



Department
of Energy &
Climate Change

Green Deal Customer Journey survey

Summary report: Quantitative survey Wave 4

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).

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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. In total, 356,514 assessments had been carried out up to the end of September 2014.¹

As part of a wider programme of Green Deal evaluation work, GfK NOP and ICF International were commissioned to conduct a fourth Green Deal Customer Experience survey of households which had had a Green Deal Assessment in the third quarter of 2014. These surveys are 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 NOP.²

This report presents summary headline findings from wave 4 of the Green Deal Customer Experience survey, conducted between 11 November and 7 December 2014, and makes comparisons with the first three waves, which were conducted in November-December 2013 (wave 1)³, April-May 2014 (wave 2) and July-August (wave 3). A full set of data tables has been released alongside this report⁴. All waves were conducted using a mixed-mode approach to data collection. The approach taken at wave 4 was much the same as at previous waves: sampled households who had had a Green Deal Assessment between 1 July 2014 and 30 September 2014 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 1,800 addresses was drawn and all households were written to. In total, 878 households completed the survey (representing a 49% response rate). All households which completed an interview were given a £10 voucher.

Throughout the report, whenever the word 'significant' is used it is done to express a statistically significant difference. This means that any differences between results are likely to be the result





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

³ In making comparisons of post-assessment actions and intentions between different waves of the survey, it should be noted that the wave 1 survey only included households that had a Green Deal Assessment during a single month (October 2013) so respondents may have had less time between their Assessment and interview to take action and install measures compared with respondents in the wave 2, 3 and 4 surveys (which all covered a 3 month Assessment period).

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

of an actual change, rather than something related to sampling or methodology. This report uses the following conventions:

- All differences commented upon are statistically significant at the 95% confidence level.
- Significant differences between consecutive waves and between sub-groups are indicated by the arrows ( ) within charts.
- Significant changes across several waves are indicated by the arrows ( ) within charts.
- All base sizes quoted in the report are unweighted.

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

⁵ Available at <https://www.gov.uk/government/publications/green-deal-customer-journey-survey-summary-report-quantitative-survey-wave-4>

Summary of headline findings

Awareness of Green Deal Assessments

Sources of awareness of Green Deal Assessments were broadly in line with those reported in previous waves.

As in previous waves, direct marketing was the most common source of awareness with 49% of households in wave 4 citing a direct marketing approach such as door-to-door sales, a telephone call, an in-store/street approach, a leaflet through their door or a letter in the post (48% in wave 3, 48% in wave 2 and 51% in wave 1).

Word of mouth sources – including friends and family, as well as other individuals and organisations⁶ - were mentioned by 35% of households (37% in wave 3, 33% in wave 2 and 35% in wave 1). Twenty per cent of households mentioned advertising or news sources⁷, similar to the wave 3 level which was a significant increase from wave 2 (18% in wave 3, 14% in wave 2 and 12% in wave 1).

Reasons for having a Green Deal Assessment

The main motivations for having an assessment at wave 4 were: saving money on energy bills (50%), the prospect of a warmer home (43%), the offer of free assessments (42%), concerns over rising energy bills (30%) and the prospect of having improvements done for free or at a reduced price (28%)⁸.

Households were also motivated by making improvements for energy efficiency (23%) and environmental concerns (20%).

Figure 1 shows that the ranking of the motivations were broadly similar across the four waves, although the proportions mentioning three of the top four motivations have dropped significantly since wave 1.

