

8 Phase 3 Stimulus Used

Phase 3 mock assessments were conducted to test revised Occupancy Assessment layouts, together with the current version of the Energy Performance Certificate.

8.1 Phase 3 Evaluation

- Occupancy Assessment A (full list and recommendation)
 - Higher version
 - Low user version
- Occupancy Assessment B (recommendation only)
 - High user version
 - Low users version
- EPC without a Green Deal

GREEN DEAL OCCUPANCY ASSESSMENT

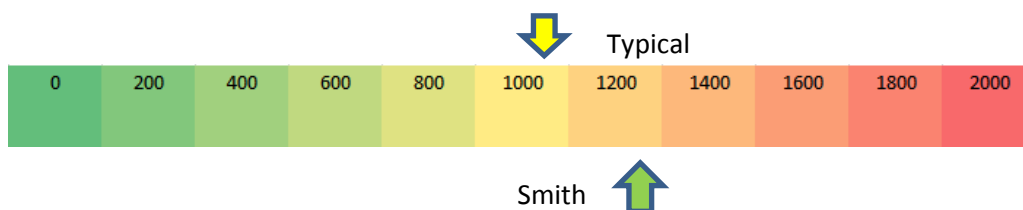
PREPARED FOR: SMITH HOUSEHOLD

33 Any Street, Anytown, XX19 8XX

Reference: 01892-7654-3456-0987

This report shows how your household uses energy currently, and recommends ways of making your home more energy efficient.

Current energy bill for your household in £/year



Typical arrows show energy usage for a typical property of this size and type. Your household's energy usage is **HIGHER** than typical. See overleaf for how we have worked this out.

Green Deal Improvements available to your property

Improvements	Estimated costs*	Your estimated annual savings	Maximum annual Green Deal repayment**
Increase loft insulation to 270mm	£100 - £350	£99	£86
External or Internal Solid Wall Insulation	£4,000 - £14,000	£712	£618
New Condensing Boiler	£2,200 - £3,000	£383	£346
Total	£6,300 - £17,350	£1,194	£1,050

Green Deal Improvements chosen by your household

Improvements	Estimated costs*	Your estimated annual savings	Maximum annual Green Deal repayment**
Increase loft insulation to 270mm	£100 - £350	£99	£86
External or Internal Solid Wall Insulation	£4,000 - £14,000	£712	£618
Total	£4,100 - £14,350	£811	£704

* Discounts available for qualifying homes

** Providers may charge below the maximum level

Your chosen package could save up to £811 per year on your heating and hot water energy bill. Actual savings will depend on how much energy you use and the cost of energy.

The maximum a Green Deal provider can charge per year for these improvements is £704. Green Deal repayments would be added to your electricity bill, spread over the year.

The Green Deal is a way to improve the energy efficiency of a home without paying to install improvements up front. Providers can only charge repayments that are equal to or less than typical savings for a property like yours.

The amount of money you could save from installing Green Deal improvements depends on how much energy your household currently uses – the higher your bills, the more you could save.

GREEN DEAL OCCUPANCY ASSESSMENT

Your heating and hot water use: HIGH energy household

Your energy use is not typical









- You use more hot water and heating than the typical example used in the Energy Performance Certificate (EPC).
- The improvements in your EPC may save you more than a typical home would save.

Why is this important?




- Green Deal Providers can not charge higher repayments than typical savings for a property like yours.
- Repayments may be lower than your savings because you are a high energy user so you might save more than a typical home.
- Page 1 shows the difference between maximum repayments and your estimated savings. Consider this difference when deciding whether to take out a Green Deal.

Why the Green Deal works like this

- The Green Deal is a loan to the property, not to your household. It is based on a typical household because this can change over time. To find out more go to www.greendealadvice.org.

What makes you different?	Typical of your type of property	Your household		
Number of occupants	3			
Hours at home each weekday	9			
Thermostat setting	21°C			
Number of rooms not heated	0			

Ways to save today

		Why this is important?	What you can do to save today
	Heating	Approximately 60% of your energy goes towards heating your home	Turn off radiators in empty rooms
	Hot Water	Approximately 20% of your energy is used to heat your water	Take showers instead of baths – and fit a water saving shower head to your mixer shower
	Lighting & Appliances	Usage is growing fast when there are easy ways to save	Always turn off the lights when you leave a room and don't leave your appliances on standby

About this document

This Occupancy Assessment report for the Smith household was produced following an occupancy assessment undertaken by a qualified assessor, contracted by [scheme name], who is certified by [certification name]

You can get details of the accreditation scheme at [scheme website address] .

Assessor's accreditation number: [accreditation number]
Assessor's name: [assessor name]
Phone number: [phone]
E-mail address: [e-mail]
Related party disclosure: No related party

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Your next steps



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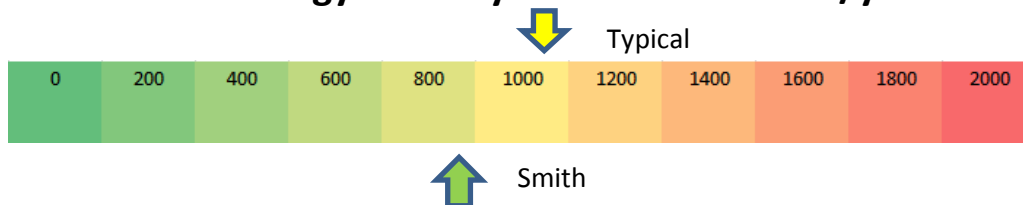
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Total	£4,100 - 14,350	£404	£704

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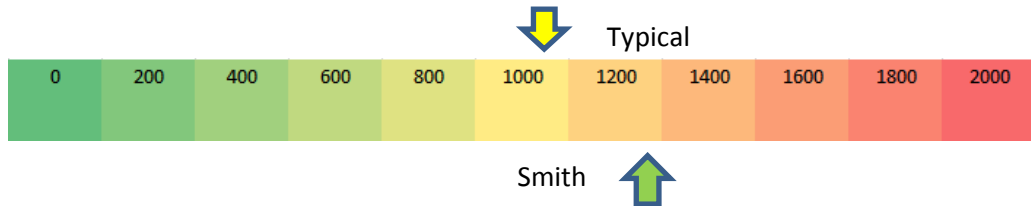
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The Energy Performance Certificate provides a full list of energy saving improvements available for this property which are based on standard occupancy of the property.

You can choose your package of improvements from the full list.

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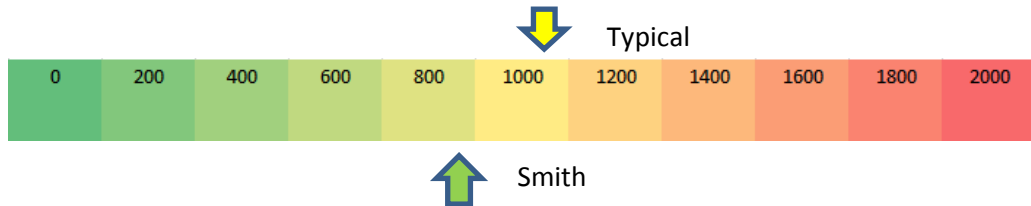
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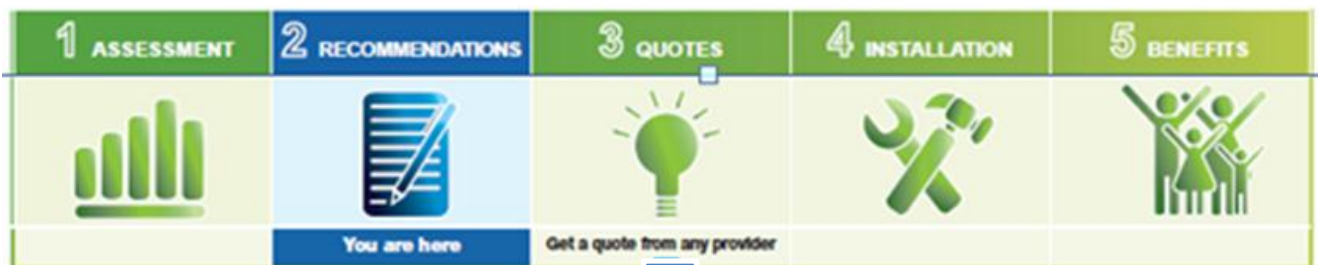
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Energy Performance Certificate (EPC)

10 High Street, Bradford, BD23 2QH

Dwelling type: Semi-detached house
Date of assessment: 31 January 2011
Date of certificate: 06 March 2012


Reference number: 0182-2079-9493-9679-4595
Type of assessment: RdSAP, existing dwelling
Total floor area: 160 m²

Use this document to:

- Compare current ratings of properties to see which properties are more energy efficient
- Find out how you can save energy and money by installing improvement measures

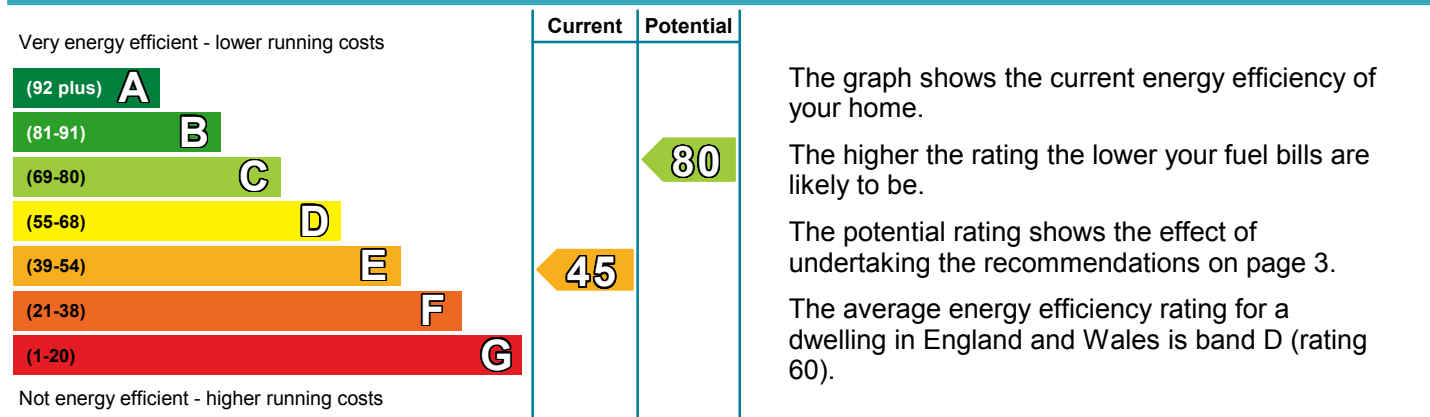
Estimated energy costs of dwelling for 3 years	£5,814
Over 3 years you could save	£3,150

Estimated energy costs of this home


	Current costs	Potential costs	Potential future savings
Lighting	£276 over 3 years	£270 over 3 years	
Heating	£5,133 over 3 years	£2,079 over 3 years	
Hot water	£405 over 3 years	£315 over 3 years	
Totals:	£5,814	£2,664	

These figures show how much the average household would spend in this property for heating, lighting and hot water. This excludes energy use for running appliances like TVs, computers and cookers, and any electricity generated by microgeneration.

Energy Efficiency Rating



Top actions you can take to save money and make your home more efficient

Recommended measures	Indicative cost	Typical savings over 3 years	Available with Green Deal
1 Increase loft insulation to 270 mm	£100 - £350	£258	
2 Internal or external wall insulation	£4,000 - £14,000	£1854	
3 Condensing boiler	£2,200 - £3,000	£1038	

See page 3 for a full list of recommendations for this property.

To find out more about the recommended measures and other actions you could take today to save money, visit www.direct.gov.uk/savingenergy or call 0300 123 1234*. When the Green Deal launches, it may allow you to make your home warmer and cheaper to run at no up-front cost.

*calls to 03 numbers should cost no more than geographic 01 or 02 UK wide calls, and may be part of inclusive minutes subject to your provider and call package.

Summary of this home's energy performance related features

Element	Description	Energy Efficiency
Walls	Solid brick, as built, no insulation (assumed) Cavity wall, filled cavity	★☆☆☆☆ ★★★★★
Roof	Pitched, 50 mm loft insulation Flat, limited insulation (assumed)	★★☆☆☆ ★★☆☆☆
Floor	Solid, no insulation (assumed)	–
Windows	Fully triple glazed	★★★★☆
Main heating	Boiler and radiators, mains gas	★★★★☆
Main heating controls	Programmer, room thermostat and TRVs	★★★★☆
Secondary heating	Portable electric heaters (assumed)	–
Hot water	From main system	★★★★☆
Lighting	Low energy lighting in 80% of fixed outlets	★★★★★

Current primary energy use per square metre of floor area: 313 kWh/m² per year

The assessment does not take into consideration the physical condition of any element. 'Assumed' means that the insulation could not be inspected and an assumption has been made in the methodology based on age and type of construction.

Low and zero carbon energy sources

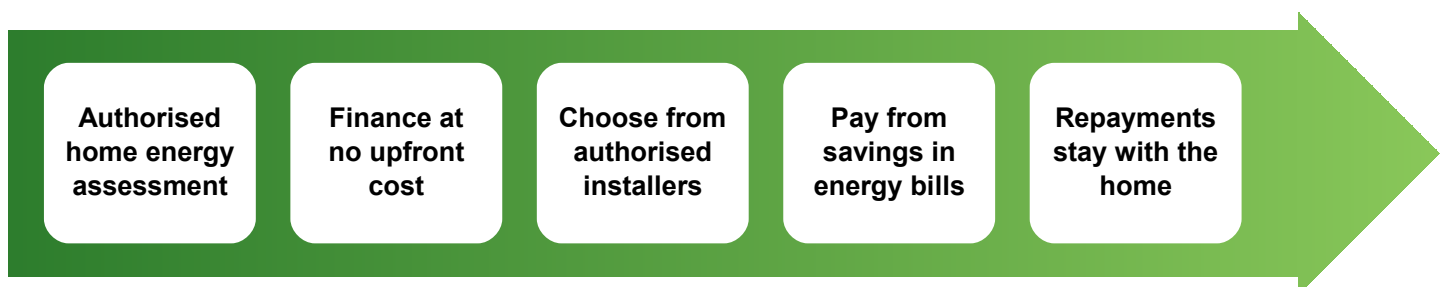
Low and zero carbon energy sources are sources of energy that release either very little or no carbon dioxide into the atmosphere when they are used. Installing these sources may help reduce energy bills as well as cutting carbon. There are none provided for this home.

Opportunity to benefit from a Green Deal on this property

When the Green Deal launches, it may enable tenants or owners to improve the property they live in to make it more energy efficient, more comfortable and cheaper to run, without having to pay for the work upfront. To see which measures are recommended for this property, please turn to page 3. You can choose which measures you want and ask for a quote from an authorised Green Deal provider. They will organise installation by an authorised installer. You pay for the improvements over time through your electricity bill, at a level no greater than the estimated savings to energy bills. If you move home, the Green Deal charge stays with the property and the repayments pass to the new bill payer.



For householders in receipt of income-related benefits, additional help may be available.









