmth was provided by a gas fire supplemented by electric heaters as needed. It was Mr J's desire to have a central heating system installed, due to increasingly feeling the cold in the house and being more and more concerned about the cost of fuel bills.

Mr J began searching on the internet to find out about central heating, and whilst doing this research came across references to Green Deal, *“We saw this Green Deal, [we thought] we might get a free boiler”*.

An assessment visit was arranged, Mr J explained that he thought the purpose of the visit was *“to come and talk to us about the central heating system on the Green Deal... [to tell us] whether or not we were eligible to have any benefit from the Green Deal...we thought we were going to get a quote for a central heating system”*.

Mr J was anticipating finding out if he qualified for “a grant or partial grant” as part of Green Deal, to help with the cost of installing central heating. Whilst his expectation did not extend to having his new central heating system paid for in its entirety, he anticipated being eligible for some form of financial contribution or grant.

The Green Deal Advice Report arrived soon after the visit, and set out a number of measures that Mr J could consider. However, Mr J had been clear all along that installing a central heating system was his only focus, and this was not taken forward following the Green Deal assessment.

Post assessment: actions and intentions

This section of the report looks at whether households had done anything, or intended to do anything, following their Green Deal assessment. It explores financing options amongst those who had installed or intended to install energy saving measures, as well as the reasons given by those who had decided not to install recommended energy saving measures.

NOTE: At Wave 1, questions about post assessment actions and intentions were only asked of households that had received their Green Deal Advice Report. Following Wave 1, it has become apparent that some households have had measures installed despite not receiving their report. As a result, all households (whether or not they had received their report) were asked about their post-assessment intentions at Wave 2 and Wave 3.

Unless specified, the rest of this report is therefore based upon Wave 2 and Wave 3 findings and no further comparisons with Wave 1 data are made.

Recommended measures

DECC conducted a detailed analysis of the energy saving measures recommended to households as part of their Green Deal assessment up to the end of June 2013. The key points from this second quarterly Green Deal and Energy Company Obligation (ECO) statistical release¹⁸ are reproduced below.

There were 225,512 improvements recommended in Green Deal assessments (around 2.6 improvements per assessment). The most common measure recommended was to install loft insulation, which accounted for 14 per cent of all measures and was recommended in over a third of all GD assessments. Cavity wall insulation accounted for 13 per cent of all recommended measures, upgrading boiler with the same fuel was 12 per cent, all solid wall insulation types was 11 per cent and photovoltaics (solar PV) was 9 per cent of all recommended measures.

Actions taken: individual recommended measures

For each of the energy saving measures that had been recommended to them by their Green Deal Advice Report, households were asked what they had done or intended to do about installing the measure, on a scale ranging from 'have had this done' to 'definitely won't do this'

At Wave 2, households claimed that 28% of all recommended measures had already been installed, with a further 4% in the process of being installed. At Wave 3, this had gone up to households claiming that 37% of all recommended measures had been installed, with a further 4% in the process of being installed. Table 3 summarises the stages of installation/intentions for

¹⁸ Available at:

https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/243865/Final_Statistical_Release_-_Green_Deal_and_Energy_Company_Obligation_in_Great_Britain_Q2_2013.pdf

all recommended measures: percentages shown are as a proportion of each recommended measure(s), as opposed to the percentage of households. In total, 1,259 measures were recommended in 507 households in Wave 2, and 1,179 measures were recommended in 499 households in Wave 3, and these are shown in the table. The table also breaks down the stages of installation/intentions by individual measure.

Around 60% of households recommended cavity wall insulation or loft insulation at Wave 2 had already had these installed by the time of the fieldwork. At Wave 3 the proportion of households recommended loft insulation who had had it installed by the time of the fieldwork had gone up to 70%, while the figure for cavity wall insulation remained about the same at 63%. Boilers and solid wall insulation were also more likely to have been installed by the time of the interview at Wave 3: (43% at Wave 3 compared with 31% at Wave 2 for boilers, 31% at Wave 3 compared with 20% at Wave 2 for solid wall insulation). In contrast, just 1% of households recommended floor insulation had had this installed at Wave 2 and this remained very low at 2% at Wave 3.

It is notable that there were no significant differences between Waves 2 and 3 in the proportions of measures which were in the process of being installed or at different stages of intentions. The only significant changes between the waves were in the proportions of those who had already installed measures (as highlighted in coloured bold/italic text in Table 3).

Here we do see some differences by segment with both Carbon Savers and Convertibles reporting a higher than average proportion of recommended measures installed or in the process of installation (48% and 47% compared with the average of 37% at Wave 3). These findings are consistent with the segment profiles.

Table 3: Wave 2 Post assessment actions and intentions (by individual measures)

Stage of post assessment journey and intention to install												
Measure (brackets show the number of respondents recommended each)	Not made a decision/ measure not recommended/ don't know *		Probably/ definitely will not install		Might or might not		Definitely/ probably will install		In the process of installing		Already installed	
	Wave 2	Wave 3	Wave 2	Wave 3	Wave 2	Wave 3	Wave 2	Wave 3	Wave 2	Wave 3	Wave 2	Wave 3
All measures (1,259/1,179)	11%	18%	28%	24%	11%	7%	17%	10%	4%	4%	28%	37%
Cavity wall ins.(179/213)	7%	11%	12%	6%	6%	5%	12%	8%	3%	7%	61%	63%
Loft insulation (208/190)	8%	8%	7%	7%	9%	6%	13%	8%	4%	2%	60%	70%
Boiler (129/120)	10%	20%	22%	12%	9%	9%	21%	14%	7%	2%	31%	43%
Heating controls (93/98)	10%	21%	20%	18%	14%	11%	29%	10%	3%	4%	24%	36%
Solid wall ins. (158/130)	11%	14%	23%	15%	16%	10%	20%	21%	9%	10%	20%	31%
Solar PV (111/98)	17%	27%	53%	54%	9%	3%	15%	4%	3%	-	5%	12%
Solar thermal (63/73)	13%	32%	64%	61%	6%	2%	11%	3%	2%	-	4%	2%
Floor ins. (108/114)	15%	28%	63%	53%	12%	8%	8%	7%	1%	1%	1%	2%
Other measures* (210/143)	15%	22%	32%	34%	13%	11%	24%	10%	5%	3%	9%	22%

Significant increases from Waves 2-3 are highlighted in **Red bold/italics (for decline) or Green bold/italics (for increase)**

Base: All Wave 2 respondents (bases shown on table). * Only those who had not received a Green Deal Advice Report were able to give these responses (due to survey routing)

* 'Other measures' includes Flat roof insulation, Room in roof insulation, Hot water cylinder insulation, Draught proofing, Other heating upgrade, Double/triple glazing, Secondary glazing, Replacement doors, Ground Source Heat Pump, Air Source Heat Pump, Biomass boiler, Wind turbine (roof mounted) and Waste water heat recovery. These measures were recommended to fewer than 50 respondents at each wave, so are not shown separately

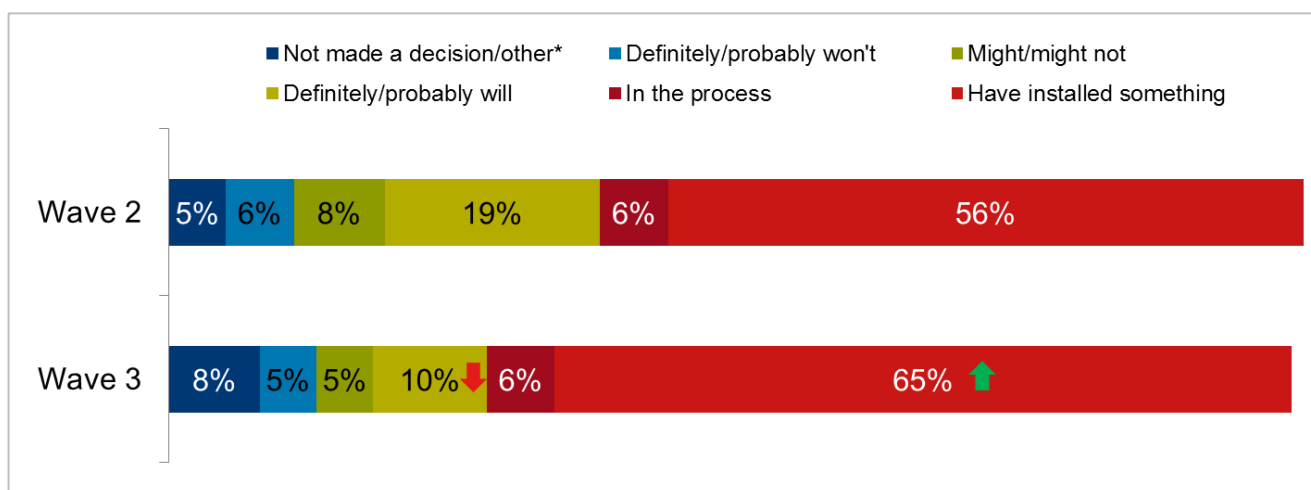
Actions taken

For each of the energy saving measures that had been recommended to them by their Green Deal Advice Report, households were asked what they had done or intended to do about installing the measure, on a scale ranging from 'have had this done' to 'definitely won't do this'

The chart below shows the *furthest point* that households had reached following their assessment at Wave 2 and Wave 3¹⁹. It is possible that households were at different stages for two or more measures, so the chart only shows the furthest point along the customer journey that they were at, e.g. if a household had installed one measure and was in the process of installing another they are only shown under 'Have installed something'.

At Wave 2, 56% of households had already installed at least one recommended measure at the time of the interview, and 6% were in the process of doing so. At Wave 3 the proportion which had already installed at least one recommended measure by the time of the interview increased to 65%, with a further 6% in the process of doing so at the time of the interview.

Chart 12: Wave 2 and Wave 3 Post assessment actions and intentions (most action taken)



Base: All households (Wave 2: 499; Wave 3: 500)

* Not made a decision/measure not recommended/don't know options only shown to those that had not received their Green Deal Advice Report

Significant differences between waves are indicated by arrows ( )

At both Wave 2 and Wave 3 there were significant differences in the responses given by owner occupiers and social tenants, with owner occupiers more likely to have had at least one measure installed:

- At Wave 2 59% of owner occupiers have had at least one measure installed, compared with 43% of social tenants
- At Wave 3 the gap had widened somewhat, with 71% of owner occupiers having had at least one measure installed, compared with 35% of social tenants

¹⁹ This differs from Table 3 which is shown based on measures recommended. Analysing data based on households (as shown in Chart 12) enables us to account for the fact that some households are recommended more than one measure.

- Interestingly, social tenants were no more likely than owner occupiers to say that they definitely/probably would not install any measures. However, given that they were less involved in the decision to have a Green Deal assessment and less likely to have received a copy of their Green Deal Advice report in the first instance, they were instead more likely to say that had not made any decision, had not received any recommendations or didn't know what they would do (12% compared with 3% of owner occupiers at Wave 2 and 25% compared 5% of owner occupiers at Wave 3).

There were no consistent patterns in response based on respondent demographics, and there were no significant differences between the six Green Deal segments in the proportion of each that had had something installed or were in the process of doing so²⁰.

It was also the case at both waves that those who found the assessment useful in understanding how to make their home more energy efficient or were confident in the recommendations made by the assessor were more likely to have had something installed than those who did not:

- Found assessment useful: 70% had installed something at Wave 3, compared with 41% of those who did not find the assessment useful. Similar differences were observed at Wave 2 (58% of those who found the assessment useful had installed something vs 37% who did not find it useful)
- Confident in the recommendations made by the assessor: 71% had installed something at Wave 3, compared with 33% of those who were not confident. Similar differences were observed at Wave 2 (59% of those who were confident vs 30% of those who were not confident)

However, it should be noted that these differences are linked with tenure: as previously noted (see page 42) owner occupiers were more likely than tenants to say that they found the assessment useful in helping to understand how to make their home more energy efficient, and owner occupiers were more likely to have installed measures.

Interestingly, at both Waves 2 and 3 households that were thinking about making any energy saving improvements before their assessment were not significantly more likely than those not thinking about any improvements to have had something installed. The data suggest that for some people the Green Deal assessment may have played a part in helping them to install measures they were already thinking about, but others have gone on to install energy saving home improvements they were not previously considering.

Given the fact that the survey interviewed those that had had a Green Deal assessment across a 3 month period at each wave, it might be expected that those households that had an assessment in the first month of each quarter would be more likely to have had something installed given the greater amount of time that had passed since their assessment. However, there were no clear patterns here, as shown in Table 4: as there appears to have been a peak of installations amongst those having their assessment in July/August compared with other months, even accounting for time since assessment. The months shown in bold in the table are the month immediately before fieldwork: so where there has been less time for the household to have completed an installation. In March and September lower proportions had had work done

²⁰ However, this statistic does not take into account the way in which measures were paid for. When this is taken into account, clear differences by segment become evident. These are described in detail on page 62 of this report.

compared with the previous months, which may be linked to the amount of elapsed time since assessment. However, when looking at the proportions who have installed something or are in the process of doing so, these differences are no longer apparent.