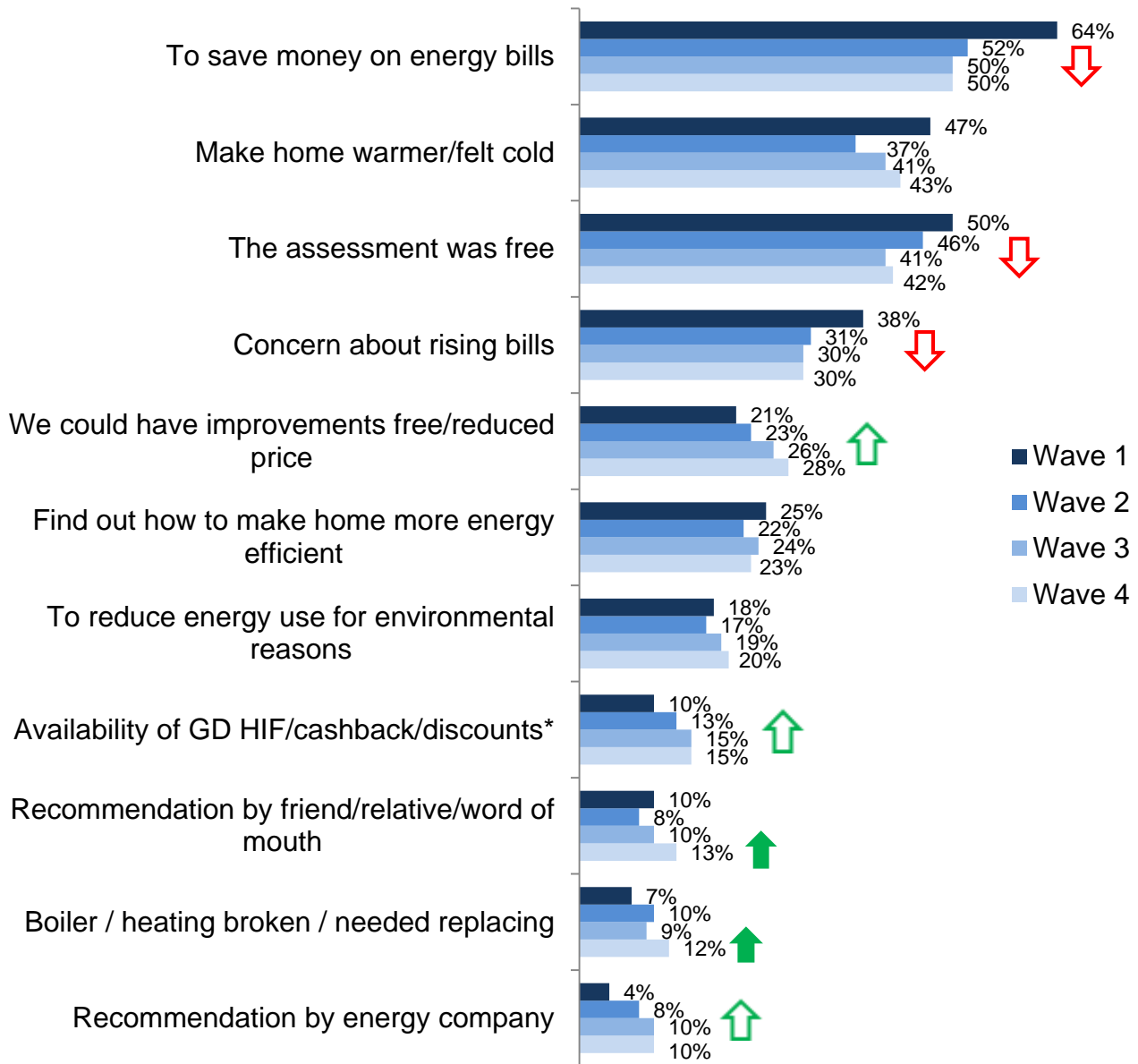
Households reported that recommendations through word of mouth have increased since wave 3 (from 10% to 13%). Between waves 1 and 4, significantly more households have cited having improvements done for free/at a reduced price and the availability of the Green Deal Home Improvement Fund (GD HIF)/cashback as reasons for having an assessment.

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).

⁸ Base: All who had a say in whether or not the assessment took place - 843

**Figure 1: Reasons for having a Green Deal Assessment
(wave 1 to wave 4 comparison of all reasons mentioned by 10% or more at wave 4)**



Base: All who had a say in whether or not the assessment took place (wave 1: 358; wave 2: 841; wave 3: 819; wave 4: 843)

Significant differences between waves are indicated by arrows ()

Significant changes across several waves are indicated by arrows ()

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

*In order to reflect the introduction of the Green Deal Home Improvement Fund, the wave 3 and wave 4 questionnaires gave respondents the opportunity to select “Availability of the Green Deal Home Improvement Fund/other cashback schemes/discounts to make improvements”. In previous waves, the code had been “Availability of cashback schemes/discounts to make improvements”.