To find out more, visit www.direct.gov.uk/savingenergy or call **0300 123 1234**.



Recommendations

The measures below will improve the energy performance of your dwelling. The performance ratings after improvements listed below are cumulative; that is, they assume the improvements have been installed in the order that they appear in the table. Further information about the recommended measures and other simple actions you could take today to save money is available at www.direct.gov.uk/savingenergy. Before installing measures, you should make sure you have secured the appropriate permissions, where necessary. Such permissions might include permission from your landlord (if you are a tenant) or approval under Building Regulations for certain types of work.

Measures with a green tick  are likely to be fully financed through the Green Deal, when the scheme launches, since the cost of the measures should be covered by the energy they save. Additional support may be available for homes where solid wall insulation is recommended. If you want to take up measures with an orange tick , be aware you may need to contribute some payment up-front.

Recommended measures	Indicative cost	Typical savings per year	Rating after improvement	Green Deal finance
Increase loft insulation to 270 mm	£100 - £350	£86		
Internal or external wall insulation	£4,000 - £14,000	£618		
Replace boiler with new condensing boiler	£2,200 - £3,000	£346		
Solar photovoltaic panels, 2.5 kWp	£9,000 - £14,000	£214		

Alternative measures

There are alternative measures below which you could also consider for your home.

- Air or ground source heat pump
- Micro CHP

Choosing the right package

Visit www.epcadviser.direct.gov.uk, our online tool which uses information from this EPC to show you how to save money on your fuel bills. You can use this tool to personalise your Green Deal package.

Directgov
Public services all in one place

Green Deal package	Typical annual savings
Loft insulation	Total savings of £1,050
Internal or external wall insulation	
Condensing boiler	
Electricity/gas/other fuel savings	£401 / £649 / £0

You could finance this package of measures under the Green Deal. It could **save you £1,050 a year** in energy costs, based on typical energy use. Some or all of this saving would be recouped through the charge on your bill.

About this document

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Assessor's accreditation number: AAA_123456
Assessor's name: John Smith
Phone number: 030 5555 1234
E-mail address: john.smith@isp.net
Related party disclosure: No related party

Further information about Energy Performance Certificates can be found under Frequently Asked Questions at www.epcregister.com.

About the impact of buildings on the environment

One of the biggest contributors to global warming is carbon dioxide. The energy we use for heating, lighting and power in homes produces over a quarter of the UK's carbon dioxide emissions.

The average household causes about 6 tonnes of carbon dioxide every year. Based on this assessment, your home currently produces approximately 9.5 tonnes of carbon dioxide every year. Adopting the recommendations in this report can reduce emissions and protect the environment. If you were to install these recommendations you could reduce this amount by 6.1 tonnes per year. You could reduce emissions even more by switching to renewable energy sources.

The environmental impact rating is a measure of a home's impact on the environment in terms of carbon dioxide (CO₂) emissions. The higher the rating the less impact it has on the environment.

Current rating **43**



Potential rating **78**

Your home's heat demand

For most homes, the vast majority of energy costs derive from heating the home. Where applicable, this table shows the energy that could be saved in this property by insulating the loft and walls, based on typical energy use (shown within brackets as it is a reduction in energy use).

Heat demand	Existing dwelling	Impact of loft insulation	Impact of cavity wall insulation	Impact of solid wall insulation
Space heating (kWh per year)	27,120	(1483)	N/A	(10614)
Water heating (kWh per year)	2,714			

9. Recruitment

9.1 Regional sample Breakdown

A total of 80 depth interviews with individuals and couples were conducted at locations in England, Scotland and Wales. The regional breakdown is shown in the table below.

Depth Interviews	Total	Midlands, East Anglia Birmingham, Norfolk	South East London	North Newcastle, Leeds, Liverpool Manchester	South West Cornwall	Wales Ebbw Vale	Scotland Glasgow
Hard to heat properties	25	7	6	6	1	3	2
Planning renovations	20	5	6	4	0	3	2
Other 'eligible' home owner	14	5	4	3	0	0	2
Renting pre-payment meters	9	3	3	2	0	1	0
Low literacy households	12	2	4	3	1	2	0
Total depths	80	22	23	18	2	9	6

9.2 Sample criteria

A criteria was used at each phase to define the types / number of households to be recruited, the types of households recruited were the same at each phase:

- Hard to heat properties
- Planning renovations
- Eco/other 'eligible' home owners
- Low literacy
- Pre-payment meter

The following example is of a criteria used for the London fieldwork at Phase 2. The number and definitions were repeated in all other locations for Phase 2.

Similar criteria were used to recruit households for the Pilot, Phase 1 and Phase 3.

WORKSHOP - RECRUITMENT CRITERIA

Job: How to explain the Green Deal

Job number: DECC15085L

Greater London

- 10 X 60 minute relay depths
 - All recruited to attend central workshop location
 - Free find recruitment
 - Main / joint main decision maker about home improvements
 - Mix of paired and one2one depths
- One2one depths must be main decision maker or joint decision maker
 - All to be planning to stay in current property for at least 3 years
 - Mix of house type and age
 - Mix of B, C1, C2, DE
 - At least one over 35k income and one under 16k

10 Depths

Relay Interviews	Total	Young Family / Single Parent (under 40)	Older Family (40-65)	Retired / Empty nesters (65+)
Hard to heat properties	3	1	1	1
Planning renovations	2	1	1	0
Eco/other 'eligible' home	2	0	1	1
Low literacy	2	1	0	1
Pre-payment meter	1	1	0	0
Total relays	10	4	3	3

Depth 1 – Young family / single parent in a hard to heat home

- Owner occupier
- Aged less than 40 with children under 12 years old
- Aware that their home is hard to heat
- Un-insulated solid walls / unfilled cavity walls and / or not on mains gas

Depth 2 – Young family / single parent planning to renovate their home

- Owner occupier
- Aged less than 40 with children under 12 years old
- Currently living in a home that was built pre 1930s or un-insulated cavity walls
- Planning to renovate all or parts of their home within the next 12 months

Depth 3 – Young family / single parent with low literacy

- Owner occupier
- Aged less than 40 with children under 12years old
- Un-insulated solid walls / unfilled cavity walls and / or not on mains gas
- Has low literacy
- Must have a partner with similar levels of literacy or be single

Depth 4 – Young family / single parent renting their home

- Rent the property they live in
- Aged less than 40 with children under 12years old
- Pay for their electricity and or gas through a pre-payment meter
- Un-insulated solid walls / unfilled cavity walls and / or not on mains gas

Depth 5– Older family in a hard to heat home

- Owner occupier
- Aged between 40 and 65 with children above 12 years old
- Aware that their home is hard to heat
- Un-insulated solid walls / unfilled cavity walls and / or not on mains gas

Depth 6 – Older family planning to renovate their home

- Owner occupier
- Aged between 40 and 65 with children above 12 years old
- Currently living in a home that was built pre 1930s or un-insulated cavity walls
- Planning to renovate all or parts of their home within the next 12 months

Depth 7 – Older family ECO / living in an ‘eligible’ property

- Owner occupier
- Aged between 40 and 65 with children above 12 years old
- Un-insulated solid walls / unfilled cavity walls and / or not on mains gas

Depth 8 – Retired / empty nester in a hard to treat home

- Owner occupier
- Aged above 65, retired / and or children have left home
- Aware that their home is hard to heat
- Un-insulated solid walls / unfilled cavity walls and / or not on mains gas

Depth 9 – Retired / empty nester ECO / living in an ‘eligible’ property

- Owner occupier
- Aged above 65, retired / and or children have left home
- Un-insulated solid walls / unfilled cavity walls and / or not on mains gas

Depth 10 – Retired / empty nester with low literacy

- Owner occupier
- Aged above 65, retired / and or children have left home
- Un-insulated solid walls / unfilled cavity walls and / or not on mains gas
- Has low literacy
- Must have a partner with similar levels of literacy or be single

- ***At least 1 of depths 8-9 to be on pension credit (Q13)***
- ***At least 1 of depths 7&9 to be on a benefit listed 1-6 in Q13***

9.3 Recruitment Screener

A recruitment questionnaire was used to screen households before they entered the research ensuring they fitted into one of the defined groups:

- Hard to heat properties
- Planning renovations
- Eco/other 'eligible' home owners
- Low literacy
- Pre-payment meter

Although the numbers of each type of household differed from each phase the definitions remained the same, therefore an example of the screener is on the following page, taken from Phase 2

INTRODUCTION

Good morning/afternoon. I am from Optimisa Research and we are looking to conduct some research looking at communications

Q1. Do you or any **members of your immediate family work** in/for ...
READ OUT

Market research or marketing	1	CLOSE
Advertising	2	CLOSE
Public Relations or Journalism	3	CLOSE
Television, Satellite or Cable industries	4	CLOSE
Building trades e.g. builder*, architect, manufacturer, building materials retailer, energy inspector / assessor	5	CLOSE
Estate agent, surveyor, house valuer,	6	CLOSE
Utilities or energy markets (i.e. gas/electricity companies)	7	CLOSE
None of the above	8	Q2

T&C – THANK YOU FOR YOUR HELP SO FAR BUT UNFORTUNATELY ON THIS OCCASION I AM NOT ALLOWED TO INTERVIEW ANYONE WHO WORKS IN THAT PARTICULAR INDUSTRY

*** If STRUGGLING CONTACT US AND WE MAY CONSIDER BUILDERS**

Q1a. **Firstly, which of the following best describes your involvement in paying bills and choosing energy providers for your home?**

	<i>(Single Code)</i>
I am the main decision maker when it comes to household bills and choosing utility providers	1
I am jointly involved in paying my household bills and choosing utility providers	2
I am not involved in paying my household bills and/or choosing utility providers	3

CLOSE

INDIVIDUAL INTERVIEWS TO CODE 1, PAIRS TO CODE 1 OR 2.

Q2. Which of the following was your **final level of education**?

	<i>(Single code)</i>
No GCSEs (or equivalent)	1
Less than 5 GCSE's (or equivalent)	2

5 or more GCSE's (or equivalent)	3
A levels/AS levels/Scottish Highers/NVQ levels 3 or 4	4
Undergraduate degree or equivalent	5
Postgraduate degree or equivalent	6
Professional qualification	7

FOR LOW LITERACY DEPTHS MUST CODE 1 OR 2

Q3a. Do any of the following apply to you?

(Multi Code)

Claiming job seekers allowance	1 Q4

Mental health service user	2 Q4
Receive disability living allowance	3 Q4
Disabled badge holder	4 Q4
Learning difficulties	5 Q4
Difficulty reading / understanding forms and official documents	6 Q3

None of the above	7 Q4

IF CODE 6 ASK Q3 FOR LOW LITERACY DEPTHS

Q3b. How good would you say you are at reading official documents?

(Single Code)

Very good	1
Fairly good	2

Below average	3
Poor	4

Cannot read English	7

CLOSE

LOW LITERACY DEPTHS MUST CODE 3 OR 4

Q4. Can you tell me which of the **following statements apply to you with regards to your household?**

(Single code)

I mainly make the decisions regarding home improvements	1
I jointly make decisions regarding home improvements	2

I do not make the decisions regarding home improvements	3

CLOSE

ALL TO CODE 1 OR 2 THEN ASK 5

Q5. Which of **these statements apply to your home?**

(Single code)

My home is owned by the council or a housing association	1 CLOSE

My home is privately rented	2
My home is privately owned	3

DEPTHS WHO ARE OWNER OCCUPIERS MUST CODE 3

DEPTHS WITH RENTED HOMES CODE 2

Q6. What **type of property** do you own (rent)?

(Single code)

Flat, tenement	1
CLOSE	
Terrace	2
Semi-detached/end of terrace	3
Detached	4
Bungalow/ Maisonette	5

ALL TO CODE 2, 3, 4 OR 5

IF CODE 1 THANK AND CLOSE

Q6a. Is your property....

- A listed building (any type or grade)
- In a Conservation area
- Neither of these

(Single code)
1 **CLOSE**
2 Q7
3 Q7

CLOSE IF PROPERTY IS LISTED BUILDING CODE 1

Q7. What is the approximate **age of your property**, when was it built?

(Single code)

Pre 1919	1
1919 – 1929	2
1930 -1980	3
1980 - 1990	4 CLOSE
1991 - 1995	5 CLOSE
Later than 1995	6 CLOSE
Don't know	7 CLOSE

IF CODE 4-7 THANK AND CLOSE

SHOWCARD (1)

Q8. Thinking about your home, does it have **any of the features listed?**

Please pick out all that apply to your home

SECTION 1

(Multi code)

Old gas boiler	1
Oil heating system	2
Solid fuel heating system (e.g. coal)	3
Electric storage heater	4
Heaters/ open fires/ wood burning stoves in individual rooms	5

SECTION 2

Single glazing	6
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SECTION 3

Solid walls (<i>Showcard with picture</i>)- not insulated	7
Unfilled cavity walls	8
Stone walls	9

SECTION 4

No loft	10
No loft insulation	11
Loft insulation 2" thick (50mm) or less	12
Loft insulation below the beams	13

SECTION 5

In a mains gas area	14
No mains gas available	15

ALL DEPTHS NEED TO SELECT CODE 7, 8, 9 OR 15 , PLUS ONE OTHER ON THE LIST (EXCEPT 10) TO CONTINUE

Q9. How do you currently **pay** your energy bills?

(Single code)

Pre pay electricity meter	1
Pre pay gas meter	2 Q11

Monthly / quarterly direct debit	3
Monthly / quarterly bills	4 Q10

OWNER OCCUPIER DEPTHS TO CODE 3 OR 4

ALL RENTING PRE PAYMENT (DEPTH NUMBER 4 AND 26) DEPTHS TO CODE 1 AND / OR 2

Q10. Thinking of the **next 12 months** which of the following are you definitely **planning on doing**?

(Multi code)

Hard landscaping of the garden	1
Redecorate one or more rooms	2

Put in a new kitchen	3
Put in a new bathroom	4
Build an extension	5
Loft conversion	6
Installing/upgrading boiler/central heating	7
Other major refurbishment	8

None of these	9

DEPTH 2, 6,19,15,22,28,32,36 (PLANNING RENOVATIONS) MUST CODE 3-8

Q11. Thinking about your home in the winter, **how easy or difficult is it to keep all the rooms at a comfortable level of warmth when the heating is on?**

(Single code)

Very easy	1 CLOSE

Fairly easy	2 Q12
Fairly difficult	3 Q12
Very difficult	4 Q12

DEPTHS 1, 5, 8, 11, 18, 14, 21, 24, 27, 31, 35, 38 (HARD TO HEAT HOMES) MUST CODE 4
DEPTHS 7, 9, 12, 16, 20, 23, 29, 23, 37, 39 (OTHER ELIGIBLE) MUST CODE 2 OR 3
OTHER DEPTHS CAN BE 2, 3, OR 4

Q12a. Overall how would you **describe your home?**

(Single code)

Very easy to heat	1 CLOSE
Fairly easy to heat	2 CLOSE

Neither easy nor difficult	3

Fairly difficult	4
Very difficult	5

Don't know	6 CLOSE
Prefer not to answer	7 CLOSE

DEPTHS 1, 5, 8, 11, 18, 14, 21, 24, 27, 31, 35, 38 (HARD TO HEAT HOMES) MUST CODE 5
DEPTHS 7, 9, 12, 16, 20, 23, 29, 23, 37, 39 (OTHER ELIGIBLE) MUST CODE 3 OR 4
OTHER DEPTHS CAN BE 3, 4 OR 5

Q12b. Overall how would you **describe how easy it is for you to afford to pay your energy bills?**

(Single code)

Very easy to afford	1
Fairly easy to afford	2

Neither easy nor difficult	3

Fairly difficult to afford	4
Very difficult to afford	5

Don't know	6
CLOSE	

CAN CODE ANY BUT RESPONSES TO THIS QUESTION TO BE MONITORED

Q13. Do you receive any of the **following benefits?**

	<i>(Multi-code)</i>
Income support	1
Working tax credit	2
Council tax benefit	3
Income based jobseeker allowance	4
Pension credit (for the over 60s)	5*
Income related employee & support allowance	6
Child tax credit	7*
None	8

RECRUIT A MIX ACROSS THE SESSIONS OF CODES 1 -7 AT LEAST 1 CODE 5 FOR EACH WORKSHOP.
CODE 7's TO BE MONITORED ACROSS WHOLE SAMPLE.

