



Department
of Energy &
Climate Change

Green Deal Customer Journey survey

Summary report: Quantitative survey wave 1

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Introduction

The Green Deal scheme was officially launched in early 2013 with the aim of enabling households to make energy saving improvements to their properties without having to pay all the costs up front. The Green Deal process comprises a number of steps, with the first of these being a Green Deal Assessment; the resulting Green Deal Advice Report explains what improvements can be made and estimates energy bill savings. Approximately 102,000 assessments had been carried out up to the end of October 2013¹.

As part of a wider programme of Green Deal evaluation work, GfK NOP and ICF International were commissioned to conduct a Green Deal Customer Experience survey of households which had had a Green Deal Assessment in October 2013². The survey was designed to understand the Green Deal customer experience and to determine what, if anything, households have done and plan to do since having the assessment. This research builds upon previous surveys of Green Deal Assessment customers carried out since April 2013 by GfK NOP³.

This report presents summary headline findings from the first wave of the Green Deal Customer Experience survey, conducted between 22 November and 22 December 2013. A full set of data tables has been released alongside this report⁴. The survey was conducted using a mixed-mode approach to data collection. In the first instance, sampled households who had a Green Deal Assessment in October 2013 were sent a letter inviting them to complete an online survey. Those that did not complete the online survey were then followed up by face-to-face interviewers. The interviewer gave the householder their laptop to complete the survey; therefore, the online and face-to-face elements were both self-completion, reducing the impact of mode effects.

A sample of 900 addresses was drawn and all selected households were written to. In total, 439 households completed the survey (representing a 49% unadjusted response rate). All households which completed an interview were given a £10 voucher.

Please note that all base sizes quoted in the report are unweighted.

For more information on the methodology please see the technical report⁵.

¹ For the latest information on assessments, see the Green Deal and ECO statistics webpage: <https://www.gov.uk/government/collections/green-deal-and-energy-company-obligation-eco-statistics>.

² Note that the sample frame for the first wave of the Customer Journey research used just one month's worth of households which had a Green Deal assessment, previous assessments research was based upon a three month reference period (e.g. households which had an assessment between July and September).

³ Other studies are available at: <https://www.gov.uk/government/collections/green-deal-assessments-research>

⁴ Available at <https://www.gov.uk/government/publications/green-deal-customer-journey-survey-summary-report-quantitative-survey-wave-1>

⁵ Available at <https://www.gov.uk/government/publications/green-deal-customer-journey-survey-summary-report-quantitative-survey-wave-1>

Summary of headline findings

Awareness of Green Deal Assessments

Direct marketing was the most common source of awareness of Green Deal assessments, with 51% of households citing a direct marketing approach such as door-to-door sales, a telephone call, being approached by a salesperson in store or in the street, a leaflet through their door or a letter in the post.

Word of mouth sources – including friends and family as well as other individuals/organisations⁶ - were mentioned by 35% of households. Twelve per cent of households mentioned advertising or news sources⁷.