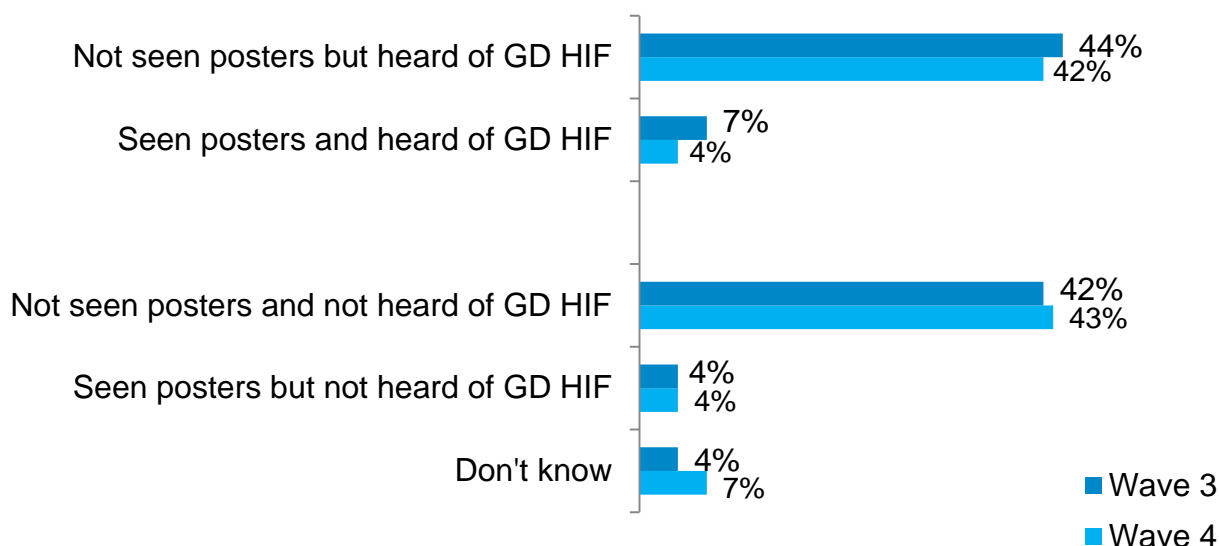
Awareness and impact of the Green Deal Home Improvement Fund

The Green Deal Home Improvement Fund (GD HIF) was announced at the start of May 2014 and the first release of funds was available to households throughout June and July 2014. The first release of funds enabled households in England and Wales to get up to £7,600 money back to offset the cost of having energy saving improvements such as solid wall insulation and new heating systems installed. Additional announcements were made about the next release of funds in October and December, which was during the fieldwork period.

Some new questions which were designed to measure awareness of GD HIF were added in wave 3, and these were also asked in wave 4, as some respondents taking part in these waves would have had assessments prior to the end of July, when the fund was still available.

Respondents were shown copies of GD HIF adverts and were asked whether they had seen them or had heard of GD HIF in some other way. In wave 4, just below half (46%⁹) reported that they had heard of GD HIF, while over half (54%) reported that they were not aware of it (similar levels to those observed in wave 3, as shown in Figure 2 below).

Figure 2: Awareness of GD HIF (waves 3 and 4 only)



Base: All respondents (wave 3: 904; wave 4: 878)

Those who had heard of GD HIF¹⁰ were asked when they found out about it: half of those who were aware of GD HIF at wave 4 (50%) reported that they had heard of it before they had their assessment. A fifth (21%) reported that they became aware of GD HIF during their assessment and a further 8% only became aware of GD HIF after having their assessment (18% said they could not remember when they became aware of GD HIF and 3% gave an 'other' answer).

