



Department  
of Energy &  
Climate Change

# Energy Companies Obligation (ECO) Customer Journey

**Research instruments**

December 2014

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The views expressed in this report are those of the authors, not necessarily those of the Department of Energy and Climate Change (nor do they reflect Government policy).

# 1. Quantitative survey of ECO households: Survey questionnaire

## A Introduction and screener

We are conducting a survey of people who have recently had energy saving/energy efficiency improvements installed in their home. The research is being conducted on behalf of the Department of Energy and Climate Change (DECC). We understand that you recently had [MEASURES FROM DATABASE] installed in your home and we are interested in finding out more about your experiences.

Your views are important and will help the government design better policies that meet people's needs, so we very much hope you will take part. We really value your opinions.

We have tested the questionnaire and found that, on average, the survey should take up to 30 minutes to complete depending on your answers. As a thank you for taking part we will send you a **£10 gift voucher**.

Your responses will be treated in the strictest of confidence and in line with the Data Protection Act. Your responses will not be passed back to your assessor or installers, and you will not be contacted again as a result without permission.

### IF COMPLETING WITH FACE-TO-FACE INTERVIEWER

A 1 Firstly, can we check that energy saving improvements were installed at this property in [MONTH]?

### IF UNSURE:

From our records we understand that you have had the following measure(s) installed in [MONTH]:

- [MEASURE]
- [MEASURE]
- [MEASURE]

Check that these are correct before continuing

A 2 And are you the best person to speak with about this work and other related topics?

### IF NOT TRANSFER / ARRANGE APPOINTMENT

NOTE: THIS MAY BE MORE THAN ONE PERSON

**B About you and your property  
(inc. segmentation questions)**

Firstly, I'd like to ask you a few questions about you and your property

ASK ALL IF TENURE IS N/A OR UNKNOWN IN THE SAMPLE

B 1 In which of these ways do you occupy your accommodation?

- Own it outright
- Buying it with the help of a mortgage or a loan
- Pay part rent and part mortgage (shared ownership)
- Rented from local authority/Council/New Town Development
- Rented from Housing Association/Co-operative/ Charitable Trust
- Rented from private landlord
- Tied to job
- Other [PLEASE TYPE IN]
- Don't know

ASK ALL  
SEGMENTATION QUESTIONS

Please think about your situation just before you had [MEASURES] installed in [MONTH].

B 2 Which one of these best describes how well you and your household were keeping up with your energy bills just before you had [MEASURES] installed?

FLIP LIST AT ALTERNATE INTERVIEWS

- I/we managed very well
- I/we managed quite well
- I/we got by alright
- I/we had some difficulties
- I/we had severe difficulties
- Don't know
- Prefer not to say

B 3 To what extent do you agree or disagree with these things?

ROTATE STATEMENTS

- I'm the type of person who likes to have the newest gadgets in my home
- It's not worth me doing things to help the environment if others don't do the same
- I'm always looking out for new ideas to improve my home

FLIP LIST AT ALTERNATE INTERVIEWS

Agree strongly  
Tend to agree  
Neither agree nor disagree  
Tend to disagree  
Disagree strongly  
Don't know

B 4 How often, if at all, did you personally do the following?

- When buying new appliances (e.g. fridge, washing machine) choose those which are more energy efficient

FLIP LIST AT ALTERNATE INTERVIEWS

Always  
Very often  
Quite often  
Occasionally  
Never  
(for items about appliances/tumble drying only) Not applicable  
Don't know

B 5 Still thinking about your home before you had [MEASURES] installed, which of these things applied?

CODE ALL THAT APPLY

Your home had a Smart Meter (new meters that are able to communicate with energy suppliers by sending and receiving information about the amount of energy being used.

Smart meters are installed by a professional engineer from your gas or electricity company, unlike an energy monitor which can be installed by householders themselves)

Your household was using a In home energy display (a portable device that displays current and past energy usage and how much it is costing or will cost. You may also know these as a Real Time Display or energy monitor. If you have a smart meter installed, it should have come with one of these displays)

Neither of these  
Don't know

B 6 Still thinking about just before you had [MEASURES] installed, which of these reasons were important to you in making your home more energy efficient? Please choose up to three.

ROTATE

To increase your home's value

To make it easier to sell/rent

To make your home warmer and more comfortable

To help reduce the amount you spend on your energy bills

To bring it up to modern standards

To reduce amount of wasted energy

To reduce carbon emissions/better for the environment

Other [PLEASE WRITE IN]

No reason – I didn't want to make my home more energy efficient

B 7 Before you had [MEASURES] installed, which of these things prevented you from doing more to make your home more energy efficient? Please tick all that apply.

ROTATE

- Cost of improvements was too high
- No guarantee that it would save me money
- Didn't know what to do
- Didn't know where to get information
- Didn't trust installers/suppliers to give me unbiased information
- Confused/received conflicting information
- Hassle/disruption of making improvements
- May change character/appearance of my home
- May lose space (e.g. room space, storage space in loft)
- Structural considerations (e.g. shared walls, lease restrictions, planning permission needed, period features in home, live in conservation area)
- No interest in energy efficiency/green issues
- Lack of time
- Other priorities (e.g. work, new baby)
- Already doing enough
- Landlord/freeholder wouldn't allow
- Wasn't planning to stay here long enough
- Other [PLEASE WRITE IN]
- None of these

B 8 And before you had your [MEASURES] installed did you have any of these problems with your home?

- Lack of adequate heating facilities/property difficult to heat
- Property expensive to heat
- Leaky roof
- Damp walls, floors, foundations etc
- Rot in windows frames or floors
- Mould/mildew
- Condensation/steamed up windows
- Other (SPECIFY)
- None of these problems with accommodation
- Don't know

## C Pre Assessment / installation

The next few questions are about how you came to have [MEASURES] installed recently.

### SHOW MEASURES INSTALLED AS GRID

C 1 We understand that the energy saving home improvement(s) shown below was/were installed in your home. For each, please say whether it was installed for free, or if you paid towards the cost of installation

CHOOSE ONE ONLY PER MEASURE

Free  
Paid towards cost of installation  
Not aware that this has been installed in my property  
Don't know

TEXT SUBSTITUTION FOR REMAINDER OF THIS SECTION WILL VARY BASED ON WHETHER OR NOT THE RESPONDENT PAID TOWARDS THE COST OF THE MEASURE

IF NOT AWARE THAT THE MEASURE WAS INSTALLED IN THEIR PROPERTY, RE-CHECK WHETHER THEY RECALL THE INSTALLATION.

C 2 Our records show that [MEASURE] was installed in your home in <date>. Is that correct?

Yes  
No – this has definitely not been done  
Don't know

IF WORK HAS DEFINITELY NOT BEEN DONE/DON'T KNOW, DO NOT FOLLOW UP MEASURE. OTHERS CONTINUE

IF MORE THAN ONE MEASURE INSTALLED

C 3 Were the [MEASURES] <all/both> installed by the same organisation and as part of the same work, or did you find out about them separately and/or have them installed by different organisations?

<All/Both> by the same organisation  
Different organisations



C 4 Did you originally start to look into having [MEASURES] installed with one organisation, and then change to another organisation later?

- Yes – because the work was sub-contracted to another organisation
- Yes – because of a problem with the original organisation (SAY WHAT IT WAS)
- Yes – because the original organisation could not do the work (SAY WHY)
- No – all contact was with one organisation
- Don't know

<IF CHANGED ORGANISATIONS AT C 4> For the next few questions, please think about how you first found out about [MEASURES], before you started to think about moving forward with the first organisation, even though the organisation you moved forward with changed later.

C 5 How did you first find out that you might be able to have [RELEVANT MEASURES] installed <for free/at a reduced price>?

PLEASE CHOOSE ALL THE WAYS IN WHICH YOU FOUND OUT  
ROTATE

IF MORE THAN ONE CODED AT C 5

C 6 And which one did you respond to or at which did you agree to find out more about having [MEASURES] installed?

- Cold call/door-to-door sales (they knocked on my door)
- Received a telephone call
- Approached by salesperson in the street/in-store
- Leaflet through my door
- Leaflet/information in energy bill
- Letter in the post
- Advert: in either newspaper/magazine, TV, online or in store
- News (e.g. TV/radio news, newspaper article)
- Energy Saving Advice Service/Home Energy Scotland
- From an energy company
- From a friend or relative/Word of Mouth
- From my landlord/local authority/housing association
- From a charity/community group/other advice service
- From freeholder/property management company/committee
- Internet/website/Google search
- After having a Green Deal assessment
- After a visit from a Chartered Surveyor
- Other [PLEASE WRITE IN]
- Don't know /can't remember

IF FROM AN ENERGY COMPANY CODED AT C6

C 7 You said that you responded to or agreed to find out more about having [MEASURES] installed from an energy company. Can we check, which of the following

was the main way in which you found out that you might be able to have [RELEVANT MEASURES] installed <for free/at a reduced price> from the energy company?