Table 4: Wave 2 Post assessment actions and intentions (by individual measures)

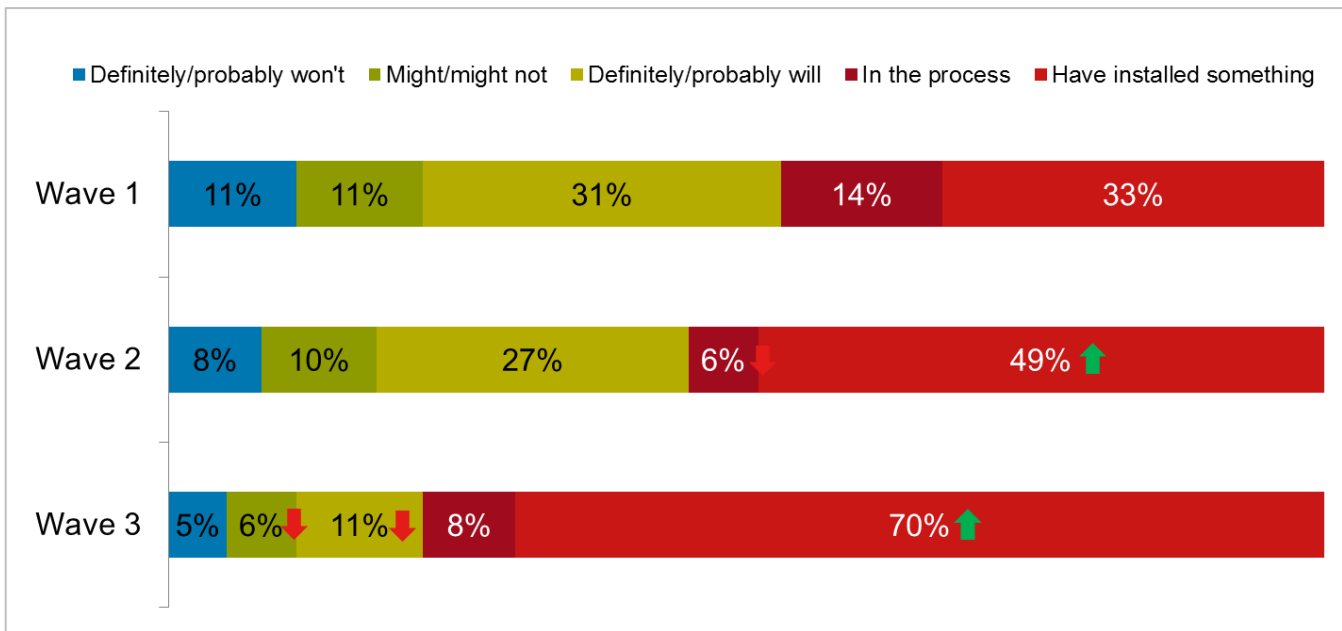
Month of assessment	Wave 1		Wave 2			Wave 3		
	Jan/ Feb*	March*	April	May	June	July	August	Sept
Base	94	191	151	176	172	166	165	169
% who have installed something	55%	25%	54%	56%	56%	69%	70%	57%
% who have installed something or are in the process of installing	68%	39%	56%	62%	66%	73%	73%	68%

*Base: All respondents undergoing assessment in each month (bases shown on table). * Note, only those receiving their GDAR were asked at W1*

Taking into account those households who said that they definitely or probably would install measures, overall, 80% of households at both Wave 2 and 3 said that they had installed, were in the process of installing, or definitely or probably would install at least one measure that was recommended by their Green Deal Advice report. Similar sub-group differences to those described above were observed, with owner occupiers (compared with social tenants) and those that found the assessment useful or were confident in the recommendations made being more likely to have installed, be in the process or intend to install something – although these differences were driven by the differences already described for those that had installed something. Comparison of actions taken between Wave 1, Wave 2 and 3

Chart 13 below shows the furthest point that households had reached following their assessment amongst those that had received their Green Deal Advice Report only. This allows for comparisons to be made between all three waves. As shown, the proportion of households (who had received a Green Deal Advice Report) that had had at least one recommended measure installed increased from 33% at Wave 1 to 49% at Wave 2,²¹ and further increased to 70% at Wave 3.

²¹ Because the sample frame for wave 1 covered two months (February and March 2013), while wave 2 covered three months (April-June 2013) GfK NOP analysed the data in order to establish whether the increase in the proportion claiming to have installed a measure arose simply because there had been a longer period since their assessment. This analysis showed no significant difference in likelihood to install measures between those who were assessed in April compared with those assessed in May and June.

Chart 13: Post assessment actions and intentions (most action taken)

Base: All households that had received a Green Deal Advice Report (Wave 1: 285; Wave 2: 258; Wave 3: 210)

Significant differences between waves are indicated by arrows (↑ ↓)

Measures already thought about before the Green Deal assessment

Table 5 below shows, for each measure recommended by their Green Deal Advice Report, the proportion of households at Wave 2 and Wave 3 that were already thinking about the energy saving measure before they had their Green Deal assessment.

Table 5: Wave 2 and Wave 3 Whether measures recommended by the Green Deal Advice Report were already being considered prior to the assessment

% of those recommended each measure that were already thinking about installing it	Recommended measures							
	New boiler	Loft insulation	Cavity wall insulation	Solid wall insulation	Solar photo-voltaic	Solar thermal	Heating controls	Floor insulation
BASE (W2 / W3)	129 / 120	208 / 190	179 / 213	158 / 130	111 / 98	63 / 73	93 / 98	108 / 114
Wave 2	66%	52%	51%	26%	17%	15%	14%	3%
Wave 3	61%	59%	51%	29%	10%	6%	7%	7%

Base: All Wave 2 and 3 households recommended energy saving measures by their Green Deal Advice Report (base varies). Table only shows measures recommended to 50+ households at both waves

The table shows that there is a considerable range in pre-assessment consideration by measure: whilst 66% of households recommended a new boiler by their Green Deal Advice

Report said that they were already thinking about this measure prior to their assessment at Wave 2, assessments also recommended measures that households had not thought of: for example, just 3% of those recommended floor insulation were already thinking about this measure before they had their assessment at Wave 2. Similar patterns were observed at Wave 3.

Although base sizes limited analysis for most energy saving measures, the survey also found that:

- 95% at Wave 2 and 73% at Wave 3 of those *who had installed or were in the process of installing* a boiler were already thinking about this energy saving improvement before they had a Green Deal assessment
- 59% (Wave 2) and 67% (Wave 3) of those who had installed or were in the process of installing loft installation, and 61% (Wave 2) and 63% (Wave 3) of those who had installed or were in the process of installing cavity wall insulation, were already thinking about making these improvements before their assessment
- In contrast, 29% (Wave 2) and 28% (Wave 3) of those *who had installed or were in the process of installing* solid wall insulation were already thinking about making this improvement before their assessment

However, it should be noted that, taken overall, those households that were thinking about making any energy saving improvements before their assessment were no more likely than those not thinking about any improvements to have had any measures installed.

Recommended selected measures – the customer journey

The survey followed up a number of selected measures to further understand the steps that households had taken since their assessment. For those that had installed a selected measure, they were asked about how they financed it, who installed it, how many quotes they obtained and their reasons for not using Green Deal finance (if applicable).

The energy saving measures followed up were chosen because they represented some of the most commonly recommended measures, but also because they tended to involve significant financial investment and/or levels of work to install and were therefore most likely to involve important decisions around financing.

The following ten measures are referred to as **recommended selected measures** throughout the remainder of this report. In order to prevent respondent fatigue (that is households having to answer about all specific measures that were recommended), a maximum of three selected measures were followed-up by the survey; these were selected at random where a household had had more than three selected measures recommended by their Green Deal Advice Report.

- Loft insulation
- Cavity wall insulation
- Solid wall insulation
- Flat roof insulation
- Room in roof insulation
- Floor insulation
- New boiler
- Upgrade/new windows/doors*
- Solar photovoltaic
- Solar thermal

* This selected measure was derived from those recommended double/triple glazing, secondary glazing and replacement doors. Households recommended one or more of these three measures were therefore followed-up about 'upgrade/new windows/doors' (subject to the random selection of this selected measure by the survey).

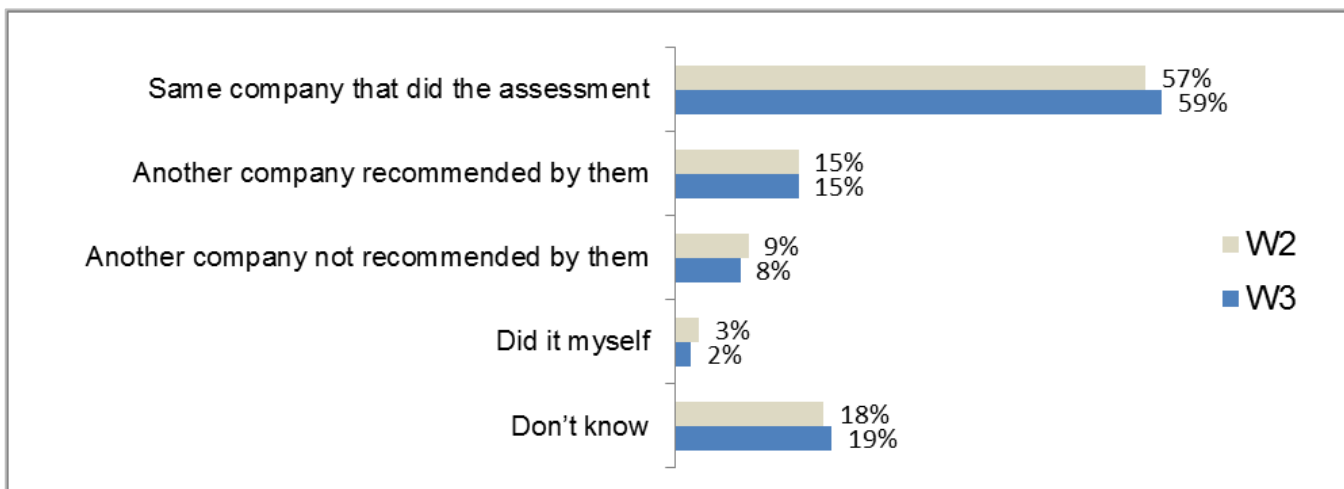
NOTE: Due to low base sizes, analysis by individual measures (e.g. loft insulation vs. cavity wall insulation) is not always possible in the following sections. However, any notable differences are commented on where base sizes allow.

In addition, percentages may add up to more than 100% at questions where households could choose only one response because some households were answering about more than one measure, and all of the household's answers have been added together.

Shopping around for installers

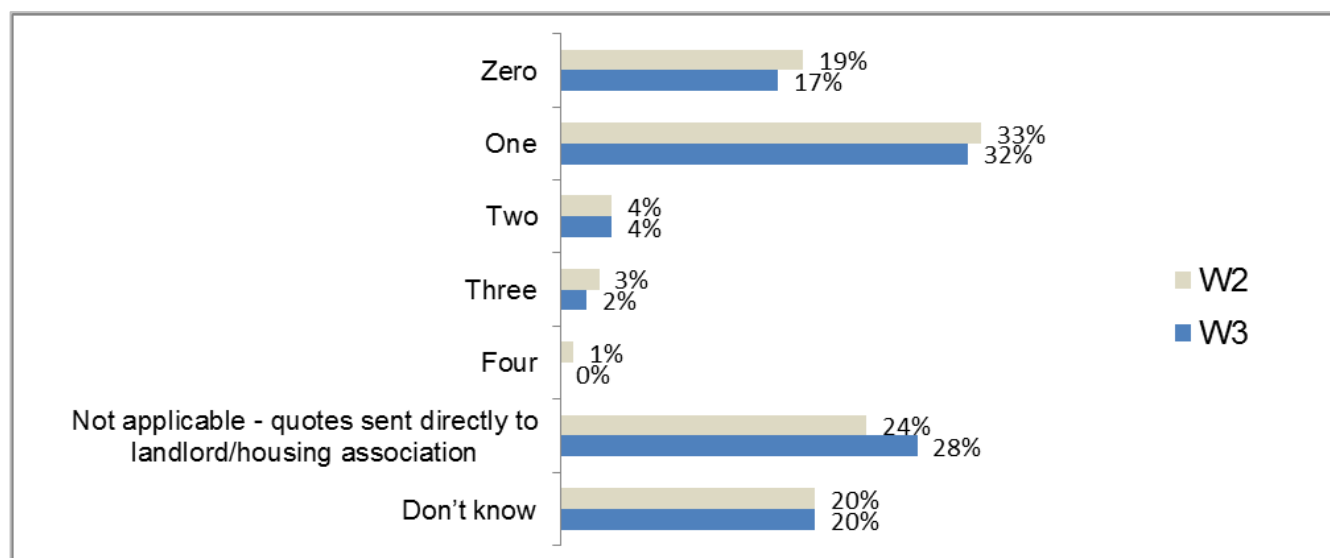
In more than half of households that installed a recommended selected measure, the same company that carried out the Green Deal assessment was responsible for the installation (57% at Wave 2, 59% at Wave 3). A further 15% said another company recommended by the company which carried out the assessment had carried out the work (Chart 14).

Chart 14: Wave 2 and 3 who carried out the installation (for the selected measure)



Base: All households that had installed a selected measure (Wave 2: 259; Wave 3: 310)

Households that had installed a selected measure were also asked how many quotes in total they had got (including from the company that did the assessment/installation). As shown by Chart 15, very few households got more than one quote, and some obtained none at all.

Chart 15: Wave 2 and Wave 3 Number of quotes obtained (for the selected measure)

Base: All households that had installed a selected measure (Wave 2: 259; Wave 3: 310)

At Wave 2, 52% of all tenants (and 64% of social tenants) said they thought that quotes had been sent directly to their landlord or housing association, whilst just 14% said that they had received one quote and none had received more than one quote. At Wave 3, similarly, 58% of all tenants and 73% of social tenants said that any quotes had been sent directly to their landlord or housing association, while 17% had received one quote. This highlights the much lower overall involvement of tenants in the assessment process at both waves.

Financing installations

Ways of paying for selected measures

All respondents who claimed to have installed any selected measures were asked how they were funded²².