In wave 4 a new question was introduced asking respondents who had heard about GD HIF whether they had applied for the fund. Of those that had heard of GD HIF¹¹, a quarter (24%) reported having applied for the voucher. This comprised:

⁹ This comprises 42% who had not seen posters but heard of GD HIF, and 4% who had seen posters and heard of GD HIF

¹⁰ Base: 411

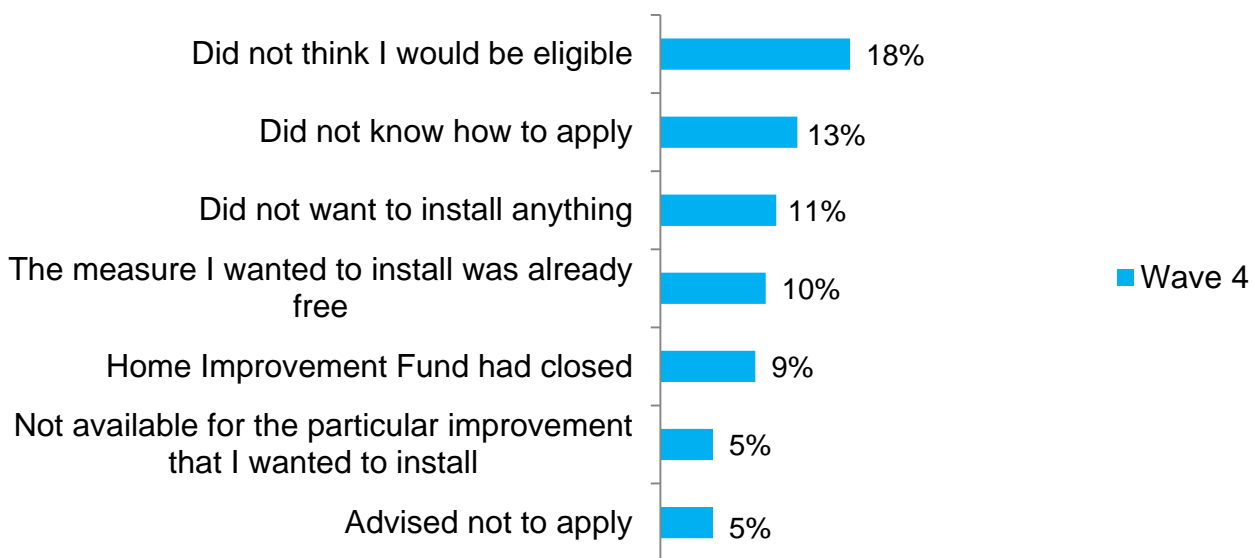
¹¹ Base: 411

- 9% who had applied for and redeemed the voucher
- 7% who had not yet redeemed it
- 6% who had not yet received the voucher
- 3% per cent said that their application had been denied¹².

Fifty nine per cent of those that had heard of GD HIF had not applied to the fund, (6% had intended to apply but the scheme closed before they were able to do so, and 10% did not know.

Those who had heard of GD HIF but did not apply for the fund¹³ were asked why they did not do so. Figure 3 below shows the main reasons given: 18% said they did not think they would be eligible and 13% said they did not know how to apply. Nine per cent said that they hadn't applied because the scheme had closed.

Figure 3: Reasons for not applying for GD HIF
(all reasons mentioned by 5% or more at wave 4 only)



Base: All respondents that were aware of, but did not apply for, the Green Deal Home Improvement Fund (wave 4: 268).

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

Those who reported having heard of GD HIF prior to their assessment¹⁴ were asked how important the availability of GD HIF was in their decision to have a Green Deal Assessment¹⁵. At wave 4, 73% (equivalent to 17% of the total sample¹⁶) reported that the availability of GD HIF was important (slightly – but not significantly – down on the 80% observed at wave 3, which equated to 20% of the total wave 3 sample). At wave 4, 58% of those who reported having

¹² Total does not add to 24% because of rounding error

¹³ Base: 268

¹⁴ Base: 196

¹⁵ Respondents were able to answer using the following scale: Very important - I wouldn't have had the assessment if it was not available, Fairly important, Neither important nor unimportant, Fairly unimportant, Very unimportant - it made no difference at all, Don't know

