

GREEN DEAL ASSESSMENT SURVEY

SUMMARY REPORT: WAVE 2 HEADLINE FINDINGS

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Executive summary

Background and objectives

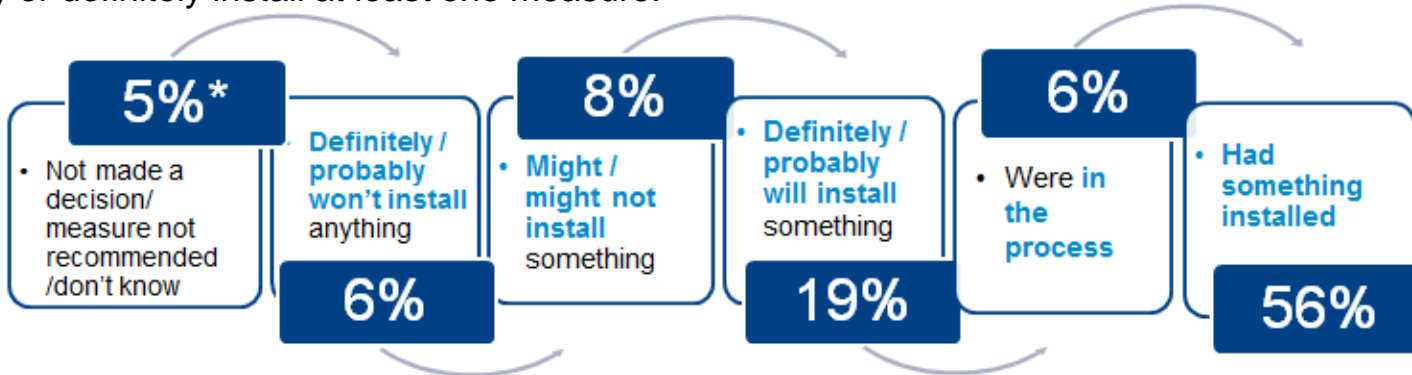
- The Green Deal was officially launched on 28th January 2013.
- The scheme aims to enable consumers to make energy saving improvements to their properties without having to pay all the costs up front.
- The first step is to have a Green Deal Assessment, the resulting Green Deal Advice Report explains what improvements can be made and estimates energy bill savings.
- Around 44k households in Great Britain had a Green Deal Assessment up to the end of June. Of these, around 9k took place in England and Wales between January and March, with the remaining 35k mostly taking place in England and Wales between April and June. For the latest information on assessments see the Green Deal and ECO statistics webpage
<https://www.gov.uk/government/organisations/department-of-energy-climate-change/series/green-deal-and-energy-company-obligation-eco-statistics>
- GfK NOP was commissioned to conduct two surveys of households which had had a Green Deal Assessment in order to find out more about the experience and what households have done and plan to do since having the assessment. Findings from the first wave of the survey were published in June
<https://www.gov.uk/government/publications/green-deal-assessment-survey-summary-report>
- This report is a summary report and reports only headline findings from the wave 2 survey. A more detailed report showing findings from waves 1 and 2 will be published at a later date.

Methodology and sampling

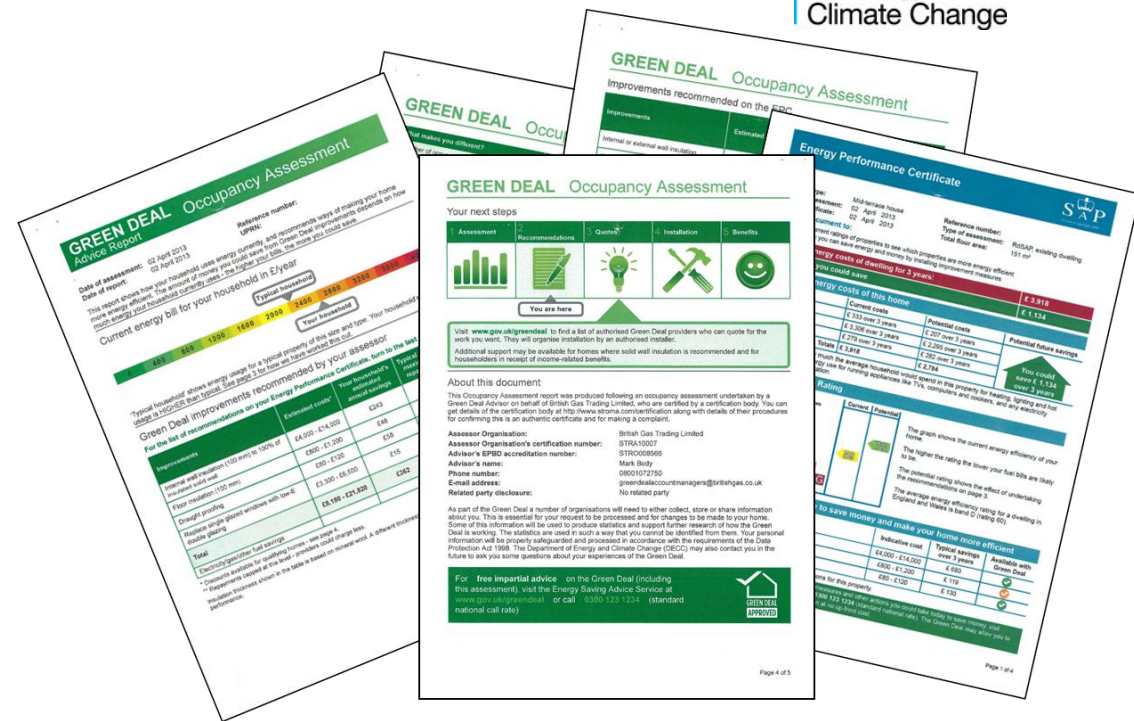
- For each of the surveys, a clustered (semi random) sample of 900 addresses was drawn from the Green Deal Assessments database (supplied to GfK NOP by DECC).
- All sampled addresses were written to and invited to take part in an online survey. Non-responders were contacted by trained face-to-face interviewers to encourage completion on a CAPI machine. To minimise mode effects the same survey was completed by respondents, not by interviewers.
- 507 households took part in the first wave of the research (56% response rate) and 499 households took part in the second wave (a response rate of 55%).

- The main **motivations** for having a Green Deal assessment were broadly the same across both waves of research (Wave 2 percentages shown):
 - to save money on energy bills (61%),
 - because the assessment was free (58%), and
 - to find out how to make properties more energy efficient (40%).
- **Paying for an assessment:** At Wave 2, 80% of respondents said they did not pay for an assessment, with 63% saying the assessor did not charge a fee and 17% saying it was paid for by a landlord, local authority or other organisation. Twelve per cent paid for their assessment in full.
- **Accessibility of assessments:** The majority of consumers who had had a Green Deal assessment were satisfied with how long they had to wait for an appointment (73%) and with the ease of finding an assessor (65%). Levels of satisfaction were unchanged from Wave 1.
- **Usefulness of and confidence in assessments:** Similar to Wave 1, the assessment itself was highly rated in relation to its usefulness (78%) whilst consumer confidence in the recommendations made by the assessor increased between waves (from 77% at Wave 1 to 82% at Wave 2).
- **Clarity of advice:** Households were asked which things were made clear to them in either the Green Deal Assessment Report or in discussion with the assessor. At Wave 2:
 - 78% said it was clear which energy saving improvements were recommended during the assessment (compared with the 74% observed at Wave 1),
 - 74% said it was clear what the improvements would entail (up from 64% at Wave 1),
 - 73% said the next steps were clear (up from 61% at Wave 1), and
 - 67% said the costs of the improvements were clear (up from 59% at Wave 1).
- The likelihood of **recommending a Green Deal assessment** to friends and family increased significantly from Wave 1 (up from 64% to 72% at Wave 2).

- **Post assessment actions and intentions.** All households were asked what they had done or intended to do after their assessment: 56% claimed to have installed at least one of the measures they were recommended, whilst 6% said they were in the process of installing. A further 19% said they would probably or definitely install at least one measure.



- **Paying for measures:** Households were asked how they funded installations (and were able to choose multiple answers) and indicated a large range of payment methods. The most common payment method amongst those who had had something installed was for an energy company (ECO) to have paid in full or in part (19%). Fourteen per cent had used their own savings or regular income and 13% said their local authority had paid in full or in part, whilst the same proportion (13%) mentioned having used the Green Deal cashback scheme.
- For those in the process of having a measure installed the most common potential payment methods were from their own savings/regular income (27%) or for the local authority funding (25%).
- Amongst those who said they will definitely/probably install something in the future, 31% expected to pay from their own savings/regular income, 24% expected to use the Green Deal finance scheme and 17% the Green Deal cashback scheme.
- **Barriers:** Amongst those who probably or definitely won't install a particular measure 63% mentioned financial barriers. The need for more information and time to decide as well as practical issues were the main reasons why respondents might or might not install key measures. For those who probably or definitely will install a key measure the key reason for not having done so yet was not having got round to it yet.



GREEN DEAL Advice Report

Reference number: 151111
Date of assessment: 02 April 2013
Date of report: 02 April 2013

This report shows how your household uses energy currently, and recommends ways of making your home more energy efficient. The amount of money you could save from Green Deal improvements depends on how much energy your household currently uses, the higher your bill, the more you could save.