Reasons for having a Green Deal Assessment

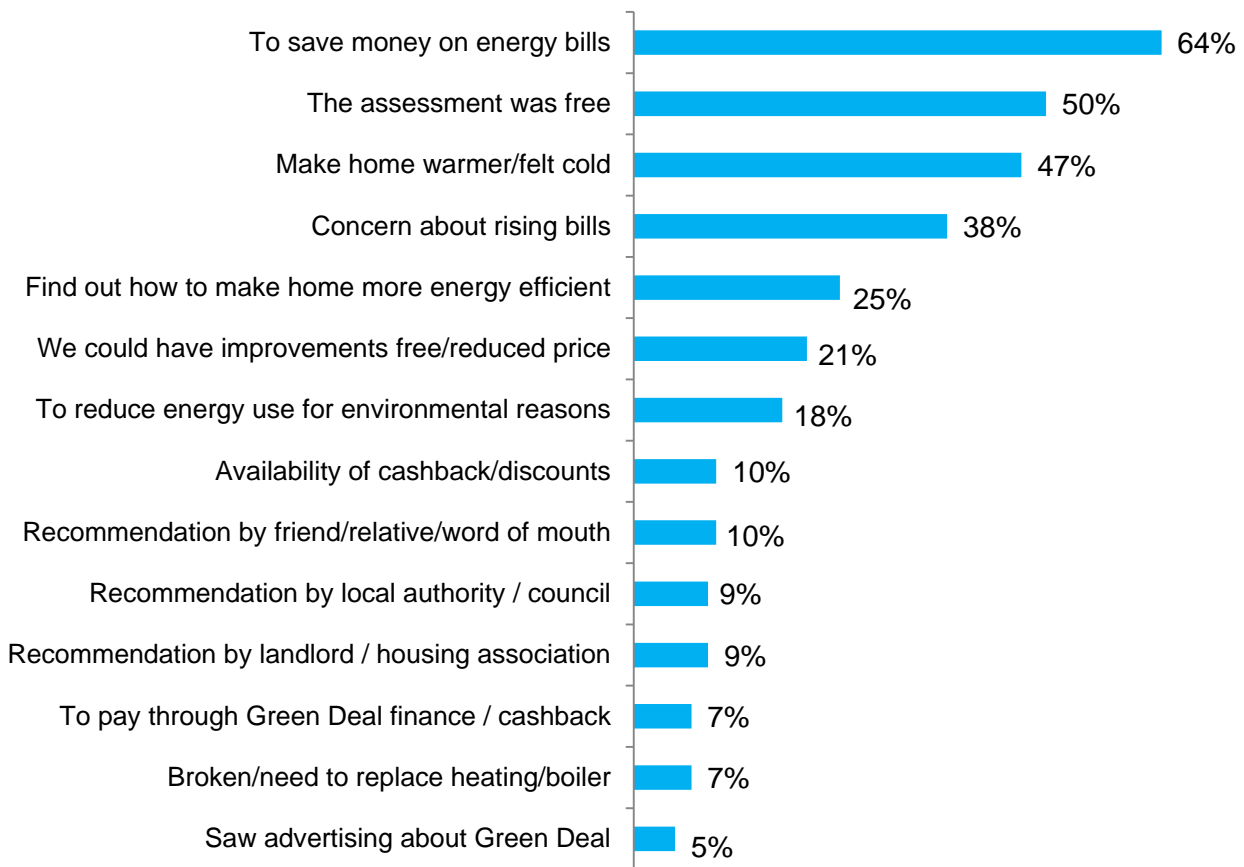
Financial considerations were most commonly mentioned as reasons for having an assessment. Figure 1 shows that the main motivations for having an assessment were: saving money on energy bills (64%), the offer of free assessments (50%), wanting a warmer home (47%) and concerns over rising energy bills (38%).

Households were also motivated by energy efficiency (25%), making improvements for free/at a reduced price (21%), and environmental concerns (18%).

⁶ Word of mouth sources include: Energy Saving Advice Service/Home Energy Scotland, from an energy company, from a friend/relative/word of mouth, from a landlord/local authority/housing association, from a charity/community group/other advice service, from freeholder/property management company/committee.

⁷ Advertising/news sources include: advert in newspaper/magazine, advert online, poster, other internet/online/Google search, TV advertising, advert/stand in store/supermarket/shopping centre, show home/stand elsewhere, news/media (e.g. saw something on TV/heard on radio/read in newspaper article).

Figure 1: Reasons for having a Green Deal Assessment (mentioned by 5% or more)



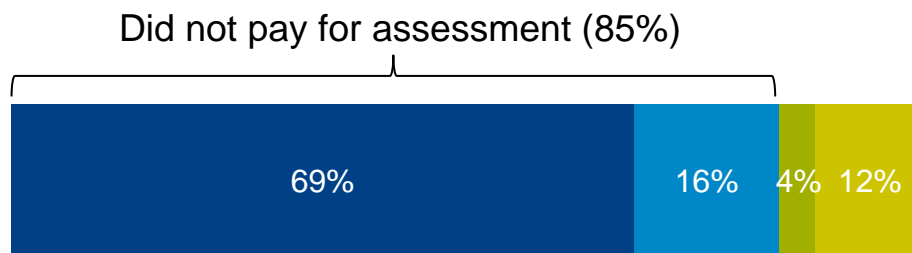
Base: All who had a say in whether or not the assessment took place (358).

Note: Respondents were able to select more than one response at this question, therefore responses add up to more than 100%.

Paying for a Green Deal Assessment

Over four in five (85%) households did not pay to have a Green Deal Assessment (Figure 2), which included seven in ten (69%) who did not pay because the company undertaking the assessment did not charge a fee. Four per cent of respondents paid for their assessment, either partially or in full.