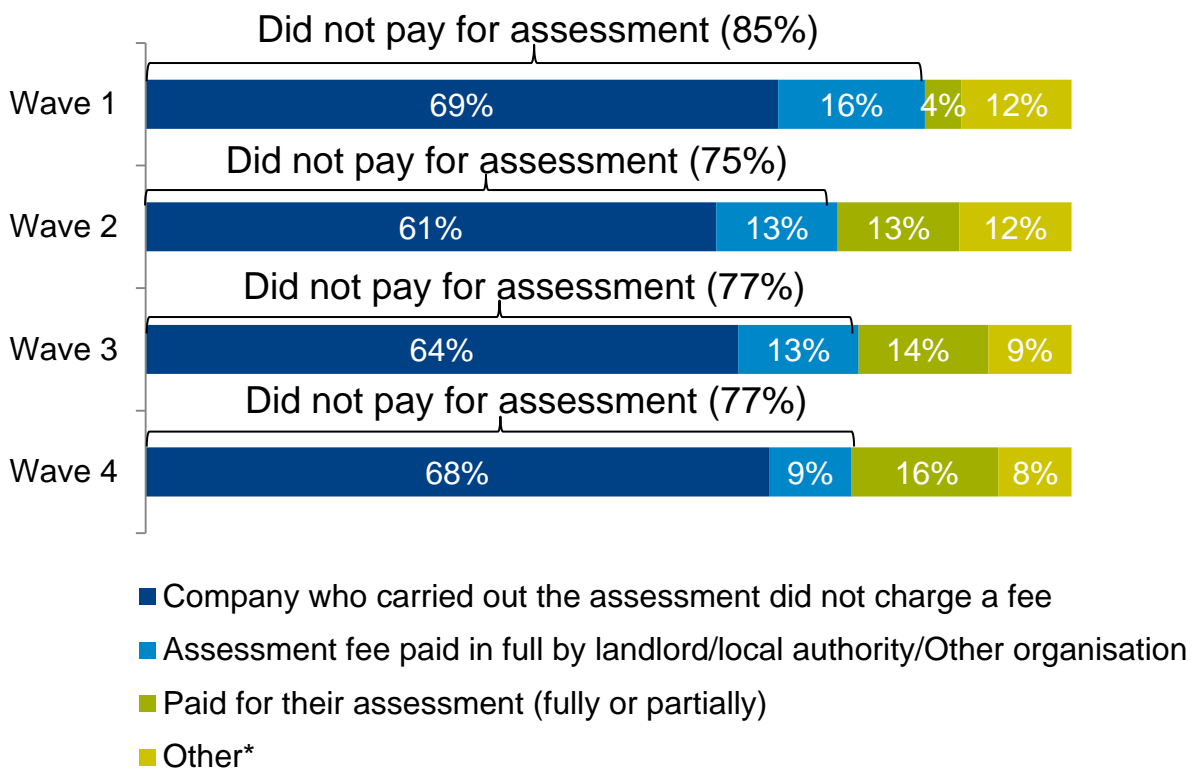
¹⁶ Base: Wave 3 - 904, Wave 4 - 878

heard of GD HIF prior to their assessment (13% of the total sample) reported that they would not have had their assessment without it, whilst 12% said that it made no difference at all to their decision.

Paying for a Green Deal Assessment

Similar to waves 2 and 3, three quarters of households (77%) did not pay to have a Green Deal Assessment, confirming a shift since wave 1 towards a greater proportion of households paying towards their assessment (the proportion reporting they did not pay towards their assessment was considerably higher in wave 1, at 85%). Figure 4 shows the full breakdown of findings from this question¹⁷.

Figure 4: Methods used to pay for Green Deal Assessments



Base: All respondents (wave 1: 439; wave 2: 946; wave 3: 904; wave 4: 878)

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

¹⁷ Households installing energy saving measures under the Green Deal Home Improvement Fund were able to apply for a refund of up to £100 on their Green Deal Assessment fee. Respondents were able to select a response "Paid assessment fee in full, but the fee will be refunded if improvements are made" at this question, which is included in the 'Paid for their assessment' category.