Q14. What is your household income (this is to ensure we recruit a mix of types of household)

	<i>(Multi-code)</i>
Under £16,000 per year	1
£16,000 – £34,999 per year	2
£35,000 per year or more	3
Prefer not to say	4

IN EACH AREA SPREAD OF INCOME LEVELS. AT LEAST ONE CODE 1, AND ONE CODE 3 FOR EACH WORKSHOP

Q15. Do you have an Energy Performance Certificate for your home (or a home you intend to purchase)?

	<i>(Single code)</i>
Yes	1
Q15b	
No	2

Q15b. If so, for the purposes of this research would it be possible to provide us with the EPC number?

Yes, I agree to a follow up to provide this number	1
No thank you	2

IF CODE 1 AT 15B, PLEASE CAN WE ENSURE THIS IS FOLLOWED UP AND THE NUMBER OF THE EPC PROVIDED TO THE RECRUITER OR DIRECT TO OPTIMISA.

9.4 Discussion Guide Pilot

The discussion flow at the Pilot Phase was based around the four stages (Discovery, Evaluation, Decision and Legacy).

Each stage ended with a quiz to test comprehension.

Incorporated within the Discussion Guide are 2 scenarios. Scenario 1 opens with households discovering the GD through an EPC document. Scenario 2 begins with households discovering the GD with material from providers or DECC.

An example of the discussion guide starts on the following page.

DISCUSSION PLAN – Workshop **Pilot** (120 mins per interview)

Project: Explaining the Green Deal

JOB NUMBER: DECC15085L


Discussion Plan Overview		
Introduction/ warm up	Purpose of this section: Put respondent at ease, introduce the research, find out some background details	5 mins
DISCOVERY ZONE	<p>Purpose of this section: Introduce the purpose of the session and explore what is known / heard already about GD</p> <p>Understand comprehension of information intended to introduce Green Deal</p>	45 mins
EVALUATION ZONE	Purpose of this section: To understand comprehension of information provided when an advisor visits their home to provide an assessment (i.e. clarity of information when considering taking out a Green Deal)	25 mins
DECISION ZONE	Purpose of this section: To understand impact of being offered quotes by providers (and clarity of obligations and terms)	20 mins
LEGACY ZONE	Purpose of this section: to understand how customers continue to be kept informed about the GD through the lifetime of payment and how information will be passed on to new owners of a GD home	20 mins
Summary & Conclusion	Purpose of this section: Obtain key points of takeout	5 mins



= respondent task (**NB – the ‘summary quizzes’ will be self-completed unless the moderator feels this may cause difficulty / stress for the respondent, in which case they will be administered verbally**)

START PARTICIPANTS IN ‘**ZONE 1**’ - **DISCOVERY**

<p>Introduction/ Warm up</p>	<p>Purpose of this section: Put respondent at ease, introduce the research, find out some background details</p>	<p>5 mins</p>
	<p>Thank respondents for coming; explanation of purpose of session;</p> <ul style="list-style-type: none"> • <i>Introduce self, Optimisa – who, what we are</i> • <i>Structure of interview (show different information in different areas of the room, get their views – reasons will become clear)</i> • <i>Purely research – no selling, no right/wrong answers, all opinions valid, that we’re testing how clear the materials are for a new concept so importance of honesty in how clear they are</i> • <i>Confidentiality of personal details</i> • <i>Audio/video recording – why, uses and permission</i> • <i>Any questions, concerns?</i> <p>INTROS: A little bit about themselves and their homes</p> <ul style="list-style-type: none"> • Family/household composition; work; hobbies, length of time lived in home • Ask them to talk a little about their home, age, what they like / dislike about it, rooms they use more or less and why? • What things would you like to change about your home? <ul style="list-style-type: none"> ○ Have you had or considered maintenance or improvement work on your home recently? Triggers for this? ○ Barriers to this? 	

<p>DISCOVER Y ZONE</p>	<p>Purpose of this section: explore what is known / heard already about GD</p> <p>Understand reaction to information intended to introduce Green Deal</p>	<p>45 mins</p>
<p>SCENARIO 1 (ask of 2 of 6 interviews per workshop) REST GO TO SCENARIO 2</p> 	<p>OPEN THIS SECTION WITH REALISTIC FIRST EXPERIENCE. YOU ARE THINKING OF MOVING HOUSE. YOU PUT IN AN OFFER AND YOU GET AN ENERGY PERFORMANCE CERTIFICATE AS PART OF THE PROCESS.</p> <p>Show EPC with GD information</p> <ul style="list-style-type: none"> • Explore understanding of information...? What are the key messages? • Note spontaneous comment on the GD information... <ul style="list-style-type: none"> ○ (If noted GD) what does this sound like? What's it about? What are the implications? ○ (if not mentioned) Did you notice this information on the Green Deal? (point out) – What does this sound like? What's it about? What are the implications? ○ What would the Green Deal mean to you? <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p><i>Tell me 3 things you've learned about this house / property from looking at this Energy Performance Certificate</i></p> </div> <ul style="list-style-type: none"> • Would this impact on whether you follow up your interest in buying this property? Why? • What would you do if you received this? <ul style="list-style-type: none"> ○ If wanted to find out more, ask how they'd go about this? <p>.....THEN JOIN SCENARIO 2...</p>	<p>10 mins</p>

<p>SCENARIO 2 (ask 4 of 6 to take this route)</p>	<p>EXPLAIN PURPOSE OF TODAY IS WE'RE LOOKING AT DUMMY MATERIAL THAT MIMICS THE INFORMATION PEOPLE MAY RECEIVE TO EXPLAIN A NEW INITIAIVE CALLED THE GREEN DEAL AND THEN GUIDE THEM THROUGH THE PROCESS IF THEY TAKE THIS UP. WE WANT TO UNDERSTAND HOW CLEAR IT IS AT EACH STAGE OF THE PROCESS.</p> <p>EXPLAIN WE HAVE INFORMATION IN DIFFERENT AREAS OF THE ROOM TO MIMIC EXPERIENCES THAT MIGHT UNOLD. HERE WE ARE TALKING ABOUT VARIOUS WAYS OF FINDING OUT ABOUT THE GD.</p> <p>FIRST OF ALL, WE WANT TO LOOK AT WHAT HELPS PEOPLE UNDERSTAND THE GREEN DEAL WHEN THEY FIRST HEAR ABOUT IT...</p> <p>So here's some (further) information, please have a read and tell me what you think the Green Deal is about:</p> <p>Then show A3 boards of headline information/screen grabs about GD + any leaflets/ads from providers</p> <ul style="list-style-type: none"> • In your own words, what does it sound like the GD is about? How do these shape your understanding of the Green Deal? • What's it about? How clear are you what this is about? • What questions about the GD do you have? <p>OFFICIAL INFORMATION WILL BE AVAILABLE. WE WANT TO SHOW YOU SOME EXAMPLES AND UNDERSTAND HOW THESE HELP (OR HINDER) EXPLANATION OF THE GREEN DEAL AND WHAT IT MEANS TO YOU...</p>	<p>25 mins (if did scenario 1)</p> <p>35 mins if not</p>
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Rotate order stimulus is shown

ASK THEM TO IMAGINE THEY'RE EITHER APPROACHED DOOR TO DOOR OR RECEIVE SOME MAIL ABOUT THE GREEN DEAL.

Show the 2 pager on GD

- Again, what are the key take outs?
- What is helping inform your understanding? What is hindering (if anything)?
- Are there ways of presenting this information more/less effectively?

Show the 4 page leaflet that might be sent by providers (give them a red and green pen to mark bits as particularly unclear or clear)

10 mins

- What's the single most helpful thing in explaining the Green Deal to you? Why?
- Again, what are the key take outs? What's helping/hindering clarity of the deal?
 - Role of Case studies and diagrams (are these noted/important) – how do they help explain the process?
- Probe understanding of: Golden Rule (i.e. GD *should* save them some money – has this come through?)
 - Was this noted? Was this clear?
 - Is it clear what would happen if energy prices rose?
- How could we make this leaflet clearer?

Summary Quiz 1: possible vox pops opportunity


See separate self-complete document = Summary Quiz 1

- How can you establish whether you're eligible for subsidies (ECO)? Is this clear?
 - How would you check?
- *At this point if you were interested is it clear what the next step would be? (If necessary revisit provider leaflet)*



	<ul style="list-style-type: none">• <i>Is it clear who would carry out an assessment? Where would you find them?</i>• <i>Who is paying for the assessment? Is it clear who is paying?</i>	
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MOVE PARTICIPANTS THROUGH TO **EVALUATION ZONE**

EVALUATION ZONE	Purpose of this section: To understand impact of information provided when an advisor visits their home to provide an assessment (i.e. clarity of information when considering taking out a Green Deal)	25 mins
	<p>EXPLAIN THAT WE'RE NOW GOING TO ASSUME THEY'RE INTERESTED IN FINDING OUT MORE ABOUT WHAT MEASURES THEY CAN HAVE. SO WE'RE LOOKING AT THE KIND OF INFORMATION PROVIDED WHEN AN ASSESSMENT IS MADE OF THEIR HOME</p> <p><i>Explain that the assessor would be able to show a certain amount of information 'on the spot' and some would be sent afterwards</i></p> <p>First of all you'd have the Advice Report (show on PC and print out afterwards)</p> <div style="border: 1px solid black; padding: 5px; text-align: center;"> <p><i>Tell me 3 things you've picked up from this document</i></p> </div> <p><i>Then probe as necessary:</i></p> <ul style="list-style-type: none"> • Again, what is this report recommending? (Get them to explain in their own words) <ul style="list-style-type: none"> ○ Is it clear the 'typical savings' are estimates? • What does the 'circumstances' box text and implications set out? • Is ability to apply for ECO mentioned spontaneously? If not, probe whether it is clear what they should do? • What would you do as a result of receiving this piece of information? What action would this encourage? <ul style="list-style-type: none"> ○ NOTE: do people notice the breakdown of savings on different fuels (under 'total savings')? Don't prompt, just note if they see it... (and capture comments if they do) <p>Show EPC without GD</p> <ul style="list-style-type: none"> • Explore understanding of information...? What are the key 	15 mins

messages?

- *Note for moderator:* on external/internal SWI top end costs are if you need additional work doing; bottom end assumes you are adding this to an existing renovation/redecoration.
- Note spontaneous comments on the GD information...
- What's being suggested by the report?
 - Probe clarity of 'some measures' but not others – do they understand why? Why have you been offered some measures?

Show the Occupancy Assessment (shown on PC and printed out afterwards)

Tell me 3 things you've picked up from this document

Then probe as necessary:

- What is this assessment recommending? (Ask to explain in own words)
- What does the 'congratulations' box text and implications set out?
- What would you do as a result of receiving this piece of information? What action would this encourage?

Show the Information Leaflet + Terms of Plan as a 'pack' of other information they should receive after the assessment (give them a red and green pen to mark bits as particularly unclear or clear)

- Again, what are the key take outs? What's helping/hindering clarity of the deal? Identify language/phrases/design harder to take in
 - Is it clear people can get a quote for (and then take out a) Green Deal with a range of providers?
- How would you decide whether to take out a plan or not?
 - Spontaneously, note do they read the Ts & Cs? If so, all of it or selectively? Which bits?





- Now focusing on Terms of the Plan:
 - How thoroughly did you read these? Why/why not?
 - When read, are these clearly understood? Anything surprising?
 - What needs to be clearer/easier to take on board?
 - Can they be grouped a bit more to improve clarity?
 - What do you think is most important to you personally at this stage? (check this again later in the interview)
 - Should you be better directed to 'more important terms'? If so, what are these?
 - What, if anything, seems to be specific to the Green Deal?

Summary: (possible vox pops opportunity)

10 mins

See separate self-complete document = Summary Quiz 2

- What else have you discovered in this section that you think you should have known about sooner?