Current energy bill for your household in £/year

Crystal insulation

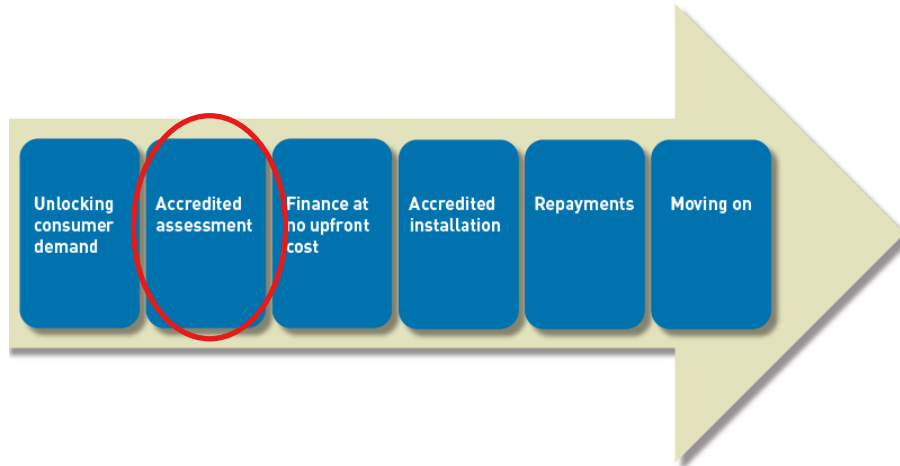
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Background to the research

The Green Deal was officially launched on 28th January 2013 with the aim of helping households to make energy saving home improvements to their properties. The scheme enables households to make energy saving improvements to their home without having to pay all the costs up front.

The Green Deal process comprises a number of steps, each of which is outlined in Figure 1.

Figure 1: The Green Deal Process¹



Because this is a brand new scheme it was crucial to understand how well the process was working for customers.

As such, GfK NOP was commissioned by DECC to undertake an initial survey about the Green Deal Assessment customer experience in April 2013 and a second survey of customers in August 2013. The findings from wave 1 of the research can be found at

<https://www.gov.uk/government/publications/green-deal-assessment-survey-summary-report>

The objectives for each of the surveys were to gain an understanding of the following issues:

- The assessment experience: How they heard about Green Deal assessments, why they had an assessment and satisfaction with the assessment.
- Post assessment actions and intentions: What, if anything, they have done or intend to do as a result of the assessment and likely actions for those who may make improvements in the future.

1. Source: https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/47978/1010-green-deal-summary-proposals.pdf

Survey Method (1)

Questionnaire

- Questionnaire designed by GfK NOP and DECC.
- A small cognitive pilot was conducted by telephone to ensure the questionnaire was 'fit for purpose'.
- A small number of changes were made for the second wave of the survey in order to improve the data collected. These are indicated in the slides.

Target Group

- Consumers who had a Green Deal assessment carried out at their property.
- Wave 1 = assessments between launch and end of March 2013.
- Wave 2 = assessments between 1st of April and end of June 2013.
- Includes owner occupiers, private and social renters.

Sampling

- DECC provided GfK NOP with complete files of addresses from which to sample. No names were provided as part of the sample file.
- GfK NOP analysed the files in order to create efficient 'clusters' from which to draw the sample.
- For the purposes of practicality and timings, clusters were formed from addresses which were sufficiently close to other addresses. As a result, some addresses were excluded from the sampling frame because they were impractical.
- All potential 'eligible' addresses were stratified by Region, Core City* vs. Non-Core City, Urbanity, Tenure, Property Type and EPC rating.
- Following stratification, a random sample of 900 addresses were selected for each survey.

* In 2012 eight cities across England were awarded funding of around £13 million to help them kick-start the Green Deal in their regions. The cities also sought matching funding and/or providing direct support themselves. For more information see: <https://www.gov.uk/local-authorities-and-the-green-deal>



Survey Method (2)

Data Collection

- All sampled addresses were sent an advance/invitation letter which informed them about the study and asked them to take part in an online survey. Non-responders were contacted by trained interviewers in order to encourage self-completion). To reduce the impact of mode effects the questionnaires were exactly the same.
- Respondents were offered a £10 incentive for taking part (condition on completion).
- In Wave 1, 507 households took part in the research (56% response rate)
- In Wave 2, 499 households took part in the research (55% response rate)
- Wave 1 fieldwork took place between 26th April and 2nd June and Wave 2 fieldwork took place between 26th July and 26th August.

Reporting conventions

This report provides selected headlines and highlights statistically significant differences between the different waves of the research. Throughout the report, whenever the word significant is used it is done to express a statistically significant difference. This means that any differences between results are likely to be down to an actual change, rather than something related to sampling or methodology.

This report uses the following conventions:

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



GREEN DEAL Advice Report

Reference number: 15111
Date of assessment: 02 April 2013
Date of report: 02 April 2013

This report shows how your household uses energy currently, and recommends ways of making your home more energy efficient. The amount of money you could save from Green Deal improvements depends on how much energy your household currently uses, the value of your bill, the home you own and...

Current energy bill for your household in £/year

Crystal measuring

Your household

Typical household always energy usage for a typical property of this age and type. Your household usage is **LOWER** than typical. See page 2 for how to learn more about this.

Green Deal improvements recommended by your assessor

For the list of recommendations see your Energy Performance Certificate. Turn to the last page.	Estimated cost*	Your household's annual energy savings	Typical payback period
Internal wall insulation (100 mm) to 100% of internal wall area	£4,000 - £14,000	£48	83A
External wall insulation	£800 - £1,000	£18	43A
Floor insulation (100 mm)	£50 - £150	£15	11B
Roof insulation (100 mm) with low E double glazing	£3,300 - £4,000	£32	43B
Total	£8,150 - £21,000		

* Discount available for selected homes - see page 10
** Payment depends on the loan - consider our shared loan repayment options shown in the table below or more-well. A different performance.

GREEN DEAL Occupancy Assessment

Improvements recommended on the fabric

Internal or external wall insulation

GREEN DEAL Occupancy Assessment

Your next steps

Assessment	Recommendations	Quoted?	Installation	Benefits

You are here

Visit www.gov.uk/greendeal to find a list of authorized Green Deal providers who can quote for the work you want. They will organise installation by an authorized installer. Additional support may be available for homes where solid wall insulation is recommended and for householders in receipt of income-related benefits.

About this document

This Occupancy Assessment report was produced following an occupancy assessment undertaken by a Green Deal Advisor on behalf of British Gas Trading Limited, who are certified by a certification body. You can get details of the certification body at <http://www.e-energy.com/verification> along with details of their procedures for conforming this is an authentic certificate and for making a complaint.

Assessor Organisation: British Gas Trading Limited
Assessor Organisation's certification number: STRO10007
Advisor's name: Mark Body
Advisor's EPCD accreditation number: STRO00569
Phone number: 08003072950
Email address: greendealaccountmanagers@britishgas.co.uk
Related party disclosure: no related party

As part of the Green Deal a number of organisations will need to either collect, store or share information about you. This is essential for your request to be processed and for changes to be made to your home. Some of this information will be used to produce statistics and support further research of how the Green Deal is working. The statistics are used in such a way that your identity is not identified from them. Your personal information will be properly safeguarded and processed in accordance with the requirements of the Data Protection Act 1998. The Department of Energy and Climate Change (DECC) may also contact you in the future to ask you some questions about your experiences of the Green Deal.

For free impartial advice on the Green Deal (including this assessment) visit the Energy Saving Advice Service at www.energysavingadvice.org.uk or call 0800 131 1234 (standard national call rate)

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GREEN DEAL Occupancy Assessment

Improvements recommended on the fabric

Internal or external wall insulation

Energy Performance Certificate

Reference number: 15111
Date of assessment: 02 April 2013
Type of assessment: RISSAP existing dwelling
Total floor area: 151 m²

Current energy bill for your household in £/year

Crystal measuring

Your household

Typical household always energy usage for a typical property of this age and type. Your household usage is **LOWER** than typical. See page 2 for how to learn more about this.

Green Deal improvements recommended by your assessor

For the list of recommendations see your Energy Performance Certificate. Turn to the last page.	Estimated cost*	Your household's annual energy savings	Typical payback period
Internal wall insulation (100 mm) to 100% of internal wall area	£4,000 - £14,000	£48	83A
External wall insulation	£800 - £1,000	£18	43A
Floor insulation (100 mm)	£50 - £150	£15	11B
Roof insulation (100 mm) with low E double glazing	£3,300 - £4,000	£32	43B
Total	£8,150 - £21,000		

* Discount available for selected homes - see page 10
** Payment depends on the loan - consider our shared loan repayment options shown in the table below or more-well. A different performance.

Energy costs of dwelling for 3 years

Energy costs of this home	£ 2,918
Current costs	£ 1,124
£ 200 over 2 years	£ 207 over 2 years
£ 270 over 3 years	£ 200 over 3 years
Total	£ 2,784

From the average household values shown in this property for heating, lighting and hot water use for heating buildings like 151, conservatories and cookers, and any electricity

Rating

Current: 2
Potential: 3

The graph shows the current energy efficiency of your home. The higher the rating the lower your fuel bills are likely to be. The potential rating shows the effect of undertaking the recommendations on page 3. The average energy efficiency rating for a dwelling in England and Wales is band C (69-80).