In line with findings from wave 3, wave 4 shows that those households which reported having heard of the Green Deal Home Improvement Fund before having their assessment¹⁸ were significantly more likely to pay for their assessment than those who had not heard of the scheme prior to having their assessment or not heard of it at all¹⁹ (29% compared with 12% in wave 4; 22% compared with 12% at wave 3). Thirty-one per cent of those who claimed that they would not have had their assessment if the Green Deal Home Improvement Fund was unavailable²⁰ also paid for their assessment (21% in wave 3 – bases too small for this to be a significant change).

The assessment experience

Feedback from all four waves of the survey indicates that the Green Deal Assessment experience was generally positive. Figures shown below are from wave 4 only, but are in line with those from all previous waves:

- The vast majority of households were satisfied with the professionalism of the assessor (83%), with 7% saying they were dissatisfied. The remainder either said they were neither satisfied nor dissatisfied (7%) or said they didn't know (2%).
- Four in five households (79%) were satisfied with the thoroughness of the assessment, 8% said they were neither satisfied nor dissatisfied, 9% said they were dissatisfied and 4% said they didn't know.
- The majority (70%) reported that their assessment lasted up to an hour, with 13% reporting an assessment lasting less than 20 minutes. Twenty-six per cent said it lasted for longer than an hour; the remaining 4% said they didn't know.
- Four in five households (78%) said they were confident in the recommendations made by the assessor; 13% said they were not confident. The remainder said they didn't know (9%).
- Over two thirds (68%) of households felt that the assessment was useful in helping them to understand what they can do to make their homes more energy efficient; a fifth (22%) thought it was not useful (rising to a third (33%) amongst those households that paid for their assessment²¹). Eleven per cent stated that they didn't know.

Findings from across all waves suggest that satisfaction with the different elements of the assessment leads to a considerable number of word of mouth recommendations: Figure 5 shows that 16% had already recommended an assessment to their friends and family and a further 56% said they definitely or probably would make a recommendation. The proportion of households who had already recommended an assessment has increased significantly since wave 3 (where it was 12%); this increase is driven primarily by households who did not have to pay for their assessment (18% of whom had already recommended at wave 4²², compared with 13% at wave 3).