Additional probes to be used if necessary once Quiz 2 completed:


- Should details of interest being payable on the Green Deal be made clearer in the advice report?
- How might you yourself impact on what you end up paying?
 - Is it clear your bills could rise if your energy usage increases (e.g. heat home to a higher temperature, size of household increases).
 - Is it clear that installations may not work well if they're damaged?
- *So to check/recap, is it clear who you could get quotes for the Green Deal from? Is it clear what is covered?*

	<ul style="list-style-type: none">• <i>Is it clear how you would pay for the Green Deal?</i>• <i>After taking out a GD, what will happen to your bills?</i> <i>(spontaneous mention of behaviour)</i>• <i>Assuming you were interested, is there any other info you'd want before getting a quote?</i>	
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MOVE PARTICIPANTS THROUGH TO **DECISION ZONE**


DECISION ZONE	Purpose of this section: To understand impact of being offered quotes by providers (and clarity of obligations and terms)	20 mins
	<p>EXPLAIN THAT WE'RE NOW GOING TO ASSUME THEY'VE BEEN GIVEN THEIR 'PRESCRIPTION' AND CAN GET QUOTES FROM GD PROVIDERS. WE WANT TO FIND OUT WHAT INFORMATION PEOPLE NEED IN ORDER TO UNDERSTAND WHAT THEY WILL PAY FOR DIFFERENT QUOTES</p> <p>Show 3 different quotes from suppliers – ASSUME THEY'VE GOT 3 QUOTES</p> <ul style="list-style-type: none"> • Which quote do you prefer? Why? • How clear are these? Any surprises? <ul style="list-style-type: none"> ○ What is making it harder/easier to compare quotes? ○ (need variation in interest rate and length of repayment) • Can they explain how the payment works from this? • What do you focus more on/less on (check for level of focus on terms of plan, payment plan, explanation of early repayment) • Does one style make it easier to understand than others? Why? • Do you have a preferred layout in terms of making the points clearer? • What information do you think should always be included in a Green Deal quote, no matter who provides it? (e.g. cost of materials, cost of installation, interest rate etc. – don't prompt but probe for level of detail expected/required) • Is the requirement to pay interest clear? Do you need this information earlier in the journey? If so, when? Why? • Where would you expect to see details of your plan / repayments? <ul style="list-style-type: none"> ○ Would you have preferred to know there was an interest repayment earlier? • (For ECO eligible / vulnerable respondents if not picked up on spontaneously) Do you think you might have been eligible for additional help with this work, for example some sort of subsidy? 	15 mins


	<ul style="list-style-type: none"> • At what stage in the process should this be made clear to you? • What would be the best way to let you know you might be eligible for additional help? • What if you wanted to pay off the Green Deal charge early? • What would/might happen if you decided to do further refurbishment work on your home? • What would you do to decide? <ul style="list-style-type: none"> ○ Do people reference being able to add/remove measures? Why? <p>Show the GD credit agreement (give them a red and green pen to mark bits as particularly unclear or clear)</p> <ul style="list-style-type: none"> • What's this telling you? What's clear/less clear and why? • How likely would you be to read this in detail? Why/why not? <p>Show the EPC Advisor website http://epcadviser.direct.gov.uk/epcadviser.html</p> <p>EPC RRN 8304-8255-5120-4526-4183 (you can use this)</p> <ul style="list-style-type: none"> • How likely would you be to visit this site? Why? • How easy is this to use? • How clear are the results? How easy is it to compare cost of measures? • Task: <i>If you spend x per year on energy (ask them roughly what they do spend a year) and you're interested in some options/measures and you're prepared to take out a GD up to the value of (get them to suggest an amount), and you want to save x. So...:</i> <ul style="list-style-type: none"> ○ What measures would you install and why? • Is it clear these costs are without interest added? Should this be more clearly stated? • How clear is wording? Suggestions for changes/bits more confusing? • Do you have any outstanding questions? (e.g. How much interest? How much will I actually save?) 	<p>5 mins</p>
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	<p>Summary: (possible vox pops opportunity)</p> <p>See separate self-complete document = Summary Quiz 3</p>	
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MOVE PARTICIPANTS THROUGH TO **LEGACY ZONE**

LEGACY ZONE	Purpose of this section: to understand how customers continue to be kept informed about the GD through the lifetime of payment and how information will be passed on to new owners/occupiers of a GD home	20 mins
	<p>EXPLAIN THAT WE'RE NOW GOING TO ASSUME THEY'VE HAD THE MEASURES INSTALLED AND THEY'RE NOW GRADUALLY PAYING OFF THE GD THROUGH THEIR BILLS...</p> <p>Before we show you a 'mock' bill:</p> <ul style="list-style-type: none"> • What would you expect to happen to your bill after the Green Deal measures have been installed? • Go up, down, stay about the same? Could it go higher? <p>Show an electricity bill + gas bill</p> <ul style="list-style-type: none"> • Again, explore clarity of wording and calls to action <ul style="list-style-type: none"> ○ Where would you go for more information? Does this depend on what you're confused about? e.g. utilities co. or someone else? • How clear is the Golden Rule? (i.e. if use more energy will see bills rise) • Include a bill that's gone up and probe as to why that might be the case • What wording (or design) changes would help improve your understanding? • How likely would you be to read this in detail? Why/why not? • <i>Probe for clarity of why a gas bill may go down but electricity bill goes up:</i> <ul style="list-style-type: none"> ○ Do you understand why one bill might go up and another go down? What could have been done to make this easier to understand? • How helpful are the tips for reducing your energy consumption? Is it clear how you can do this? Why is this important? • For pre-payment customers – is it clear that you will pay through charges on your electricity bills over the summer for 	15 mins

	<p>savings you will not see until winter?</p> <ul style="list-style-type: none"> ○ What might help make this point clearer? <p>Show the annual energy statement from suppliers (give them a red and green pen to mark bits as particularly unclear or clear)</p> <ul style="list-style-type: none"> • What's this telling you? What's clear/less clear and why? • How likely would you be to read this in detail? Why/why not? <p>Summary: (possible vox pops opportunity)</p> <div style="border: 1px solid black; padding: 5px; text-align: center;"> <p>See separate self-complete document = Summary Quiz 4</p> </div> <p><i>Additional probes if needed once summary quiz completed:</i></p> <ul style="list-style-type: none"> • Is it clear that payments are flexible? <ul style="list-style-type: none"> ○ What does it tell you about early repayment? ○ What happens if you miss a payment? • Do you want to know when each measure's been paid off? Should the statement emphasise this? • Is it clear that you can switch energy provider or tariff irrespective of having GD measures installed? • What would you do if there was a problem with a GD installation you'd had done? <ul style="list-style-type: none"> ○ Is it clear where to go or who enforces the warranty? 	<p>5 mins</p>
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Summary/ Close	Purpose of this section: Obtain key points of takeout	5 mins
	<div data-bbox="330 441 1230 683" style="border: 1px solid black; padding: 10px; text-align: center;"> <p><i>See separate self-complete document 'Green Deal Journey': ask respondent to write in (or talk through if more appropriate) the steps they would expect to go through in signing up to a Green Deal</i></p> </div> <p>Then ask before finishing:</p> <ul style="list-style-type: none"> • What are the top 3 most important things you have taken away from this session about the Green Deal? (vox pops) • What works well in explaining the Green Deal and what needs more work? (vox pops) • To recap – when you leave here this afternoon / this evening – if someone asked you what the Green Deal was, how would you explain it to them? • Thank and close 	

9.5 Discussion Guide Phase 1

The discussion flow at the Phase 1 was again based around the four stages (Discovery, Evaluation, Decision and Legacy).

Quizzes at the end of the each stage were removed to allow more time to concentrate on probing of how best to word aspects of the GD.

We separated scenario 1 and 2 (from the Pilot) into two discussion guides. Scenario 1 opens with households discovering the GD through an EPC document. Scenario 2 begins with households discovering the GD with material from providers or DECC.

An example of scenario 2 starts on the next page. Scenario 1 follows a similar discussion except the EPC with the GD is the first document shown.

DISCUSSION PLAN – Workshop Phase 1 (120 minutes per interview) Scenario 2

Discussion guide for 4 of the 6 respondents from each workshop

Project: Explaining the Green Deal

JOB NUMBER: DECC15085L

Discussion Plan Overview		
Introduction/ warm up	Purpose of this section: Put respondent at ease, introduce the research, find out some background details	5 mins
DISCOVERY ZONE	<p>Purpose of this section: Introduce the purpose of the session and explore what is known / heard already about GD</p> <p>Understand comprehension of information intended to introduce Green Deal</p>	30 mins
EVALUATION ZONE	Purpose of this section: To understand comprehension of information provided when an advisor visits their home to provide an assessment (i.e. clarity of information when considering taking out a Green Deal)	35 mins
DECISION ZONE	Purpose of this section: To understand impact of being offered quotes by providers (and clarity of obligations and terms)	20 mins
LEGACY ZONE	Purpose of this section: to understand how customers continue to be kept informed about the GD through the lifetime of payment and how information will be passed on to new owners of a GD home	20 mins
Summary & Conclusion	Purpose of this section: Obtain key points of takeout	10 mins



= respondent task

IF THE RESPONDENTS ARRIVES EARLY PROVIDE WITH EITHER ADVERT AND DECC 2 PAGER OR THE 4 PAGE LEAFLET TO READ WHILST THEY WAIT. ALSO GIVE THEM RED AND GREEN PENS TO HIGHLIGHT AREAS WHICH ARE PARTICULARLY CLEAR OR DIFFICULT TO UNDERSTAND

START PARTICIPANTS IN 'ZONE 1' - DISCOVERY

<p>Introduction/ Warm up</p>	<p>Purpose of this section: Put respondent at ease, introduce the research, find out some background details</p>	<p>5 mins</p>
	<p>Thank respondents for coming; explanation of purpose of session;</p> <ul style="list-style-type: none"> • <i>Introduce self, Optimisa – who, what we are</i> • <i>Structure of interview (show different information in different areas of the room, get their views – reasons will become clear)</i> • <i>Purely research – no selling, no right/wrong answers, all opinions valid, that we're testing how clear the materials are for a new concept so importance of honesty in how clear they are</i> • <i>Confidentiality of personal details</i> • <i>Audio/video recording – why, uses and permission</i> • <i>Any questions, concerns?</i> <p>INTROS: A little bit about themselves and their homes</p> <ul style="list-style-type: none"> • Family/household composition; work; hobbies, length of time lived in home • Ask them to talk a little about their home, age, what they like / dislike about it, rooms they use more or less and why? • What things would you like to change about your home? <ul style="list-style-type: none"> ○ Have you had or considered maintenance or improvement work on your home recently? Triggers for this? ○ Barriers to this? <p>HAND RESPONDENT THE DISCOVERY PACK AND MOVE INTO DISCOVERY ZONE</p>	

<p>DISCOVERY ZONE</p>	<p>Purpose of this section: explore what is known / heard already about GD</p> <p>Understand reaction to information intended to introduce Green Deal</p>	<p>30 mins</p>
	<p>EXPLAIN PURPOSE OF TODAY IS WE'RE LOOKING AT DUMMY MATERIAL THAT MIMICS THE INFORMATION PEOPLE MAY RECEIVE TO EXPLAIN A NEW INITIAIVE CALLED THE GREEN DEAL AND THEN GUIDE THEM THROUGH THE PROCESS IF THEY TAKE THIS UP. WE WANT TO UNDERSTAND HOW CLEAR IT IS AT EACH STAGE OF THE PROCESS.</p> <p>EXPLAIN WE HAVE INFORMATION IN DIFFERENT AREAS OF THE ROOM TO MIMIC EXPERIENCES THAT MIGHT UNFOLD. HERE WE ARE TALKING ABOUT VARIOUS WAYS OF FINDING OUT ABOUT THE GD. REITERATE SWITCHES BETWEEN ZONES SO IT IS CLEAR AND THEY UNDERSTAND</p> <p>FIRST OF ALL, WE WANT TO LOOK AT WHAT HELPS PEOPLE UNDERSTAND THE GREEN DEAL WHEN THEY FIRST HEAR ABOUT IT...</p> <p>MODERATOR TO BE AWARE IF RESPONDENT SAYS THEY WOULD BOOK AN ASSESSMENT TO MOVE THEM ONTO THE EVALUATION STAGE RATHER THAN GOING THROUGH ALL THE DICOVERY MATERIAL THEY HAVE NOT READ</p> <p>NOTE IF THEY WOULD SPONTANEOUSLY MENTION THEY'D CHECK WHAT IT COST BEFORE ORGANISING AN ASSESSMENT.</p>	

So here's some (further) information, please have a read and tell me what you think the Green Deal is about:

Then show A3 boards of headline information/screen grabs about GD + any leaflets/ads from providers

- **THOSE WHO HAVE NOT ALREADY READ INFORMATION:** In your own words, what does it sound like the GD is about? How do these shape your understanding of the Green Deal?
- **THOSE WHO HAVE ALREADY READ INFORMATION:** In your own words, what does this add to the information you have already read about the GD?
- What's it about? How clear are you what this is about?
- What questions about the GD do you now have?

OFFICIAL INFORMATION WILL BE AVAILABLE. WE WANT TO SHOW YOU SOME EXAMPLES AND UNDERSTAND HOW THESE HELP (OR HINDER) EXPLANATION OF THE GREEN DEAL AND WHAT IT MEANS TO YOU...

Rotate order stimulus is shown

ASK THEM TO IMAGINE THEY'RE EITHER APPROACHED DOOR TO DOOR OR RECEIVE SOME MAIL ABOUT THE GREEN DEAL.



Show the 2 pager on GD - HALF RESPONDENTS TO PRE DOMINATELY DISCUSS 2 PAGER PLUS AD (AND IF HAVE TIME 4 PAGER ALSO - BELOW)

ALLOW 5 MINS FOR THOSE RESPONDENTS WHO HAVE NOT ALREADY TO READ – MODERATOR TO LEAVE THE RESPONDENT ALONE FOR THOSE 5 MINS



- What are the key take outs?
- What is helping inform your understanding? What is hindering (if anything)?
- Are there ways of presenting this information more/less effectively?

Show the 4 page leaflet that might be sent by providers (give them a red and green pen to mark bits as particularly unclear or clear) - HALF RESPONDENTS TO PRE DOMINATELY DISCUSS 4 PAGER (AND 2 PAGER PLUS AD IF HAVE TIME ALSO - ABOVE)

ALLOW 5 MINS FOR THOSE RESPONDENTS WHO HAVE NOT ALREADY TO READ – MODERATOR TO LEAVE THE RESPONDENT ALONE FOR THOSE 5 MINS

- What's the single most helpful thing in explaining the Green Deal to you? Why?
- Again, what are the key take outs? What's helping/hindering clarity of the deal?
 - Role of Case studies and diagrams (are these noted/important) – how do they help explain the process?

MODERATOR TO MAKE A NOTE WHICH STIMULUS PREDOMINANTLY REVIEWED BY EACH RESPONDENT

ALL RESPONDENTS

- Probe understanding of: Golden Rule (i.e. GD *should* save them some money – has this come through?)
 - Was this noted? Was this clear?
 - Is it clear what would happen if energy prices rose?
- How could we make these leaflets clearer?

Note to moderator: we need to understand how the bar chart helps/hinders understanding at different stages in the journey – once presented here, leave it with the respondent as they move around the zones and observe whether or not they refer to it at different points. If not, probe on it at the end of the session

Note from DECC on where it may help at different points:

At **discovery** it should help people understand the basics of the Golden Rule:

- Measures reduce energy bills
- Repayments increase bills


The Golden Rule is that **estimated** savings must be higher than repayments. (ie the red bit and the new blue bit can't be bigger than the old blue bit or there'll be no green bit!)

At **evaluation** people should begin to understand that savings are estimated based on the **average** energy consumed (the EPC) in a property like theirs, but that **actual** savings will depend on how they use their home (Occupancy test). They should also understand that if they use less than average, they'll save less than average (and vice versa – if they use more than average, they'll save more than average).

At **decision** (or earlier) people should understand that if they use less energy than average, they may save less than average, so their estimated savings may be smaller than the costs of measures: crucially, the new bill (energy + repayment) may be larger than the old bill for these people!