Cold call/door-to-door sales (they knocked on my door)

Received a telephone call

Approached by salesperson in the street/in-store

Leaflet through my door

Leaflet/information in energy bill

Letter in the post

Advert: in either newspaper/magazine, TV, online or in store

News (e.g. TV/radio news, newspaper article)

Other [PLEASE WRITE IN]

Don't know /can't remember

IF GDA OR CHARTERED SURVEYOR CODED AT C 5/C 6, OTHERS CHECK ROUTE BEFORE C 10

C 8 Can we just check, did you know that you might be able to have [measure] installed <for free/at a reduced price> before you had the <Green Deal Assessment/visit from the surveyor> or did you first find out as a result of the <Assessment/surveyor visit>?

Aware before <Assessment/surveyor visit>

Found out during or after <Assessment/surveyor visit>

Don't know

IF AWARE GDA OR SURVEYOR VISIT AT C 8, OTHERS CHECK ROUTE BEFORE C 10

C 9 You said you were aware that you might be able to have [measure] installed <for free/at a reduced price> **before** the <Green Deal Assessment/visit from the surveyor>. Where did you first find this out?

List as C 5 (excluding GDA/surveyor visit)

IF FOUND OUT FROM DOOR KNOCK/TELEPHONE CALL/APPROACH IN STREET/IN STORE AT C 6, OTHERS CHECK ROUTING BEFORE C 22

C 10 You said <someone knocked on your door/you were telephoned/you were approached in the street/in store> about having [MEASURES] installed <for free/at a reduced price>. How many organisations in total approached you about having your [MEASURES] installed, including the one you decided to move forward with.

If you were approached by an organisation working on behalf of another (e.g. a company working on behalf of the council), please only count that as one organisation

Enter number

Don't know

IF MORE THAN ONE AT C 10, OTHERS GO TO C 13

C 11 And to what extent do you agree or disagree with each of these things about being approached by more than one organisation to have your [MEASURES] done?

- It was good to have a choice of people to do it
- It made me feel pressurised into having work done
- It was off-putting

Strongly agree

Tend to agree

Neither agree nor disagree

Tend to disagree

Strongly disagree

Don't know/not applicable

C 12 Which organisation did you decide to have the installation with?

The first one which approached me

One of the others (IF MORE THAN 2 AT C 10)

The last one which approached me

I chose an organisation which had not approached me

Don't know

(IF MORE THAN ONE AT C 10) For the next few questions, please only think about the organisation you decided to move forward with.

IF FOUND OUT FROM DOOR KNOCK/TELEPHONE CALL/APPROACH IN STREET/IN STORE AT C 6, OTHERS CHECK ROUTING BEFORE C 22

C 13 When <the person knocked on your door/you were telephoned/you were approached in the street/in store> (from the organisation you had the installation with) which of these best describes what happened?

CODE ALL THAT APPLY

The person came into the property at that visit to see what needed to be done/talk about what could be done

Made an appointment for someone to visit me

They took my contact details and I agreed for them to contact me

I got information so I could contact them (e.g. card, leaflet)

I just noted the name of the organisation so I could contact them later

Other (specify)

None of these

Don't know

C 14 And at that time, did the person tell you that you might be eligible to have [MEASURES] installed <for free/at a reduced price> for any of these reasons?

SELECT ALL THEY MENTIONED

Because you live in council/local authority/housing association property

Because someone in the household receives certain benefits/tax credits

Because someone aged 60+ lives in the household

Because a disabled person lives in the household

Because dependent children live in the household

Because of the type of property you have (for example property with solid walls or hard to treat cavity walls)

Because of the area you live in/all properties in your area are eligible

They said you were eligible but you don't know why

No, they didn't mention any of these

Don't know/can't remember

C 15 Were you given or sent any written information after you had spoken with the person <who knocked on your door/ telephoned/approached you in the street/in store> ?

Yes, at the time  
Yes, sent in the post/by email after  
No, not at all  
Don't know

C 16 At that time how clear were each of these things made to you, if they were mentioned at all? This could be in your discussions with the person who < knocked on your door telephoned/ approached you in the street/in store> <or in any written material they may have given you or sent to you after this>.

- Which energy saving improvements you might be eligible to have installed free or at a reduced price
- What the recommended improvements would entail (e.g. how they would be installed)
- The benefits of having those improvements installed
- The costs of the recommended improvements (ASK IF CODE 2 AT C 1)
- What the next steps were/what you needed to do next
- Where you could go for more information/advice

Very clear  
Fairly clear  
Neither clear nor unclear  
Fairly unclear  
Very unclear  
Not mentioned at all  
Don't know

C 17 If you had any problems or issues with the person who knocked on your door/telephoned/approached you, please write them in below.

Open ended  
None

ASK ALL TENANTS

C 18 Following that first contact, which of these happened?

CODE ALL THAT APPLY

- I contacted my landlord/housing association to get permission to find out more/have the work done
- The organisation contacted my landlord/housing association to get permission to find out more/have the work done
- Neither of these
- Don't know

ASK ALL

C 19 Did the organisation get back to you, for example to check whether you were interested, or to make an appointment for someone to visit, or did you contact them?

CODE ALL THAT APPLY

- They contacted me
- I contacted them
- No - all arrangements for installation of [measure] were made on first contact
- Don't know

IF NO AT C 19, GO TO SECTION D. OTHERS CONTINUE

C 20 How long did it take between the time that <you gave the organisation permission to contact you/you took their contact details>, and when <they made contact with you/you contacted them>?

- Same day
- Next day
- Within a week
- 1-2 weeks
- 2 weeks up to a month
- More than a month
- Don't know

IF THE RESPONDENT CONTACTED THE ORGANISATION AT C 19

C 21 Did you contact the organisation which originally <knocked on your door/telephoned/approached you>, or did you contact someone else?

- Same organisation which <knocked on your door/telephoned/ approached you>
- Someone else
- Don't know

IF RESPONDED TO ADVERTISEMENT/NEWS ARTICLE/INTERNET SEARCH AT C 6

C 22 Can I check, did the <leaflet/letter/advertisement/news/website or online article> contain the telephone number or contact details of an organisation you could contact to find out more about getting [MEASURES] installed <for free/at a reduced price>?

- Yes – and I contacted this organisation
- Yes – but I contacted another organisation
- No
- Don't know

IF RESPONDED TO WORD OF MOUTH SOURCE AT C 6

C 23 You said you were told that you might be able to have [MEASURES] installed free of charge or at a reduced price by <friends/family/your landlord/local authority/housing association/a charity/community group or other advice service>.

Did they give you the telephone number or contact details of an organisation you could contact to find out more about getting [MEASURES] installed <for free/at a reduced price>?

- Yes – and I contacted this organisation
- Yes – but I contacted another organisation
- No
- Don't know

IF RESPONDED AFTER GREEN DEAL ASSESSMENT/SURVEYOR VISIT AT C 6  
(AND THEY PASS THE CHECK THAT THEY GENUINELY FOUND OUT THROUGH  
THIS ROUTE (CODE 2 C 8))

C 24 To what extent do you agree or disagree with these things about the <Green Deal assessor/surveyor> who conducted the Green Deal assessment/visited you?

- They were friendly
- They knew what they were talking about
- They didn't give me a choice over whether or not the improvements should be done
- They made me think that it was important to consider having [MEASURES] installed
- They made me feel pressurised into having work done/having an assessment
- They clearly told me what I should do

- Strongly agree
- Tend to agree
- Neither agree nor disagree
- Tend to disagree
- Strongly disagree
- Don't know/not applicable

C 26 At that time how clear were each of these things made to you by the <Green Deal Assessor/surveyor> if they were mentioned at all? This could be in your discussions with the < Green Deal assessor/surveyor> or in any written information they gave or sent to you.

- Which energy saving improvements you might be eligible to have installed free or at a reduced price
- What the recommended improvements would entail (e.g. how they would be installed)
- The benefits of having those improvements installed
- The costs of the recommended improvements (ASK IF CODE 2 AT C 1)
- What the next steps were/what you needed to do next
- Where you could go for more information/advice

Very clear  
Fairly clear  
Neither clear nor unclear  
Fairly unclear  
Very unclear  
Not mentioned at all  
Don't know

C 27 If you had any problems or issues with the < Green Deal assessor/surveyor>, please write them in below.

Open ended  
None

C 28 You said you were told that you might be able to have [MEASURES] installed free of charge or at a reduced price by <a Green Deal Assessor/Chartered Surveyor>. Did they give you the telephone number or contact details of an organisation you could contact to find out more about getting [MEASURES] installed <for free/at a reduced price>?

Yes – and I contacted this organisation  
Yes – but I contacted another organisation  
No  
Don't know



IF CONTACTED ANOTHER ORGANISATION AT C 21, C 22, C 23 OR C 24

C 29 Why did you contact another organisation?