To save money and make your home more efficient

Indicative cost	Typical savings over 2 years	Available with Green Deal
£4,000 - £14,000	£ 48	Yes
£800 - £1,000	£ 18	Yes
£50 - £150	£ 15	Yes
£3,300 - £4,000	£ 32	Yes

Free for this property

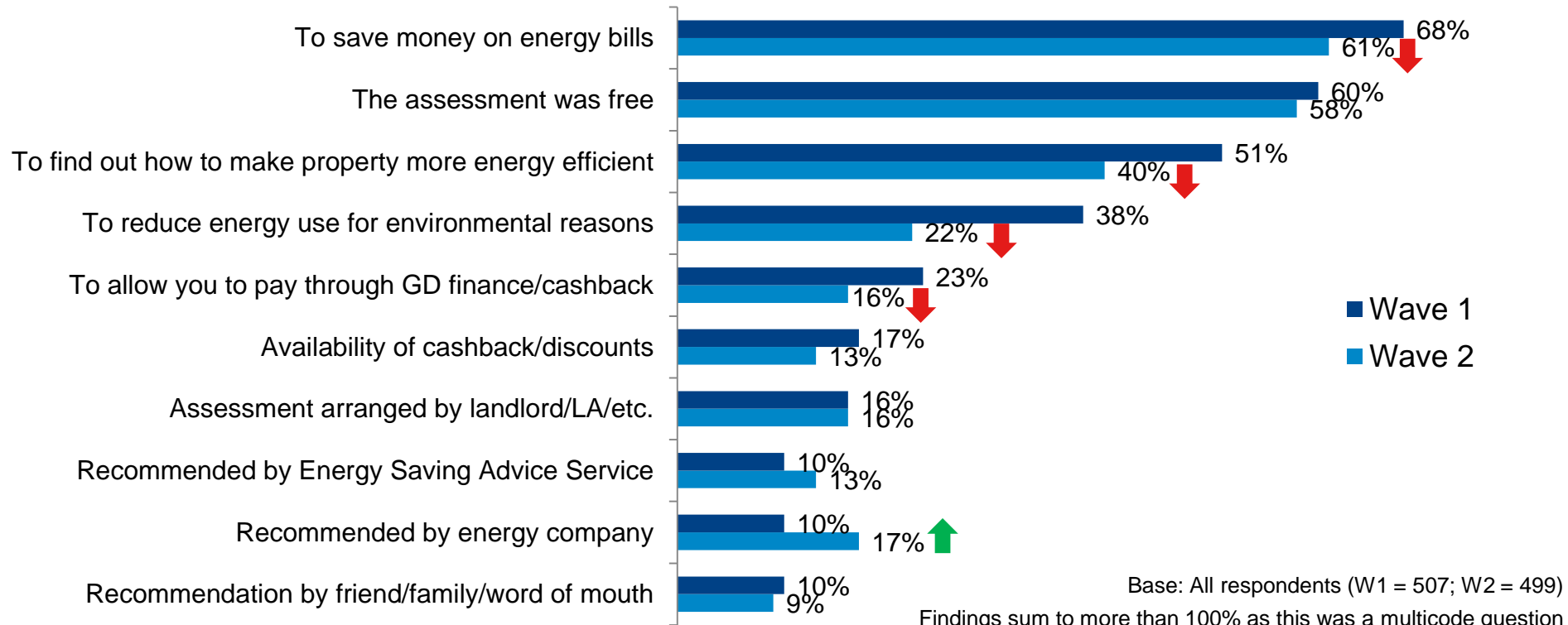
Approved providers (including those that have been approved by the Green Deal) may offer you a 0% or 5% off your cost.

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THE ASSESSMENT EXPERIENCE



Reasons for having an assessment: The main reasons for having an assessment were broadly the same across both waves of research; saving money, free assessments and finding out how to make the property more energy efficient were the most common motivations.



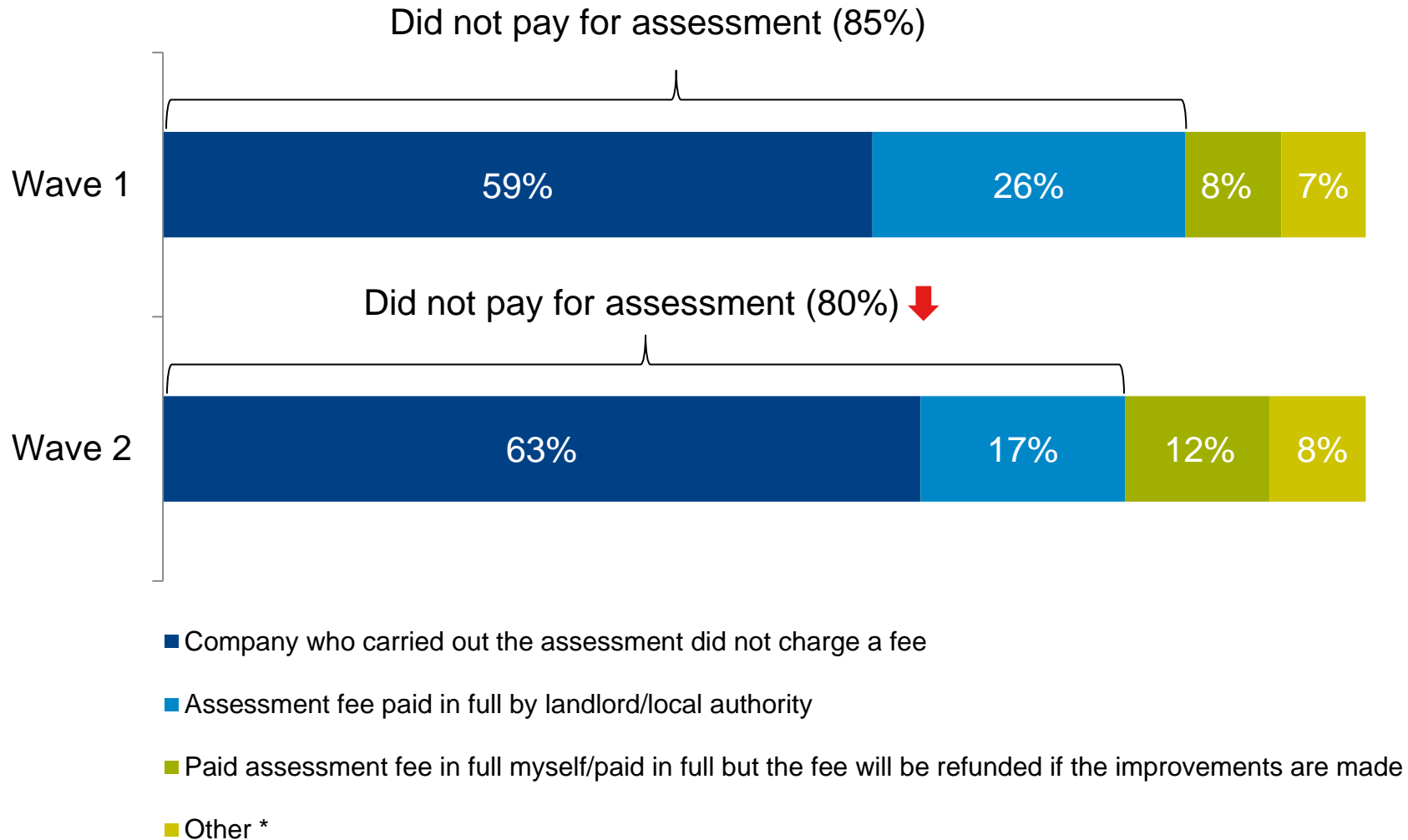
■ Wave 1
■ Wave 2

Significant differences between waves are indicated by arrows (↑↓) **Chart shows all responses mentioned by 9% or more at either wave**

Although the general pattern of response was broadly similar in both Wave 1 and 2 there were a number of significant differences observed between the waves:

- The proportion saying they were recommended the assessment by their energy company increased from 10% at Wave 1 to 17% at Wave 2.
- A significantly lower proportion of respondents mentioned saving money, finding out how to make the property more efficient or reducing energy use for environmental reasons at Wave 2, although these remained key reasons for having an assessment.
- Green Deal finance/cashback was also mentioned by a significantly lower proportion at Wave 2 (16% compared with 23% at Wave 1).

Paying for an assessment: The vast majority of customers did not pay for their assessment. In both waves around 60% said that the assessment company had not charged a fee.



Base: All respondents (W1 = 507; W2 = 499)