- MODERATOR: If respondent finds GR unclear, observe if they understand the bar chart and if they interpret:
 - the size of the red repayment depends on their estimated energy use
 - that the bill after a GD depends on how much energy they use and future energy prices
 - the implications this has for saving
- How can you establish whether you're eligible for subsidies (ECO)? Is this clear?
 - How would you check?
- *At this point if you were interested is it clear what the next step would be? (If necessary revisit provider leaflet)*
- *Is it clear who would carry out an assessment? Where would you find them?*
- *Who is paying for the assessment? Is it clear who is paying?*

MOVE PARTICIPANTS THROUGH TO **EVALUATION ZONE**

<p>EVALUATION ZONE</p>	<p>Purpose of this section: To understand impact of information provided when an advisor visits their home to provide an assessment (i.e. clarity of information when considering taking out a Green Deal)</p>	<p>35 mins</p>
	<p>EXPLAIN THAT WE'RE NOW GOING TO ASSUME THEY'RE INTERESTED IN FINDING OUT MORE ABOUT WHAT MEASURES THEY CAN HAVE. SO WE'RE LOOKING AT THE KIND OF INFORMATION PROVIDED WHEN AN ASSESSMENT IS MADE OF THEIR HOME</p> <p><i>Explain that the assessor would be able to show a certain amount of information 'on the spot' and some would be sent afterwards</i></p> <p>HAND RESPONDENT EVALUATION PACK (EPC 2ND IN THE PACK)</p> <p>First of all you'd have the Advice Report (show on PC and print out afterwards)</p> <p>ALLOW RESPONDENT 5 MINS ALONE TO READ</p> <div data-bbox="330 1552 1230 1641" style="border: 1px solid black; padding: 5px; text-align: center;"> <p><i>Tell me 3 things you've picked up from this document</i></p> </div> <p><i>Then probe as necessary:</i></p> <ul style="list-style-type: none"> • Again, what is this report recommending? (Get them to explain in their own words) <ul style="list-style-type: none"> ○ Is it clear the 'typical savings' are estimates? • What does the 'circumstances' box text and implications set out? • Is ability to apply for ECO mentioned spontaneously? If not, probe whether it is clear what they should do? 	<p>15 mins</p>

- What would you do as a result of receiving this piece of information? What action would this encourage?
 - NOTE: do people notice the breakdown of savings on different fuels (under 'total savings')? Don't prompt, just note if they see it... (and capture comments if they do)

Show EPC without GD

ALLOW RESPONDENT 2 MINS ALONE TO READ

- Explore understanding of information...? What are the key messages?
 - *Note for moderator:* on external/internal SWI top end costs are if you need additional work doing; bottom end assumes you are adding this to an existing renovation/redecoration.
- Note spontaneous comments on the GD information...
- What's being suggested by the report?
 - Probe clarity of 'some measures' but not others – do they understand why? Why have you been offered some measures?

Show the Occupancy Assessment (shown on PC and printed out afterwards)

ALLOW RESPONDENT 2 MINS ALONE TO READ

Tell me 3 things you've picked up from this document

Then probe as necessary:

- What is this assessment recommending? (Ask to explain in own words)
- What does the 'congratulations' box text & implications set out?
- What would you do as a result of receiving this piece of information? What action would this encourage?

Show the Information Leaflet as a 'pack' of other information they should receive after the assessment (give them a red and green pen to mark bits as particularly unclear or clear)



ALLOW RESPONDENT 2 MINS ALONE TO READ

- Again, what are the key take outs? What's helping/hindering clarity of the deal? Identify language/phrases/design harder to take in
 - Is it clear people can get a quote for (and then take out a) Green Deal with a range of providers?
- How would you decide whether to take out a plan or not?

Summary: (possible vox pops opportunity)

- What else have you discovered in this section that you think you should have known about sooner?


10 mins

Additional probes to be used if necessary:

- What would the assessment cost? Do you assume it is free? When would you find out how much it cost? (make a note if the respondent suggests they would check the cost beforehand)
- Should details of interest being payable on the Green Deal be made clearer in the advice report?
- How might you yourself impact on what you end up paying?
 - Is it clear your bills could rise if your energy usage increases (e.g. heat home to a higher temperature, size of household increases).
 - Is it clear that installations may not work well if they're damaged?
- *So to check/recap, is it clear who you could get quotes for the Green Deal from? Is it clear what is covered?*
- *Is it clear how you would pay for the Green Deal?*
- *After taking out a GD, what will happen to your bills? (spontaneous mention of behaviour)*
- *Assuming you were interested, is there any other info you'd want*

	<p><i>before getting a quote?</i></p> <p>ASK RESPONDENT TO TAKE DISCOVERY / EVALUATION MATERIALS TO THE NEXT ZONE</p>	
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MOVE PARTICIPANTS THROUGH TO **DECISION ZONE**

DECISION ZONE	Purpose of this section: To understand impact of being offered quotes by providers (and clarity of obligations and terms)	20 mins
	<p>EXPLAIN THAT WE'RE NOW GOING TO ASSUME THEY'VE BEEN GIVEN THEIR 'PRESCRIPTION' AND CAN GET QUOTES FROM GD PROVIDERS. WE WANT TO FIND OUT WHAT INFORMATION PEOPLE NEED IN ORDER TO UNDERSTAND WHAT THEY WILL PAY FOR DIFFERENT QUOTES</p> <p>HAND RESPONDENT DECISION PACK</p> <p>Show 3 different quotes from suppliers with the Terms of the Plan – ASSUME THEY'VE GOT 3 QUOTES</p> <p>ALLOW RESPONDENT 5 MINS ALONE TO READ</p> <ul style="list-style-type: none"> • Which quote do you prefer? Why? • What do you think 'lower user' means? <p>MODERATOR: Are they aware what the implications are and how this might be different it is was high/average user. Note down if they understand the importance of their energy use – do they realise there are several scenarios where the savings may be smaller than the repayments? i.e. being a low user, increasing their household size, elect to use more energy such as building an extensions, taking more baths, working from home. Do not lead on this just make a note)</p>	15 mins

- How clear are the quotes? Any surprises?
 - What is making it harder/easier to compare quotes?
 - (need variation in interest rate and length of repayment)
- Can they explain how the payment works from this?
- What do you focus more on/less on (check for level of focus on terms of plan, payment plan, explanation of early repayment)
- Does one style make it easier to understand than others? Why?
- Do you have a preferred layout in terms of making the points clearer?
- What information do you think should **always** be included in a Green Deal quote, no matter who provides it? (e.g. cost of materials, cost of installation, interest rate etc. – don't prompt but probe for level of detail expected/required)
- Is the requirement to pay interest clear? Do you need this information earlier in the journey? If so, when? Why?
- Where would you expect to see details of your plan / repayments?
 - Would you have preferred to know there was an interest repayment earlier?
- **(For ECO eligible / vulnerable respondents if not picked up on spontaneously)** Do you think you might have been eligible for additional help with this work, for example some sort of subsidy?
- At what stage in the process should this be made clear to you?
- What would be the best way to let you know you might be eligible for additional help?
- What if you wanted to pay off the Green Deal charge early?
- What would/might happen if you decided to do further refurbishment work on your home?
- What would you do to decide?
 - Do people reference being able to add/remove measures? Why?
 - Spontaneously, note do they read the Ts & Cs? If so, all of it or selectively? Which bits?
- Now focusing on Terms of the Plan:
 - How thoroughly did you read these? Why/why not?
 - When read, are these clearly understood? Anything surprising?



- What needs to be clearer/easier to take on board?
 - Can they be grouped a bit more to improve clarity?
 - What do you think is most important to you personally at this stage? (check this again later in the interview)
- Should you be better directed to 'more important terms'? If so, what are these?
- What, if anything, seems to be specific to the Green Deal?

Show the GD credit agreement (give them a red and green pen to mark bits as particularly unclear or clear)

ALLOW RESPONDENT 2 MINS ALONE TO READ

5 mins

- What's this telling you? What's clear/less clear and why?
- How likely would you be to read this in detail? Why/why not?

Show the EPC Advisor website

<http://epcadviser.direct.gov.uk/epcadviser.html>


EPC RRN 8304-8255-5120-4526-4183 (you can use this)

- How likely would you be to visit this site? Why?
- How easy is this to use?
- How clear are the results? How easy is it to compare cost of measures?
- **Task:** *If you spend x per year on energy (ask them roughly what they do spend a year) and you're interested in some options/measures and you're prepared to take out a GD up to the value of (get them to suggest an amount), and you want to save x. So....:*
 - What measures would you install and why?
- Is it clear these costs are without interest added? Should this be more clearly stated?
- How clear is wording? Suggestions for changes/bits more confusing?
- Do you have any outstanding questions? (e.g. How much interest? How much will I actually save?)
- (briefly) At this point, do you think you might look at other ways of



	<p>funding this work?</p> <ul style="list-style-type: none"> • What options might you have? Where would you go for information? <p><i>Additional probes</i></p> <ul style="list-style-type: none"> • <i>Could you take a different set of measures once you've decided on the package?</i> • <i>Do you understand you have a choice with the measures</i> • <i>Probe understanding of the pie and bar chats if not covered earlier</i> <p>ASK RESPONDENT TO TAKE DISCOVERY / EVALUATION / DECISION MATERIALS TO THE NEXT ZONE</p>	
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MOVE PARTICIPANTS THROUGH TO LEGACY ZONE

<p>LEGACY ZONE</p>	<p>Purpose of this section: to understand how customers continue to be kept informed about the GD through the lifetime of payment and how information will be passed on to new owners/occupiers of a GD home</p>	<p>20 mins</p>
	<p>EXPLAIN THAT WE'RE NOW GOING TO ASSUME THEY'VE HAD THE MEASURES INSTALLED AND THEY TOOK THE DIY QUOTE</p> <p>Before we show you a 'mock' bill:</p> <ul style="list-style-type: none"> • What would you expect to happen to your bill after the Green Deal measures have been installed? • Go up, down, stay about the same? Could it go higher? Why? • Moderator to note if they are currently a dual fuel customer <p>HAND RESPONDENT LEGACY PACK</p> <p>Show an electricity bill + gas bill IF DUAL CUSTOMER SHOW TOGETHER IF NOT SHOW SEPARATELY</p>	<p>15 mins</p>

ALLOW RESPONDENT 2 MINS ALONE TO READ

- Again, explore clarity of wording and calls to action
 - Where would you go for more information? Does this depend on what you're confused about? e.g. utilities co. or someone else?
- How clear is the Golden Rule? (i.e. if use more energy will see bills rise)
- Include a bill that's gone up and probe as to why that might be the case
- What wording (or design) changes would help improve your understanding?
- How likely would you be to read this in detail? Why/why not?
- *Probe for clarity of why a gas bill may go down but electricity bill goes up:*
 - Do you understand why one bill might go up and another go down? What could have been done to make this easier to understand?
- How helpful are the tips for reducing your energy consumption? Is it clear how you can do this? Why is this important?
- **For pre-payment customers** – is it clear that you will pay through charges on your electricity bills over the summer for savings you will not see until winter?
 - What might help make this point clearer?
- Would you like to know what you have saved?
 - Where would you look for this on the statement?
 - What sort of evidence would you be looking for? (e.g. changed in your bills compared to a neighbour)


Show the annual energy statement from suppliers, DIY store quote (give them a red and green pen to mark bits as particularly unclear or clear)

ALLOW RESPONDENT 2 MINS ALONE TO READ

- What's this telling you? What's clear/less clear and why?
- How likely would you be to read this in detail? Why/why not?

Summary: (possible vox pops opportunity)



	<p><i>Additional probes:</i></p> <ul style="list-style-type: none"> • Do you understand what happens to the payments if you move out? • Is it clear when the loan will be repaid? • Is it clear that payments are flexible? <ul style="list-style-type: none"> ○ What does it tell you about early repayment? ○ What happens if you miss a payment? • Do you want to know when each measure's been paid off? Should the statement emphasise this? • Is it clear that you can switch energy provider or tariff irrespective of having GD measures installed? • What would you do if there was a problem with a GD installation you'd had done? <ul style="list-style-type: none"> ○ Is it clear where to go or who enforces the warranty? 	5 mins
<p>Summary/ Close</p>	<p>Purpose of this section: Obtain key points of takeout</p>	<p>10 mins</p>
	<p>RESPONDENT TO BRING ALL ZONE PACKS WITH THEM INTO SUMMARY</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p><i>See separate self-complete document 'Green Deal Journey': ask respondent to write in (or talk through if more appropriate) the steps they would expect to go through in signing up to a Green Deal</i></p> </div> <p><i>Respondent to complete final GD Quiz then vox pops opportunity – ask respondent best way for DECC to explain the key concepts – Golden Rule, estimated savings, impact on bills (cognitive link)</i></p> <p>Then ask before finishing:</p> <ul style="list-style-type: none"> • MODERATOR IF THIS HASN'T COME UP ALREADY: is it easier to understand if the GD is described as a loan/repayment? 	

	<p>Moderator to BE AWARE WHICH DOCUMENTS FROM EACH ZONE PACK RESPONDENT USERS TO EXPLAIN THE BELOW PROBES</p> <ul style="list-style-type: none">• What are the top 3 most important things you have taken away from this session about the Green Deal? (vox pops)• What works well in explaining the Green Deal and what needs more work? (vox pops)• To recap – when you leave here this afternoon / this evening – if someone (friend / partner) asked you what the Green Deal was, how would you explain it to them?• Thank & Close	
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9.6 Discussion guide Phase 2

The discussion flow at the Phase 2 was again based around the four stages (Discovery, Evaluation, Decision and Legacy).

Households however would only do one of the three following journeys...

- Discovery and Evaluation
- Decision and Legacy
- Legacy EPC with Green Deal and Evaluation

There was a discussion guide for each of these journeys. Discovery and Evaluation starts on the next page followed by the discussion guide for Decision & Legacy then Legacy EPC with a Green Deal.

Judgment was made to pull apart the discussion into these three areas to spend more time on each of the stages of the journey. Time was also allocated towards the documents that DECC had more of a role in adapting (such as the Occupancy Report).

DISCUSSION PLAN – Workshop Phase 2 (60 minute)

Discovery & Evaluation

Discussion guide for 5 respondents from each workshop

Project: Explaining the Green Deal

JOB NUMBER: DECC15085L

Discussion Plan Overview		
Introduction/ warm up	<ul style="list-style-type: none"> • Purpose of this section: Put respondent at ease, introduce the research, find out some background details 	5 mins
DISCOVERY ZONE	<ul style="list-style-type: none"> • Purpose of this section: Give respondents a brief introduction to the Green Deal and then focus on the key messages for Discovery <ul style="list-style-type: none"> ○ Descriptions of the Green Deal ○ Explanations of the Golden Rule ○ Understanding the purpose of the assessment and costs applied • In particular this section will provide evidence supporting recommendations for: <ul style="list-style-type: none"> ○ Key points an independent website / call centre would need to make clear, understanding difference between two sets of contact details ○ Guidance for Green Deal providers 	25 mins
EVALUATION ZONE	<ul style="list-style-type: none"> • Purpose of this section: To understand comprehension of information provided when an advisor visits their home to provide an assessment (i.e. clarity of information when considering taking out a Green Deal) <ul style="list-style-type: none"> ○ Comprehension of how all the documents work together ○ Appropriate sections of the EPC to read ○ Understanding of costs, savings (use less so save less) 	30 mins
Summary & Conclusion	<ul style="list-style-type: none"> • Purpose of this section: Obtain key points of takeout 	5 mins



= respondent task

- Respondents to move into 2 zones
 - 25 mins in the Discovery Zone & 35 mins in the Evaluation Zone

START PARTICIPANTS IN 'ZONE 1' - DISCOVERY

<p>Introduction / Warm up</p>	<p>Purpose of this section: Put respondent at ease, introduce the research, find out some background details</p>	<p>5 mins</p>
	<p>Thank respondents for coming; explanation of purpose of session;</p> <ul style="list-style-type: none"> • <i>Introduce self, Optimisa – who, what we are</i> • <i>Structure of interview (show different information in different areas of the room, get their views – reasons will become clear)</i> • <i>Purely research – no selling, no right/wrong answers, all opinions valid, that we're testing materials are for a new concept so importance of honesty in how clear they are</i> • <i>Confidentiality of personal details</i> • <i>Audio/video recording – why, uses and permission</i> • <i>Any questions, concerns?</i> <p>INTROS: A little bit about themselves and their homes</p> <ul style="list-style-type: none"> • Family/household composition; work; length of time lived in home • Ask them to talk a little about their home, age, what they like / dislike about it • Have you had or considered maintenance or improvement work on your home recently? <ul style="list-style-type: none"> ○ Triggers for this? ○ Barriers to this? ○ Any contractors used? How well did this work? How long did it take you to decide what to have done/who to use? (cross ref with likely timescales for GD decision at end of Evaluation stage) • Would you consider your energy usage and bills to be relatively high or low compared with an average home like yours/ 	

- How would you expect the GD improvements to affect your energy bills overall? (NB Moderator to remember if they think they are a high or low user from intro section)
- What are the stages of finding out about and getting a Green Deal?
 - Would you describe or show the sequences differently to make it clearer?
- What specifically is the next stage (assuming you'd just found out about the Green Deal and were interested)
- How would you go about getting an assessment? Would you be charged for this, how could you find out?
- Who would be carrying out the measures to homes? Is there a choice?
 - Do you have to use the same company for getting an assessment and getting the actual work done?
 - Do you have to go to your current energy provider for a GD? What choices do you have?
- Is any extra advice available?