**Problems with contact details**

Could not remember the name of the original organisation/lost information they gave me

Contact details of original organisation were incorrect/did not work

**Problems with the organisation which <knocked on your door/telephoned/approached you/was shown in the leaflet/letter/advertisement/news/mentioned>**

Did not like/trust the organisation/person

Poor publicity about organisation in local news

Poor word of mouth in the area about the organisation (e.g. they did not do good work on a friend/family member/neighbour's property)

Organisation was no longer in business/went bust/stopped doing this work

**Preferred to use someone else:**

Recommendation by friend/family

Recommendation by local council/housing association/landlord

Someone I had used before

Wanted a Green Deal Accredited organisation

Wanted a well known organisation/someone you trust

Wanted someone local/small/independent company

Someone else contacted me in the meantime

Other reason (specify)

Don't know

IF RESPONDED TO ADVERTISEMENT/NEWS ARTICLE/INTERNET SEARCH AT C 6

C 30 Did the <leaflet/letter/advertisement/news/website or online article> tell you that you might be eligible to have [MEASURES] installed free of charge or at a reduced price for any of these reasons?

IF RESPONDED TO WORD OF MOUTH SOURCE AT C 6

C 31 Did <your friends/family/your landlord/local authority/housing association/the charity/community group or other advice service> tell you that you might be eligible to have [MEASURES] installed free of charge or at a reduced price for any of these reasons?

IF RESPONDED TO GREEN DEAL ASSESSMENT/SURVEYOR AT C 6

C 32 Did <the Green Deal Assessor/Chartered Surveyor> tell you that you might be eligible to have [MEASURES] installed free of charge or at a reduced price for any of these reasons?

SELECT ALL THEY MENTIONED

Because you live in council/local authority/housing association property

Because someone in the household receives certain benefits/tax credits

Because someone aged 60+ lives in the household

Because a disabled person lives in the household

Because dependent children live in the household

Because of the area you live in/all properties in your area are eligible

Because of the area we live in/all properties in this area are eligible

They said you were eligible but you don't know why

No, they didn't mention any of these

Don't know/can't remember

## D Motivations for having measures installed

ASK ALL

ASK FOR EACH MEASURE

D 1 Before you first found out that you might be able to have [MEASURES] installed <for free/at a reduced price>, to what extent had you thought about making the improvements?

This could include doing the work yourself, or getting someone else into install the [MEASURES] for you.

SHOW MEASURES AS GRID, ASK FOR EACH

I hadn't heard of this at all  
I had heard of this but wasn't aware that it could be done to this property

I hadn't thought about doing this  
I had looked into but didn't want to do this  
I wanted to do this, but not at this stage  
I had firm plans to do this soon  
I was in the process of doing this

(ONLY SHOW TENANTS) It is not my decision to make because I'm renting the  
property  
Don't know

IF IN THE PROCESS/FIRM PLANS/WANTED TO DO IT/HAD LOOKED INTO IT AT D 1

D 2 You said that you were in the process of installing/had firm plans to install/wanted to do it/had looked into installing [MEASURES]. Which of these statements best describes what, if anything, you had done?

SELECT ONE ONLY

I hadn't thought about it at all  
I had thought about it but hadn't looked into it  
I had thought about it, but decided not to do it  
I had found out more information about it  
I had looked for quotes from installers  
I had received quotes from installers but hadn't made a decision on what I wanted to do  
I had received quotes from installers and had made a decision on what I wanted to do  
I had booked an installer to do the work  
Don't know

ASK ALL

Now I'd like you to think about your decision to look into having [MEASURES] installed

D 3 When you were making a decision on whether or not you wanted to consider having [MEASURES] installed did you ask for, read or look up any information in any of these places?

This could be information about the improvements or about how you could have them installed

**Asked for information from**

The organisation which approached you  
Friend/relative  
Landlord/housing association  
Energy Saving Advice Service/Home Energy Scotland  
Energy company  
Charity/community group (e.g. Age Concern)  
Local builder/someone who works in the trade

**Read or looked for information on**

The Internet  
Newspaper/magazine  
Leaflet  
Already knew about it from doing similar work before/on another property  
Something else (specify)  
Nowhere – did not read or look up any information  
Don't know/can't remember

ASK ALL

D 4 What were your reasons for wanting to have [MEASURES] installed?

ROTATE BLOCKS AND WITHIN BLOCKS: SELECT ALL THAT APPLY

IF MORE THAN ONE MENTIONED

D 5 Which one of these would you say was the main reason for wanting to have [MEASURES] installed?

PLEASE SELECT ALL THAT APPLY

**Reasons related to property**

- To make property more energy efficient
- To save money on energy bills
- To reduce energy use for environmental reasons
- Because our boiler/heating was broken or nearing the end of its life and we wanted to replace it
- To make home warmer/more comfortable/home felt cold
- Concern about energy bills rising in the future
- Doing other work to the property/having other building work done
- Change in household (e.g. new baby, someone ill in household)

**Reasons related to finance**

- Because I was told that we could have improvements made for free/at a reduced price
- Availability of cashback schemes/discounts to make improvements
- To allow you to pay for improvements using the Green Deal finance/cashback schemes (i.e. pay back through your energy bills)

**Recommended by others**

- Recommended by friend/relative/word of mouth
- Recommended by landlord/housing association/other organisation
- Recommended by local authority/council
- Recommended by/referred by Energy Saving Advice Service/Home Energy Scotland
- Recommended by energy company
- I had no choice – landlord/housing association/council/freeholder/other organisation said that the work had to be done

Other [PLEASE WRITE IN]

Don't know/can't remember

## E Next steps

ASK ALL

Next we would like to ask you about what happened after you had decided that you were interested in finding out more about having [MEASURES] <for free/at a reduced price>.

E 1 Did someone come around to talk with you about the [MEASURES] and how they might be installed? This could include someone coming round to look at your property and/or measure up to install the [MEASURES].

<IF ORIGINAL APPROACH WAS DOOR KNOCK> This could have been the person who originally knocked on your door and they could have done this on their first visit, or come back later to do it.

<IF MORE THAN ONE ORGANISATION AT C 4> Please answer these questions thinking about the person working on behalf of the organisation who continued to install the [MEASURES].

CODE ALL THAT APPLY

IF ORIGINAL APPROACH WAS DOOR KNOCK

Yes – the person who originally knocked on the door did this on their first visit

Yes - the person who originally knocked on the door did this on a later visit

Yes – someone else came

No

Don't know

ALL OTHERS

Yes

No

Don't know

IF YES AT E 1 (APART FROM WHERE DOOR KNOCK WAS FOLLOWED UP ON SAME VISIT), OTHERS GO TO SECTION H

E 2 How satisfied or dissatisfied were you with these aspects of arranging for someone to visit to talk to you about the [MEASURES]/measure up?

- How easy it was to make the appointment
- The flexibility in appointment times offered
- How long you had to wait for an appointment
- How much information you were given about what would happen

Very satisfied

Fairly satisfied

Neither satisfied nor dissatisfied

Fairly dissatisfied

Very dissatisfied

Don't know/not applicable

## G The visit

ASK ALL WHO HAD A VISIT

Next I'd like you to think about the person who visited to talk to you about the [MEASURES] or measure up.

<IF MORE THAN ONE ORGANISATION AT C 4> Please answer these questions thinking about the person working on behalf of the organisation who continued to install the [MEASURES].

UNLESS DOOR KNOCK FOLLOWED UP ON FIRST VISIT AT E 1

G 1 Did they arrive at the time arranged?

- Yes
- No – but they called to say that they would be late
- No – and there was no notification that they would be late
- Don't know/can't remember

ASK ALL VISITED

G 2 How long in total did the visit take, including any time the person spent looking around your property and speaking with you/your family about what you do and your energy use?

IF YOU'RE NOT SURE, PLEASE ENTER AN ESTIMATE

- Less than 20 minutes
- 20 minutes to 1 hour
- 1-2 hours
- More than 2 hours
- Don't know/can't remember

G 3 Which of these things did the person who came round do?

CHOOSE ALL THAT APPLY

- Look in your loft (if applicable)
- Look at/talk to you about the structure of your property (what types of walls you have)
- Measure the size of rooms and/or radiators
- Inspect the walls (to check for type of walls and insulation)
- Drill holes in any walls to see how they are built
- Look at floors/under carpets
- Look at your windows/doors
- Look at your heating system/boiler, etc.
- Look at your appliances (e.g. washing machine, cooker)
- Talk to you about how you and your family (if applicable) uses energy (e.g. thermostat setting, whether you tumble dry washing)
- Look at energy bills
- Ask about the number of people who live in the property/occupants

- None of these
- Don't know

G 5 Did the person only look at the areas of your property relevant to [measures], or did they also look at other areas of your home?

- Only looked at areas of property relevant to measures
- Looked at other areas of the home
- Don't know

G 6 And which of these did the person who came round do?

<IF PREVIOUSLY SAID THAT THESE WERE CHECKED BY PERSON WHO KNOCKED ON DOOR AT C 14 SAY> Please only think about whether this was done by the person who came round to visit/measure up, not if it was done by the person who first <knocked on your door/telephoned/approached you in the street/in-store>  
CHOOSE ALL THAT APPLY

- Checked your eligibility for having the improvements done <for free/at a reduced price>
- Looked at documents to prove that you were eligible to have the improvements made <for free/at a reduced price>
- Took copies of these documents
- Took documents away to make copies

- None of these
- Don't know

ASK ALL WHO WERE VISITED

G 7 Were you given or sent any written information about having [MEASURES] installed, either during the visit, or in the post or by email after?