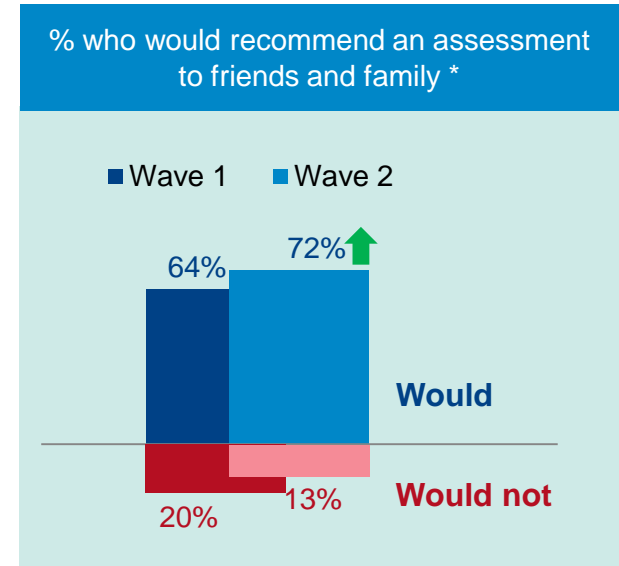
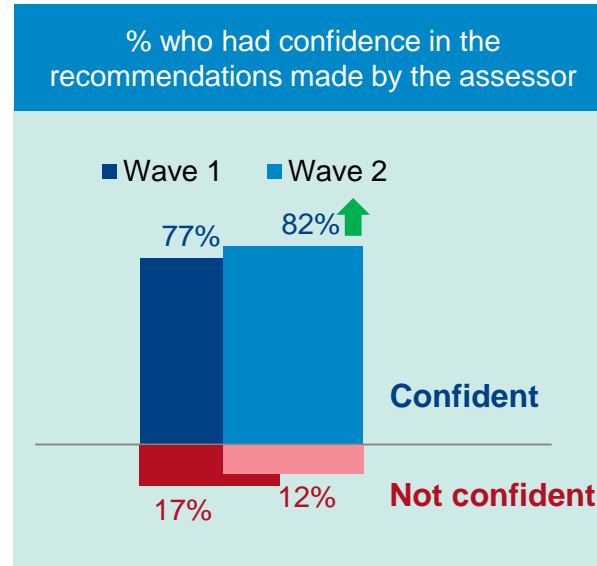
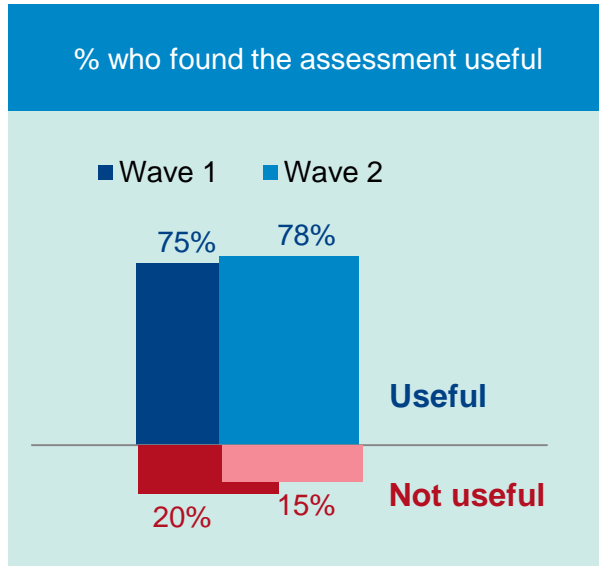
* Other category includes those whose assessment was paid for partially themselves/partially by landlord/local authority, those who answered 'Don't know' and those giving 'Other' responses

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

¹ <http://www.ofgem.gov.uk/Sustainability/Environment/ECO/Pages/index.aspx>

² https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/65570/6712-local-authority-competition-fund-application-pack.pdf

Assessment experience satisfaction: Confidence in the recommendations made by the assessor and the likelihood to recommend an assessment both increased significantly from Wave 1.



Charts exclude 'Don't know' responses

* Response 'Might or might not' not shown

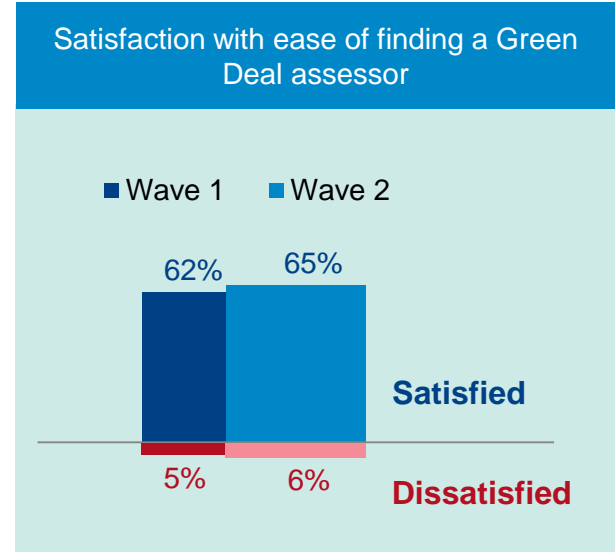
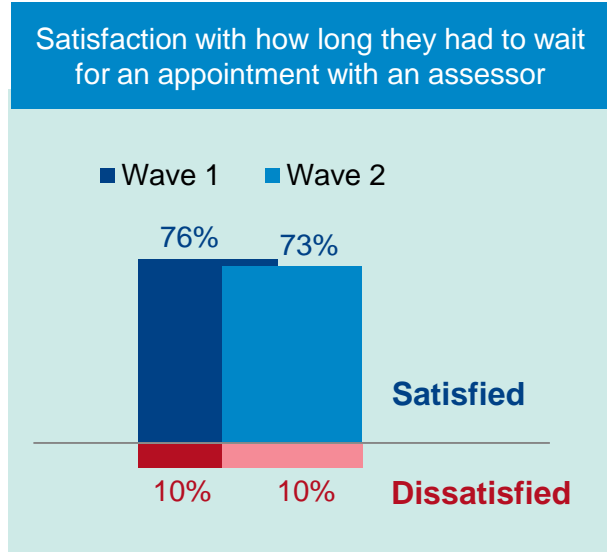
- Similar to Wave 1, 78% found the assessment very/somewhat useful compared with 15% who found it not very/at all useful.
- Confidence in the recommendations (very/somewhat confident) made by the assessor increased significantly to 82% (up from 77% at Wave 1). Twelve per cent were not very/at all confident at Wave 2.
- Likelihood to recommend a Green Deal assessment to friends and family also increased significantly, from 64% at Wave 1 to 72% at Wave 2. Thirteen per cent said they would not recommend an assessment at Wave 2.

Significant wave on wave increases are indicated by a green arrow (↑)

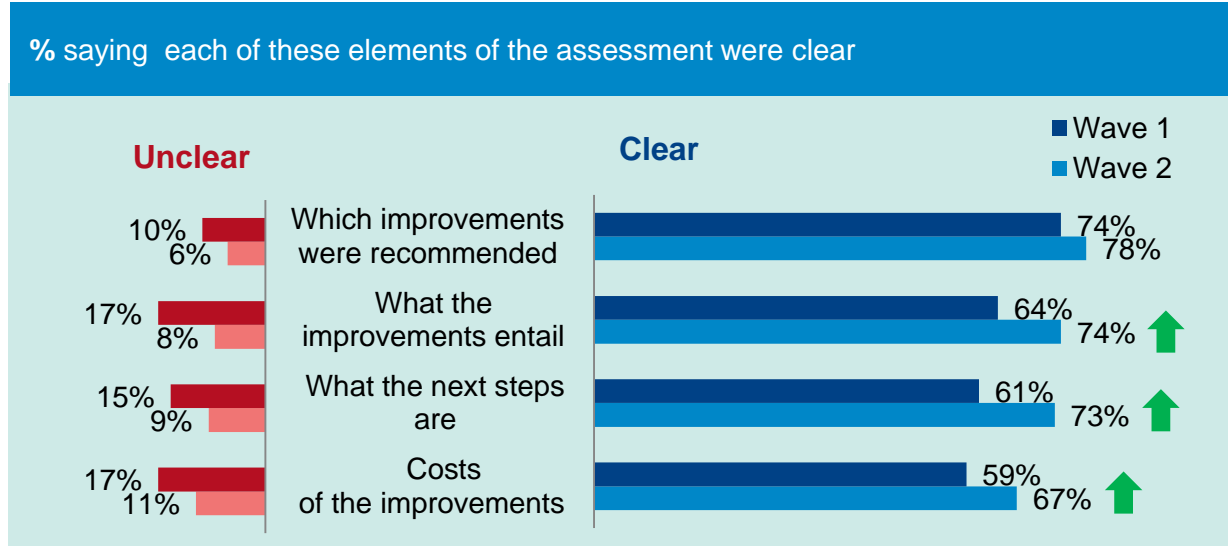
Base: All respondents except those whose assessment was arranged for them and whose report was sent straight to their landlord/housing association (W1 = 460; W2 = 483)

Assessment experience satisfaction: Customers' perceptions of the clarity of the advice received during the assessment also increased at Wave 2

- Satisfaction with how long respondents had to wait for an appointment and the ease of finding an assessor remained unchanged from Wave 1.



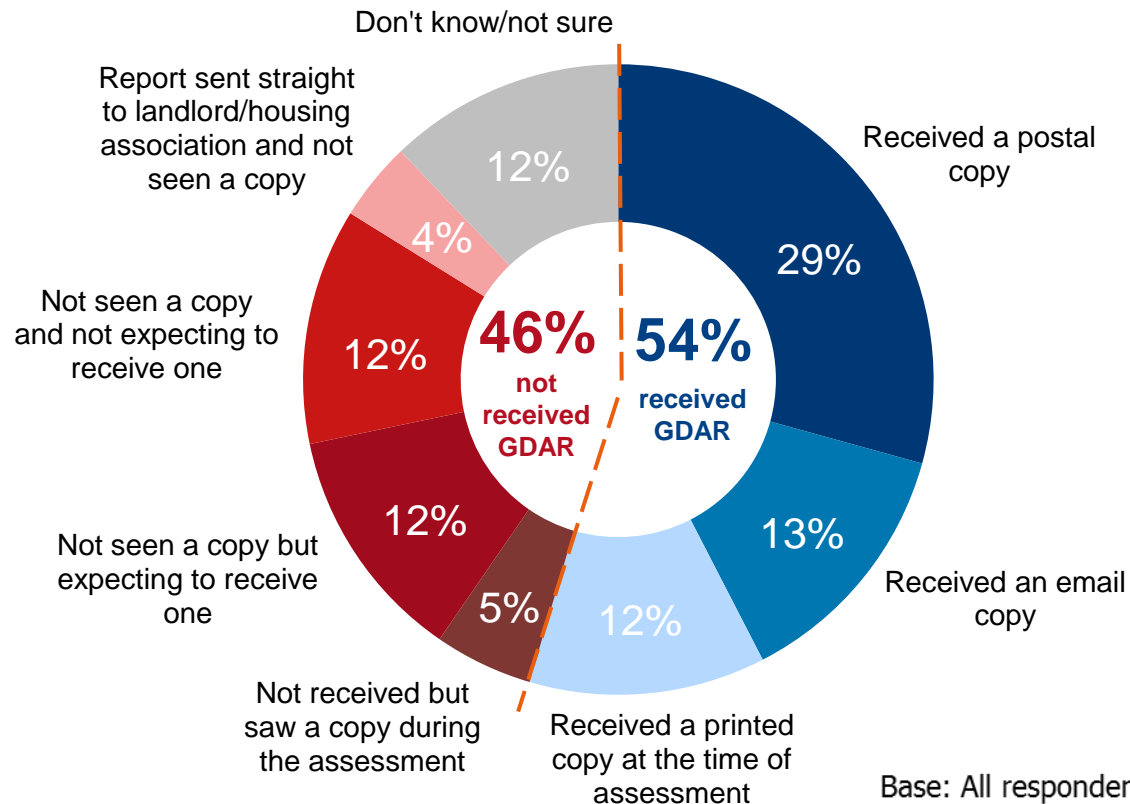
- However, there were significant increases at Wave 2 in the clarity of particular elements of the assessment, namely what the improvements entail, what the next steps are and the costs involved.