Figure 2: Methods used to pay for Green Deal Assessments



- Company who carried out the assessment did not charge a fee
- Assessment fee paid in full by landlord/local authority/Other organisation
- Paid for their assessment (fully or partially)
- Other*

Base: All respondents (439)

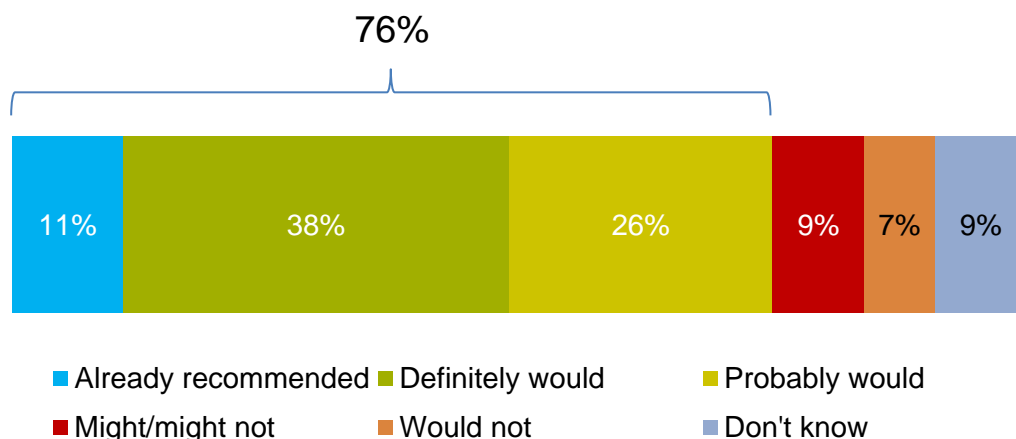
*Other category includes those who answered 'Don't know' and those giving 'Other' responses.

The assessment experience

Feedback on the Green Deal Assessment itself indicates that this was generally a positive experience for respondents:

- The vast majority of households were satisfied with the professionalism of the assessor (89%), with only 3% saying they were dissatisfied. The remainder either said they were neither satisfied nor dissatisfied (4%) or said don't know (3%).
- Four in five households (82%) were satisfied with the thoroughness of the assessment, 9% said they were neither satisfied nor dissatisfied and 4% said don't know. Just 5% were dissatisfied.
- Almost three quarters (72%) said that their assessment lasted up to an hour, with one in ten (12%) reporting an assessment lasting less than 20 minutes. In comparison, just under a quarter (23%) said it lasted for more than an hour, though 5% couldn't remember how long it lasted.
- Four in five households (78%) said they were confident in the recommendations made by the assessor; 8% said they were not confident. Fourteen per cent said they didn't know.
- Almost three quarters of households (73%) felt that the assessment was useful in helping them to understand what they can do to make their homes more energy efficient; 13% thought it was not useful, and a similar proportion (14%) stated that they did not know.
- It appears that satisfaction with the different elements of the assessment leads to considerable word of mouth recommendations: Figure 3 shows that 11% had already recommended the assessments to their friends and family and a further 64% said they definitely or probably would make a recommendation.

Figure 3: Likelihood of recommending Green Deal Assessments to family and friends



Base: All respondents (439)