- Yes, during the visit
- Yes, sent in the post/by email after
- No, not at all
- Don't know

IF YES AT G 7

G 8 What information were you sent?

CODE ALL THAT APPLY

- Green Deal Advice Report (show copy on screen)
- Information specific to my property about the improvements that could be made
- General information about improvements that could be made to make homes more energy efficient
- Quotations for work to be done
- More information on the organisation which visited
- Confirmation of appointments made
- Other (specify)
- Don't know

IF ANY AT G 8, OTHERS GO TO G 11

G 9 Have you used or looked at the information since you first received it?

- Yes – more than once
- Yes – once
- No – not at all
- Don't know



IF YES G 9, OTHERS GO TO G 11

G 10 To what extent did you read the information?

Read it carefully  
Just skim read it  
Didn't read it at all  
Don't know

ASK ALL VISITED

G 11 And at that time how clear were each of these things made to you, if they were mentioned at all? This could be in your discussions with the person who visited your home <or in any written material they may have given you or sent to you after this>.

- Which energy saving improvements you might be eligible to have installed free or at a reduced price
- What the recommended improvements would entail (e.g. how they would be installed)
- The benefits of having those improvements installed
- The costs of the recommended improvements (if any)
- What the next steps were/what you needed to do next
- Where you could go for more information/advice

Very clear  
Fairly clear  
Neither clear nor unclear  
Fairly unclear  
Very unclear  
Not mentioned at all  
Don't know

G 12 How useful was the visit in helping you to understand what you can do to make your home more energy efficient?

Very useful  
Quite useful  
Not very useful  
Not at all useful  
Don't know

G 13 How confident were you in any recommendations made by the person who visited?

Very confident  
Fairly confident  
Not very confident  
Not confident at all  
They did not make any recommendations  
Don't know

G 14 How satisfied or dissatisfied were you with these aspects of the visit?

- The professionalism of the person who visited
- How long the visit took
- How thorough the visit was

Very satisfied  
Fairly satisfied  
Neither satisfied nor dissatisfied  
Fairly dissatisfied  
Very dissatisfied  
Don't know/not applicable

G 15 If you had any problems or issues with the person who visited, please write them in below.

Open ended  
None

ASK ALL TENANTS IF NOT ALREADY DONE AT C 18

G 16 And which of these happened following this visit?

CODE ALL THAT APPLY

- I contacted my landlord/housing association to get permission to find out more/have the work done
- The organisation contacted my landlord/housing association to get permission to find out more/have the work done
- Neither of these
- Don't know

ASK ALL VISITED

G 17 Did the person who came to visit you have to come back again, or arrange for anyone else to contact or visit you before the [MEASURES] were installed?

Yes

No

Don't know

IF YES AT G 17, OTHERS GO TO SECTION H

G 18 Why was that?

To do a Green Deal Assessment (IF NOT ALREADY DONE)

A (different) surveyor needed to check that the property is suitable for installation

Someone needed to measure up/discuss options for installation

Someone contacted me to arrange an installation appointment

Someone contacted me to discuss finance options/how to pay for the installations

(ONLY IF CODE 2 AT C 1)

Someone contacted me to see whether I wanted to go ahead with any installations

Other reason (specify)

Don't know

G 19 How many times in total did someone contact you or you contact them after the visit, but not including when they came to install [MEASURES]?

Enter number of telephone calls (0-20)

Enter number of emails (0-20)

Enter number of visits (0-20)

Don't know

## H Choosing an installer/next steps

ASK ALL

H 1 Which of these best describes how the installation of [MEASURES] was arranged?  
CODE ONE ONLY

The installation was arranged by the same organisation who visited/telephoned/wrote\*

### **Another installer/company was used**

I/my partner found another installer/company/organisation ourselves  
Someone else passed on details of another Installer/company/organisation and we arranged the installation

Installation was arranged by landlord/housing association/local council/freeholder/other organisation and we had no part to play\*\*

Other [PLEASE WRITE IN]

Don't know

IF ANOTHER INSTALLER WAS USED

H 2 Why did you use another installer/different company?

### **Problems with contact details**

Could not remember the name of the original organisation/lost information they gave me

Contact details of original organisation were incorrect/did not work

### **Problems with the organisation which <knocked on your door/telephoned/approached you/was shown in the leaflet/letter/advertisement/news/mentioned>**

Did not like/trust the organisation/person

Poor publicity about organisation in local news

Poor word of mouth in the area about the organisation (e.g. they did not do good work on a friend/family member/neighbour's property)

Organisation was no longer in business/went bust/stopped doing this work

### **Preferred to use someone else:**

Recommended by friend/family

Recommendation by local council/housing association/landlord

Someone I had used before

Wanted a Green Deal Accredited organisation

Wanted a well known organisation/someone you trust

Wanted someone local/small/independent company

Someone else contacted me in the meantime

I had no choice – landlord/housing association/council/freeholder/other organisation said who was going to do the work

Other reason (specify)

Don't know

FOUND THE INSTALLER THEMSELVES, OTHERS GO TO H 4

H 3 How did you go about finding an installer for [MEASURES]?

Through energy company  
Local council/housing association/landlord  
Energy Saving Advice Service/Home Energy Scotland (Scotland only)  
Green Deal/ORB/ DECC/Department of Energy and Climate Change (Gov.uk) website  
– Find an Installer tool  
Elsewhere online / Google search

Yellow Pages/telephone book  
Asked friends/family for recommendation  
Saw poster/advertisement for Installer  
Other (specify)  
Didn't have to find an Installer, they came to me (NOW GO TO H 5)  
Don't know/can't remember

IF \*\* AT H 1 GO TO SECTION H. OTHERS CONTINUE

H 4 How many companies did you contact or attempt to contact to book the installation?

One – the company that did the installation  
More than one (enter number)  
Don't know/can't remember

H 5 How satisfied or dissatisfied were you with these aspects of arranging the installation for [MEASURE]?

- How easy it was to find an installer (UNLESS \* AT H 1)
- The range of appointment times offered
- How long you had to wait for an appointment
- How much information you were given about the installation and what would happen
- How easy the website was to use (IF USED WEBSITE AT H 3)

Very satisfied  
Fairly satisfied  
Neither satisfied nor dissatisfied  
Fairly dissatisfied  
Very dissatisfied  
Don't know/not applicable

H 6 Can we just check, why did you decide to use the installer you used for [MEASURE]?

(ONLY ASK IF SPOKEN TO ONE ORGANISATION ONLY)

It was the only organisation I had spoken to about [MEASURES]

(ONLY ASK IF SPOKEN TO MORE THAN ONE ORGANISATION)

It was the first organisation I had spoken to about [MEASURES]

It was the last organisation I had spoken to about [MEASURES]

(ASK OF ALL)

Availability of convenient/early appointment times to do the installation

Company were specialists in installing [MEASURE]

They were offering to do it for free

They were the lowest price option (though not free)

(IF HAD GDA) It was the same company who did the Green Deal Assessment

Recommendation from friends/family

Recommendation by local council/housing association/landlord

Recommendation from Green Deal Assessor

Already known to me/have used them before

Trusted name/brand name

Green Deal Accreditation/Quality mark

Local company/tradesperson

They offered warranties/guarantees

They seemed to be the most professional

They seemed to offer the best quality work

They were able to do other work at the same time (e.g. rerouting pipes, clearing loft, redecorating)

I had no choice – landlord/housing association/council/freeholder/other organisation said who was going to do the work

Other (specify)

None of these

Don't know/can't remember

## I Installation experience

ASK ALL

Next I'd like you to think about having the [MEASURES] installed.

I 1 To what extent do you agree or disagree with these things about [MEASURE]?

- I was keen to have [MEASURE] installed

Strongly agree  
Tend to agree  
Neither agree nor disagree  
Tend to disagree  
Strongly disagree  
Don't know/not applicable

ASK ALL WHO PAID towards installation (at C 1)

I 2 You mentioned earlier that you paid towards the cost of having MEASURE installed. How did you pay/how are you paying it?

SELECT ALL THAT APPLY  
ROTATE BLOCKS

### Financed myself using...

Savings or regular income from current account  
Loan from bank/building society  
Mortgage extension  
Loan/finance scheme through installer/provider  
Other finance (credit card, high street loan, loan from friends/family etc)

### Paid for partly or fully by (including grants, subsidies)...

Local authority/Council  
Housing Association  
Landlord

### Other way

Green Deal finance scheme (loan paid back through savings on your electricity bill)

Green Deal cashback scheme (apply for cashback from the government to help pay for the improvement)

Paid for in some other way [PLEASE WRITE IN]

Don't know

I 3 How much in total did you pay towards the cost of having [MEASURE] installed?  
PLEASE ENTER AN ESTIMATE IF YOU'RE NOT SURE  
ENTER VALUES (DON'T KNOW OPTION AVAILABLE)  
PLEASE ENTER VALUE INCLUDING VAT (IF APPLICABLE)

ASK ALL

I 4 Do you know who paid for <the rest of the cost for the > [MEASURE] to be installed?