Overall

- Check understanding of what the Green Deal offers and what the steps are (does this stand alone as a document)

Moderator to rate if they understood the 6 key concepts:

1. Improve home with no up front payments
2. New kind of loan attached to property not person
3. Paid via electricity bill
4. Subsidies available
5. GD not suitable for everyone
6. Free and impartial advice available



FOCUS ON THE 4 PAGE ENERGY COMPANY LEAFLET & PROVIDER AD – SPECIFICS & DIRECTED TAKE OUTS

EXPLAIN THAT THIS IS MOCK ADVERTISING THE SORTS OF THINGS PROVIDERS MIGHT PRODUCE

RESPONDENTS TO REFER TO NOTES MADE ON THE LEAFLET FOR THEIR PRE TASK (RED AND GREEN PEN MARKS).

- How well is the GD described in the ad, and in the 4 page leaflet?
- How do you think the GD should be talked about – as a Deal, a loan,

	<ul style="list-style-type: none"> • Test alternative approaches to CL: Read both. Which is most useful, which is easiest to understand. Do they all mean the same thing or are they different <ul style="list-style-type: none"> ○ DECC 2 pager : 4 Things no 3 ○ Energy Fix 4 pager:...Questions no 1 • You mentioned early on that you think you are a high/medium/lower than average user...would you expect the GD to save you more, less or about the same as other people? <ul style="list-style-type: none"> • Where would you go for impartial advice and what questions would you want answers to? • Where would you expect to find this information? Probe role of helpline, online, print? <p>SUMMARY (VOX POP)</p> <ul style="list-style-type: none"> • <i>Can you describe the Green Deal in your own words? What are the most important things about it?</i> <i>What would you do next? Would you get an assessment? How? How would this work?</i> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p><i>Moderator to complete rest of Discovery Moderator form while resp reads Evaluation Docs</i></p> </div> <p style="text-align: center;">END OF DISCOVERY ZONE</p> <p style="text-align: center;">ASK RESPONDENT TO TAKE DISCOVERY MATERIALS TO THE NEXT ZONE</p>	2 – 3 mins
EVALUATION ZONE	Purpose of this section: To understand impact of information provided when an advisor visits their home to provide an assessment (i.e. clarity of information when considering taking out a Green Deal)	25 mins
	<p>EXPLAIN THAT WE'RE NOW GOING TO ASSUME THEY'VE DECIDED TO FIND OUT MORE ABOUT WHAT MEASURES THEY CAN HAVE. SO WE'RE LOOKING AT THE KIND OF INFORMATION PROVIDED WHEN AN ASSESSMENT IS MADE OF THEIR HOME.</p> <p>EXPLAIN: The assessor will have asked how they use energy at home, will have pointed out things they can do and will have discussed which</p>	1 mins

options they prefer, perhaps highlighting the costs/savings associated with each measure. They will very likely highlight the difference between typical usage and their own.



HAND RESPONDENT EVALUATION PACK

- **Occupancy report**
- **EPC without Green Deal**
- **4 Pager**

Explain that the assessor would be able to show a certain amount of information 'on the spot' and some would be sent afterwards

I would now like you to read these 3 documents which you would use to decide whether you would like Green Deal measures done to your home

ALLOW RESPONDENT A FEW MINS ALONE TO READ. MODERATOR TO ACT AS AN ASSESSOR WOULD WHERE NECESSARY, BY ANSWERING ANY QUESTIONS THEY MAY HAVE ABOUT THE DOCUMENTS NOTE QUESTIONS

From these three documents:

- What is being recommended for this home?
- Which of the 3 docs/which parts are most interesting/relevant to you as a decision maker?

5
mins



FOCUS ON THE OCCUPANCY REPORT

REMINDEE RESP OF CONTEXT.

ALL RESPONDENT TIME TO COMMENT SPONTANEOUSLY ABOUT THE DOCUMENT THEN PROBE WITH...

- What is this report recommending? (Get them to explain in their own words)
- What would you do as a result of receiving this piece of information? What action would this encourage?

8
mins

- What are the main pieces of financial information, what are they suggesting?

Understanding of key concepts (Moderator to rate on form)

1. **What are the measures**
2. **What could I save**
3. **What will it cost me?**
4. **Is it worth it for me?**
5. **Why are some measures included and not others?**

Take through / direct to key information in the Occupancy report and explore the clarity

- How could the layout be improved to bring out key points of information?
- Understanding of the alternative package – is role understood? What do they want to know about this package at this stage? Do they want to see the typical savings and the savings for that household as well as the costs for each measure, or is a summary sufficient. (Use versions A and B to facilitate discussion)
- Direct them to GR element (bottom of page 1/ 'Why is this imp't' on page 2): Understanding – is this more/less easy to understand than before? Is text on top of page 2 useful?
 - Link to whether they said they were a high/medium/low user at the beginning – what might be the implications for them? How might their bills be affected?
 - Why does it talk about **estimates** of savings, costs etc (rather than actuals)?
 - Is it clear the 'typical savings' are estimates?
 - Is 'typical' a suitable term – what about average, standard...something else?
- Would Occupancy Assessment Version A be clearer if, in the table: 'Package you discussed with your assessor':
 - We removed 'Your home' title on left
 - We replaced '*This package has been chosen for you by your advisor based on the information you have provided.*' with an attempt to explain why the costs are different in the top and

bottom e.g. . 'Savings for each measure depend on the whole package of measures chosen'.

FOCUS ON THE EPC WITHOUT GD

- Explore understanding of information...? What are the key messages?
- Is link with Occupancy report noticed?
- NOTE SPONTANEOUS COMMENTS ON THE GD INFORMATION
- IF DON'T SPONTANEOUSLY MENTION PROMPT WITH... what are the messages about the GD?
- What's being suggested by this document?
 - Probe clarity of 'some measures' but not others – do they understand why? Why have you been offered some measures? What does an orange tick mean?

DIRECT TO GD ELEMENTS: (BRIEF)

Specifically: Front Page

Page 3

Bottom of page 4


- What information does the respondent take out (don't prompt)?
- Note references to:
 - What is being recommended? What are the measures?
 - What will/may it cost?
 - What choices do you have?
 - What should you do next if interested?
 - What does it tell you about extra financial help being available?
 - Where can you go for more advice/help
 - where would you expect to find impartial information?

3 - 4
mins



FOCUS ON THE 4 PAGER LEAFLET

- Have you learned anything new from this document?
- Which of the 5 things do you think are particularly important to

	<p>someone who is already a lower than average user?</p> <p>If interested, what would you do next? More deliberation/consideration of different options, or getting a quote? Likely timescales? Cross ref with any previous work done.</p> <p>SUMMARY (VOX POP)</p> <ul style="list-style-type: none"> • <i>Could you sum up the role of these three documents – what is the purpose of each one?</i> • <i>What's the occupancy report telling you in your own words?</i> • <i>Any areas to take in / how clear are the recommendations in the EPC</i> <p><i>Moderator to complete Moderator form while respondent completes their own assessment form below.</i></p>	
<p>Summary</p> <p>Close</p>	<p>Purpose of this section: Obtain key points of takeout</p>	<p>5 mins</p>
	<p>RESPONDENT TO BRING BOTH ZONE PACKS WITH THEM INTO SUMMARY</p> <hr/> <p>COMPLETE DOCUMENTS SUMMARY SCORE CARD</p> <hr/> <p>MODERATOR TO BE AWARE WHICH DOCUMENTS FROM EACH ZONE PACK RESPONDENT USES TO EXPLAIN THE BELOW PROBES</p> <ul style="list-style-type: none"> • What are the top 3 most important things you have taken away from this session about the Green Deal? (vox pops) • What works well in explaining the Green Deal and what needs more 	<p>5 mins</p>

work? (**vox pops**)

- **To recap** – when you leave here this afternoon / this evening – if someone (friend / partner) asked you what the Green Deal was, how would you explain it to them? What would you say are the main advantages? And what would you tell them are the main drawbacks?

Thank & Close

DISCUSSION PLAN – Workshop Phase 2 (60 minute)

Decision & Legacy

Discussion guide for 4 respondents from each workshop

Project: Explaining the Green Deal

JOB NUMBER: DECC15085L

Discussion Plan Overview		
Introduction/ warm up	<ul style="list-style-type: none">• Purpose of this section: Put respondent at ease, introduce the research, find out some background details	5 mins
DECISION ZONE	<ul style="list-style-type: none">• Purpose of this section: To understand impact of being offered quotes by providers (and clarity of obligations and terms)	30 mins
LEGACY ZONE	<ul style="list-style-type: none">• Purpose of this section: to understand how customers continue to be kept informed about the GD through the lifetime of payment and how information will be passed on to new owners of a GD home	20 mins
Summary & Conclusion	<ul style="list-style-type: none">• Purpose of this section: Obtain key points of takeout	5 mins



= respondent task

- Respondents to move into 2 zones
 - 25-30 mins in the Decision Zone & 20-25 mins in the Legacy Zone

START PARTICIPANTS IN 'ZONE 1' - DECISION

<p>Introduction/ Warm up</p>	<p>Purpose of this section: Put respondent at ease, introduce the research, find out some background details</p>	<p>5 mi ns</p>
	<p>Thank respondents for coming; explanation of purpose of session;</p> <ul style="list-style-type: none"> • <i>Introduce self, Optimisa – who, what we are</i> • <i>Structure of interview (show different information in different areas of the room, get their views – reasons will become clear)</i> • <i>Purely research – no selling, no right/wrong answers, all opinions valid, that we're testing how clear the materials are for a new concept so importance of honesty in how clear they are</i> • <i>Confidentiality of personal details</i> • <i>Audio/video recording – why, uses and permission</i> • <i>Any questions, concerns?</i> <p>INTROS: A little bit about themselves and their homes</p> <ul style="list-style-type: none"> • Family/household composition; work; hobbies, length of time lived in home • Ask them to talk a little about their home, age, what they like / dislike about it, rooms they use more or less and why? • What things would you like to change about your home? <ul style="list-style-type: none"> ○ Have you had or considered maintenance or improvement work on your home recently? Triggers for this? ○ Barriers to this? ○ Have you ever had contactors in to price work in your home? ○ When (or if) you are given a quote for your home what do you look for in the quote? • Would you consider your energy bills to be relatively high or low compared with an average home of similar size / type as yours 	

- How would you explain the purpose of these documents in your own words? SPEND MORE TIME ON THE OCCUPANCY REPORT
- What would you do next?

MODERATOR TO EXPLAIN ANY AREAS OF CONFUSION

HAND RESPONDENT **DECISION** PACK

NOW WE'RE GOING TO ASSUME YOU'VE BEEN GIVEN THEIR 'PRESCRIPTION' AND CAN GET QUOTES FROM GD PROVIDERS. WE WANT TO FIND OUT WHAT INFORMATION PEOPLE NEED IN ORDER TO UNDERSTAND WHAT THEY WILL PAY FOR DIFFERENT QUOTES

5
mins

- **3 X Quotes**
- **Terms of the plan**
- **CCA**

Here are 3 different quotes, the terms of the plan and a consumer credit act agreement; can you please now spend 5 mins reading these

- What information do these documents provide?
- Which are the most important bits of information?
- Which bits of information are less important?



FOCUS ON THE **QUOTES X 3**

- Can you explain to me in your own words what each of these quotes is offering?
- How clear is all the information? Which parts are clearer than others?
- How easy is it to compare the quotes? What are the key bits of information you want to compare?
- Which parts to each quote do you prefer and why? / Which bits of information on the quotes would you find useful?
- Any surprises?
 - What standard information should be included?
 - What is making it harder/easier to compare quotes?
- Which parts of the quotes are the most useful/important?

5 mins

- If you wanted to take out one of the quotes what should you do next? How clear is this on the quote?

MODERATOR: ARE THEY AWARE WHAT THE IMPLICATIONS ARE

- THAT THIS IS A LOAN / STAYS WITH PROPERTY
- HOW SAVINGS MIGHT BE DIFFERENT IF IT IS WAS HIGH/AVERAGE USER.

Moderator to rate performance of docs on bringing out key criteria

1. *Understanding of quotes*
2. *Low energy user warning*
3. *Important to read the terms of the plan*
4. *Aware of choices?*

- Can you explain how the payment works from this?
- What information should the quote provide?
- Would you consider visiting a website to help you understand the quote (e.g. like the Ofgem or Consumer Focus Website – use as examples to help respondent understand)
- What do the quotes tell you about?
 - Repayments
 - Interest
 - Early repayments
- Did you notice the reminders, how helpful would these prove? Is there any reminder information missing? PROBE WITH:
 - Impartial advice
 - More information on the GD etc.
 - Subsidy (do you prefer the term discount?)
 - Implications of altering the improvements
- Do you think it would be possible to do this home improvement work without a GD? Why? Why not?



FOCUSING ON TERMS OF THE PLAN: (give them a red and green pen to mark bits as particularly unclear or clear)

- MODERATOR TO ENSURE RESPONDENT READ ALL THE DOCUMENT when read, are these clearly understood? Anything surprising?
 - What do you think is most important to you personally at this stage? (check this again later in the interview)
- Are there any words / phrases that are difficult to understand?
 - What do you think these mean and how would you word differently?
- How flexible are payments (can you miss a payment or repay early)?
 - What are the implications if you do either of the above?
- Is there any information missing that you expected to be there?
- Can the document be grouped differently to improve clarity?

10 mins



FOCUS ON THE CONSUMER CREDIT ACT (give them a red and green pen to mark bits as particular unclear or clear in relation to the GD)

- What's this telling you? What's clear/less clear and why?
- Is it important to have it signposted on the terms of the plan or the quotes?
- What, parts or this document are specific to a Green Deal?