Overall, at Wave 3 12% of all households interviewed said that they had installed at least one selected measure which they had paid for at least in part, and 9% had installed any selected measures which had *only* been self-financed. Similar proportions were observed at Wave 2 (11% had self-financed any measure, and 8% had only self-financed measures).

Eight per cent of households at both waves said they had installed any selected measures which had been financed at least in part using Green Deal finance or cashback.

²² In interpreting these findings, please note the following:

Respondents were only asked about how they funded selected measures. Some may have installed other measures for which we did not ask about how they were funded.

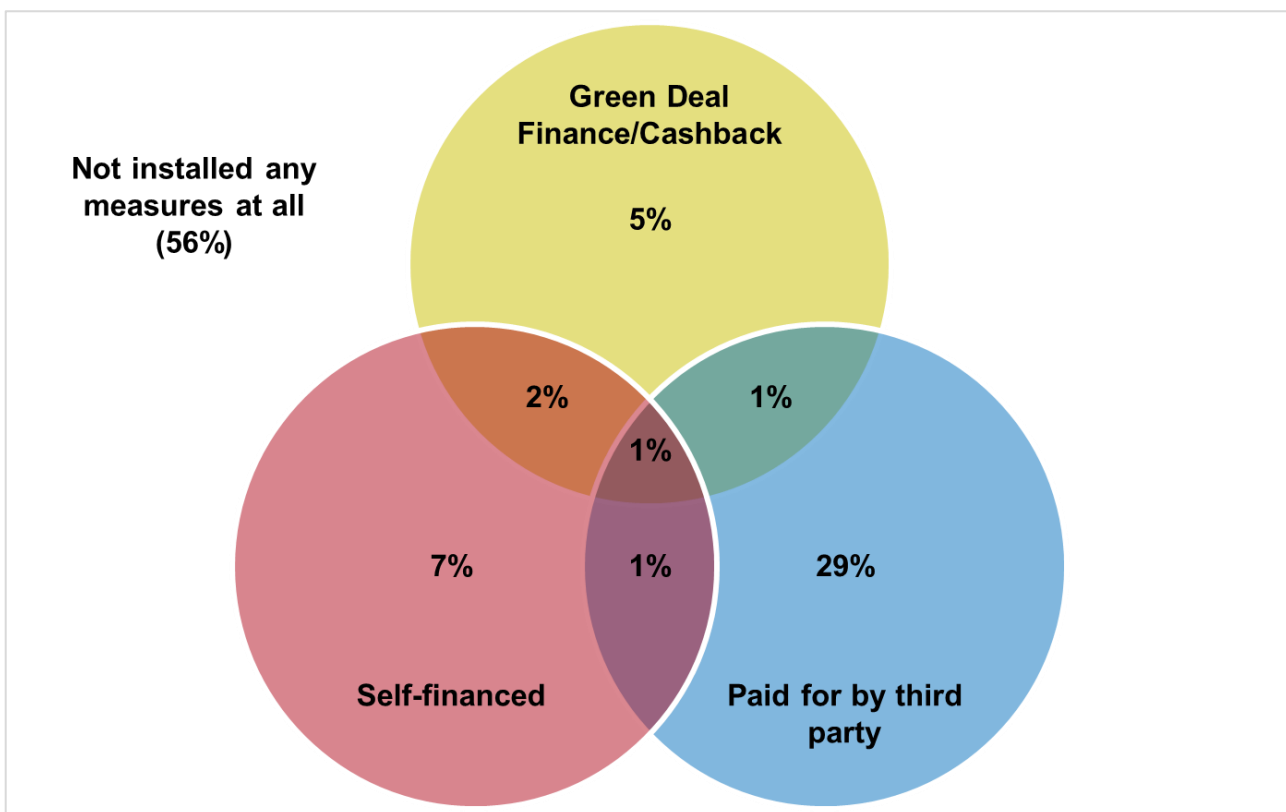
Households could say that they paid for measures using more than one method. Below we discuss whether measures were self-funded or paid for by third parties. The categories are defined as follows:

- Self-funded: paid from savings/regular income, savings/regular income, loans from bank/building society, loans from installers/providers, mortgage extension or other finance
- Paid for by third parties: local authority, housing association, landlord, energy company, other Green Deal provider/installer

In comparison, around three in ten households (34% at Wave 3, 28% at Wave 2) said that they had installed selected measures which were paid for by third parties only (i.e. they had not paid towards the cost of installing those measures).

Chart 16 shows how the ways in which households paid for selected measures interact. It shows that one per cent of households (3 households in total) financed measures using a combination of funding methods: paying something towards the measures (e.g. from own savings), having part paid by a third party, and using Green Deal finance or cashback to pay in part. It should be noted that this combination of funding may have been used to finance multiple measures.

Chart 16: Waves 2 and 3 How measures were paid for



Base: All households (Waves 2 and 3 combined : 999)

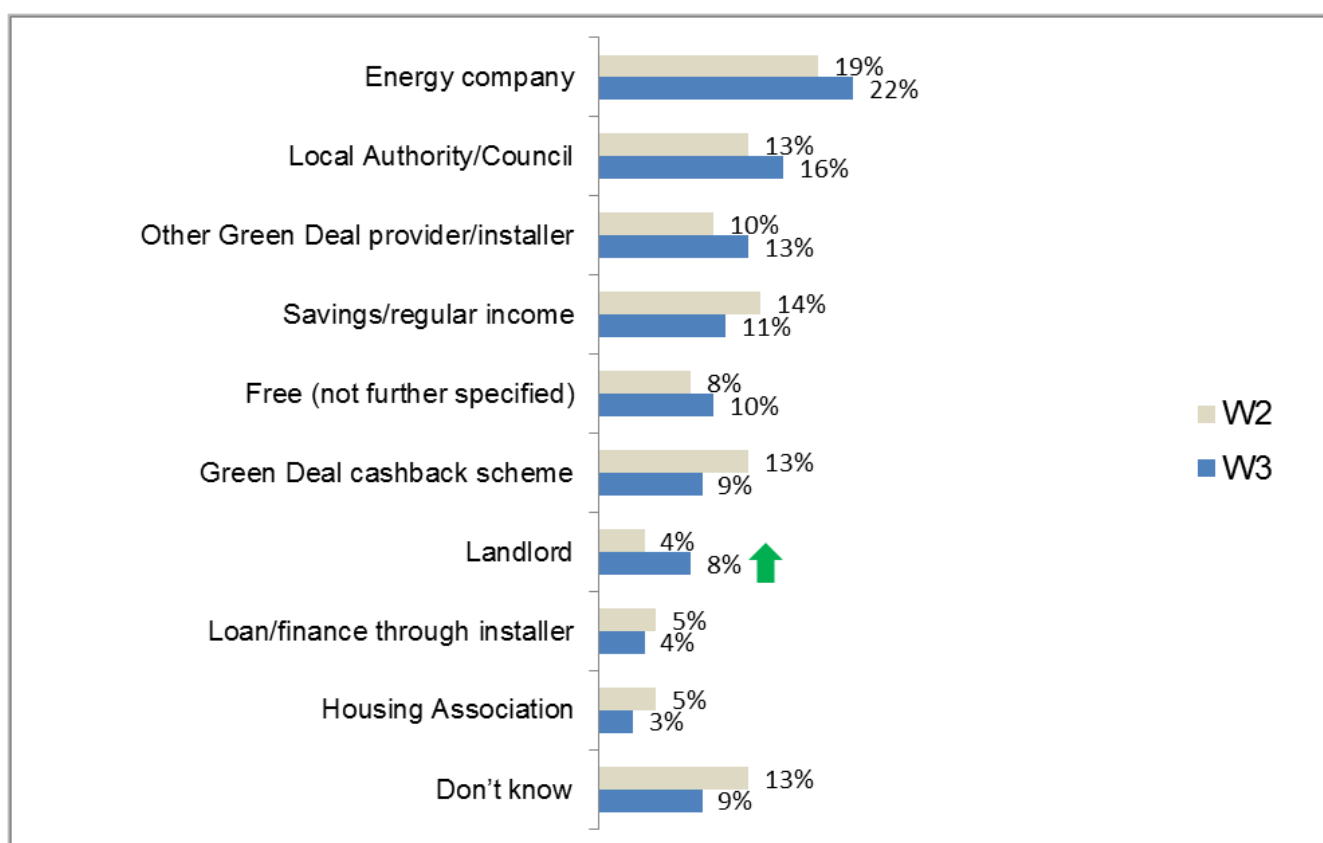
Proportions do not add to 100% due to rounding error. Note, the size of the circles in the diagram above is not proportionate to the percentages they denote

Looking at differences by segment, at Wave 3 those in the Convertibles (18%) and Overstretched (17%) segments were more likely than others to say that they had installed any selected self-funded measures: this proportion fell to 6% amongst the Cost Savers and 11% amongst the Disengaged Rejectors. The Disengaged Rejectors were instead more likely to say that they had installed *only* selected measures funded by third parties (44%). Similar patterns in response were shown at Wave 2.

Chart 17 shows the ways in which households that claimed to have installed a selected measure said they had funded it (percentages are based only on households which had installed at least one measure: previous percentages were based on all respondents, including those who had not installed any measures). Households were allowed to choose more than one answer, as it is

possible to combine payments from different sources. Energy company funding was the most frequently mentioned payment method at both waves (19% at Wave 2, 22% at Wave 3). Nine per cent at Wave 3 and 13% at Wave 2 had indicated they had used the Green Deal cashback scheme²³.

Chart 17: Wave 2 and Wave 3 Payment methods used by those who had installed a selected measure



Base: All households that had installed a selected measure (Wave 2: 259; Wave 3: 310). Multiple options could be chosen. Only responses mentioned by 5% or more at either wave shown

Significant differences between waves are indicated by arrows ( )

Overall, at Wave 3 20% of those who had installed at least one selected measure mentioned any form of self-financing (savings/regular income, loans from bank/building society, loans from installers/providers, mortgage extension or other finance), whilst 70% said that a measure had been paid for fully or partially by any third party, including grants and subsidies (local authority, housing association, landlord, energy company, other Green Deal provider/installer, government scheme/grant, free). These figures were very similar to those seen at Wave 2 (21% and 60% respectively).

²³ The findings on the payment method should be treated with caution, as there appears to be confusion as to how measures were funded (mainly when paid for by a third party). This could be explained by a combination of finance/funding being available and also households not being aware of where ECO funding is coming from.

Within the self-finance options, paying from savings/regular income or a loan or finance through an installer or provider were most commonly mentioned. The specific self-finance methods mentioned by respondents were:

- Savings/regular income: 14% at Wave 2, 11% at Wave 3
- Loan/finance through installer/provider: 5% at Wave 2, 4% at Wave 3
- Loan from bank/building society: 2% at Wave 2, 2% at Wave 3
- Other finance (credit card, high street loan): 1% at Wave 2, rising slightly to 4% at Wave 3
- Mortgage extension: 1 person (<1/2%) at Wave 2, no-one at Wave 3

By tenure, owner occupiers were more likely to have self-financed any measures at all (23% vs 4% of tenants at Wave 3), whilst 77% of tenants said that a measure had been paid for fully or partially by a third party (compared with 68% of owner occupiers). Similar patterns in response were observed at Wave 2. Social tenants generally reported that the local authority, housing association or their landlord paid for (or co-funded) the measures: at Wave 3, half (49%) mentioned the local authority. Two fifths (39%) of private tenants at Wave 3 said that their landlord had funded the measure.

Households not receiving any benefits were, unsurprisingly, more likely than those receiving benefits to be self-financing the measures to any extent (25% compared with 14% at Wave 3). It might be more surprising that the proportion of households receiving benefits who were self-financing was as high as 14%. Seven per cent of those who described themselves as having difficulty keeping up with energy bills were also self-financing the measures²⁴ to some extent, though the figures for those who were getting by alright or managing well were, again unsurprisingly, higher at 20% and 27% respectively (Wave 3 figures). There was no significant difference by benefit status or by the level of difficulty respondents experienced in keeping up with energy bills in the proportion of respondents saying that the measures were paid for fully or partially by third parties or that they were paid for through Green Deal finance or cashback.

By segment, Cost Savers were less likely than average to finance themselves to any extent at Wave 3 (10% compared with 20%), while Disengaged Rejectors and Cost Savers were both more likely than other segments to say the measures were paid for by a third party to some extent (78% and 75% respectively at Wave 3).

There were also a number of differences by measure:

- At Wave 3, 68% of boiler installations* involved self-financing (this included 16% who had used a loan/finance scheme through the installer/provider), with 30% accessing cashback. (At Wave 2 we had also observed that a particularly high proportion of boiler installations involved self-financing, at 86%)
- 83% of cavity wall insulation installations, 81% of loft insulations and 58% of solid wall insulations* were paid for at least in part by a third party. Specifically, 36% of loft insulation

²⁴ At Wave 3, those who said they were having difficulty keeping up with their energy bills and who had self-financed the measures said that they had used the following funding methods: Savings/regular income (1 person), Loan from bank/building society (1 person), Loan/finance through installer/provider (1 person), Other finance (2 people)

installations were funded at least in part by an energy company. (At Wave 2 we had also observed that these measures were particularly likely to have been paid for to some extent by a third party.)

* Caution: small base size at Wave 3 (Solid wall insulation: 41; New boiler: 45)

Qualitative participants that had installed a measure following a Green Deal assessment had either had something installed under the Energy Company Obligation at no cost to themselves, or had self-financed. The case study below describes the decision to self-finance a new boiler.

Male, Midlands, Owner Occupier

Mr K received a leaflet through his door from his local council introducing the Green Deal and advising him that he could ring up and arrange for an “*energy efficiency check*” on his house. He thought it sounded like a good idea and went ahead and arranged a visit. The assessor discussed various different types of energy efficient measures and behaviours, and when they came to look at the boiler, Mr K confirmed that it was about thirty years old and agreed with the assessor that it was time to think about having a new boiler.