**Yes ...**

Local authority/Council

Housing Association

Landlord

Energy company (Energy Company Obligation - ECO)

The Government

Other (SPECIFY)

**No**

Don't know

I 5 How well informed did you feel about these aspects of [MEASURE]?

- The benefits of having [MEASURES] installed
- (Before the installation ) What was going to happen when they came to install [MEASURES]
- (While they were installing [MEASURES]) What was happening during the installation process

Very well informed

Fairly well informed

Not very well informed

Not at all informed

Don't know



I 6 How satisfied or dissatisfied were you with the following things related to the installation of the [MEASURE]?

READ OUT. rotate order of presentation.

Very satisfied  
Fairly satisfied  
Neither satisfied nor dissatisfied  
Fairly dissatisfied  
Very dissatisfied  
Don't know  
Not applicable

- How long you had to wait for an appointment to have the [MEASURE] installed
- The professionalism of the installer(s)
- How clean/tidy the property was left after the installation
- How long the [MEASURES] took to install
- How much the installation cost (IF PAID TOWARDS INSTALLATION AT C 1)
- Quality of the installer's work
- Quality of the [MEASURE] installed

I 7 To what extent did having [MEASURES] installed disrupt your day to day activities?

A great deal  
To some extent  
Not very much  
Not at all  
Don't know

I 8 Can we just check, have there been any issues or problems with the [MEASURE] or the installation of the [MEASURE] that you would like to mention?

Yes – record details (open ended)  
No – no problems  
Don't know

I 9 And since the [MEASURE] was installed, has anyone been in touch in any of these ways to check the quality of the installation or whether you are happy with the work done?

CODE ALL THAT APPLY

Yes – received a letter asking if you are happy (for example, customer feedback survey)

Yes – telephone call

Yes - email

Yes – visit/someone has inspected the work

Yes – some other way

No – no contact at all

Don't know

END OF MEASURES LOOP.

IF RESPONDENT HAD MORE THAN ONE ECO MEASURE INSTALLED ASK

I 10 [IF “NEW BOILER AND HEATING CONTROLS” OR “CAVITY WALL INSULATION AND LOFT INSULATION”] Was your experience of having <New boiler>/<Cavity wall insulation> installed very different from the experience of having <Heating controls>/<Loft insulation> installed? If so, please tell us how your experience was different thinking about things such as: [IF ONE MEASURE PRIORITISED OVER THE OTHER] Was your experience of having [Other measures] installed very different from the experience of having [measure] installed? If so, please tell us how your experience was different thinking about things such as:

- Who paid for the measure?
- Did a different company install the measure?
- How easy was it to make an appointment?
- How satisfied were you with the work that was done?
- Have you had any issues with the measure since it was installed?
- Anything else you would like to tell us?

OPEN-ENDED WRITE IN

**J OTHER RECOMMENDATIONS RECEIVED**

ASK ALL

J 1 Were you recommended any other energy saving improvements, but have not had them installed yet?

Yes  
No  
Don't know

IF RECOMMENDED OTHER IMPROVEMENTS AT J 1. IF NO, GO TO K 1.

J 2 Which energy saving improvements were you recommended?

GRID TO SHOW – THOSE CHOSE NOT TO HAVE INSTALLED AT ALL, THOSE CHOSEN TO HAVE INSTALLED IN THE FUTURE BUT NOT YET

[USE SAME LIST AS BEFORE]

J 3 Were they offered free of charge or would you have had to pay towards their installation?

Offered free of charge  
Offered at a reduced price  
Not offered at a reduced price  
Don't know

J 4 Do you want to have them installed, or have you chosen not to?

Would like to have them installed  
Have chosen not to  
Don't know

IF HAVE CHOSEN NOT TO HAVE THEM INSTALLED

J 5 Why did you choose not to have it/them installed?

PLEASE CHOOSE ALL THAT APPLY

**COST/SAVINGS/FINANCE**

Cost of improvements is too high

Would not save enough money to make it worthwhile

No guarantee that it would save me money

Cannot access finance for it (e.g. loan/mortgage extension)

Applied for or enquired about Green Deal finance or grant but have been turned down

Applied for or enquired about a government subsidy or grant but have been turned down

Green Deal finance not available for this improvement

Green Deal finance options are not attractive

Worried that having Green Deal repayments linked to my property will make it harder to sell

**PRACTICAL ISSUES**

Had difficulties finding someone to provide quotes/carry out the work

Installer booked to install [MEASURE] would not confirm appointment/didn't turn up

Hassle/disruption of making improvements

May change character/appearance of my home

May lose space (e.g. room space, storage space in loft)

Structural considerations (e.g. period features in home, potential damage to property, unsuitable for property)

Told I would have to have too many improvements made to my property at once

Landlord/local authority/housing association/freeholder would not allow it

Could not get other consent (e.g. planning, live in conservation area, listed building)

**INFORMATION**

Not sure what has been recommended to me

Confused/don't know what to do next

Need more time/information to make a decision (e.g. find out about what the installation entails, how much I will save)

Need more information about what to do next (e.g. how to apply for Green Deal Finance)

**OTHER**

Illness/disability in the household

Other priorities at the moment (e.g. work, new baby)

Won't stay here long enough

Put off by experience of having [MEASURES] installed

Other [PLEASE WRITE IN]

No choice – landlord/housing association/council/freeholder/other organisation decided

No reason

Don't know

**IF WOULD LIKE TO HAVE THEM INSTALLED BUT HAVE NOT YET**

J 6 For which, if any, of these reasons have you experienced delays in starting work on the [MEASURE]?

**ROTATE BLOCKS AND CODES WITHIN BLOCKS**

Had no significant delays

**SUPPLIER**

Had difficulties finding someone to provide quotes/carry out the work

Company carrying out the work could not start straight away

Took a long time to get quotes

**FINANCE**

Needed to save up to have this done

Needed to arrange finance (e.g. apply for a loan/mortgage extension)

Applied for or enquired about Green Deal/ECO finance or grant but delays with application

Applied for or enquired about Green Deal/ECO finance or grant but was turned down

Looked for alternative ways of financing it (e.g. through Energy Company)

**PRACTICAL ISSUES**

Needed to carry out other work to my property before this could be done

Wanted to wait for the weather to improve before I carried out any work on my property

Needed to clear my loft out [LOFT INSULATION ONLY]

Needed to wait for my landlord/local authority/housing association/freeholder/other organisation to approve the work

Needed to get other consent before I can start (e.g. planning, live in conservation area, listed building)

Other [PLEASE WRITE IN]

No particular reason

Don't know

## K Post-installation

ASK ALL

K 1 To what extent do you feel you have benefitted from having [MEASURES] installed in your property?

A great deal  
A fair amount  
Not very much  
Not at all  
Don't know  
Too early to tell

K 2 And which, if any, of these things have you noticed as a result of the energy saving home improvements which have been made?

CODE ALL THAT APPLY.

Your home is warmer and more comfortable  
Your home is less draughty  
You have less condensation  
Lower levels of illness (e.g. colds, asthma)  
You are spending less on your energy bills  
Your home has been brought up to modern standards  
You can use rooms in your home that were previously too cold/draughty to use  
Benefits for the children (specify)  
Benefits for the household/family (specify)  
Other positive impact (specify)  
Any negative impacts (specify)  
None of these  
Too early to tell

ASK ALL

K 3 And taking everything into account, to what extent would you recommend these things to friends or family?

Definitely would  
Probably would  
Might or might not  
Probably would not  
Definitely would not  
Already recommended  
Don't know

- Having [MEASURE] installed (ask for each measure installed)
- Making energy saving home improvements in general

K 4 And, can we just check have you done any of these things since having energy saving improvements installed?

Had a Smart Meter installed (new meters that are able to communicate with energy suppliers by sending and receiving information about the amount of energy being used.

Smart meters are installed by a professional engineer from your gas or electricity company, unlike an energy monitor which can be installed by householders themselves)

Installed a Home Energy Monitor (a portable device that displays current and past energy usage and how much it is costing or will cost. You may also know these as a Real Time Display or energy monitor. If you have a smart meter installed, it should have come with one of these displays)

Installed any more energy efficient home appliances (e.g. fridge, washing machine)

Installed any other energy saving improvements (SPECIFY)

Any other activities to reduce the amount of energy your household uses (specify)

None of these

Don't know

## L DEMOGRAPHICS

Finally, a few questions about you and this property.

### ASK OWNER/OCCUPIERS ONLY

L 1 You said earlier that you own this property. Do you (and your partner) own this house/flat freehold, common hold/share of freehold or leasehold?

Common hold/share of freehold refers to a situation where a group of people own the freehold to a property (e.g. all the owners of flats in a block share the freehold of the block)

Freehold  
Common hold/share of freehold  
Leasehold  
Don't know

### ASK ALL

L 2 When was this property built?