Green Deal Advice Report

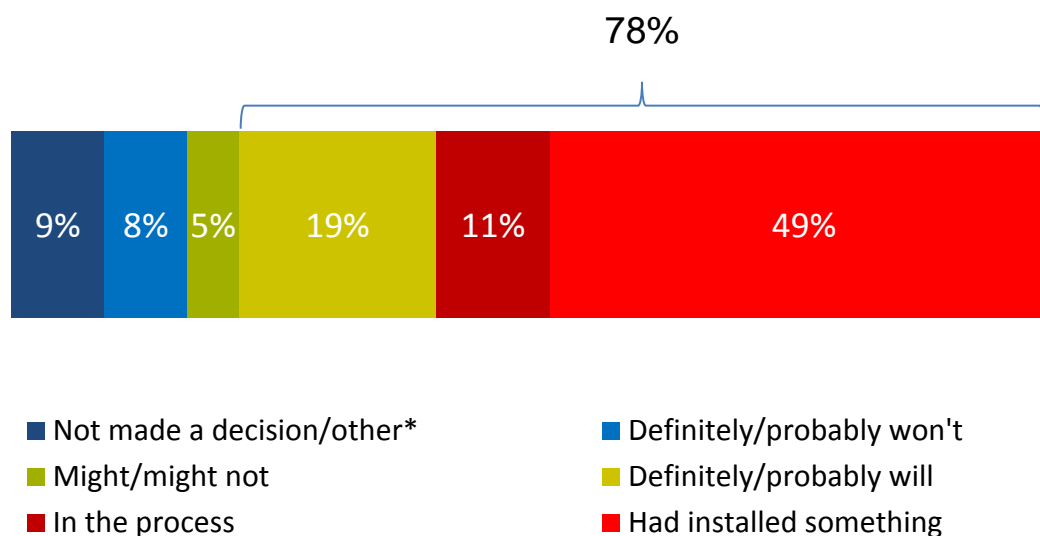
Around two in five (43%) households said they had received their Green Deal Advice Report at the time of their interview.

A similar proportion (39%) said they had not received a copy of their advice report: this comprised 4% who said they had seen a copy during the assessment, 26% who had not seen a copy at all and 9% who said that it had been sent directly to a landlord/housing association/other organisation. The remaining 18% of households didn't know whether they had received their report or not.

Post-assessment actions and intentions

Figure 4 shows that around four in five households (78%) reported either having already installed, being in the process of installing or intending to install at least one energy-saving home improvement recommended as a result of their Green Deal Assessment. Half (49%) of households had already installed at least one energy-saving home improvement.

Figure 4: The furthest point in the Green Deal customer journey that respondents had reached



Base: All respondents (439)

* only those who had not received a Green Deal Advice Report were able to give these responses which included: Not made a decision because I've not received my Green Deal Advice Report yet; The assessor did not recommend this; I don't know/can't remember if the assessor recommended this and Don't know.

Note: proportions do not sum because of rounding error. Actual proportions are: Had something installed = 48.7%, In the process = 10.7%, Definitely/probably will = 18.7%, Had something installed or in the process or definitely/probably will = 78.1%

Of all recommended energy-saving home improvements, 29% were reported to have already been installed by the time of interview, with considerable variation by specific improvement: loft insulation and cavity wall insulation were the recommendations most likely to have been acted upon (64% of loft insulation and 60% of cavity wall insulation had already been installed).

Paying for improvements

Households were asked how they had paid for their improvements; they were prompted with a number of different payment options and were able to choose more than one response. Findings indicated that three fifths (62%) of households that had installed a core⁸ energy saving improvement⁹ were funded fully or partially by a third party.

The third party funding sources included the local authority (mentioned by 19% of those who had had a core energy saving improvement installed), the Energy Company Obligation (15%) – that is, energy companies delivering energy saving improvements for free under the obligation –

⁸ Core energy saving improvements include: Loft insulation, cavity wall insulation, solid wall insulation, flat roof insulation, room in roof insulation, floor insulation, new boiler, solar photovoltaic, solar thermal, renewable heat technologies (ground and air source heat pumps, biomass boiler), replacement windows/doors

⁹ Base: Households that had had a core energy saving improvement installed (197)

and other Green Deal providers (that are not energy companies¹⁰) (12%). Thirteen per cent said the improvement was free (that is, it was paid for by a third party but they did not know exactly who); 12% said that their landlord paid and 8% said their Housing Association paid.

A fifth 18% said they paid towards the installation of energy saving improvements through the Green Deal finance scheme or Green Deal cashback scheme, and 5% self-financed the improvements.

The installation experience

Satisfaction levels amongst those households which said they had had any core energy saving improvements installed¹¹ were very positive, with over four in five saying they were satisfied in terms of the following elements of the installation:

- Time taken to install (90%)
- The professionalism of the installer (88%)
- How long they had to wait for an appointment (85%)
- The quality of the installer's work (86%)
- The quality of the improvement installed (84%)
- How clean and tidy the property was left after the installation (83%)

Of those who had had a core energy saving improvement installed¹², 89% said they had either already recommended having the energy-saving home improvement installed to family and friends or would recommend it to them in future. A similar proportion of all respondents said they had either already recommended making energy saving home improvements in general or would recommend doing so in future (82%).