Base: All respondents except those whose assessment was arranged for them and whose report was sent straight to their landlord/housing association (W1 = 460; W2 = 483)

Significant wave on wave increases are indicated by a green arrow (↑)

Receipt of the Green Deal Advice Report: 54% of Wave 2 respondents had received their Green Deal Advice Report at the time of their interview (at least 4 weeks after their assessment took place).



- This question was amended after Wave 1 in order to understand whether those who had not received their Green Deal Advice Report had at least seen a copy or expected to see a copy. Comparisons between waves should therefore be treated with caution.
- At Wave 1 64% of households said they had received their Green Deal Advice Report, 7% said it was sent directly to a landlord/housing association/other organisation, 24% said they had not received it and 6% said they do not know or were not sure.

Note: Energy companies are using Green Deal assessments to deliver ECO measures, which could explain why households are not receiving their GDAR's. This is particularly the case for those that have not seen a copy and are not expecting to receive one.



GREEN DEAL Occupancy Assessment

Reference number: 15111
Date of assessment: 02 April 2013
Date of report: 02 April 2013

This report shows how your household uses energy currently, and recommends ways of making your home more energy efficient. The amount of money you could save from Green Deal improvements depends on how much energy your household currently uses, the higher your bills, the more you could save.

Current energy bill for your household in £/year

1000	1200	1400	1600	1800	2000	2200	2400	2600	2800	3000
Your household										

Typical household always energy usage for a typical property of this age and type. Your household usage is **HIGHER** than typical. See page 2 for how to learn more about this.

Green Deal improvements recommended by your assessor

Improvements	Estimated cost	Your household's potential savings	ESR
Internal wall insulation (100 m ²)	£4,000 - £14,000	£48	£48
External wall insulation	£800 - £1,200	£16	£16
Floor insulation (100 m ²)	£50 - £150	£15	£15
Energy profiling	£3,300 - £8,000	£382	£382
Replace single glazed windows with low-E double glazing	£8,100 - £21,300	£382	£382
Total			

Electricity (generator fuel savings, heat pump)
* Discounts available for eligible homes - see page 10
** Payments depend on the type of measures used. A different weighting relation between them is to be used based on meters used. A different weighting relation.

GREEN DEAL Occupancy Assessment

Your next steps

Assessment	Recommendations	Quoted	Installation	Benefits
You are here				

Visit www.gov.uk/greendeal to find a list of authorised Green Deal providers who can quote for the work you want. They will organise installation by an authorised installer. Additional support may be available for homes where solid wall insulation is recommended and for householders in receipt of income-related benefits.

About this document

This Occupancy Assessment report was produced following an occupancy assessment undertaken by a Green Deal Advisor on behalf of British Gas Trading Limited, who are certified by a certification body. You can get details of the certification body at <http://www.easenergy.com/greendeal> along with details of their procedures for conforming this is an authentic certificate and for making a complaint.

Assessor Organisation: British Gas Trading Limited
Assessor Organisation's certification number: STRO10007
Advisor's name: Mark Body
Advisor's EPRD accreditation number: STRO09569
Phone number: 08003072750
Email address: greendealaccountmanagers@britishgas.co.uk
Related party disclosure: No related party

As part of the Green Deal a number of organisations will need to either collect, store or share information about you. This is essential for your request to be processed and for changes to be made to your home. Some of this information will be used to produce statistics and support further research of how the Green Deal is working. The statistics are used in such a way that your control is identified from them. Your personal information will be properly safeguarded and processed in accordance with the requirements of the Data Protection Act 1998. The Department of Energy and Climate Change (DECC) may also contact you in the future to ask you some questions about your experiences of the Green Deal.

For free impartial advice on the Green Deal (including this assessment) visit the Energy Saving Advice Service at www.esas.gov.uk or call 0800 131 1234 (standard national call rate)

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GREEN DEAL Occupancy Assessment

Improvements recommended on the fabric

Internal or external wall insulation

Estimated

GREEN DEAL Occupancy Assessment

Improvements recommended on the fabric

Internal or external wall insulation

Estimated

Energy Performance Certificate

Reference number: R5AP 15111
Date of assessment: 02 April 2013
Type of assessment: R5AP existing dwelling
Total floor area: 151 m²

Current energy efficiency rating: 2
Potential energy efficiency rating: 3

Energy costs of dwelling for 3 years

Current costs	Potential costs
£ 203 over 3 years	£ 207 over 3 years
£ 279 over 3 years	£ 200 over 3 years
£ 498	£ 350 over 3 years
	£ 274

From the average household values shown in this property for heating, lighting and hot water use for heating appliances like TVs, computers and consoles, and any electricity

You could save £ 1,134 over 3 years

Rating

Current	Potential
2	3

The graph shows the current energy efficiency of your home. The higher the rating the lower your fuel bills are likely to be. The potential rating shows the effect of undertaking the recommendations on page 3. The average energy efficiency rating for a dwelling in England and Wales is band C (69-80).

To save money and make your home more efficient

Indicative cost	Typical savings over 3 years	Available with Green Deal
£4,000 - £14,000	£ 48	Yes
£50 - £150	£ 15	Yes
£80 - £120	£ 16	Yes

For more information on Green Deal visit www.gov.uk/greendeal or call 0800 131 1234 (standard national call rate)

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POST ASSESSMENT: ACTIONS AND INTENTIONS



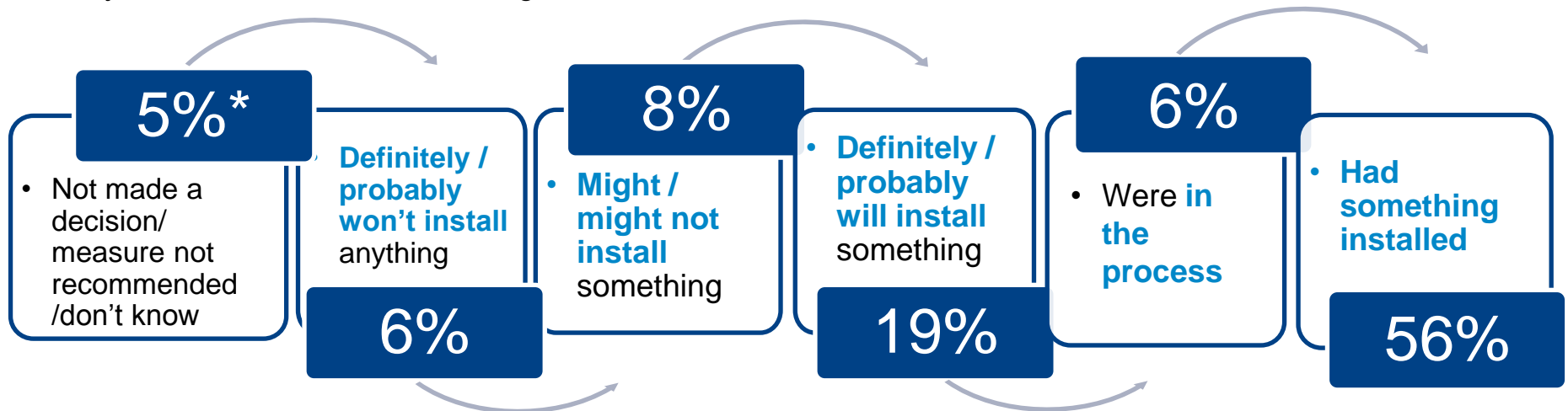
Household's post-assessment actions and intentions: More than half of households in the Wave 2 survey claimed to have already installed at least one energy saving home improvement.

In Wave 1 those who had not received their Green Deal Advice Report were not asked follow-up questions about their post-assessment intentions. Since that time it has become apparent that some households have had measures installed despite not receiving their report.

As a result, those respondents who had not received their report were asked about their post-assessment intentions in Wave 2.

Because the rest of this report is based upon the full sample – rather than just Green Deal Advice Report recipients – apart from slide 18 no further comparisons with Wave 1 data are made.

- The chart shows the furthest point that customers had reached following their assessment (for at least one of the measures recommended to them).
- It should be noted that it is possible that customers had reached different stages for two or more measures, for example if a customer had installed one measure and was in the process of installing another they are only shown under 'Had something installed'.



Base: All Wave 2 respondents (499). * only those who had not received a GDAR were able to give these responses.