By that, I mean when was the original building built, even if it was extended or converted later.

PLEASE ENTER AN ESTIMATE IF YOU ARE NOT SURE

Before 1919  
1919-1945  
1945-1980  
1980 or later  
Don't know

### ASK IF PROPERTY TYPE IS BLANK IN THE SAMPLE

L 3 What type of property do you live in?

House  
Bungalow  
Purpose built flat/maisonette  
Converted flat/maisonette  
Tenement  
Mobile home  
Other

### ASK ALL IN HOUSE/BUNGALOW/FLAT/MAISONETTE/ TENEMENT

L 4 Which of these does this property have?

CODE ONE ONLY

Loft conversion  
Loft boarded or partially boarded  
Loft, not converted or boarded  
No loft  
Don't know

### ASK ALL



L 5 And how many bedrooms does your home have?

Please include any room that, when built, was intended to be a bedroom, even if it is not used as such at present and even if it does not have a bed in it. It must have a window. Include bedsits, box rooms, attic bedrooms. Exclude rooms that are not habitable, halls, landings and alcoves, and rooms used solely for business. Exclude living rooms used for sleeping.

If studio flat or bedsit, please enter 0

Enter number

L 6 What types of fuel you use to heat your home?

CODE ALL THAT APPLY.

IF COMMUNAL HEATING, PLEASE SAY HOW THAT COMMUNAL HEATING IS FUELLED. PLEASE ONLY USE CODE 5 IF YOU DON'T KNOW

Gas  
LPG Propane Gas  
Electricity  
Oil  
Solid fuel (e.g. coal, wood)  
Communal heating, not sure of fuel  
Other (specify)

IF MORE THAN ONE FUEL MENTIONED

L 7 And which is the main fuel which you use to heat your home?

CODE ONE ONLY.

Gas  
LPG Propane Gas  
Electricity  
Oil  
Solid fuel (e.g. coal, wood)  
Communal heating, not sure of fuel  
Other (specify)

IF GAS NOT MENTIONED AT L 6

L 8 Is your home connected to mains gas?

Yes  
No – but in area which has mains gas supply  
No – no mains gas supply in the area  
Don't know

ASK ALL

L 9 For how long in total have you and your household lived at this property?

Less than 12 months  
12 months but less than 2 years

- 2 years but less than 3 years
- 3 years but less than 5 years
- 5 years but less than 10 years
- 10 years but less than 20 years
- 20 years or more
- Don't know

L 10 And for how long into the future do you think you and your household will live at this property?

- Less than 12 months
- 12 months but less than 2 years
- 2 years but less than 3 years
- 3 years but less than 5 years
- 5 years but less than 10 years
- 10 years but less than 20 years
- 20 years or more
- No plans to ever move
- Don't know

L 11 Which methods do you use to pay for your <electricity/gas/ oil/other fuel>?  
 CODE ALL THAT APPLY (IF USE DIFFERENT METHODS TO PAY FOR GAS AND ELECTRICITY, CODE BOTH METHODS)

- Direct debit/standing order
- Monthly/quarterly bill
- Pre-payment (keycard or token) meter
- Included in rent
- Frequent cash payment method (more frequent than monthly)
- Fuel direct/direct from benefits
- Fixed annual bill (however much gas/electricity is used ) e.g. Stay Warm
- Other (specify)
- Don't know

And now some questions about you and the people you live with.

L 12 How old are you?

Enter actual age

L 13 Are you...?

Male  
Female  
Other

L 14 Are you ...

Single, that is, never married?  
Living with someone in this household as a couple  
Married and living with your husband/wife?  
A civil partner in a legally-recognised Civil Partnership  
Married and separated from your husband/wife?  
Divorced?  
Or widowed?

L 15 Are you ...?

Working in a paid job as an employee  
Working in a paid job or business on a self-employed basis  
(Temporarily) laid off, or on short time  
Unemployed for less than a year and actively seeking work  
Unemployed for over a year and actively seeking work  
On a special government training or employment scheme  
Doing unpaid work for yourself or a relative  
A full time student or pupil  
Looking after the family or home  
Not working because temporarily sick or injured  
Not working because long-term sick or disabled  
Retired from paid work  
None of these  
Don't know  
Prefer not to answer

L 16 What is your TOTAL HOUSEHOLD INCOME from all sources BEFORE tax and other deductions?

The reason we are asking is because additional support may be available for those in receipt of particular means-tested benefits to make their homes more energy efficient .

	<u>PER WEEK</u>	<u>PER MONTH</u>	<u>PER ANNUM</u>
01	UP TO £47	UP TO £207	UNDER £2,500
02	£48 - £86	£208 - £374	£2,500 - £4,499
03	£87 - £125	£375 - £540	£4,500 - £6,499
04	£126 - £144	£541 - £624	£6,500 - £7,499
05	£145 - £184	£625 - £790	£7,500 - £9,499
06	£185 - £222	£791 - £958	£9,500 - £11,499
07	£223 - £260	£959 - £1,124	£11,500 - £13,499
08	£261 - £308	£1,125 - £1,333	£13,500 - £15,999
09	£309 - £338	£1,334 - £1,458	£16,000 - £17,499
10	£339 - £386	£1,459 - £1,666	£17,500 - £19,999
11	£387 - £483	£1,667 - £2,083	£20,000 - £24,999
12	£484 - £677	£2,084 - £2,916	£25,000 - £34,999
13	£678 - £962	£2,917 - £4,167	£35,000 - £49,999
14	£963 - £1,422	£4,168 - £6,250	£50,000 - £74,999
15	£1,423 - £1,923	£6,251 - £8,333	£75,000 - £99,999
16	£1,924 AND OVER	£8,334 AND OVER	£100,000 AND OVER

L 17 Is anyone in your household, including yourself, currently receiving any of these benefits?

CODE ALL THAT APPLY

- None of these
- Job seekers allowance
- Income support
- Employment support allowance
- Working tax credit
- Child tax credit
- Pension credit
- Housing benefit
- Council Tax benefit
- Disability Living Allowance/ others
- Other state benefits
- Don't know
- Prefer not to answer

L 18 Which of these groups do you consider you belong to?

White English/Welsh/Scottish/Northern Irish/British  
Irish  
Gypsy/Irish Traveller  
Any other White background  
White and Black Caribbean  
White and Black African  
White and Asian  
Any other mixed/multiple ethnic group  
Indian  
Pakistani  
Bangladeshi  
Chinese  
Any other Asian background  
Black African  
Black Caribbean  
Any other Black/ African/ Caribbean background  
Arab  
Any other ethnic group  
Refused

L 19 Do you have any long standing illness, disability or infirmity that limits your normal day to day activities?

By 'long-standing' we mean anything that has troubled you over a period of time or that is likely to affect you over a period of time.

Normal day to day activities include everyday things like eating, washing, walking and going shopping

Yes I have any long-standing illness, disability or infirmity ...  
It limits my activities all of the time  
It limits my activities some of the time  
It doesn't limit my activities  
I don't have any long-standing illness, disability or infirmity

L 20 How many ADULTS (that is people aged 18 and over) are there in your household, excluding yourself?

Enter number  
No others

IF 1 OR MORE OTHER ADULT AT L 20

L 21 And how many of these adults are aged 60 or older?

Enter number  
None

ASK ALL

L 22 Are there any CHILDREN in these age groups in your household?

CODE ALL THAT APPLY

0-4  
5-11  
12-15  
16-18  
None

L 23 We may want to contact some people again to ask them some more questions about this subject. If you agree to this you would receive a further incentive, in the form of a gift voucher. Would you be willing for us to contact you again about this?

Yes – willing  
No – not willing

IF WILLING TO BE RECONTACTED

L 24 In order to recontact you at a later date please enter the best telephone number to contact you on in the boxes below.

ENTER TELEPHONE NUMBER

L 25 It is sometimes possible by using an address to link the data we have collected with other government surveys or datasets held by government for the purposes of statistical analysis. Would you be happy for your responses to be passed to the Department of Energy and Climate Change for this purpose?

Your confidentiality will be maintained, and linked data will only be used for statistical purposes by researchers authorised by – and analysts working for - the Department of Energy and Climate Change.

## 2. Qualitative topic guide for ECO households

**Notes:** This guide is intended to guide the discussion however; the exact flow and question wording will be tailored by the moderator to best fit the respondent. Resultantly, not all questions may be asked, or they may not be asked in the order below, or using the precise wording below. A timeline approach will be used to structure the interview and explore the customer journey.

### 1. Introduction

**5 mins**

- Thank you for agreeing to take part in this research
- Introduce self and GfK NOP.
- Explain purpose of the research: **We are carrying out research on behalf of the Department for Energy and Climate Change, who are very interested in your views about ways to save gas and electricity at home, and the ways government can help**
- Explain the importance of being able to say what you think, there are no right or wrong answers and please be honest.
- Explain audio recording
- Reassure participant that the discussion is confidential, and that it complies with the Market Research Society Code of Conduct.
- Explain the discussion will last one hour, and that part of this will include a tour of the home.
- Any questions?