About four weeks after the visit, Mr K received a quote for a new boiler: “*they offered me a quote for the boiler of £2450 I think it was and the Green Deal would loan me £700 or £800, I forget now. So anyway I denied the quote, it was no good to me so I got my own boiler. My son knows a boiler fitter and he came out, gave me his price and I paid it*”.

For Mr K, the prospect of repaying a loan over ten years (as he had understood the Green Deal terms to be) was not attractive. Firstly, the repayment terms did not make financial sense for him, and also he did not like the idea of selling the house with a loan attached to it, he felt this would be unappealing for potential buyers. So, Mr K used a lump sum and paid for his boiler outright at a cost of £2,500 – “*We’ve got a bond at the bank, I sold my bond and bought myself a boiler with the bond. I could have kept my bond and paid monthly. If I’d paid for a boiler like that I would have been paying £3000 or £4000, £5000 for a boiler [with Green Deal finance] and in my opinion although it’s a lot I might as well buy it and be done with it*”.

Mr K said he was very pleased with his new boiler, and felt that his home was warmer and more comfortable as a result.

Reflecting the numbers from the quantitative survey, few qualitative participants had heard of or used Green Deal cashback. The case study below gives an example of one participant who installed a new boiler using cashback – although the participant referred to this as ‘a discount’ rather than cashback.

Female, Leeds, Owner Occupier

Ms L was intending to replace her old boiler with a new combination one, as part of a refurbishment of her bathroom to accommodate her reduced mobility. She went to [Energy Supplier] for a quote - they sent an assessor to provide a cost estimate, and she set about negotiating a bigger discount off the £3,700 quoted than the £400 he was offering:

"I'm quite insistent when I'm trying to get money down ... I kept saying 'No, it's far, far too much' ... and then he said 'Well I'm trying to make it [the discount] as much as I can for you'. And he said 'Perhaps you could qualify for £270'."

The assessor went on to explain to her that the government were making an 'offer' of £270 for compliance with requirements such as having all rooms double-glazed, and that they send someone out to verify everything and you are then paid the £270 if you qualify*. She told him this was fine, as she had had all the appropriate measures done. She then got a telephone call from [Energy Supplier] within about a week, saying they understood she was interested in the offer and arranging an assessment appointment. No explicit reference to Green Deal or Green Deal cashback was made.

"I still didn't know what that [£270] was ... I didn't go into it for being Green Deal, I went into it for saving money ... We were talking about how much I had to pay out to get this, but also the fact that [the old boiler] wasn't considered safe anymore ... and it was within the government's wishes for things to be right ... He just basically wanted me to buy this boiler."

Ms L did go ahead to have the boiler installed with her energy supplier, even at the higher price, because she felt that they were a trusted supplier with whom she had an existing and ongoing relationship.

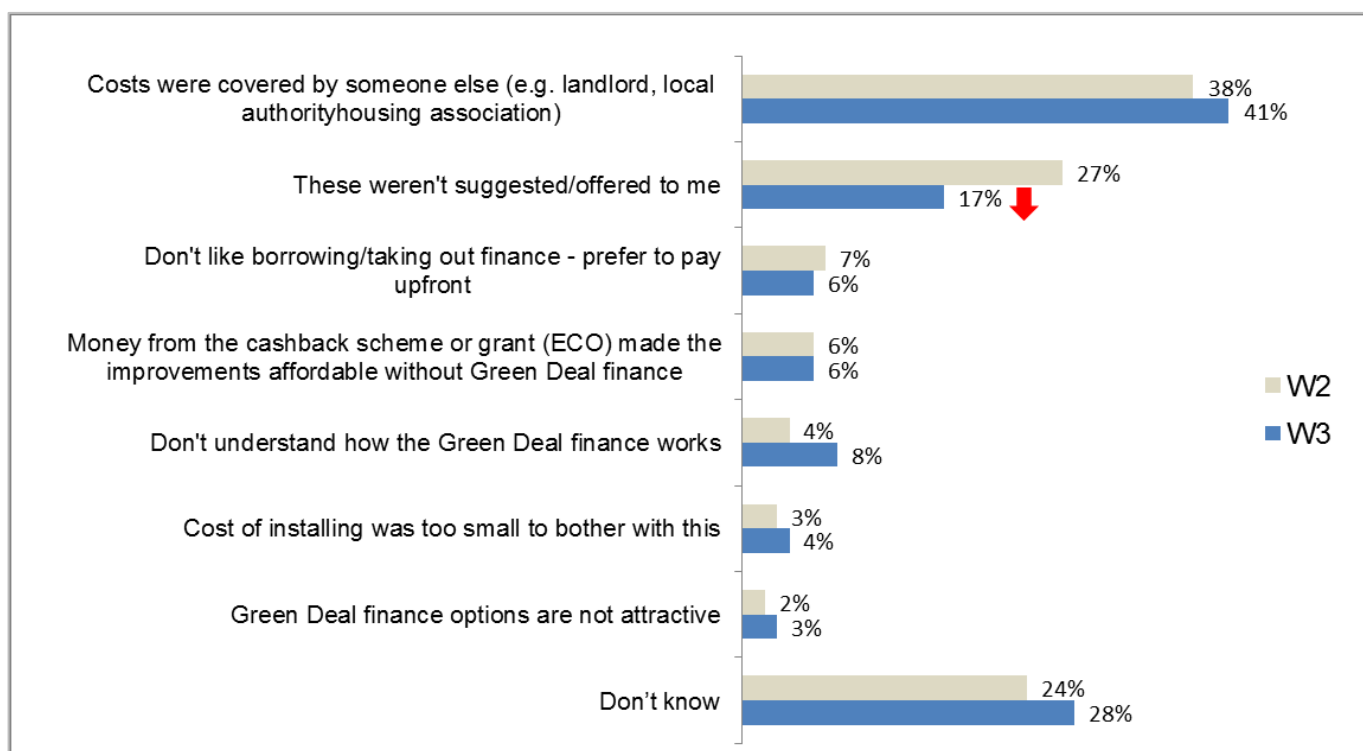
*Please note that this information provided by the assessor (as represented by the participant) is not accurate.

Reasons for not using Green Deal finance

Households that had installed a selected measure but had not used either the Green Deal finance or cashback scheme were asked the reasons for not choosing to use Green Deal finance.

As shown by Chart 18 below, the main reasons given were that the costs were covered by someone else (41% at Wave 3) or Green Deal finance options were not suggested (17% at Wave 3). Twenty-eight per cent answered that they did not know. The proportions giving each reason given were very similar between Wave 2 and Wave 3, with the sole exception that the proportion saying that Green Deal finance options were not suggested or offered went down from 27% to 17%. As might be expected, tenants were more likely than owner occupiers to give the reason that the costs were covered by someone else (63% vs 31% at Wave 2).

Chart 18: Wave 2 and Wave 3 Reasons for not using any Green Deal finance to pay towards installation of selected measures



Base: All households that had installed a selected measure but not used any Green Deal financing (Wave 2: 229; Wave 3: 264) Only responses given by 3% or more at either wave shown.

Significant differences between waves are indicated by arrows ( )

The same households (those that hadn't used any Green Deal finance to fund their installation) were also asked whether they had been offered a subsidy or grant to have the selected measure installed, by their energy company, Green Deal assessor or Green Deal provider. At Wave 3, 28% said that they had been, 54% that they had not and 23% did not know (note that these figures add up to more than 100% as respondents may have been answering about more than one measure). These figures were almost identical to those for Wave 2 when 26% of the equivalent group said that they had been offered a subsidy or grant by their energy company, Green Deal assessor or Green Deal providers.

Qualitative participants described a range of reasons for not wanting to use Green Deal finance. As shown in Chart 18, some simply had not heard of Green Deal finance and did not recall it being explained during their Green Deal assessment: for some this was because their assessment and installation had been arranged by someone else (e.g. landlord, local authority, energy company), and they had had no contact at all with the way in which the measures were financed.

"It must have been my Landlord [who paid or arranged funding]...I have got no idea to tell you the truth".

Female, Birmingham, Private Renter

Others assumed that they had not discussed finance options because it simply was not relevant to their situation.

“He didn’t [mention finance] because I am on disability attendance allowance so there was no need for him to, as long as I could prove it [receipt of the benefit]. It was free”.

Female, Manchester, Owner Occupier

The case study below describes how a Green Deal assessment led to an ECO installation at no cost to the participant. Where this type of journey was experienced participants typically did not recall receiving any information about Green Deal Finance, or discussing any finance options.

Female, London, Owner Occupier

Mrs M first heard about the Green Deal when someone knocked on her door to tell her that assessments were being done in her local area to identify whether people could make any energy saving improvements to their properties. Mrs M was interested to learn more so agreed to a Green Deal Assessment. The assessment lasted around one hour and the assessor took measurements of the home and asked questions about the household energy usage. Mrs M felt that the assessment was professional. During the assessment it was identified that Mrs M was eligible for free cavity wall insulation (under the Energy Company Obligation).

Mrs M was delighted to hear that she was eligible for this free insulation. The assessor confirmed that the installation would be free of charge and there was no discussion of anything to do with finance.

“[They]...said it was free of charge and everything is free of charge.”

The insulation was installed the week following the assessment. Mrs M is pleased with the cavity wall insulation and her experience overall.

“It is very good because I didn’t know about these cavity walls. They pop in my door and they offer [it to] me, this is very good.”

Others felt that whilst it had been mentioned it was not clear how green Deal Finance would work, and the benefits of using Green Deal Finance over and above other funding mechanisms were not clear to them.

“I think it’s not clear what [Green Del Finance] is. They’ve tried to tart it up as this great Green Deal initiative and really it’s a loan”

Male, Midlands, Owner Occupier

Some participants expressed concerns regarding the length of the loan, loan terms and the interest rate.

“Well, I wouldn’t like to buy a house with an outstanding bill on it” (reference to Green Deal finance terms)

Female, Midlands, Owner Occupier

“It’s not 100% funded so they will cover certain percentages of certain things but if you want your external wall insulation, no it’s not 100% of that, you still have to fork out you know £1,000 or £2,000 upfront”

Male, Midlands, Owner Occupier

Across the qualitative research the Green Deal finance terms were cited as a key reason for deciding not to use it. In some cases – as highlighted by the case study below – this meant that participants decided to self-finance instead.

Male, Midlands, Owner Occupier

Mr N first heard about Green Deal through a discussion on the radio. He then read an article on moneysavingexpert.com, which explained the Green Deal, including the principles of Green Deal finance which he found interesting:

"The repayments...would never be more than the savings, so it's not costing you anything on a month to month basis..."

Following a Green Deal assessment which included further discussion of the Green Deal finance options, Mr N found a Green Deal installer to provide a formal quotation for the two measures that Mr N considered a priority, of those presented in the Green Deal Advice Report. Green Deal finance was also discussed with the Green Deal installer who indicated that it wasn't something they would recommend, suggesting a bank loan may be cheaper, adding that Green Deal finance still required a credit check and the levels of interest rates were comparable with those of a bank loan. Mr N also understood that Green Deal finance would not cover all of the outlay, and he would still need to fund some of the costs himself.

With these considerations in mind, combined with the formal quotation for the work which was considered to be expensive, Mr N is now planning on having a boiler installed with a cheaper local provider, and funding the improvement himself. The potential cost of the second measure, external wall insulation, was considered prohibitively high and so Mr N does not intend to take this forward.

Mr N is pleased to have found a local provider who can install the boiler at a cheaper cost. He and his family are looking forward to having a new energy efficient boiler installed and saving money on energy bills.

In other cases, participants decided not to pursue any installations as described in the case study below.

Male, Manchester, Owner Occupier

Mr P paid £120 for a Green Deal assessment, and received a Green Deal Advice Report recommending external Solid Wall Insulation, a new boiler and solar panels. He had been told about and felt he understood how Green Deal finance worked, but was put off by the implications:

"I was thinking that seems fair enough and I will go ahead ... and then I noticed that the interest is charged at 6.9% [sic]. I know the Golden Rule is you can't pay back more than what you are saving but I thought, if it is 7% and it is £3,000 they have put in and I am saving £300, then it is £200 in interest per year and it is only £100 off the capital. I thought, hang on, it is going to be however many years before it is paid off I am still fronting half the money ... and then the savings I am making is going towards paying off what they have lent me."

Mr P felt that it would take too long to see a benefit that would justify the initial outlay, and he also suspects that salespeople might be using Green Deal and Green Deal cashback as an excuse to add to the costs quoted:

“The best way to do it financially, long-term, is to pay for it myself and maybe go back to the [installing] company and say ‘I am going to pay it out of my own pocket, what can you do to bring it down?’ and then do it that way ... Once [the money] is gone it is gone and it is pretty hard to replace ... I wanted to do it ... but at the same time I don’t want to squander what I have got ... In time things may be better. There may be more on offer so you get a fairer deal. I have done that so many times, made the wrong decision and thought ‘Why didn’t I wait?’ So this time I am waiting.”

Overall, participants viewed Green Deal finance as an option that they thought they themselves and other people would only consider if the individual had no other option and needed the installation.

“[it is a good idea] for some but I wouldn’t say it would be ideal for everybody. It would be a good idea for someone in such circumstances where the improvement was drastically needed and maybe they couldn’t afford to have it done and by not having it done then obviously they are losing out. I would say probably for some but if it is not something you really, really need doing straight away and you are having to fork out and you can’t really afford to do it then I wouldn’t see the point of it”.