MODERATOR TO SEE IF RESPONDENTS SEES THESE AND THEN POINT THEM TO ANY OTHER AREAS THAT ARE SPECIFIC TO THE GD AND CAN BE CHANGED BY DECC

- Which parts of the CCA are particularly useful? (size of loan, how much repaid so far, outstanding debt, annual and monthly repayments, timescales for repaying the loan)
- Anything missing? Would you suggest to add anything?
- Is it clear who you should go to if you have a problem with any measures (work done)? Should this be something that this document mentions?
- What warranties and assurances are there that there / should it assure you that these problems will be resolved fast and for free

5 mins

	<p>TO COVER IF NOT MENTIONED COVER WITH BOTH QUOTES AND TERMS:</p> <ul style="list-style-type: none"> • What choices do you have with the measures? Do you have to do all of them or can you choose which ones? • Should there be more information about discounts/grants/subsidies? If so, where, what kind of information? • How well is further information signposted? • Ask what do with each of these sorts of documents (file it? bin it?) <p>Summary: (possible vox pops opportunity)</p> <ul style="list-style-type: none"> • Any terms that are not clear here and why? • How would you expect this to affect your energy bill for gas, oil, electricity, pre-payment <ul style="list-style-type: none"> ○ What factors would affect what level of savings you can make. <p><i>MODERATOR TO CROSS REFERENCE TO WHAT THEY TOLD US ABOUT HIGH / LOW USER</i></p> <p><i>Moderator to complete rest of Decision assessment form while respondent reads Legacy Docs</i></p> <p>END OF DECISION ZONE</p> <p>ASK RESPONDENT TO TAKE DECISION MATERIALS TO THE NEXT ZONE</p>	
<p>LEGACY ZONE</p>	<p>Purpose of this section: to understand how customers continue to be kept informed about the GD through the lifetime of payment and how information will be passed on to new owners of a GD home</p>	<p>20 mins</p>
	<p>EXPLAIN THAT WE'RE NOW GOING TO ASSUME THEY'VE HAD THE MEASURES INSTALLED AND THEY TOOK THE DIY QUOTE</p> <p>Before we show you a 'mock' bill...</p> <ul style="list-style-type: none"> • What would you expect to happen to your bills after the Green Deal measures 	<p>2 mins</p>

have been installed?

Your electricity bill?

Your gas or oil bill?

Your pre-payment meter ONLY ASK RESPONDENTS WHO HAVE ONE

- Go up, down, stay about the same? Could they go higher? Why?
- MODERATOR TO NOTE IF THEY ARE CURRENTLY A DUAL FUEL CUSTOMER

HAND RESPONDENT **LEGACY** PACK

- **Bills x 2**
- **Annual Credit Statement**

ALLOW RESPONDENT 5 MINS ALONE TO READ

- If you move into a house with a GD, what kinds of things would you ask?
need to know?
- Would you be able to choose your energy supplier in the new house?

Moderator to complete assessment form as each of key tops first arises:

1. *Moving into a property with a GD*
2. *How to I assess the impact of the GD*
3. *What if a problem with GD measures*
4. *What about payments flexibility*
5. *Supplier switching*

FOCUS ON THE **BILLS**

- Explore clarity of wording relating to the GD and calls to action
- Where would you go for more information? Does this depend on what you're confused about? e.g. utilities co. or someone else?

5 mins

5

mins



- What wording changes would help improve your understanding?
- Probe for clarity of why a gas bill may go down but electricity bill goes up:
 - How clear is the Golden Rule? (i.e. if use more energy will see bills rise)
 - Do you understand why one bill might go up and another go down?
What could have been done to make this easier to understand?
 - What factors would affect the level of the bill
 - Are there any circumstances which would make your bills rise even though you've got the GD and why?
- What would you like to be told on the statement that is currently not there?

PROBE OVERALL EFFECT OF GD ON ENERGY SPENDING

- If you had an annual energy bill what would you like to see on this bill with relation to the GD?

5 mins

FOCUS ON THE ANNUAL CREDIT STATEMENT (give them a red and green pen to mark bits as particularly unclear or clear)

ASK RESPONDENT TO RE-READ IN MORE DETAIL

- What's this telling you? What's clear/less clear and why?
MODERATOR TO CONCENTRATE ON THE GREEN DEAL PARAGRAPH IF NOT SPONTANEOUSLY MENTIONED
- What is this telling you and how clear is it? Which elements could be seen as confusing?
- How would you write this paragraph so it was clearer for you?
- Would signposting of information from the CCA help? What areas?
- Who would you go to if you had any further questions about the statement / or had any problems with the measures (work) that had been done to your home?



FOCUS ON 1 PAGER '5 THINGS YOU SHOULD KNOW ABOUT PROPERTY WITH THE GD'

- Do you understand all of the 5 things? Are some more clear than others?
- Do you think these are the important things to know at this stage?

5 mins

- Which ones are more important than the others?
- If you could change of the 5 points what would you change?
- Do you have any questions about the 5 points?

TO COVER IF NOT MENTIONED:


- What are the main things you should know if you move into a home with a GD?
- What happens to the payments if you move out?
- Does it tell you when the loan will be repaid?
- To what extent are payments flexible?
- Do you want to know when each measure's been paid off? Should the statement emphasise this?
 - Role of warranty
- Can switch energy provider or tariff irrespective of having GD measures installed?
- What would you do if there was a problem with a GD installation you'd had done?
- Is it clear where to go or who enforces the warranty?

Summary: (possible vox pops opportunity)

- *What do the documents tell you about early repayment?*
 - *How visible was this in the documents? How could you improve this?*
- *What happens if you miss a payment?*
 - *How visible was this in the documents? How could you improve this?*

END OF LEGACY ZONE

Moderator to complete assessment while resp does own score card

Summary Close	Purpose of this section: Obtain key points of takeout	5 mins
	<p>RESPONDENT TO BRING BOTH ZONE PACKS WITH THEM INTO SUMMARY</p> <hr/> <p><i>COMPLETE DOCUMENTS SUMMARY SCORE CARD</i></p> <p>MODERATOR TO ENSURE ALL DOCUMENTS ARE LAID OUT IN FRONT OF THE RESPONDENT</p> <p style="text-align: center;">Looking back at all the documents we have seen today</p> <ul style="list-style-type: none"> • What is the best way to describe the Green Deal? SPONTANEOUS <ul style="list-style-type: none"> ○ Is it easier to understand if the GD is described as a loan/repayment/advance? ○ MODERATOR TO PROBE; ‘Green Deal is a loan attached to the electricity bill for the property, not the person’ <u>does this make sense or do you prefer</u> ‘a new kind of loan attached to the property, not a person’ • If we explain the repayments as ‘a green deal provider cannot charge you more than the average person would save’ <u>or</u> ‘the estimated savings will always be the same as or more than the cost of the repayments for the recommended measures’... which one is clearer? • Where can you go for impartial advice, and at what stage along the journey is it important to know this? • Is there any information about extra financial help for certain groups of people – who is it aimed at? <ul style="list-style-type: none"> ○ What should the extra help be called – a subsidy? A grant? A discount? 	

	<ul style="list-style-type: none">○ Was this noted? Was this clear?● What does the Kitemark mean? Was it noticed? <p>MODERATOR TO BE AWARE WHICH DOCUMENTS FROM EACH ZONE PACK RESPONDENT USERS TO EXPLAIN THE BELOW PROBES</p> <ul style="list-style-type: none">● What are the top 3 most important things you have taken away from this session about the Green Deal? (vox pops)● To recap – when you leave here this afternoon / this evening – if someone (friend / partner) asked you what the Green Deal was, how would you explain it to them? <p style="text-align: center;">Thank & Close</p>	
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DISCUSSION PLAN – Workshop Phase 2 (60 minute)

DISCOVERY AND LEGACY (EPC WITH GREEN DEAL)

Discussion guide for 2 respondents from each workshop

Project: Explaining the Green Deal

JOB NUMBER: DECC15085L

Discussion Plan Overview		
Introduction/ warm up	<ul style="list-style-type: none">• Purpose of this section: Put respondent at ease, introduce the research, find out some background details	5 mins
EPC WITH GREEN & DISCOVERY ZONE	<ul style="list-style-type: none">• Purpose of this section: To understand impact a EPC with a GD when first move into a new property followed by any discovery material	20 mins
LEGACY ZONE	<ul style="list-style-type: none">• Purpose of this section: to understand how customers continue to be kept informed about the GD through the lifetime of payment and how information will be passed on to new owners of a GD home	30 mins
Summary & Conclusion	<ul style="list-style-type: none">• Purpose of this section: Obtain key points of takeout	5 mins






= respondent task

- Respondents to move into 2 zones
 - 25 mins in the EPC with GD Zone & 35 mins in the Legacy Zone

START PARTICIPANTS IN 'ZONE 1' – EPC WITH GREEN DEAL AND DISCOVERY

<p>Introduction/ Warm up</p>	<p>Purpose of this section: Put respondent at ease, introduce the research, find out some background details</p>	<p>5 mins</p>
	<p>Thank respondents for coming; explanation of purpose of session;</p> <ul style="list-style-type: none"> • <i>Introduce self, Optimisa – who, what we are</i> • <i>Structure of interview (show different information in different areas of the room, get their views – reasons will become clear)</i> • <i>Purely research – no selling, no right/wrong answers, all opinions valid, that we're testing how clear the materials are for a new concept so importance of honesty in how clear they are</i> • <i>Confidentiality of personal details</i> • <i>Audio/video recording – why, uses and permission</i> • <i>Any questions, concerns?</i> <p>INTROS: A little bit about themselves and their homes</p> <ul style="list-style-type: none"> • Family/household composition; work; length of time lived in home • Ask them to talk a little about their home, age, what they like / dislike about it, rooms they use more or less and why? • What things would you like to change about your home? <ul style="list-style-type: none"> ○ Have you had or considered maintenance or improvement work on your home recently? Triggers for this? ○ Barriers to this? • Are you considering to move home / what are the types of documents that are important to read when you look at buying a home and why • If no but... If you were considering moving home what are the types of documents that are important to read and why? 	

EPC WITH GD ZONE	Purpose of this section: To understand impact a EPC with a GD when first move into a new property followed by any discovery material	25 mins
	<p>EXPLAIN PURPOSE OF TODAY IS WE'RE LOOKING INFORMATION PEOPLE MAY RECEIVE WHEN THEY ARE THINKING ABOUT MOVING INTO A NEW HOME</p> <p>TO BEGIN WITH FIRST IMAGINE YOU RECEIVED THIS (EPC) AS PART OF THE 'INFORMATION' ON THE HOME...</p> <p> SHOW THE EPC WITH THE GD</p> <p>LEAVE RESPONDENT ALONE FOR THOSE 5 MINS TO READ</p> <ul style="list-style-type: none"> • What information is there in this document about the Green Deal? MODERATOR TO OBSERVE HOW QUICKLY THEY CAN LOCATE THE INFORMATION REGARDING THE GD AND DO THEY SHOW THE FRONT AND BACK INFORMATION • In your own words what does it sound like the GD is about according to this document? • Explore understanding of information...? What are the key messages? <p>NOTE SPONTANEOUS COMMENTS ON THE GD INFORMATION...</p> <ul style="list-style-type: none"> • What is the report telling you about the home you are moving into? • What measures have been implemented into this home? <ul style="list-style-type: none"> ○ Is it clear what was done under the green deal and what was not? Are the on-going costs / charges clear? • What questions do you have about the GD now? • How would you react to receiving this document when looking to buy / move into a home <p>MODERATOR TO OBSERVE AND PROBE: Do they understand information on page 1 which signposts them to information elsewhere and do they understand it</p> <ul style="list-style-type: none"> • Would you like to see more information signposted about buying a home with a GD attached? How would you like to see this? <p> RESPONDENT TO TAKE OUT THE DISCOVERY PACK THEY WERE PRE PLACED WITH</p> <p>Leaving aside what you have just seen...Have a quick at this information, and as you are reading think about what they are telling you that EPC doesn't</p> <ul style="list-style-type: none"> • 2 page DECC leaflet (inc. 6 things you should know) • 1 page ad • 4 page provider leaflet (including info on measures, etc.) <ul style="list-style-type: none"> ○ In your own words, what does it sound like the GD is about in these documents? ○ Which of the documents was most helpful? Why? ○ What are the key things that stood out about it? ○ What questions about the GD do you now have? ○ What should this initiative be called? (THEN PROBE; a loan, an advance, a repayment plan) <p>MODERATOR TO EXPLAIN ANY AREAS OF CONFUSION</p> <p></p>	<p>2 mins</p> <p>10 mins</p> <p>5 mins</p>

FOCUS ON THE 2 PAGE DECC LEAFLET – SPONTANEOUS/UNPROMPTED TAKEOUTS

5
mins

What does it tell you the Green Deal is? Is it clearly described?

- What are the measures that can be done to a home by the Green Deal?
- How/where would you expect to pay for Green Deal improvements? (NB PPM Customers: -what do they expect?)
- How would you expect the GD improvements to affect your energy bills overall? (NB Moderator to remember if they think they are a high or low user from intro section)
- What are the stages of finding out about and getting a Green Deal?
 - Would you describe or show the sequences differently to make it clearer?
- What specifically is the next stage (assuming you'd just found out about the Green Deal and were interested)
- How would you go about getting an assessment? Would you be charged for this, how could you find out?
- Who would be carrying out the measures to homes? Is there a choice?
 - Do you have to use the same company for getting an assessment and getting the actual work done?
 - Do you have to go to your current energy provider for a GD? What choices do you have?
- Is any extra advice available?

Overall

- Check understanding of what the Green Deal offers and what the steps are (does this stand alone as a document)

Moderator to rate if they understood the 6 key concepts:

1. **Improve home with no up front payments**
2. **New kind of loan attached to property not person**
3. **Paid via electricity bill**
4. **Subsidies available**
5. **GD not suitable for everyone**
6. **Free and impartial advice available**

5
mins



FOCUS ON THE 4 PAGE ENERGY COMPANY LEAFLET & PROVIDER AD – SPECIFICS & DIRECTED TAKE OUTS

EXPLAIN THAT THIS IS MOCK ADVERTISING THE SORTS OF THINGS PROVIDERS MIGHT PRODUCE RESPONDENTS TO REFER TO NOTES MADE ON THE LEAFLET FOR THEIR PRE TASK (RED AND GREEN PEN MARKS).

- How well is the GD described in the ad, and in the 4 page leaflet?
- How do you think the GD should be talked about – as a Deal, a loan, an advance, a repayment plan? A package (i.e. assessment, advice, finance)?
- If you saw these ads/leaflets and you were interested, what would be your next step?
- Who is providing the Energy Fix plan? (probe: is it a company scheme or a government scheme)? If you wanted independent advice what would you do – where would you look, who would you call?

- Direct to case studies:
 - Role of case studies and diagrams (are these noted/important) – how do they help explain the process?
- Direct to 'keeping things transparent':
 - What are the important bits of information to you in this section
 - What does it tell you about...is it clear enough....
 - about interest?
 - about alterations to GD improvements?
 - about paying for assessments?