**Moderator to note: reflect respondent language throughout in relation to key terms used for e.g. installation, assessment, inspection, installer etc.**

### Participant introduction

- Please tell me a little bit about yourself...

Perhaps we can start by you showing me around your home. As the tour takes place...

- First name
- Family background
- What you do with your time (working / not working etc.)
- How long lived in property, own or rent?
- What work have you had done to the property since you moved in
- For renters ask: Deal directly with property owner or a letting agency?
  - How often do you contact your landlord or housing association?
  - What do you contact them about?
  - What has your experience been regarding repairs and improvements to the property since you've been here?

- What comes to mind when I mention 'Home energy efficiency'
  - How important is this to you?
    - What things do **you do personally** that you consider to be 'energy saving'?
    - What things do **you do as a household** that you consider to be 'energy saving'?
    - What about things you do to have a warmer home?
- What are the types of things that spring to mind when you think about saving energy in the home / having a warmer home?
- **Moderator note: before asking the next questions please bear in mind that for social tenants the degree of proactivity will vary as the property will not be theirs to make more energy efficient. So ask these questions as appropriate.**
- How important to you personally is it for your home to be energy efficient? Why/why not?
  - What were the main motivations to making your home more energy efficient?
    - Prompt: to save energy; to save money; warmer home?
  - Are there any barriers to making your home more energy efficient?
    - Prompt: cost, hassle, structural issues, lack of information, other priorities?
- Is there anything you else you'd like to do but haven't done yet to make your home more energy efficient?
  - What?
  - What has prevented you from doing this so far?
- Where do you find out information about being energy efficient?
  - Probe thoroughly: local information sources (e.g. CAB, community groups, neighbourhood office), websites, leaflets, posters, local paper, supplements, newspaper, conversations.
  - For each: how useful is this source?
  - Which is the most useful source?
- Have you previously (in the last 3 years) done anything specific to help save energy in your home e.g. low energy light bulbs, loft insulation, cavity wall insulation?
  - Which of these (if any) were paid for (if yes, who by).
    - If yes, did you initiate these, or were you approached
  - If you initiated – what factors motivated you (cost savings, property values, environmental impacts)
  - If you were approached – who was this, why did they approach you, what was offered, was this unexpected?
  - Have you heard of any schemes that help households install energy saving improvements?
    - PROBE: Had you heard of the CESP, CERT programmes? Probe for any others they might have heard of



Now I'd like to ask you a few questions about government initiatives to help people install energy saving improvements (and reduce bills and/or have a warmer home).

- Have you heard about any initiatives to help people install energy saving improvements?
  - What have you heard?
  - What can you tell me about it?
  - Where have you heard about it?
- Explore all then prompt:
  - Has the local authority any initiative?
  - Have you heard about the Green Deal?
  - Have you heard about ECO, or Energy Company Obligation?
  - For each of these mentioned probe:
    - What have you heard?
    - How did you hear about it?
    - When did you hear about it?
    - What can you tell me about it?
    - Where have you heard about it?
      - TV adverts
      - Martin Lewis/Money Saving Expert
      - EST/ESAS
      - Information on bills
      - via annual service contract communications/contact
      - recent media coverage about 'green tax' and increasing energy bills – which media (newspaper, TV programmes)
      - cold calling
    - What do you think about it?
    - What do you think it is for?
    - Who do you think it is aimed at?
    - As far as you know, what is covered e.g.
      - Solid wall insulation
      - Cavity wall insulation
      - Hard to Treat
      - Loft insulation
      - New boiler
      - What else do you know about?
  - What did you do once you became aware of this/these?
    - Nothing
    - Explored further about eligibility
    - Explored further about the cost of installation
    - Explored further about money saved on bills
    - Waited/expected to be contacted by sales people/energy supplier/landlord

In this part of the interview I'd like you to tell me about the installation you had recently.

Can I just check when you first heard about the possibility of having anything installed in your home?

Moderator note: Please refer to the journey grid to map their responses for this section. *Establish clearly what the installation was, when it was done (and if more than one).*

For each of these stages aim to ascertain:

- i. Timing
- ii. Key events / actions taken
- iii. Who they spoke to / sought help from
- iv. Other information sources
- v. Measures considered / rejected
- vi. Key drivers to action – motivations and barriers
- vii. Thoughts, feelings, concerns

*(NOTE TO MODERATOR: For this section we will be using the journey grid (Appendix 1) at analysis stage to help with pinpointing key touch points during the journey and prompt the respondent at each stage to attempt to refresh their memory. Please note that the journey may have taken a different course / set of stages for each participant and we need to use this flexibly to reflect their experience). Work with the participant to develop a journey diagram on a blank sheet to help structure an individual journey map.*

#### Stage 1 of journey: Initial awareness of the installation

- First of all can you tell me a bit more about how you came to have your <measure> done?
- Who made the initial contact?
- How was the initial contact made?
  - If contacted by someone first, ask:
    - Who contacted you?
    - How did they contact you? (Did someone come to the door/ call you?)
    - How did they introduce themselves
    - Where did they say they were from?
  - If contacted themselves ask
    - Who did you call?
    - How did you get their details?
    - How did you know who to call?
- What were you told about it?
  - The measures/improvements (**reflect respondent language**):
    - What it was, what was involved, advantages, disadvantages – what was it presented as offering (e.g. cost savings, energy savings, short term, long term)?
  - Eligibility:
    - what did they ask you about to check whether you are eligible
  - Cost
  - What it covers
  - What is not covered
- What did they offer to do – what options were presented?
- Had you heard of this before?
- How helpful did you find the explanation?
- How clear did you find the explanation?
- Overall, how did you feel about that initial contact?
  - What was your experience like
  - Was it as you expected?
- Now I'd like you tell me when you first became aware that something might be installed in your home.

- If chose yourself or jointly:
  - What was your reason for doing it?
  - When did you decide to go ahead?
  - If it was someone else: who was that?
    - What was their motivation do you think?
    - Were you given a choice?
    - If you were given a choice, what would you have said? Why?
- How much did you know about this before it took place?
  - Where did you hear about it?
- What was the reason given for the offer of an installation?
  - Probe: Just that it needs to be done, Warmer home, higher property value, energy saving, money saving, being 'greener'

#### Stage 2 of journey: assessment / visit details and process

- Can you tell me if anyone came to your home to make an (energy) assessment before the installation? **Please note customer language in relation to this.**
  - Who was this? (**likely that respondents will be unsure of this was so expect some 'Don't knows'**)
    - Green Deal Assessor
    - Chartered surveyor/surveyor/assessor
    - sales person
    - Someone from energy supply company
    - Someone else
  - PROBE FURTHER: What kind of things did they discuss?
  - How did this appointment come about?
    - Lots of choice?
    - Pressured to let someone in?
    - Appointment was presented with little option to consider?
  - Who was responsible for arranging this?
    - If householder:
      - What did you know at this stage?
      - What information did you receive?
      - From which sources?
      - What did you do next?
      - Who did you contact? / who contacted you?
      - If applicable ask: How easy or difficult was it to arrange the assessment / visit?
      - If applicable ask: How easy/difficult was it to book an appointment?
      - How long did you have to wait for the visit once you booked the appointment?
  - If someone else arranged (**e.g. landlord, energy company, or other organisation**):
    - What involvement if any did you have?
    - How involved did you feel?
    - How did you feel about this?
    - What did you need to do?
    - When were you told?
    - Were you offered any choice?
    - How much notice did you receive?
- Did you have to pay for the Assessment/visit?
  - How much?
  - How did you pay?
  - When did you pay?
  - Did you know in advance?
- Prior to the assessment/inspection visit, can you recall if you needed to do anything in preparation?
  - What did you have to do?
    - Get paperwork ready (energy bills and statements etc)

- Agree to a subsequent visit
  - Something else?
- Did the assessment happen on the same day they made the first visit or did they make another appointment for the assessment/visit?
  - Why is that?
  - What happened to see if you were eligible or not?
    - Checked to see that someone in the household was on means tested benefits
    - Checked to see that home was suitable for improvements
  - (If eligible/ineligible) – what happened next?