Male, Midlands, Owner Occupier

FOLLOW UP SURVEY

Background and objectives

In September 2013, GfK NOP was commissioned to conduct a follow up survey of Green Deal assessment customers which aimed to assess:

- Whether intentions which were stated in the Green Deal Assessment Survey turn into actions
- The post-assessment intentions and actions of the customers who had not received their Green Deal Advice Report at the time they were first interviewed
- Motivations for taking action after the assessment, and barriers to taking action
- Experiences of installation amongst those who had taken action after the assessment

Further, the study aimed to test potential methods for follow up research amongst assessment customers, including understanding potential response rates, developing question sets, and assessing the levels of recall of experiences after the assessment.

Only customers from Wave 1 of the Assessment Survey were followed up: these customers had their assessment in January – March 2013, and follow up interviews were conducted in November-December 2013 (approximately 9-10 months after the Green Deal assessment). The decision was taken to follow up only Wave 1 customers because the 9-10 month period was felt to be sufficient to give customers time to take action.

Sample and methods

Of the 507 households interviewed in the Wave 1 survey, 338 (67%) gave permission to be recontacted and provided a telephone number. All 338 households were sent an advance letter before being contacted to participate in a telephone interview. Interviews were conducted by experienced members of GfK NOP's Telephone Interviewing Service (TIS), who were personally briefed by researchers before starting work.

Eight or more calls were made in an attempt to contact households, with calls made at different times of the day and on different days of the week. Respondents were offered £5 in High Street Vouchers for taking part, to encourage response, and the average interview length was 11 minutes.

Of the 338 leads available for the survey, 12 provided incorrect telephone numbers or had moved house since the initial survey. This left an usable sample of 326. A total of 190 households participated in the research, which represents a 60% response rate amongst eligible households. Reflecting the sample for the Wave 1 Assessment Survey, the sample covered England and Wales only.

Data were weighted to the known profile of all households which received a Green Deal assessment in January-March 2013 using the following characteristics: region, property type and tenure. Results included in this report are based on weighted data.

In addition at the analysis stage, respondents to the follow up survey were matched back to the database of households which had had any measures installed which had been funded through the Energy Company Obligation (ECO). It should be noted that these respondents may be answering about other work which they had had completed on their property (i.e. other than the work which was ECO funded) though it is worth noting that the majority of these households receiving ECO funding said that the work completed on their property was paid for by a third party.

Important note on the findings

Because the objective of this research was to see if intentions turned into actions and to gather further evidence on the customer experience, the study did not aim to be representative of the whole assessment population.

Only households that had received their Green Deal Advice Report were asked about their actions and intentions in the initial (Wave 1) survey. Of the 507 households that took part in Wave 1 of the research, 285 had received their advice report, 194 of these gave permission to be re-contacted and 114 completed a follow up interview. Therefore the number of households to follow up actions and intentions with is fairly low, so findings should be treated as indicative and caution should be exercised with how results are used. This means that results from this survey should not be used to extrapolate to the number of households installing measures or installing individual measures. However, the findings do add value over and above the assessments research as they allow us to follow up on households and see if intentions have turned into actions.

While the survey response rate is fairly high for a study of this type, the fact that only a fifth of those who were originally sampled to participate in the Wave 1 research went on to complete both the Wave 1 and follow up surveys should be noted.

In addition, small base sizes limit opportunities for sub-group analysis, so we do not look in detail at patterns of response by demographics, region, etc. in this report. In some cases, where results are shown broken down into sub-groups, raw figures are shown rather than percentages.

This report uses the following conventions:

- All differences commented on are statistically significant at the 95% confidence level.
- Different significance tests are used depending on the type of analysis being conducted.
 - When looking at differences between demographic groups, standard Z-tests are used.
 - When looking at changes over time (between the Wave 1 and follow up surveys), differences between the two points in time have been tested using a paired test.
- Significant difference are indicated by arrows within charts
- Unless otherwise specified all base sizes quoted in the report are unweighted

Profile of those interviewed

The table below compares the profile of those interviewed in the Wave 1 assessment survey with the follow up survey. Unweighted profiles are shown. In general, the profiles of respondents to the two surveys are very similar, though the follow up survey somewhat over-

represented respondents in the South of England and under-represented those from the Midlands (including Wales).

In interpreting these results, it should be noted that the sample of households interviewed in the Wave 1 Assessment Survey over-represented tenants (33% of those interviewed were tenants, compared with 15% of all those receiving an assessment), respondents in urban areas (61%, compared with 56% of those receiving an assessment), and those living in flats (12%, compared with 8% of those receiving an assessment). See Table 1 for more information.

Table 6: Sample profile: Wave 1 versus follow up survey

	Wave 1 Assessment survey	Follow up survey
	507 %	190 %
Region		
North	37	34
Midlands (inc. Wales)	32	26
South	32	40
Urbanity		
Urban	61	59
Mixed urban/rural or rural	39	41
Tenure		
Owner-occupied	67	74
Tenant	33	26
Energy rating		
A-D	66	64
E-G	34	36
Household receiving ECO funding		
Yes	32	33
No	68	67

Intentions and actions

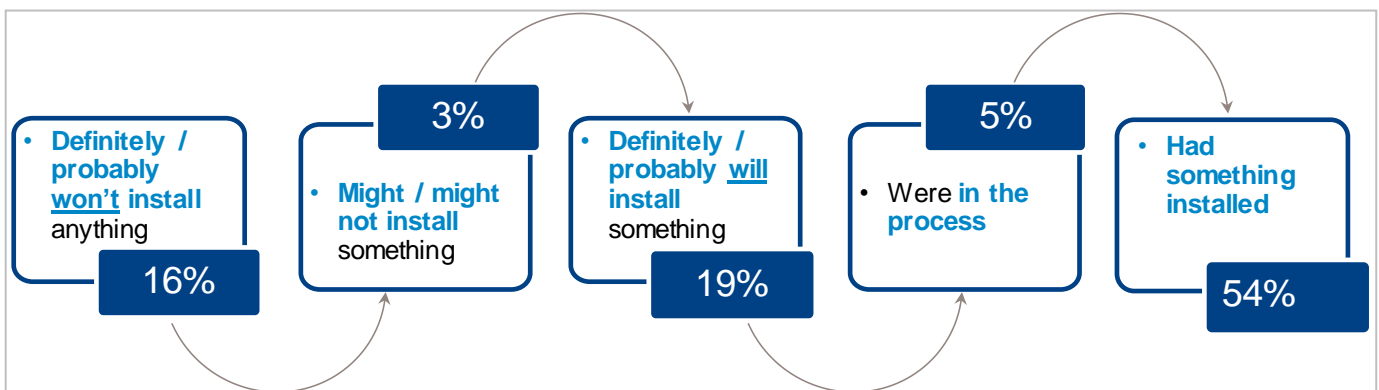
At the Wave 1 Survey, only those households who had received their Green Deal Advice Report were asked about their post-assessment intentions and actions. In the follow up survey, all respondents were asked about their intentions and actions. Questions followed the pattern

outlined below for each measure which was recommended to the household, as recorded in the Green Deal Advice Report:

- Those who had received their Green Deal Advice Report when they were interviewed at Wave 1 were reminded of their responses in that interview, and asked where they are today with respect to that measure: answering on a scale ranging from 'have had this done' to 'definitely won't do this'
- Those who had not received their Green Deal Advice Report were reminded of the measures recommended to them and asked what they had done or intended to do about installing the measure, on a scale ranging from 'have had this done' to 'definitely won't do this'

The chart below shows the *furthest point* that **all** of the 190 households interviewed in the follow up survey had reached following their assessment. It is possible that consumers were at different stages for two or more measures, and the chart only shows the furthest point along the customer journey that they were at, e.g. if a consumer had installed one measure and was in the process of installing another they are only shown once under 'Had something installed'.

Chart 19: Follow up survey post assessment actions and intentions (most action taken)



Base: All completing the Follow Up (190)

Over half of households completing the follow up survey (54%) had said they installed at least one measure, and a further 5% said they were in the process of having a measure installed²⁵.

The following sub-group differences were noted, and these were similar to the sub-group differences noted in the Wave 1 assessment survey:

- Households receiving any means tested benefits were more likely to have had measures installed (62% vs 45% of those not in receipt of means tested benefits), which may reflect the fact that some installations had been funded under ECO (e.g. 79% of households receiving ECO funding were in receipt of means tested benefits)
- Respondents in the South of England were less likely than those in the rest of England and Wales to have had measures installed (35% vs 69% in the North and 65% in

²⁵ In reading these results, it should be remembered that this research was not intended to be representative of the 9,224 assessments between (launch in) January and the end of March. The objective of this research was to see if intentions turned into actions and to gather further evidence and insights on the installation experience. Results should therefore be treated as indicative.

Wales/Midlands), and were more likely to say that they definitely/probably won't have measures installed (25% vs 15% in the North and 5% in Wales/Midlands). This may also be because of the distribution of households receiving ECO funding in the sample, as 62% of households in the North received ECO funding, compared with 32% in Wales/Midlands and only 2% in the South.

- Households in core cities (71% vs 48% not in a core city)

Forty one per cent of all households had had one measure installed, and 14% had had two or more measures installed, including one respondent who had had five measures installed. The average number of measures installed by households who had had at least one measure installed was 1.4.

Looking at this on the basis of measures, the 190 respondents to the follow up survey had been recommended a total of 559 measures: this includes those who had received their Green Deal Advice Report when they were interviewed at Wave 1, as well as those who had not received their report. Information on recommended measures was taken from the Landmark Database, where Green Deal Advice Reports are lodged.

Of the 559 measures recommended to respondents to the follow up survey, they told us a quarter (24%) had been installed at the time of the follow up interview, with a further 3% of measures in the process of being done²⁶. Table 7 summarises the stages of installation/intentions for all recommended measures. Because of low base sizes, results are shown as raw figures rather than percentages with the exception of the 'All measures' row which shows both percentages and raw figures.

68% of the 140 recommended measures which were installed were in households receiving ECO funding.

²⁶ Once again, it should be noted that these results should be treated as indicative.

Table 7: Follow up survey Post assessment actions and intentions

Measure (brackets show the weighted number of respondents recommended each)	Stage of post assessment journey and intention to install by % of recommended measures (raw figures shown)					
	Not made decision / measure not recommended / don't know ^	Probably / definitely won't install	Might or might not install	Definitely / probably will install	In the process of installing	Had this installed
All measures (585) number	22	258	60	89	16	140
All measures (585) %	4%	44%	10%	15%	3%	24%
Solid wall insulation (119)	6	39	6	9	6	53
New boiler (59)	1	15	6	14	2	21
Loft insulation (42)	2	12	3	7	-	18
Heating controls (38)	-	10	3	9	1	15
Solar photovoltaic (73)	3	43	10	9	-	7
Cavity wall insulation (24)	-	14	2	2	-	6
Double/triple glazing/ replacement doors (41)	2	14	5	11	3	6
Draught proofing (30)	-	6	6	9	5	4
Floor insulation (73)	4	48	9	8	-	3
Hot water cylinder insulation (16)	3	5	1	6	-	3
Solar thermal (47)	1	36	7	2	-	1
Flat roof /room in roof insulation (10)	-	5	1	1	-	1
Other heating upgrade (5)	1	2	-	1	-	1
Microgeneration/other * (10)	1	7	1	-	-	-

Base: All respondents to follow up survey (bases shown on table). Raw figures shown because of low base sizes
^ Only those who had not received a Green Deal Advice Report were able to give these responses. (due to survey routing)

* Includes Ground Source Heat Pump, Air Source Heat Pump, Wind turbine (roof mounted) and Waste water heat recovery.

Around two fifths of households recommended solid wall insulation (53/119) had had the insulation installed, and a further 6 said that it was in the process of being installed. Similar proportions said that they had had loft insulation installed (18/42), though none said that it was in the process of being done.

Around a third of households recommended a new boiler had had this done (21/59) and two further households said they were in the process of doing so.

The objective of this research was to see if intentions turned into actions and to gather further evidence and insights on the installation experience. Therefore, findings should be treated as indicative and should not be extrapolated up to the assessment population as a whole.

Small base sizes mean that it is not possible to look in details at responses broken down by demographic groups.

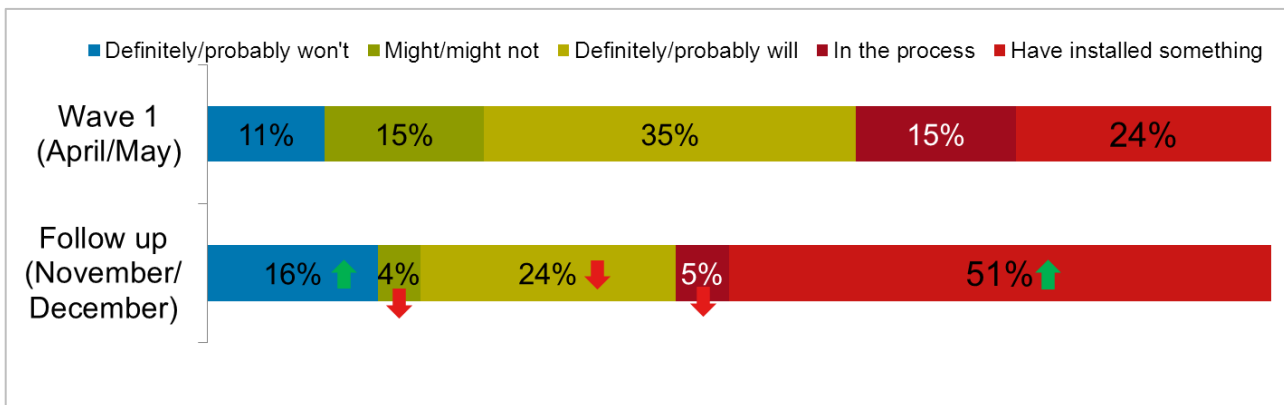
Changes in intentions and actions

Only those respondents who had received their Green Deal Advice Report were asked about their intentions in the Wave 1 interview. It is therefore only possible to look at changes in intentions and actions between Wave 1 and the follow up amongst this sub-sample of those interviewed. The base size for this is fairly low (114 interviews in total), which limits opportunities for sub-group analysis.