¹⁰ Green Deal providers offer finance, help with cashback and arrange installation of energy saving improvements. They are made up of a range of different business, from SME's to large energy companies. Energy companies were not included in this option, as they have an obligation to deliver energy saving improvements under the Energy Company Obligation where they primarily deliver them for free.

¹¹ Base: Households that had had an energy saving improvement installed by a company (195).

¹² Base: Households that had had a core energy saving improvement installed (197)

Technical notes

The results shown here are based on 439 interviews conducted with a clustered sample of households which had a Green Deal Assessment during a single month (October 2013). Fieldwork was conducted between 22 November and 22 December 2013 by GfK NOP, using mixed-mode online and face-to-face interviewing.

Addresses were selected from the Landmark database, which is an administrative data source used to compile DECC Official Statistics. No names or telephone numbers were available as part of the sample file. Clusters of addresses were formed (to make it practical and cost effective for interviewers to get to households within the time available for fieldwork), meaning that 34% of addresses were eligible for inclusion in the sample. A stratified random sample was then drawn from the clustered addresses using region, Core City vs. non-Core City¹³, urbanity¹⁴, tenure, property type and Energy Performance Certificate (EPC) rating.

The questionnaire was designed by GfK NOP in conjunction with DECC and ICF International. It built upon:

- Previous quantitative research amongst households which had had assessments;
- Feedback from qualitative research with households who had recently had an assessment;
- A small cognitive pilot.

A letter was sent to households, inviting them to take part in an online survey and stating that if they did not an interviewer would be sent to the house. In total 900 letters were sent and 439 completed the survey, giving an unadjusted response rate of 49%. Responses were split between online completion (70) and CAPI completion on the interviewer's laptop (369).

The average interview length was 30 minutes.

The profile of those interviewed looked similar to that of all households which had a Green Deal Assessment during October 2013 (the "universe"). Where there were discrepancies between the profile of those interviewed and that of the universe the data were weighted to the known profile of all households which received a Green Deal Assessment in October 2013 by region, urbanity, tenure, property type and EPC rating. The effective sample size, which is calculated to take into account the impact of weighting, was 74% of the unweighted sample size (325 interviews).

Please refer to the full technical report for further details¹⁵.

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

¹⁴ The urbanity stratifier is broken down into three groups; Urban, Suburban and Rural. Urban areas are defined as those in which the population density is greater than 7 persons per hectare, Suburban areas are defined as those in which the population density is greater than 1.5 persons per hectare but less than 7 and rural areas are defined as those in which the population density was less than 1.5 persons per hectare.

¹⁵ Available at <https://www.gov.uk/government/publications/green-deal-customer-journey-survey-summary-report-quantitative-survey-wave-1>

Confidence intervals

Surveys are conducted because it is much more practical and cost effective than interviewing an entire population. However, we need to know how close our survey estimates are to the 'true' figures if we had interviewed the entire population. Confidence intervals are a statistical device which allows us, using our survey results, to estimate the variation that might be anticipated because a sample rather than an entire population was interviewed. This is essentially a range where the true (overall population) value is likely to sit. In general, the larger the sample, the more sure we can be of the accuracy of our survey estimates, though subject to diminishing returns at larger sample sizes. In other words, if we were to conduct the same survey again we would be more likely to get a similar result if we had a large sample than a smaller sample.

Note that, strictly speaking, analysis of sampling error in this way should only be applied to random probability surveys. However it is generally accepted that confidence intervals can be applied to surveys such as this which use different sampling schemes, as a guide.

The table below indicates the confidence intervals associated with various survey estimates (calculated based on the effective sample size¹⁶). When calculating confidence intervals, we typically use a 95% confidence interval. This means that we can be 95% sure that the survey estimate reflects the true figure for the entire population.

Table 2: Confidence intervals

Sample size	Survey response		
	10% / 90%	30% / 70%	50% / 50%
439	3.3	5.0	5.4

The table shows that, with a total sample size of 439, the confidence interval for a 50% response would be up to $\pm 5.4\%$. This means that if the survey found that 50% of respondents held a certain view, we could be 95% sure that the true proportion of people in the (overall) population who hold that view would be between 44.6% and 55.4%.

¹⁶ The effective sample size describes the effect of the weighting on the accuracy of survey estimates. It is dependent upon the size of weights applied to respondents: the more the weights deviate from 1, the smaller the effective sample size. (Effective sample size was (325)).

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