### Stage 3 of journey: assessment experience

- **Moderator note: Please note that not all ECO customers need an assessment so questions to ECO customers in this section should be about the inspection visit.**
- How did you feel about the Assessment visit initially?
- What happened at this visit?
  - Who did the assessment/visit?
    - Who else came?
  - What did they do?
  - How long did they spend in your home?
  - Did they cause any mess?
  - Did they leave any mess?
- What did you think of the Assessment visit?
  - Was it as you expected?
    - Why do you say that?
  - How did it leave you feeling? (satisfied/dissatisfied) – Why is that?
  - How useful did you find it? (useful/not useful) – Why is that?
  - Did anything happen that was unexpected?
  - What was discussed during this visit?
    - Did you have to agree to anything at the time? – what was that?
    - Were you left with information to consider? Did it provide you with what you needed to make a decision?
    - Was there a subsequent visit? Why was that?
    - Did you have to sign anything?
      - Can you remember what it was?
      - How did you feel about that? Why?
  - Were any recommendations made at this time? What were they?
- **Moderator to note: important to delineate between Green Deal and ECO measures at this point, and focus interview on ECO – refer to Appendix 2. Refer to respondent information which will include installation info.**
  - How much confidence did you have in the recommendations?
  - At what stage were finances discussed (if at all)?
  - How did you find the discussion around finances?
    - Were there any financial obligations for you?
    - What were they?
  - What kind of financial contributions were you expecting to make, if at all?
    - What finance options were discussed with you?
    - What was the contribution you were expected to make? What was it for?
    - What plans / packages were offered to you? **Moderator – ask respondent if they have retained any paperwork**
      - Did they mention Green Deal Finance?
      - What about ECO?
      - Any other options or ‘packages’?
    - Was there a discussion of costs of energy saving improvements?
    - Were the options explained clearly to you?

- Was it made clear who was paying for each element?
  - What kind of explanations did the Assessor/inspector provide around the next steps?
    - Were they clear?
    - What did the Assessor say about them?
    - Did they mention Green Deal / ECO?
    - To what extent did you feel that the assessor/inspector was 'selling' something to you?
      - Did you feel under pressure? Why?
- What other issues did the Assessor/inspector mention at the visit?
  - Time and hassle associated with installation
  - Warranties and reliability of suggested measures
  - Consideration of 'green' issues/carbon saving
  - Money-saving
  - Home improvement
  - Other
- What were your expectations at that stage?
  - Which measures/improvements?
  - Benefits of these?
  - Had you considered installing any of these measures/improvements before this?
  - How well informed did you feel at that stage? Why?
  - What were your expectations of the installation experience at that stage?
    - Timescales
    - Process
    - Involvement from you
- What information did you have at this stage?
  - Did the assessor / inspector leave any paperwork / other information with you?
  - If so, did you read this?
  - How useful did you find this?
  - Did you have any paperwork to complete at this stage – what?
  - Can you recall if you had a further visit or call to confirm what you wanted to do?
    - How much choice did you have?
  - Although the company was offering to provide the improvement, did you consider refusing and looking elsewhere?
    - What would have encouraged you to do this?
    - If so, how did you go about this?
    - What factors did you take into account in choosing a supplier?
- If appropriate ask: How did you finally make the decision to accept the offer of an installation?
  - What was your thought process after the recommendation? What steps did you take before making the decision to install?
  - Was the possibility of refusing considered?
  - What benefits did you expect? What were the most important?
    - Prompt:: It was free, it was cheap, improving value of the property, immediate cost savings, long term savings, helps keep house warm, 'right thing to do', environmental benefits
  - For Carbon Saving Obligation customers:
    - Were you aware that your home has solid walls/ cavity walls
    - Were you aware they were difficult / costly to insulate?
    - How did you become aware of this?
  - Did you consider not having an installation at any stage? If so, why was this?
  - What other information did you take into account at that stage to help with the decision?
  - To what extent did you feel that you had enough information to make a decision?
- What happened once you had made your decision?
  - What was agreed between you and the supplier?
  - How was it agreed
    - e.g in writing
    - did something need to be signed?

- How did you agree that the installation would be paid for?
  - Who has ultimately paid for the installation?
  - Why do you think this?

**Moderator note: Please note that HHCRO (Affordable Warmth) was the biggest ECO group in terms of delivery for August (where the sample has been drawn from) at 45% and there is a means test. Boilers, wall insulation and loft insulation are all available free. (Wall insulation and loft insulation are available through communities obligation). However, there may be other installation costs e.g. pipes may not be suitable, radiators may need moving or it may be that they weren't eligible after all.**

I'd like to find out what happened at installation. Can you take me through what happened next and when? Can you show me the area in your house where the installation/s was/were made?

#### Stage 4 of journey: installation

- How was the installation arranged?
  - Who contacted you / who did you contact?
  - What do you think about the way the installation was arranged?
- What did the installation involve?
  - What did the installers need to do?
  - How was your household affected?
- What else was involved?
  - E.g. did anything need to happen prior to the installation that wasn't expected, that the assessment / visit hadn't identified?
- Who was responsible for the installation?
  - Is this what you'd expected?
- How would you describe the experience?
  - Prompt: Convenient? Disruptive? Hassle-free? Stressful?
  - Did they leave a mess?
  - Where the installers respectful and professional?
- **Key question:** Where you happy with the work done? Do you have confidence in the quality of the installation?
- Did the installation happen at the time that you'd expected it to?
  - If not, how did you feel about this?
  - Did the installers communicate with you through any delays?
- How well informed did you feel about the installation?
  - Process
  - Timescales
  - How you'd be affected?
- Did the installer provide advice on maintenance, possible problems to look out for, contacts if things go wrong, provide warranties or guarantees, offer to sell insurance?
- Did the installation experience match your expectations?
  - If not, how was it different?
- How satisfied did you feel with the experience overall at the time?
  - Overall positives?
  - Overall negatives?
- Did the process to this point provide you with
  - A better understanding of energy savings and how to achieve them
  - An interest in taking further measures/having further improvements?
  - Information on other government initiatives (which)
    - Were you aware of Green Deal at this point?

#### Stage 5 of journey: post installation

Now I'd like to find out about what (if anything) has changed since the installation/s.

- Did you have any contact with the installers after the installation took place?
  - If not, would you like to have any contact?
  - If so, how did you find this contact? Was it planned?
  - If you had wanted to contact them how would you have gone about this?
- Has anyone been round to check the quality of the installation?
  - Did you have any questions you wanted to ask then following the installation?

- **Key question:** Have there been any problems or issues since the installation or do you have any concerns about the work that was carried out?
- How do you feel about the changes in your home?
  - What has been the impact on you / your household?
  - Benefits?
    - Have you noticed that your energy bills have changed?
    - Now that winter is approaching, are you expecting a change to your energy bills?
    - ASK those with HHCR (Affordable warmth):
      - How much of an impact have household energy bills had on your finances?
      - What do you expect the ECO measures/energy saving improvements impact to be on your household energy bills now?
  - Disadvantages?
  - What have the advantages been for you since the installation?
    - Less condensation
    - Few illnesses
    - Warmer house
    - Able to use all or more rooms in the house
    - Individual and family benefits
    - Lower bills, less concern about bills
      - Other?
  - Any disadvantages?
    - What are they?
  - To what extent do you feel able to have the heating on?
    - Is it on more compared to before the installation?
    - How much more/less do you worry about the winter?
    - What kind of savings do you **expect** to your bills following the installation?
- Have you considered any other energy saving or home improvement changes to your home since this?
  - Why have you considered this?
  - What would be the benefits / drawbacks?
- **Moderator to note: this section is a lesser priority and only to be covered only if there is time:**
- Has the installation made you more aware of energy use in your home?
  - In what way?
  - How has this changed what you do day to day?
  - An interest in taking further measures/having further improvements
  - Provided information on other government initiatives (which)
    - Are you aware of Green Deal (before this interview)
- Are you doing anything nowadays, since the Assessment / inspection / installation to try and save energy? What else?
  - discussed energy efficiency with other people/residents
  - Turned the thermostat down
  - Installed a smart meter or other energy efficiency measures/improvements at your own cost (what)
  - Making other behavioural changes like turning off lights, etc.
    - Turn your thermostat down to save energy
    - Boil the kettle with only the amount of water you are going to use
    - Don't leave your TV or PC on standby for long periods of time
    - Don't leave a mobile phone charger (or other charger) switched on at the socket when not in use
    - Wash clothes at 30 degrees or lower
    - Don't tumble dry clothes
    - Keep rooms at different temperatures depending on how much they are used
    - Take showers rather than baths
    - Close curtains/blinds after dark to keep the heat in
    - Had a Smart Meter installed
    - Installed a Home Energy Monitor
    - Installed any energy efficient home appliances (e.g. fridge, washing machine)



- Any other activities to reduce the amount of energy your household uses
- Visited the DECC/GD/supplier websites or thought about using Green Deal
  - Contacted EST/ESAS
- Spoken with others about it,
- Finding out information elsewhere.

**Overall experience**

**Are they content?**

**Where they happy with the overall experience?**

**Would they recommend to friends and family?**

**7. Wrap and close**

**5 mins**

- Finally is there anything else you'd like to say about any of the things we have discussed so far?
- Do you have any questions for me?
- Thank and close

**Appendix 1: journey grid**

Moderator note: There are no hard and fast rules for how to use this grid (**Appendix 1**) but it should be helpful in keeping a linear record of the various actions at each stage and timelines involved in order to help respondents recall events in the order they happened, and how long each stage took.

	Pre- inspection	Inspection / Offer	Pre-installation/ Decision-making	Post-installation
Timing				
Key events / actions taken				
Who they spoke to / sought help from				
Other information sources				
Measures considered / rejected				
Key drivers to action				
Thoughts, feelings, concerns				

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