Chart 20 shows the furthest point that the 114 households had reached at the time of each interview. As mentioned earlier, it is possible that customers would be at different stages for two or more measures, so the chart only shows the furthest point along the customer for each measure

It should also be remembered that a sub-sample of those respondents who had received their Green Deal Advice Report at Wave 1 were included in the survey. The furthest stage reached by this sub-sample was somewhat different to the furthest stage reached by *all* those interviewed at Wave 1 (the proportion was 31% in the Wave 1 research). This can be explained by this being a follow up survey of an initial sample.

Chart 20: Follow up survey Post assessment actions and intentions at Wave 1 and follow up survey



Base: (Both points in time) All who had received their Green Deal Advice Report at Wave 1 and were re-contacted (114)

Significant differences between waves are indicated by arrows (↑ ↓)

Since the initial interviews were conducted in May 2013, there has been an increase in the proportion of households who had had at least one measure installed: rising from 24% at Wave 1 to 51% at the follow up interview. This means that intentions to install their first recommended measure have turned into actions for over a quarter (27%) of households taking part in the research.

The reduction in the proportion of households saying they are in the process of installing a measure (falling from 15% at Wave 1 to 5% at the follow up survey) suggests that many respondents have completed work they were in the process of. There has also been a reduction in the proportion saying they might/might not make improvements, falling from 15% at Wave 1 to 4% at the follow up interview, but an increase in the proportion saying that they definitely/probably won't install any measures (from 11% at the initial interview to 16% at the follow up).

It therefore appears that in the intervening time period, respondents have made firmer decisions on the actions they would like to take following their Green Deal assessment.

Comparing intentions and actions within households

To enable us to look at changes in intentions and actions on a household basis, comparisons were made between responses made at the initial and follow up interviews. Overall, 51% of all those interviewed at both Wave 1 and the follow up survey had higher intentions (having either installed a measure since the Wave 1 interview, or indicating higher intentions to install something), 18% of households' intentions had stayed the same, and 6% indicated lower intentions to install.

Chart 21 compares the furthest point that respondents had reached at the time of each interview. Categories at the top of the chart show the furthest point reached at the initial interview, and categories down the side show the furthest point at the follow up interview. Base sizes are too small for us to look in detail within each category, so all cells in the chart are shown based on all respondents who were asked about their intentions in both interviews (i.e, those who had received their Green Deal Advice Report at Wave 1).

Twenty four per cent of all households said they had installed at least one measure at the time they were initially interviewed. Fifteen per cent of all household said at the Wave 1 interview that they were in the process of installing measures, and these measures had been installed by the follow up survey (circled in red on the chart). A further one per cent said that measures were in the process of being done at Wave 1, but these had not been completed by the follow up interview, and had moved into the 'definitely/probably will be done' category.

Chart 21: Follow up survey comparing post-assessment actions and intentions at Wave 1 and follow up survey

		Furthest point at INITIAL interview				
		Has been done	In the process of being done	Definitely/probably will be done	Might/Might not be done	Definitely/probably won't be done
Furthest point at FOLLOW UP Interview	Installed at initial interview	24%				
	Installed after initial interview		15%	9%	3%	
	In the process of being done			4%	1%	
	Definitely/probably will be done		1%	17%	5%	2%
	Might/might not be done			1%	3%	
	Definitely/probably won't be done			4%	2%	9%

Base: (Both points in time) All who had received their Green Deal Advice Report at Wave 1 and were re-contacted (114)

It is interesting to note that, of the 62 households which had had at least one measure installed at all, 23 (37%) had received any funding under ECO.

Most of those who said they definitely/probably would install measures at the initial interview had stayed in the same category (17% of all respondents said this at both interviews – circled in light green). Those who have changed their intentions were more likely to express a greater intention to install than a lower intention to install:

- 13% indicated a greater intention to install: this included 9% who had gone on to install measures, and 4% who were in the process of installing
- 5% indicated a lower intention to install: 1% changed to say that work might/might not be done, and 4% had moved on to say that the work definitely/probably would not be done

Amongst those who said they might or might not install measures at the initial interview, there was a spread of movement through the customer journey (circled in dark green). While 3% of respondents said they might or might not install at the initial interview and remained in the same category, 5% had moved to say that they definitely/probably will install, and 4% had installed measures or were in the process of doing so. However, 2% indicated lower intentions, now saying that they definitely/probably would not install measures.

There was less movement out of the 'definitely/probably will not' category. Nine per cent of respondents said that they definitely/probably would not install measures at the initial interview and remained in the same category at the follow up interview (circled in blue). However, 2% did indicate higher intentions: moving into the definitely/probably will be done category.

Comparing intentions and actions for measures

Looking at this on the basis of measures, the 114 respondents who were asked about their intentions at both interviews were recommended a total of 410 measures. Of these, 38 (9%) had been installed at the time of the Wave 1 interview, and a further 50 (12%) had been installed since the Wave 1 interview (i.e. between May and November 2013). For a third of measures, respondents' intentions stayed the same. Table 8 summarises the stages of installation/intentions for all recommended measures. Because of low base sizes, results are shown as raw figures rather than percentages with the exception of the 'All measures' row which shows both percentages and raw figures.

Table 8: Follow up survey: Post assessment actions and intentions

Measure (brackets show the weighted number of respondents recommended each)	Changes in intention between Wave 1 and Follow up Survey (raw figures shown)				
	Installed by initial interview	Has been installed since initial interview	Intentions stayed the same	More intention to install than at time of initial interview	Less intention to install than at time of initial interview
All measures (410) number	38	50	135	69	115
All measures (410) %	9% ²⁷	12%	33%	17%	29%
Solid wall insulation (69)	10	14	14	7	24
New boiler (47)	8	10	9	8	11
Loft insulation (30)	5	8	9	5	3
Heating controls (32)	5	8	5	7	7
Solar photovoltaic (52)	1	3	26	11	10
Cavity wall insulation (18)	2	-	3	3	9
Double/triple glazing/ replacement doors (31)	2	3	10	6	10
Draught proofing (27)	1	3	7	8	9

²⁷ The figure of 9% of measures being installed by the initial interview is different to the initial wave 1 research (where it was 14%). This can be explained by this being a follow up survey of an initial sample.

Changes in intention between Wave 1 and Follow up Survey (raw figures shown)					
Measure (brackets show the weighted number of respondents recommended each)	Installed by initial interview	Has been installed since initial interview	Intentions stayed the same	More intention to install than at time of initial interview	Less intention to install than at time of initial interview
Floor insulation (50)	1	1	25	4	19
Hot water cylinder insulation (6)	1	-	1	1	3
Solar thermal (33)	-	-	20	6	7
Flat roof /room in roof insulation (8)	1	-	1	1	3
Other heating upgrade (1)	1	-	-	-	-
Microgeneration/ other * (6)	-	-	4	2	-

Base: All measures recommended to respondents who had received their Green Deal Advice Report at Wave 1 and were re-contacted. Raw figures shown because of low bases

** Includes Ground Source Heat Pump, Air Source Heat Pump, Wind turbine (roof mounted) and Waste water heat recovery.*

Low base sizes mean it is difficult to draw conclusions from the data, but solid wall insulation, new boilers, loft insulation and heating controls had been most commonly installed since the Wave 1 interview. These measures were the most likely to have been financed by ECO²⁸, which may go some way to explaining why these measures had most commonly been installed at all, and most likely to have been installed since the Wave 1 interview.

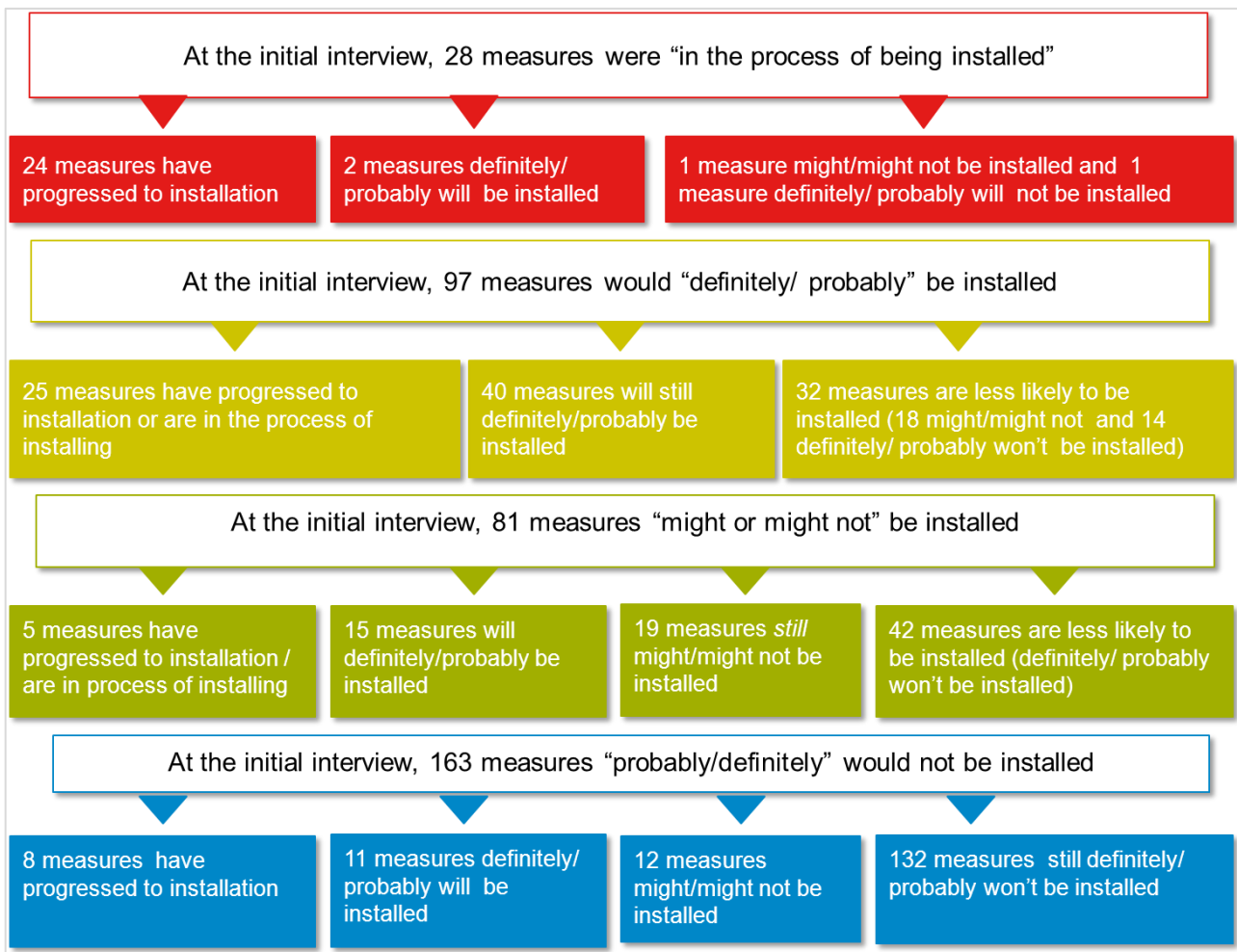
However, it is also notable that cavity wall insulation (9/18 recommendations) was the most likely measure to be associated with lower intentions at the follow up interview than at the time of the initial interview.

Chart 21 compares changes in intentions and actions between the Wave 1 and follow up interviews. Once again, because of small base sizes, raw figures are shown in the chart and results should be treated with caution. .

28

https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/244349/statistical_release_green_deal_eco_great_britain.pdf

Chart 21: Follow up survey comparing post-assessment actions and intentions at Wave 1 and follow up survey for recommended measures



Base: (Both points in time) All measures recommended to respondents who had received their Green Deal Advice Report at Wave 1 and were re-contacted

NOTE: Findings should be treated with caution because of low base sizes. Findings are based upon all measures that were recommended as part of the Green Deal Advice Report

The vast majority measures that were in the process of being installed at Wave 1 had been installed by the time of the follow up. 24 of the 28 measures that were said to be in the process of being installed in May had been installed by December. This suggests that when households start the process of installation they tend to go on and install something.

The largest number of the measures that were intended to definitely/probably be installed at Wave 1 were still at the same stage of intention (40/97), though some have progressed to installation (25). However, slightly more (32) were associated with lesser installation intentions at the time of the follow up: 18 measures were now described as might/might not install and 14 measures were now at the stage of definitely/probably not being installed. This suggests that where households say they will definitely/probably install a measure, between a fifth and a quarter of those measures may progress to installation.

Of the measures which respondents said 'might or might not' be installed at Wave 1, most were associated with similar or lesser intentions at the time of the follow up (19/81 same intentions, 42/81 lesser intentions). Fewer (20) were associated with higher intentions and only 5 had

progressed to installation. Base sizes are too small to draw firm conclusions, but these results may suggest that if respondents opt for the 'might or might not' category when thinking about their intentions, few will go on to install that measure.

Of the respondents who said they definitely/probably would not install measures at Wave 1, few had changed their intentions: 132/163 gave the same response. However, 8 had gone on to install the measure asked about, and 23 stated higher intentions to install when interviewed at the follow up: suggesting that intentions can change over time.