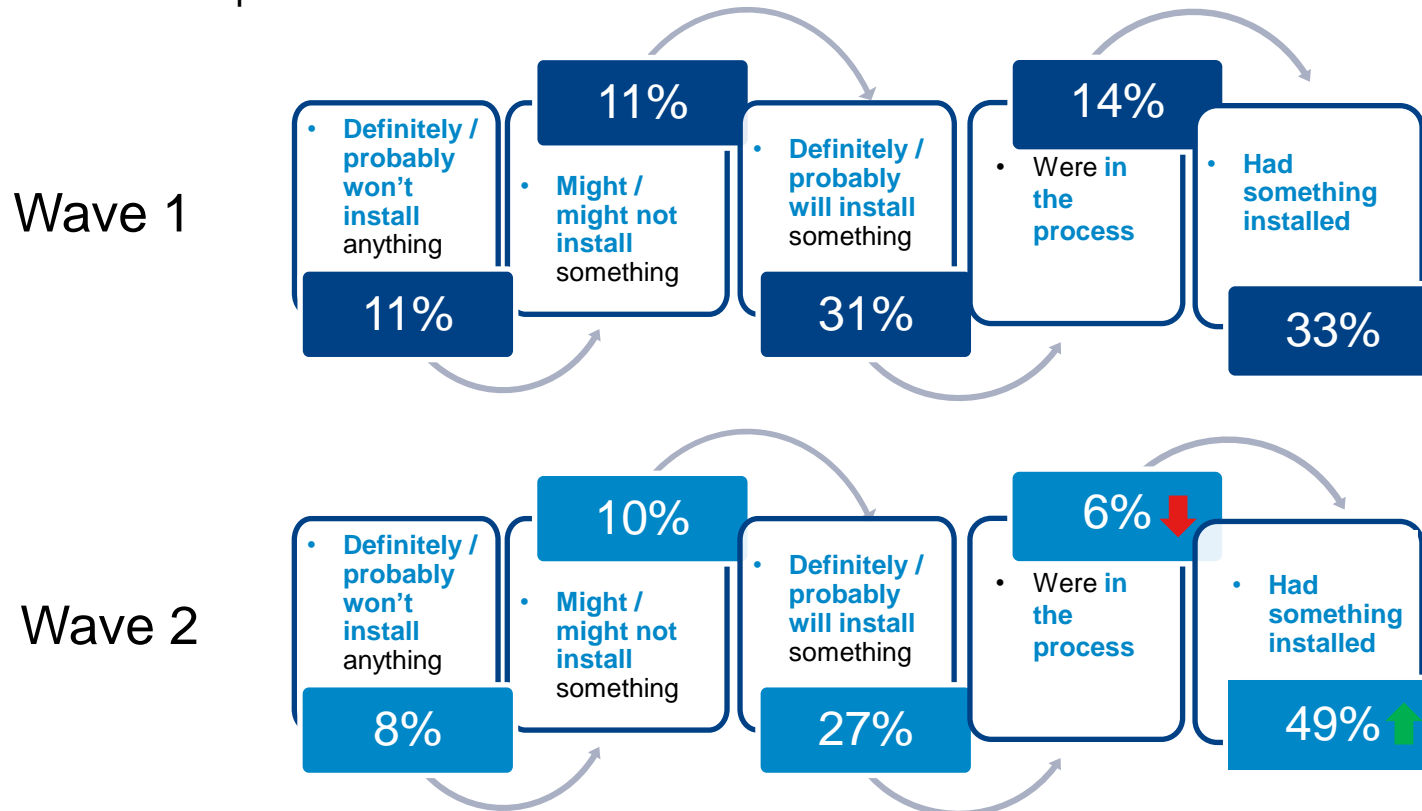
Notes: Findings are based upon all measures that were recommended as part of the Green Deal Advice Report. A comparison with Wave 1 findings is not shown because changes to the questionnaire mean comparisons are not valid for this question.



Household's post-assessment actions and intentions: 49%

of customers who had received their Green Deal Advice Report had installed at least one measure, compared with 33% at Wave 1.

- The chart shows the furthest point that customers had reached following their assessment (for at least one of the measures recommended to them) amongst those that had received their Green Deal Advice Report only.
- This allows for comparisons to be made with Wave 1.



Significant differences between waves are indicated by arrows ()

Base: All respondents that had received their GDAR (W1 = 285; W2 = 258).

Notes: Findings are based upon all measures that were recommended as part of the Green Deal Advice Report. Because the sample frame for wave 1 covered two months (February and March 2013), while wave 2 covered three months (April-June 2013) data was analysed to establish whether the increase in the proportion claiming to have installed a measure arose simply because there had been a longer period since their assessment. This showed no significant difference in likelihood to install measures between those who were assessed in April compared with those assessed in May and June. Therefore the increase in those that had something installed in wave 2 is not down to the longer time period.



Post assessment actions and intentions by recommended

measures: respondents claimed that 28% of all recommended measures had already been installed, with a further 4% in the process of being installed. Around 60% of the cavity wall insulation or loft insulation which had been recommended had already been installed.

- The table below shows the **overall post assessment actions and intentions to install for all recommended measures**. This is the 1259 measures recommended to the households that were interviewed in Wave 2 of the survey.

Measure (brackets show the number of respondents recommended each)	Stage of post assessment journey and intention to install					
	Not made a decision/ measure not recommended / don't know *	Probably/ definitely will not install	Might or might not	Definitely/ probably will install	In the process of installing	Already installed
All measures (1,259)	11%	28%	11%	17%	4%	28%
Cavity wall insulation (179)	7%	12%	6%	12%	3%	61%
Loft insulation (208)	8%	7%	9%	13%	4%	60%
Boiler (129)	10%	22%	9%	21%	7%	31%
Heating controls (93)	10%	20%	14%	29%	3%	24%
Solid wall insulation (158)	11%	23%	16%	20%	9%	20%
Solar photovoltaic (111)	17%	53%	9%	15%	3%	5%
Solar thermal (63)	13%	64%	6%	11%	2%	4%
Floor insulation (108)	15%	63%	12%	8%	1%	1%
Other measures^ (210)	16%	33%	13%	25%	5%	9%

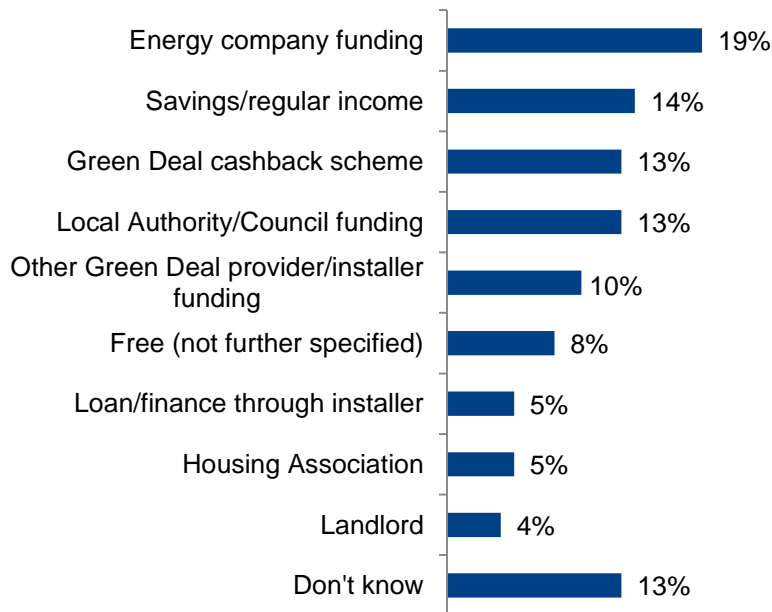
Base: All Wave 2 respondents (bases shown on table). * Only those who had not received a GDAR were able to give these responses.

^ 'Other measures' includes Flat roof insulation, Room in roof insulation, Hot water cylinder insulation, Draught proofing, Other heating upgrade, Double/triple glazing, Secondary glazing, Replacement doors, Ground Source Heat Pump, Air Source Heat Pump, Biomass boiler, Wind turbine (roof mounted) and Waste water heat recovery.

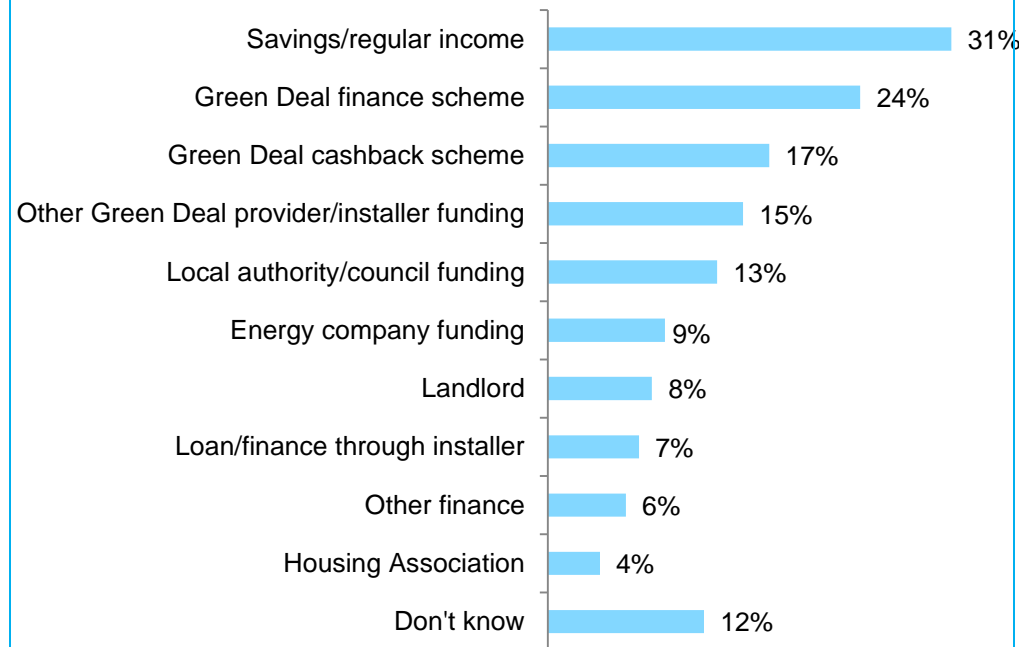


Paying for improvements: energy company funding was the most frequently mentioned payment method for those who had already installed a measure. Those who were likely to install it were more likely to think they would self-finance the measure(s) and there is evidence that households intending to install plan to use Green Deal finance (24%).