5 mins

LOOKING AT ALL THE DISCOVERY DOCUMENTS (NB Content not design)




- What reassurance is there that this is a good quality scheme?
- What does the Kitemark mean? Was it noticed?
- What is the role of a) DECC/the government and b) the company producing the leaflet?
- Does the Energy Fix plan seem to be the same as the Green Deal or is it different?
- Is there any information about extra financial help for certain groups of people – who is it aimed at?
 - What should the extra help be called – a subsidy? A grant? A discount?
 - Was this noted? Was this clear?
- The scheme has been described in slightly different ways in different places. Which do you feel works best, and why? – NB Content not design
 - The Ad
 - Energy Fix 4 pager second paragraph
 - DECC 2 pager opening paragraph
- Test 3 wordings for GR: read all three. Which is most useful/easiest to understand. Do they all mean the same thing or are they different
 - DECC 2 pager: page 2 'How could this affect your energy bills'
 - DECC 2 pager 4 Things...no 4
 - Energy Fix 4 pager : Keeping things transparent – second bullet
- Test alternative approaches to CL: Read both. Which is most useful, which is easiest to understand. Do they all mean the same thing or are they different
 - DECC 2 pager : 4 Things no 3
 - Energy Fix 4 pager:...Questions no 1
- You mentioned early on that you think you are a high/medium/lower than average user...would you expect the GD to save you more, less or about the same as other people?
- Where would you go for impartial advice and what questions would you want answers to?
- Where would you expect to find this information? Probe role of helpline, online, print?



SUMMARY (VOX POP)

- *Can you describe the Golden Rule in your own words?*
What would you do next? Would you get an assessment? How? How would this work?

Moderator to complete rest of Discovery Moderator form while resp reads Evaluation Docs

END OF THE EPC WITH THE GD ZONE
ASK RESPONDENT TO MATERIALS TO THE NEXT ZONE

LEGACY ZONE	Purpose of this section: to understand how customers continue to be kept informed about the GD through the lifetime of payment and how information will be passed on to new owners of a GD home	30 mins
	<p>EXPLAIN THAT WE'RE NOW GOING TO ASSUME THEY'VE BEEN IN THE HOME FOR SOME TIME AND CONTINUE TO RECEIVE RELEVANT DOCUMENTS ABOUT THE GD</p> <p style="text-align: center;">Before we show you a 'mock' bill...</p> <ul style="list-style-type: none"> • When you receive your first energy bills how would you expect the bills to be affected by the Green Deal? <ul style="list-style-type: none"> Your electricity bill? Your pre-payment meter Your gas or oil bill? • Go up, down, stay about the same? Could they go higher? Why? • MODERATOR TO NOTE IF THEY ARE CURRENTLY A DUAL FUEL CUSTOMER <p> HAND RESPONDENT LEGACY PACK</p> <ul style="list-style-type: none"> • Bills x 2 • Annual Credit Statement • 1 pager - '5 things you should know about a property with a GD' <p>ALLOW RESPONDENT 5 MINS ALONE TO READ</p> <p> FOCUS ON THE BILLS</p> <ul style="list-style-type: none"> • Explore clarity of wording relating to the GD and calls to action • Where would you go for more information? Does this depend on what you're confused about? e.g. utilities co. or someone else? • What wording changes would help improve your understanding? • Probe for clarity of why a gas bill may go down but electricity bill goes up: <ul style="list-style-type: none"> ○ How clear is the Golden Rule? (i.e. if use more energy will see bills rise) ○ Do you understand why one bill might go up and another go down? What could have been done to make this easier to understand? ○ What factors would affect the level of the bill ○ Are there any circumstances which would make your bills rise even though you've got the GD and why? • What would you like to be told on the statement that is currently not there? PROBE OVERALL EFFECT OF GD ON ENERGY SPENDING <ul style="list-style-type: none"> ○ If you had an annual energy bill what would you like to see on this bill with relation to the GD? <p> FOCUS ON THE ANNUAL CREDIT STATEMENT (give them a red and green pen to mark bits as particularly unclear or clear)</p> <p>ASK RESPONDENT TO RE-READ IN MORE DETAIL</p>	<p>5 mins</p> <p>5 mins</p> <p>5 mins</p>

	<ul style="list-style-type: none"> • What's this telling you? What's clear/less clear and why? • How likely would you be to read this in detail? Why/why not? <p>MODERATOR TO CONCENTRATE ON THE GREEN DEAL PARAGRAPH IF NOT SPONTANEOUSLY MENTIONED</p> <ul style="list-style-type: none"> • What is this telling you and how clear is it? Which elements could be seen as confusing? • How would you write this paragraph so it was clearer for you? • Would signposting of information from the CCA help? What areas? • Who would you go to if you had any further questions about the statement / or had any problems with the measures (work) that had been done to your home? <p>FOCUS ON 1 PAGER '5 THINGS YOU SHOULD KNOW ABOUT PROPERTY WITH THE GD'</p> <ul style="list-style-type: none"> • Do you understand all of the 5 things? Are some more clear than others? • Do you think these are the important things to know at this stage? • Which ones are more important than the others? • If you could change of the 5 points what would you change? / Do you have any questions about the 5 points? <p>TO COVER IF NOT MENTIONED:</p> <ul style="list-style-type: none"> • What happens to the payments if you move out? • Is it clear when the loan will be repaid? / Is it clear that payments are flexible? • Do you want to know when each measure's been paid off? Should the statement emphasise this? • Can switch energy provider or tariff irrespective of having GD measures installed? • What would you do if there was a problem with a GD installation you'd had done? • Is it clear where to go or who enforces the warranty? <p>Summary: (possible vox pops opportunity)</p> <ul style="list-style-type: none"> • <i>What do the documents tell you about early repayment?</i> <ul style="list-style-type: none"> ○ <i>How visible was this in the documents? How could you improve this?</i> • <i>What happens if you miss a payment?</i> <ul style="list-style-type: none"> ○ <i>How visible was this in the documents? How could you improve this?</i> <p style="text-align: center;">END OF LEGACY ZONE</p>	<p>5 mins</p>
<p>Summary Close</p>	<p>Purpose of this section: Obtain key points of takeout</p>	<p>5 mins</p>
	<p>RESPONDENT TO BRING BOTH ZONE PACKS WITH THEM INTO SUMMARY</p> <p>COMPLETE DOCUMENTS SUMMARY SCORE CARD</p> <ul style="list-style-type: none"> • MODERATOR TO RETURN ATTENTION TO THE EPC WITH A GREEN DEAL: 	

- What information that you have learned should appear on the EPC that you saw at the beginning?

MODERATOR WILL ENSURE COMMENTS ARE RESTRICTED TO THE AREAS OF TEXT ALREADY COVERING THE GD (PARTS DECC CAN MANDATE)

- Imagine you are moving into a new home which parts of the GD do you really need to know?
- How do you feel about the usefulness of this EPC now they have seen other documents?
- Do you have concerns or issues?
- What questions would you want to ask?

Moderator to BE AWARE WHICH DOCUMENTS FROM EACH ZONE PACK RESPONDENT USERS TO EXPLAIN THE BELOW PROBES

- What are the top 3 most important things you have taken away from this session about the Green Deal? (**vox pops**)
- What works well in explaining the Green Deal and what needs more work? (**vox pops**)
- **To recap** – when you leave here this afternoon / this evening – if someone (friend / partner) asked you what the Green Deal was, how would you explain it to them?

Thank & Close

9.7 Discussion guide Phase 3

The discussion flow at the Phase 3 focussed on the Evaluation phase. Interviews were conducted by a researcher together with a domestic energy assessor. These took place in the participants' home, and the overall interview was split into several sections;

- Mock assessment – brief examination of the home and heating usage (assessor and participant)
- Explanation of the Occupancy Assessment (assessor and participant)
- Discussion of the assessment process and occupancy assessment explanation (researcher and participant)
- Discussion about explanation process (researcher and assessor)

A detailed interview guide is shown on the following pages.

DISCUSSION PLAN

Project: *Occupancy Assessment Research*

JOB NUMBER: 12010003

Discussion Plan Overview		
Introduction/ warm up - all	<ul style="list-style-type: none"> • Purpose of this section: Put respondent at ease, introduce the research, find out some background details 	5 mins
Researcher and Householder check understanding of Green Deal	<ul style="list-style-type: none"> • Researcher talks to householder briefly about Green Deal Discovery documents 	10 mins
Assessor walk through home	<ul style="list-style-type: none"> • Assessor and householder walk around property, see key features (walls, boiler, loft) 	5 - 10 mins
Assessor high low user evaluation	<ul style="list-style-type: none"> • Check usage characteristics to make sure correct version of Occupancy Assessment used 	5 - 10 mins
Assessor takes householder through Occupancy Assessment	<ul style="list-style-type: none"> • Assessor explains Occupancy Report and answers questions. Researcher observes and completes checklist 	30 – 35 mins
Researcher discusses with household	<ul style="list-style-type: none"> • Understanding of the Occupancy Assessment, what would make things clearer? 	30 mins
Researcher discusses with Assessor	<ul style="list-style-type: none"> • What is working well, what needs to be amended? • What would help? 	20 – 30 mins

Introduction/ warm up - all	<ul style="list-style-type: none"> • Purpose of this section: Put respondent at ease, introduce the research, find out some background details 	5 mins
	<p>Thank respondents for taking part; explanation of purpose of session;</p> <ul style="list-style-type: none"> • <i>Introduce self, Optimisa – who, what we are</i> • <i>Introduce the Assessor. Explain roles (including any observers)</i> • <i>Structure of interview – who will be doing what</i> • <i>Purely research – no selling, no right/wrong answers, all opinions valid, that we're testing materials are for a new concept so importance of honesty in how clear they are</i> • <i>Confidentiality of personal details</i> • <i>Audio/video recording – why, uses and permission</i> • <i>Any questions, concerns?</i> 	
Researcher and Householder	<ul style="list-style-type: none"> • Researcher talks to householder briefly about Green Deal Discovery documents 	10 mins
	<p>Firstly: A little bit about themselves and their homes</p> <ul style="list-style-type: none"> • Family/household composition; work; length of time lived in home • Ask them to talk a little about their home, when built. • Have you had or considered maintenance or improvement work on your home recently? <ul style="list-style-type: none"> ○ Triggers for this? ○ Any contractors used? How well did this work? • Would you consider your energy usage and bills to be relatively high or low compared with an average home like yours/ <p>RESPONDENT TO TAKE OUT THE DISCOVERY PACK THEY WERE PRE PLACED WITH</p> <ol style="list-style-type: none"> 4. 2 Page DECC A4 leaflet 5. 4 Page energy company leaflet 	
	<p>Have a quick look back at the information we sent you, just to refresh your memory.</p> <ul style="list-style-type: none"> • In your own words, what does it sound like the GD is? What's it about? • What are the key things that stood out about it? • What questions about the GD do you now have? • Check if respondent has understood: <ol style="list-style-type: none"> 7. Improve home with no up front payments 8. New kind of loan attached to property not person 9. Paid via electricity bill 10. Subsidies available 11. GD not suitable for everyone 12. Free and impartial advice available <p>EXPLAIN: we are now going to assume that you have decided you are interested and that you have arranged for an accredited Assessor to look at your home. They will advise you on what energy improvements would be available under the Green Deal.</p>	

Assessor walk through home	<ul style="list-style-type: none"> • Assessor and householder walk around property, see key features (walls, boiler, loft) 	5 - 10 mins
Assessor high low user evaluation	<ul style="list-style-type: none"> • Check usage characteristics to make sure correct version of Occupancy Assessment used 	5 - 10 mins
	<p>Assessor to ask householder:</p> <ul style="list-style-type: none"> • How many people live in the property? • How many hours a day is the heating on, on a typical weekday? • What do you normally have your thermostat set to? What is it set to today? • Are there any living rooms or bedrooms that you don't normally use, where the heating is not turned on? 	
Assessor takes householder through Occupancy Assessment	<ul style="list-style-type: none"> • Assessor explains Occupancy Report (and EPC) and answers questions. Researcher observes and completes checklist 	30 – 35 mins
	<p>Observe which explanations work/do not work Record which questions are asked Note apparent level of understanding of key questions:</p> <ul style="list-style-type: none"> • Do consumers understand the difference between the Occupancy Assessment and the Energy Performance Certificate? • Do they understand the information provided in terms of recommended measures? • Do they understand what level of cost/repayment may be involved? • Do they understand what they might save? • Do they understand that their own energy usage patterns will have an impact on their actual level of savings? • Do low users understand that their savings might be less than their repayments? • Do they understand what they can do to minimise their energy usage post installation? • Do they understand what to do next and what will happen next? 	
Researcher discusses with household	<ul style="list-style-type: none"> • Understanding of the Occupancy Assessment, what would make things clearer? 	30 mins
	<p>ALL RESPONDENT TIME TO COMMENT SPONTANEOUSLY ABOUT THE DOCUMENT THEN PROBE WITH...</p> <ul style="list-style-type: none"> • What is this report recommending? (Get them to explain in their own words) • What would you do as a result of receiving this piece of information? What action would this encourage? • What are the main pieces of financial information, what are they suggesting? <p>Understanding of key concepts (Moderator to rate on form)</p> <ol style="list-style-type: none"> 6. What are the measures 7. What could I save 8. What will it cost me? 	

	<p>9. Is it worth it for me? 10. Why are some measures included and not others?</p> <ul style="list-style-type: none"> • Take through / direct to key information in the Occupancy report, explore the understanding/clarity of: <ul style="list-style-type: none"> ○ Difference between the EPC and the Occupancy Assessment ○ If they are a low or high user, and why this is important? ○ Their savings would be affected by how much energy they use after the measures are installed (and the future cost of energy) ○ Any words or phrases that are not clear? ○ How could the layout be improved to bring out key points of information? ○ What is the difference between the full list and the list of chosen measures? Do they prefer OA that shows both sets of figures, or their chosen figures only ○ Suggestions for reducing energy usage post installation ○ What to do next/where to get more information? • Thinking about the way the assessor explained the Occupancy assessment <ul style="list-style-type: none"> • Which parts were easier/harder to understand • Was there anything in particular that he/she said that made things clearer? • Having talked about it some more, is there anything that you feel he/she should have said, or should have said more clearly? • Show wording of extra paragraphs <ul style="list-style-type: none"> ○ What does this mean? Is there anything in here that you don't understand? Does this help to explain the Green Deal • What questions do you still have? 	
• THANK AND CLOSE WITH HOUSEHOLDER		

<p>Researcher discusses with Assessor</p>	<ul style="list-style-type: none"> • What is working well, what needs to be amended? • What would help? 	<p>20 – 30 mins</p>
	<ul style="list-style-type: none"> • What is working well? • Which elements were easy to explain? • What specific form of words seemed to work best (around each of the key question areas above) • Which elements were difficult to explain. Any specific suggestions for how to improve this. • Did the order of explaining things seem to work – if not what would be better? • What advice would you give to assessors about conducting the assessment? 	