Reasons for changes in intentions

All those who had not gone on to install measures were asked why this was. The question asked varied depending on respondents' stated intentions at the Wave 1 and follow up interviews:

- Those who stated a greater intention to install measures at the follow up interview compared with Wave 1 were asked why they had changed their mind.
- Those who had not changed their intentions were asked whether there were any reasons why they had not yet made any progress towards having the measure installed
- Those who stated lesser intentions at the follow up interview compared with Wave 1 were asked why they have become less likely to have the measure installed

Base sizes are low, so responses are shown as raw figures rather than percentages.

Of those who stated greater intentions (25 respondents), motivations for changing their mind were very similar to the motivations for making energy efficient home improvements described by those who had installed measures: this suggests that these are fairly strong motivators at all stages of the customer journey:

- wanting to save money on energy bills (8 respondents)
- wanting a warmer and more comfortable home (4 respondents)
- because they were carrying out other work on the property (3 respondents)
- that they were planning on doing the work anyway (2 respondents).

While wanting to reduce energy use for environmental reasons was mentioned as a reason for changing intentions, this was only mentioned by one respondent, suggesting that this is not a commonly held view.

For some respondents, financial reasons had prompted their changes in intentions: 5 respondents mentioned any financial reasons at all, including four who said their change in intentions was because the measure was free/paid for by someone else and one who said it was because of the availability of discounts/cashback schemes to pay for the improvements. However, no respondents said that the availability of Green Deal finance or cashback impacted on their change in intentions.

Of those who had not changed their intentions (19 respondents), responses indicated that they had not had enough time to think about it (4 mentions), or needed to carry out other work on their property (4 mentions). Three respondents said that they needed to save up to have the work done.

However, a few respondents said that they had not changed their intentions because of issues related to Green Deal/ECO finance

- 1 respondent said that they had applied for Green Deal or ECO finance but had been turned down
- 1 respondent had applied and was awaiting a decision
- 2 respondents wanted more information about Green Deal or ECO finance before proceeding

Other reasons for not changing intentions were given by 2 respondents or fewer. The reasons given by some respondents suggested that they may go on to have energy saving improvements installed at a later date, rather than saying that they were ruling it out.

Thirty nine respondents stated lower intentions than at the Wave1 interview, and cost and hassle were most commonly mentioned as barriers to making improvements. This reflects findings all waves of the assessment surveys. The hassle and disruption of making changes were mentioned as the reason for stating lower intentions by 8 respondents, while 6 felt that they would not stay at the property for long enough and five said that structural considerations (e.g. need for planning permission) made them less likely to install measures.

Cost issues were also mentioned, with 8 respondents saying that their intentions were lower because the cost of improvements is too high and 6 respondents saying that they cannot access the finance to pay for the measures. Given that the Green Deal finance package aims to enable households to access improvements without high up-front costs, the availability of Green Deal finance could have been motivating to some of these respondents.

Four respondents said that they were less likely to have the measures installed than previously because they felt that they had already done enough, for example they had made other energy saving home improvements, though two of these four respondents had not had any of the measures recommended in their Green Deal Advice Report installed (they may have had measures not recommended installed, or installed measures before the assessment was done). It may be that further information on the benefits of making improvements could have been motivating to some of these respondents.

Those who stated higher intentions to install energy efficient home improvements at the follow up compared with Wave 1, but who had not (yet) gone on to install the improvements were asked if there were any particular reasons why the measure had not been installed yet. Once again, responses centred around time and cost: of the 43 respondents asked:

- 16 said they need to save up to have the work done, and 3 needed to look into how to finance the work. There were a few mentions of Green Deal/ECO finance, with one respondent saying that they had applied for Green Deal/ECO finance but been turned down and another awaiting a decision. While mentioned at low levels, it appears that the process of accessing finance through the Green Deal finance package or ECO has been a barrier to some.
- 4 needed to carry out other work before the installation could be done. 5 have not got round to it yet, and 1 said they need more time to think about it. For these respondents, it may be that they will go on to have measures installed at a later date.
- 3 respondents said they were waiting until their current boiler breaks down before they replace it.

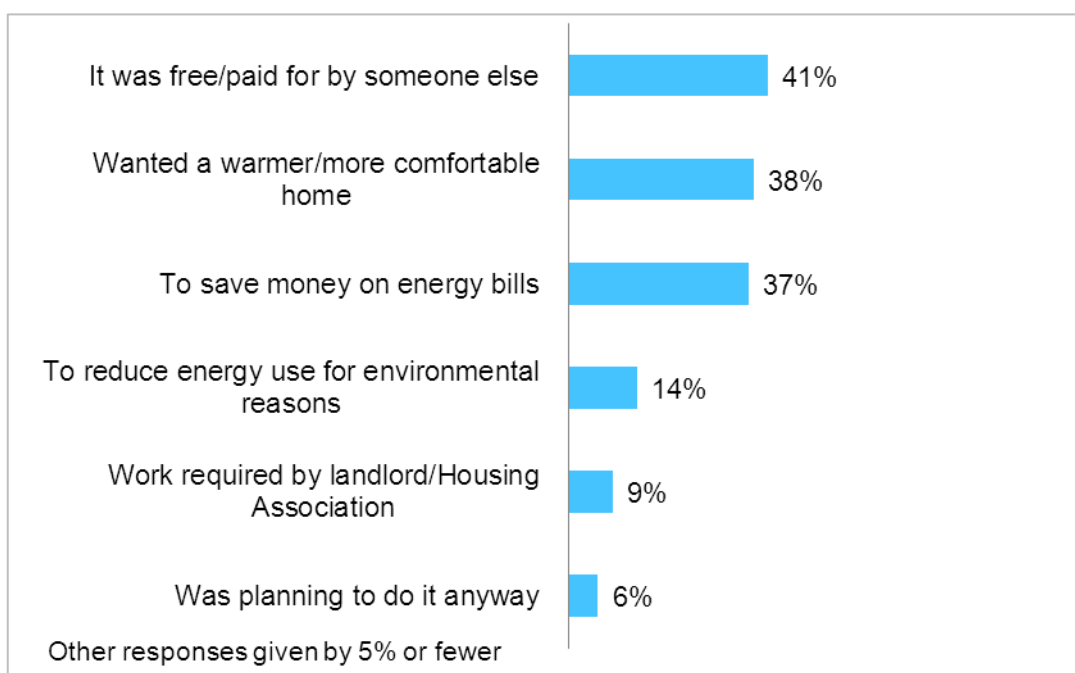
There were also some mentions of supply-side problems leading to delays, with 3 respondents saying that they had had difficulties finding someone to provide quotes or do the work, and one respondent saying that the supplier could not start work straight away.

Motivations to install measures

Capturing the reasons why households chose to take action was a key objective of the Wave 1 follow up research. It found seventy two respondents had installed a selected measure which had been recommended to them since the Wave 1 interview, and they were asked about their reasons for having measures installed, how they paid for them, and their installation experience.

The motivations to install measures mentioned by respondents were very similar to the motivations to make energy efficient home improvements, which suggests that these motivations are fairly universal (see page 28 of this report). Wanting a warmer and more comfortable home and wanting to save money on energy bills were each mentioned by around two fifths (Chart 22). The fact that the measure was free was also a key motivation with 41% saying that they had had the measure installed because it was free/paid for by someone else. This shows that the availability of free energy saving improvements through ECO may have helped some households who may not have otherwise made improvements to their home to do so.

Chart 22: Follow up survey Motivations for installing measures



Base: All respondents who have installed a recommended specific measure since the initial interview (72) – Question not asked at initial interview.

It is interesting to note that, while households which had received ECO funding and had measures installed were more likely than average to say that they had had installed measures because they were free (49% said this), they were no less likely to mention other reasons for having measures installed: 42% said they had measures installed because they wanted a warmer/more comfortable home and 40% because they wanted to save money on energy bills. Nine per cent of those who had received ECO funding and installed measures since Wave 1 said that this was because the work was required by their landlord/Housing Association and they

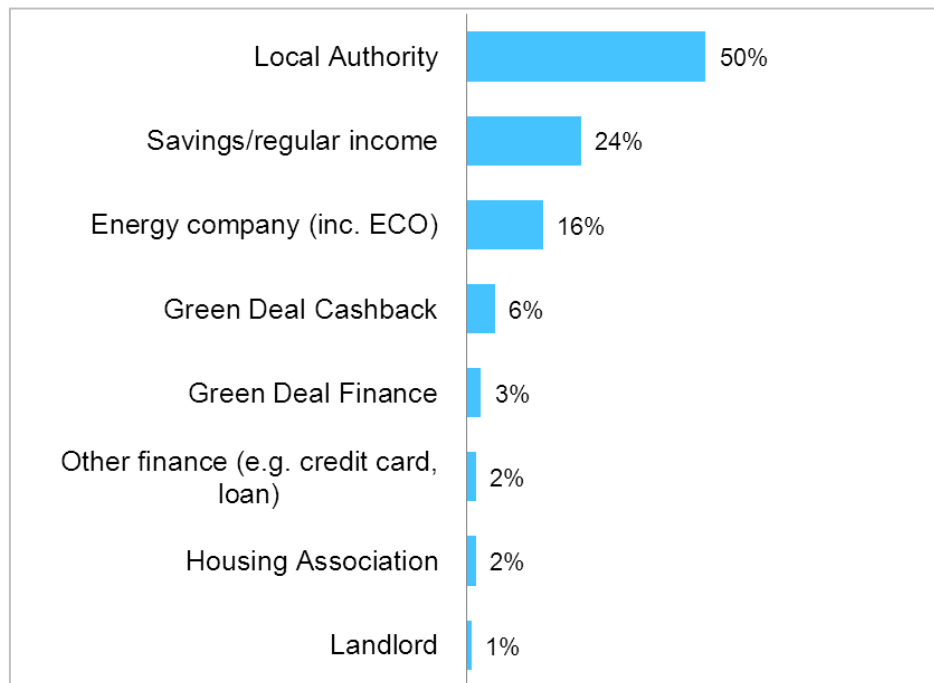
did not have a choice. This may suggest that ECO funding is helping to fulfil un-met needs for having improvements made.

Financing installations

All who had installed measures at all (before or since completing the Wave 1 interview) were asked how the work was paid for: responses should be treated with caution, as respondents often do not know how installations are funded, and 3% said they didn't know how their measures were paid for.

Half of respondents said that the measure was paid for by the local authority, and a quarter (24%) said that they had paid from savings or regular income (Chart 23). Overall, 66% said that the work was financed only by a third party (e.g. energy company, local council, landlord).

Chart 23: Follow up survey how installed measures were paid for



Base: All respondents who have installed a recommended selected measure (95)

Looking at differences between the responses given by those who had installed measures before or after the Wave 1 interview, base sizes are small, so comparisons should be treated with caution. However, those who had installed measures since Wave 1 were slightly more likely to have had the measure financed through a third party (72%, compared with 50% of those who had installed before Wave 1), and slightly less likely to have financed through savings or regular income (20%, compared with 36% of those installing earlier). This may suggest that self-funded measures are installed somewhat more quickly, and there may be more of a time lag where measures are installed under ECO or by local authorities, though again the small base sizes to this question should be noted.

Almost nine in ten (86%) of those in households which had received ECO funding said that the measures they had installed had been paid for at least in part by a third party, though 7% said that they had paid towards the measures and 2% didn't know how they were funded.

In addition, 9% of all those who had installed a recommended selected measure said that Green Deal finance or cashback were used to pay for measures. Those who had installed a recommended selected measure since Wave 1 were specifically asked if they had applied for or intended to apply for Green Deal cashback, and a further 3 respondents said they had (2 had received it, 1 was waiting to receive it). This means that in total 7 respondents (10% of those who had installed a recommended selected measure since Wave 1) had used Green Deal cashback in some way.

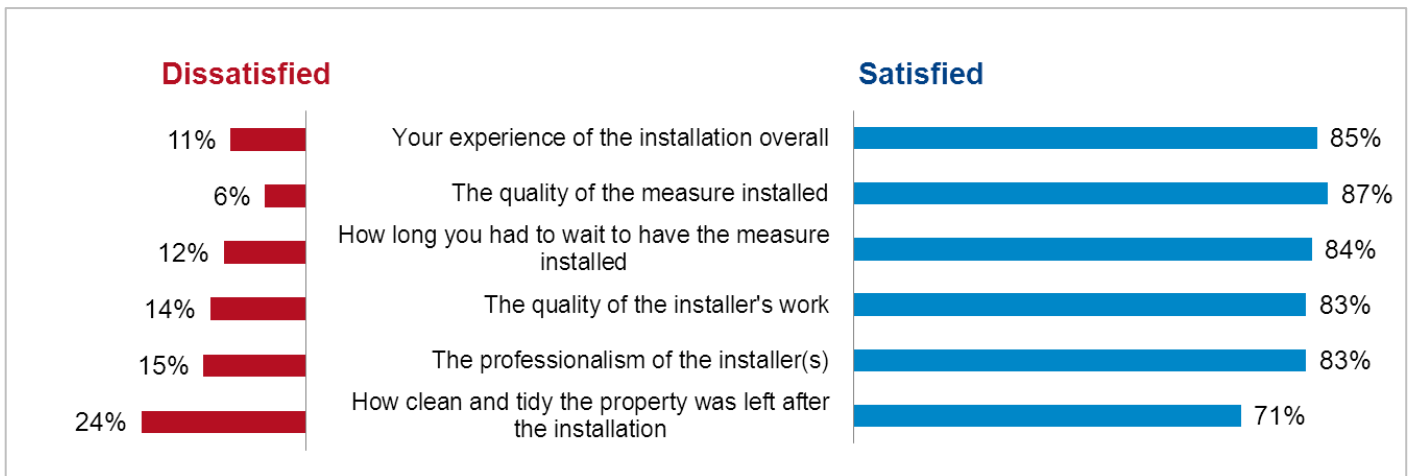
All who had installed recommended selected measures were asked how many, if any, quotes they had received for the installations of those measures, and who had completed the installation. Findings indicate low levels of shopping around, with half of those who had had measures installed saying that the work was done by the company that did the assessment (40%) or another company recommended by them (10%). While a quarter said that the work was done by another company not recommended by the assessor (25%) and 5% did the work themselves, a further 28% didn't know who had installed the measures. Amongst those receiving ECO funding, 55% said the work was done by the company which did the assessment or another company recommended by them, and a further 36% didn't know who installed their measures.