Payment methods for those who have **already installed** an improvement



Potential payment methods for those who **definitely/probably will install** an improvement



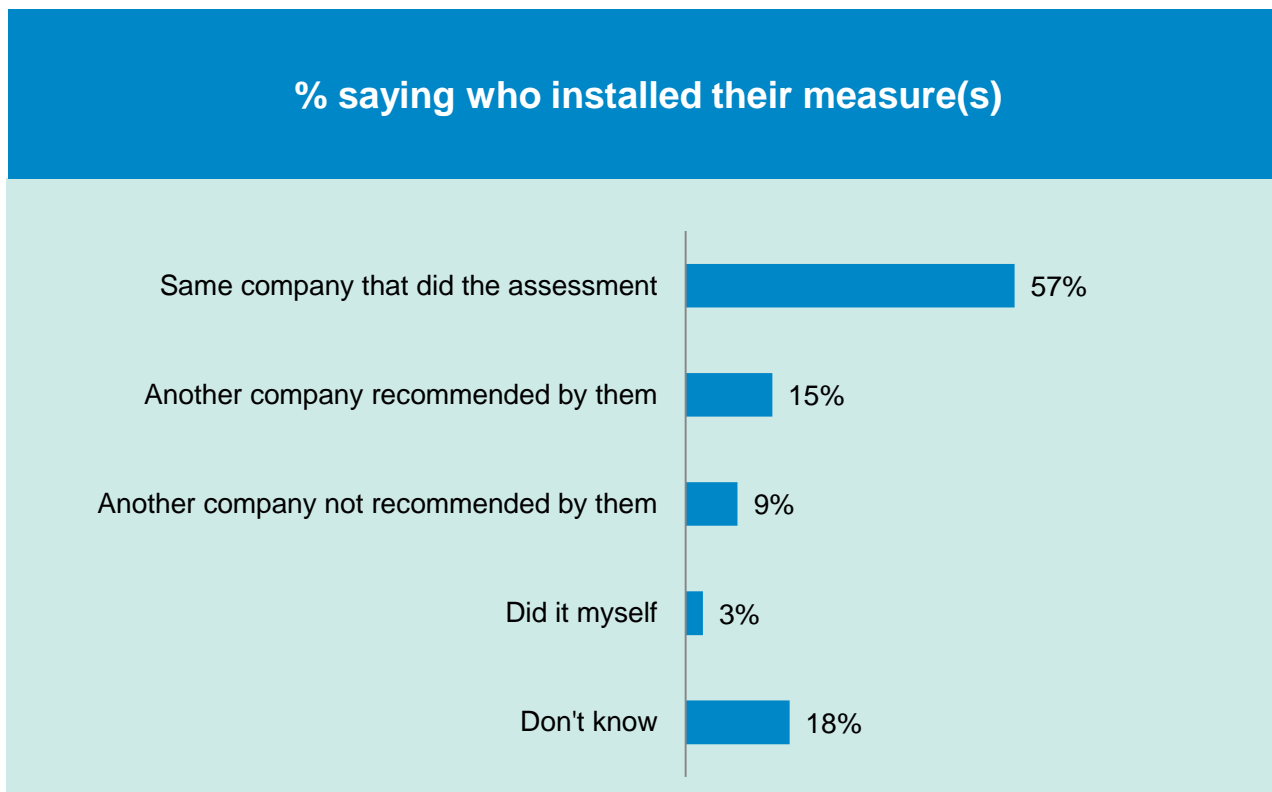
- For those **in the process of installing** the measures the most common potential payment methods were savings (27%) and the Local Authority/Council (25%). It should be noted that the base size for this group was small and numbers should be treated with caution.

Charts show all responses mentioned by 4% or more

Base: All respondents who have installed a recommended key measure (259) / definitely/probably will install a recommended key measure (87).

Notes: In some cases households were answering about more than one key measure. **It should be noted that base size for those who were in the process of installing measures is small (38), as a result these findings should be treated with caution.** Additionally readers should note that many measures will be covered by a combination of finance/funding and therefore householders may be confused about the source of funding to report.

Had something installed: findings indicate that the installation of measures is carried out by the same company that did the assessment for majority of households (57%). A further 15% used a company recommended by the assessor to carry out the installation.

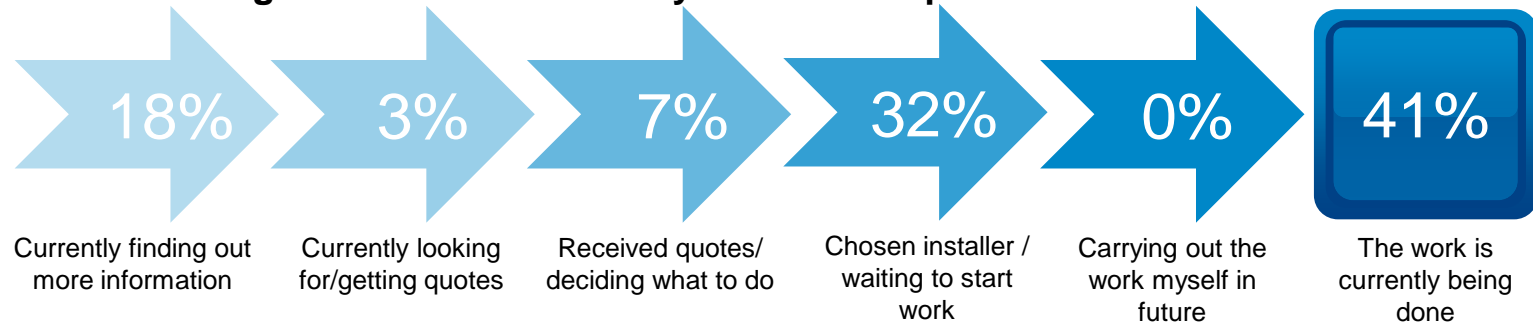


- The majority of those who had had a measure installed said it had been done by the same company that had carried out the assessment.



In the process of installing: Most households that were in the process of installing were well into the customer journey, with 32% waiting for the work to start and 41% currently having work done (and therefore have already got more information/received quotes).

**You said you were in the process of having a measure installed.
Which of the following best describes where you are in the process?**



- Around half of those in the process of installing had already decided who would carry out the work:
 - 28% said the installation would be carried out by the same company who did the assessment;
 - 19% said the installation would be carried out by a company which had not been recommended by their assessor;
 - 14% said the installation would be carried out by another company recommended by their assessor.
- A sizeable minority of those in the process of installing energy saving measures had yet to decide who would carry out the work (33%) or said don't know (13%).

- 37% of those in the process of installing energy saving home improvements said they had had **no significant delays in starting work**.
- 33% mentioned delays related to a supplier:
 - 17% said delays had occurred because the company carrying out the work could not start straight away.
 - 14% said it took a long time to get quotes.
- 27% mentioned other practical reasons for delays in starting work:
 - 18% needed to wait for their landlord/local authority/housing association to approve the work.
 - 20% mentioned any finance issues in relation to delays in starting work.

Base: All respondents in the process of installing key measure (38). **Because of the small base size these findings should be treated with caution.** Note: In some cases households were answering about more than one key measure.

Intend to install: When those that said they will definitely or probably install were asked why measures had not yet been installed a variety of reasons were mentioned. The key reason was not having got round to it yet.



Of the measures which will definitely or probably be installed 50% were intended to be installed within 6 months and a further 11% were intended to be installed in between 6 and 12 months' time.