In addition, only 15% of those who had installed a selected measure recommended in their Green Deal Advice Report said that they had got more than one quote for the work. Two fifths (43%) had not got any quotes at all and 30% had got one quote. However, many households said that their installation was funded by third parties: amongst those which had received some ECO funding, only 2 respondents (7%) had got more than one quote and most (50%) had not received any quotes at all.

Installation experience

One of the core objectives of the follow up survey was to examine the installation experience of those who had had had measures installed since Wave 1. Those who had only installed measures themselves and had not made use of any installers were excluded from these questions because they were less relevant to them. Experiences of installation were broadly very positive.

In general, levels of satisfaction with the installation experience were high, with over four fifths saying that they were satisfied with most aspects of the installation: almost nine in ten (87%) said that they were satisfied with the quality of the measure installed and 84% said they were satisfied with how long they had to wait to have the measure installed (Chart 24). Within the satisfied category, half or more said that they were very satisfied.

Chart 24: Follow up survey satisfaction with aspects of the installation experience

Base: All respondents who have had a measure installed by an organisation (not self-installed) since Wave 1 (70)

The lowest levels of satisfaction and highest levels of dissatisfaction related to how clean and tidy the property was left after the installation: a quarter (24%) said that they were dissatisfied, through 71% said they were satisfied at all and 47% were very satisfied. Respondents who had received ECO funding expressed similar levels of satisfaction to the average.

Two fifths (43%) of those who had had a measure installed by an organisation (not self-installed) since Wave 1 said that they had been contacted to check on the installation after completion: this included 30% who said that someone had visited to inspect the work, 9% who had received a telephone call and 3% who had received a letter to check they were happy. Those who received ECO funding were more likely to have been contacted (56% vs 32% of those who did not receive ECO funding), suggesting that ECO customers did not feel that they received a less satisfactory service than those who paid for the measures to be installed.

Most (77%) of those who have had a measure installed said they had had no issues or problems with it since it was installed, though a fifth (20%) said they had. No demographic groups were more likely than others to say that they had had any issues or problems, and responses from those receiving ECO funding did not differ significantly from the average.

Qualitative participants were largely positive about their installation experience with many noting that the work was professional, clean and tidy.

"They [the cavity wall installation company] were very neat. In fact, you couldn't even see where the holes were -.they have managed to fill them in very well. It was a good company"

Male, London, Owner Occupier

"He [the boiler installer] was here at ten to eight and they did a fabulous job...the next day [they] came and collected the rubbish and if anybody had walked into my house half an hour after they had gone, nobody would have even known that I had had work done...nobody could be happier".

Female, Midlands, Owner Occupier

The case study below describes a positive installation experience including the final installation being inspected and certified. Where work was checked participants felt reassured that it had been carried out to a professional standard.

Male, Manchester, Owner Occupier

Mr Q had already had a number of previous offers of free cavity wall insulation that had come to nothing, so he was wary when a new company came cold-calling about it and offering to do a Green Deal assessment then and there. But this company seemed very organised, and said they could do the work even on older hard to treat properties:

“At first, I said ‘Look, we have had so many [calls about this], we are not interested ... But ... I felt the length of time that they were here in comparison to the other companies that had come ... they inspired confidence ... We felt happier, and ... they more or less told us that within two weeks the job would be done.”

In fact there was another set-back when the paperwork went missing, but following a repeat assessment the new company did a very good and professional job of installing Cavity Wall Insulation. They took care to prepare the job thoroughly, they worked efficiently, and they cleaned up after themselves properly - unlike another company who'd done work at their neighbour's across the road:

“They were a very efficient company to deal with. They cleaned all the cavities out, all the rubble. And another thing that we were really pleased about was that they retained the existing [Victorian] air bricks ... They had spent time and cut them out with a disc-cutter so that they didn't damage them, and put them back in place.”

The job had been inspected by a supervisor, and they had been left with a certificate of work and the company's contact details. They have already noticed the increased warmth, and are able to have the heating on for less time.

Few qualitative participants cited negative experiences of the installation. One such example is described in the case story below.

Female, London, Owner Occupier

Mrs R arranged to have loft insulation installed following a Green Deal assessment. She agreed the date with the company and when the day arrived nobody turned up. She was surprised and telephoned the company who apologised and arranged an alternative day. Again, when the day arrived nobody turned up. Mrs R was frustrated as she and her disabled husband had gone to some considerable trouble to remove items from the loft in preparation for the installation. She again telephoned the company who arranged for another day.

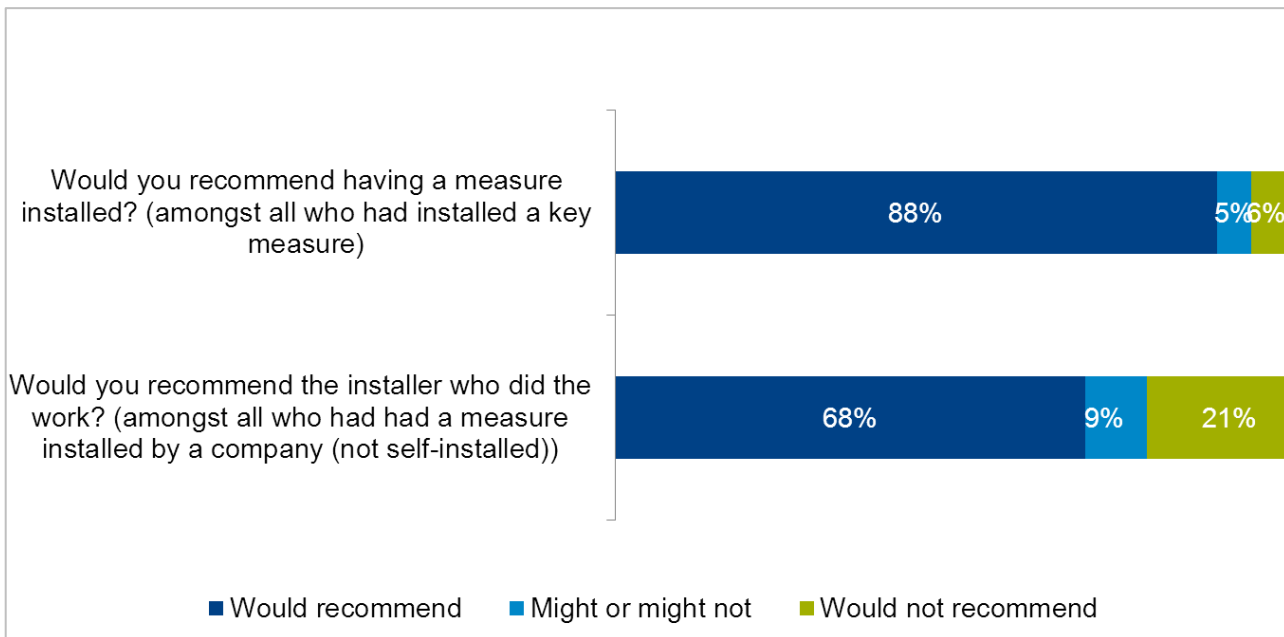
“I phoned them up on the phone and they said they were very sorry and they would be coming round on such and such a day and then they never come again. I phoned them up again...I had boxes all over the place...they said something had got mixed up, I dunno and finally after a month they come and put the new insulation in.”

Mrs R finally had her loft insulation fitted but was not pleased that they had waited so long and been let down on so many occasions. The installation process itself was clean and much quicker than Mrs R had expected which again left her frustrated that it had taken so long for someone to finally come and install it.

Shortly after the loft insulation was installed someone from the company came to her home to check the installation. They said that not enough insulation had been laid in one part of the loft so added more. She was very pleased with this and it put her and her husbands' minds at rest that the installation has been done professionally and properly.

Overall, the strong majority (88%) of those who have installed a recommended specific measure since Wave 1 said that they would recommend having a measure installed to friends or family, and levels of endorsement were high with 71% saying they definitely would recommend (Chart 25). Those receiving ECO funding were particularly likely to say they would recommend having a measure installed (82% definitely would vs 59% of those not receiving ECO funding).

Chart 25: Follow up survey Recommendations to friends and family



Base: All who have installed a recommended selected measure since initial interview (72), All respondents who have had a measure installed by an organisation (not self-installed) since initial interview (70), CAUTION: LOW BASES

Fewer (68%) of those who had had a measure installed by a company (i.e. who had not self-installed measures) said that they would recommend the installer who did the work. However, on balance, more said they would definitely recommend the installer (49%) than definitely would not (12%). There were no particular groups who were more or less likely to endorse their particular installer.

Conclusions (and next steps)

Overall actions and intentions

Overall, the survey estimated that, of the 76,648²⁹ households (covered by the research) which had had a Green Deal assessment between launch and September 2013, between 58,070 and 64,198 households had installed at least one measure, were in the process or definitely/probably intended to install a measure³⁰. Within this, between 42,365 and 49,780 households had already installed at least one measure, between 2,721 and 6,292 were in the process and 8,557 and 13,902 intended to install³¹.

Conclusions

Direct marketing has become a more important source of awareness of the Green Deal over time (including cold calling, door to door sales and leaflet through doors). This reflects the market-led nature of the policy. Landlords, local authorities and housing associations were key sources of awareness for tenants.

Motivations for having a Green Deal assessment were very similar to motivations for having measures installed: namely wanting a warmer, more comfortable home, and saving money on energy bills. Even amongst those who had assessments conducted and measures installed for free, warmth, comfort and saving money continued to be key motivators, suggesting that these may be the most motivating messages for future marketing.

The majority of respondents at all waves said that they did not pay for their Green Deal assessment to be conducted (only around one in ten at each wave had done so).

No prevailing issues were identified with finding an assessor or booking an assessment (though it should be remembered that few had proactively sought out an assessor for themselves).

Almost half of respondents said that they had not received their Green Deal Advice Report, and the proportion who had received it declined over time. While for some this was because the report was sent to their landlord, local authority or housing association, a similar proportion (around one in ten) said that they were expecting a report but had not received it.

The research suggested that the advice conveyed through the Green Deal assessment visit and Green Deal Advice Report were positively viewed. While the qualitative research suggested some potential improvements to the report, some of those who had not received their report said that they would have found it useful. Given that the Green Deal Advice Report contains broader information on energy use and energy saving behaviours which should be applicable to all households, we feel that it could be useful for all households to receive a report – even when

²⁹ It should be noted that the sample included households which had had a Green Deal assessment which was lodged within the relevant quarter. A small number of assessments were lodged outside of the relevant quarter, but these were excluded from the sample. This can explain the differences between the figure presented here and the Green Deal and ECO Official Statistics. Further detail is provided in the technical report

³⁰ Estimates are shown as ranges to account for survey error. Calculations are based on the effective sample size for the survey. For more information on how these were calculated, please see the survey technical report.

³¹ It should be noted not all households in the process of installation go onto install and our research suggested around a quarter of those that say they intend to install had gone on to install 9-10 months after their assessment (see page 77). Please note that figures cannot be added together because of rounding error.

households are not able to make decisions on major installations (insulation, boilers) because this is the responsibility of their landlord/local authority/housing association.

Where a Green Deal assessment is conducted as a conduit to accessing ECO funding and an Advice Report is not provided (as happened in some cases in the qualitative research), this may be a missed opportunity, as the broader behavioural advice appeared to be generally welcomed.

In general, views of the assessment experience were positive and there were high levels of advocacy. The main exceptions seen in the qualitative research related to cases where the household did not feel involved in the assessment process, and/or it was not explained to them.

There was little evidence in either the qualitative or quantitative research that households were 'shopping around' for installers after receiving their Green Deal Advice Report, though where qualitative respondents did shop around they generally found better deals. In addition, some qualitative research respondents installing measures said that they found better prices for the work when using installers who were not accredited by the Green Deal.

There has been a general increase in the proportion of assessment customers who have installed at least one energy saving home improvement after their assessment: rising from 31% in wave 1, 56% at Wave 2 to 65% at Wave 3.

Most of those who start the process of installing measures soon after the assessment do go ahead to complete the installation: where intentions are less well defined, fewer had gone on to complete an installation at the time of the follow interview. While there was an increase in the proportion who had installed measures over time (between the initial and follow up interview), it is notable that many of the later installations were funded by third parties. The results suggest that if households are going to fund installations themselves, they are much more likely to do it if they start quickly after the assessment, and there therefore may be a role for follow-up contact with households to ensure that they don't lose motivation to install measures at a later date.

In general views of the installation experience, quality of installation and of measures were positive. Where qualitative respondents received follow up contact after the installation, this was viewed as reassuring. However almost a fifth of respondents to the follow up survey said that they had had issues or problems with the measures after they had been installed.

Next steps

Further waves of research amongst Green Deal assessment customers are underway, with the intention that they will also be followed up in the future. This will add significantly to the evidence base, enable us to see further how experiences change over time, and provide further analytical opportunities associated with larger sample sizes.

© Crown copyright 2013
Department of Energy & Climate Change
3 Whitehall Place
London SW1A 2AW
www.gov.uk/decc

URN