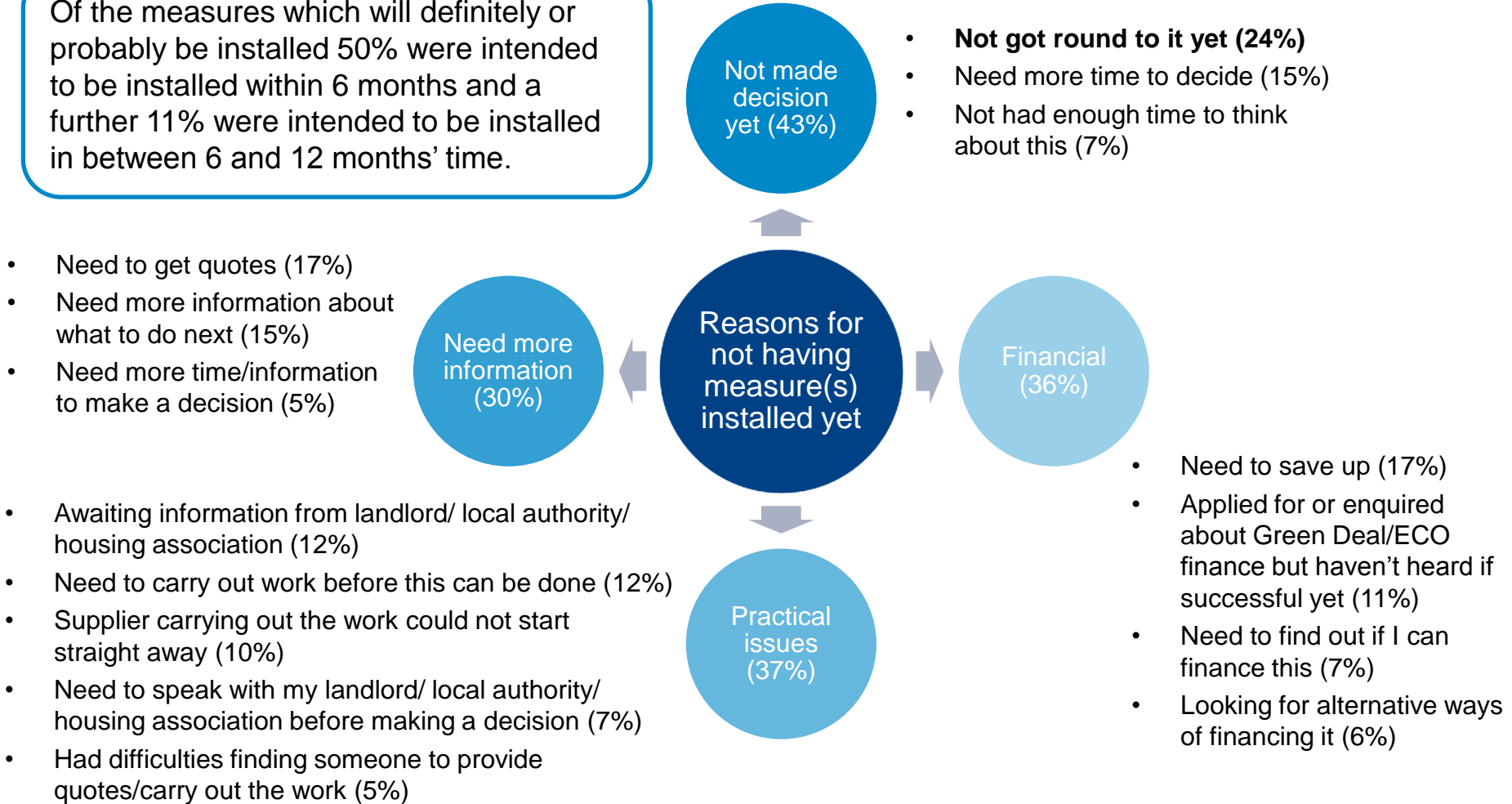


Chart shows all responses mentioned by 4% or more

Base: All respondents who definitely/probably will install a measure (87). Households were able to choose more than one option and in some cases were answering about more than one key measure. **Because of the small base size these findings should be treated with caution.**

Might/might not install: the most common reasons why an improvement either might or might not be installed were needing more information and time to decide/not got round to it.

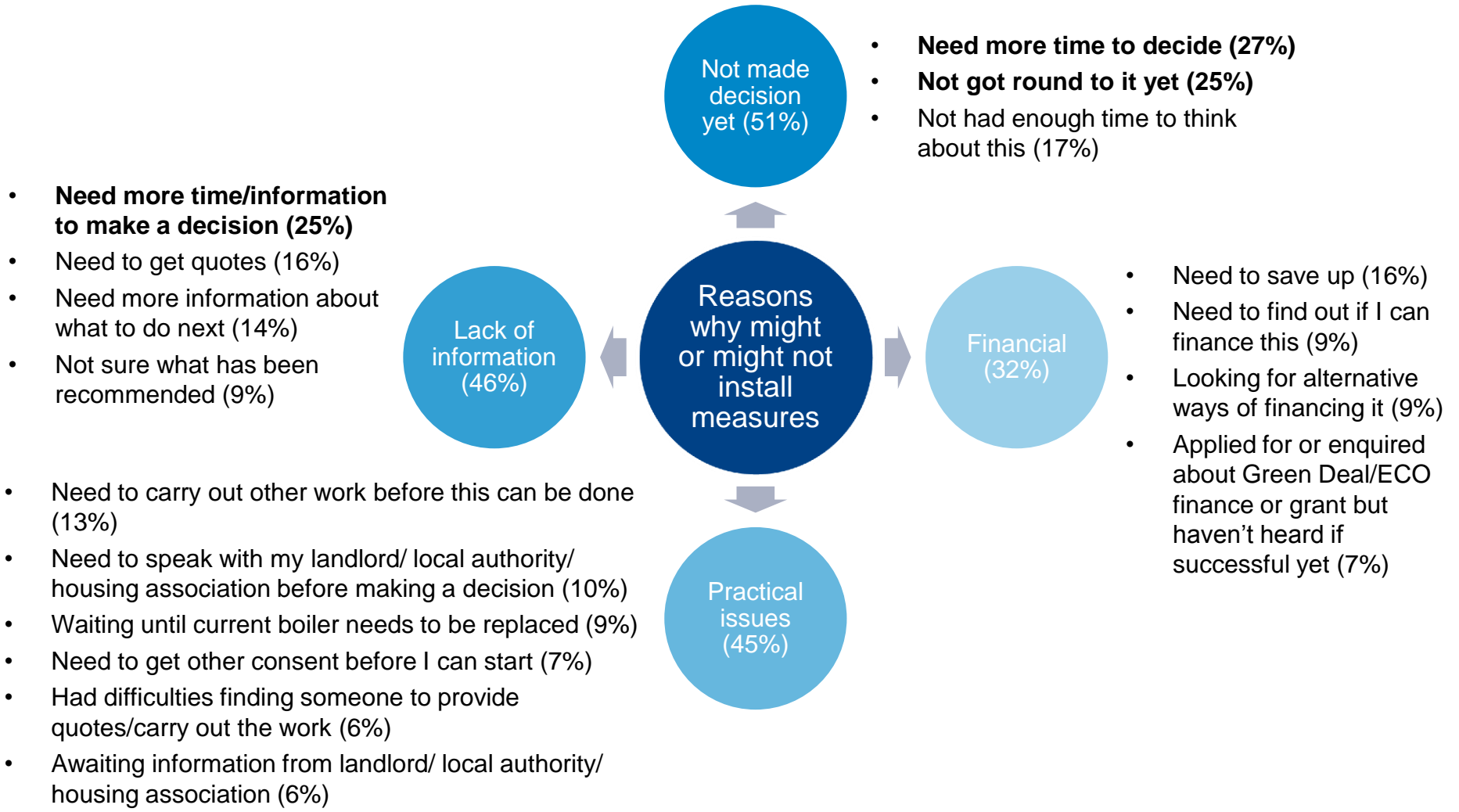


Chart shows all responses mentioned by 4% or more

Base: All respondents who might or might not install measures (69). Households were able to choose more than one option and in some cases were answering about more than one key measure. **Because of the small base size these findings should be treated with caution.**

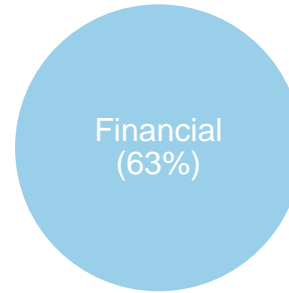


Reasons why improvements won't be installed:

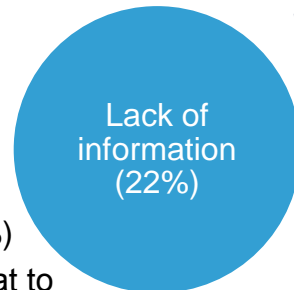
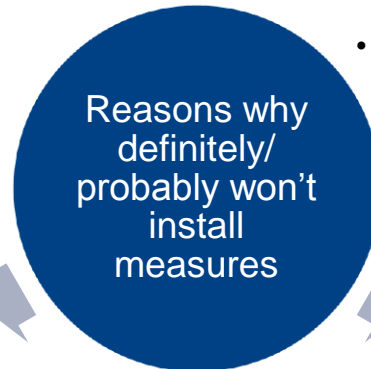
Cost and concerns about money savings from measures were the main barrier for those who probably or definitely won't install a key improvement. Structural considerations and hassle/disruption were also prominent barriers.

OTHER RESPONSES:

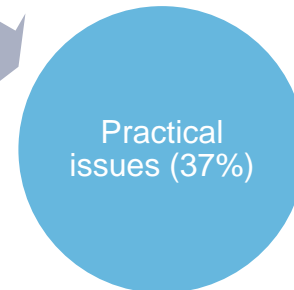
- Won't stay here long enough (11%)
- Already have this/already done (9%)
- Other priorities at the moment (5%)



- **Cost of improvements is too high (34%)**
- **Would not save enough money to make it worthwhile (26%)**
- **No guarantee that it would save me money (20%)**
- Cannot access finance for it (12%)
- Green Deal finance options are not attractive (7%)
- Green Deal finance not available for this improvement (6%)
- Worried that having Green Deal repayments linked to my property will make it harder to sell (5%)



- Need more time/information to make a decision (9%)
- Not sure what has been recommended to me (8%)
- Confused/don't know what to do now (7%)
- Need more information about what to do next (6%)



- **Structural considerations (17%)**
- **Hassle/disruption of making improvements (16%)**
- May change character/appearance of my house (13%)
- May lose space (5%)

Chart shows all responses mentioned by 4% or more

Base: All respondents who definitely/probably won't install measures (133). Households were able to choose more than one option and in some cases were answering about more than one key measure.