¹⁸ Base: 196

¹⁹ Base: 664

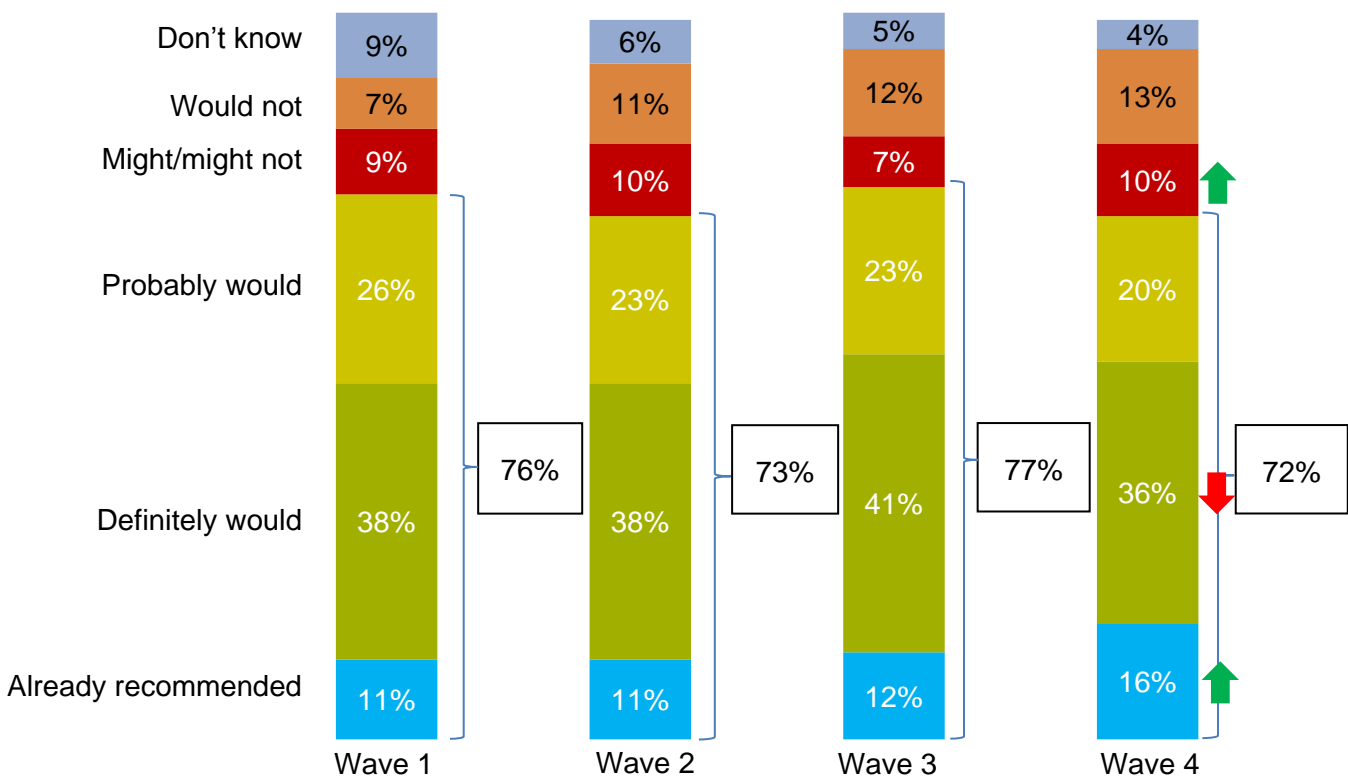
²⁰ Base: 115

²¹ Base: 142

²² Base: 671

Conversely, the proportion of households saying they would not recommend an assessment to friends and family has remained between 11-13% across waves 2-4. Digging deeper, it can be seen that this was primarily driven by the increase between waves in the proportion of households which paid towards their assessment, as those that paid towards their assessment were significantly less likely to recommend a Green Deal Assessment to friends and family: 21% of these households said they would not recommended an assessment to friends and family in wave 2, rising significantly to 33% in wave 3 and slightly (not significantly) to 37% in wave 4. This is further compounded by the fact that the proportion of respondents paying for their assessments appears to be increasing wave-on-wave: as Figure 4 showed, between waves 1 and 4 there has been a significant increase (from 4% to 16%) in those paying – fully or partially – for their assessment.

Figure 5: Likelihood of recommending Green Deal Assessments to family and friends (All waves comparison)



Base: All respondents (wave 1: 439; wave 2: 946; wave 3: 904; wave 4: 878)

Significant differences between waves are indicated by arrows ()



The 16% of households which paid for their assessment²³ in wave 4 were asked whether they were satisfied with their assessment in terms of value for money. Of these respondents, half (51%) were satisfied in this regard, and 34% were dissatisfied. Ten per cent were neither satisfied nor dissatisfied and 5% said they didn't know. These findings are comparable with those observed at previous waves.

Analysis of the other satisfaction measures by whether or not a household paid for their assessment suggests that those who paid tended to be less satisfied overall. As Table 1

²³ Base: 138

shows, there were significant differences between the two groups in terms of their assessment of the professionalism of the assessor (77% of those who paid compared with 86% of those who did not), and whether they would recommend an assessment to friends and family (43% of those who paid would compared with 78% of those who did not).

Table 1: The assessment experience: comparison of those who paid for their assessment against those who did not

	Paid for assessment	Did not pay for assessment
Base:	142	671
	%	%
Satisfied with the professionalism of the assessor	77	86 
Satisfied with the thoroughness of the assessment	76	81
Confident in the recommendations made by the assessor	75	79
Felt that the assessment was useful in helping them to understand what they can do to make their homes more energy efficient	66	69
Would recommend/already recommended Green Deal assessments to family or friends	43	78 

Arrows () indicate a significant difference between subgroups.

Green Deal Advice Report

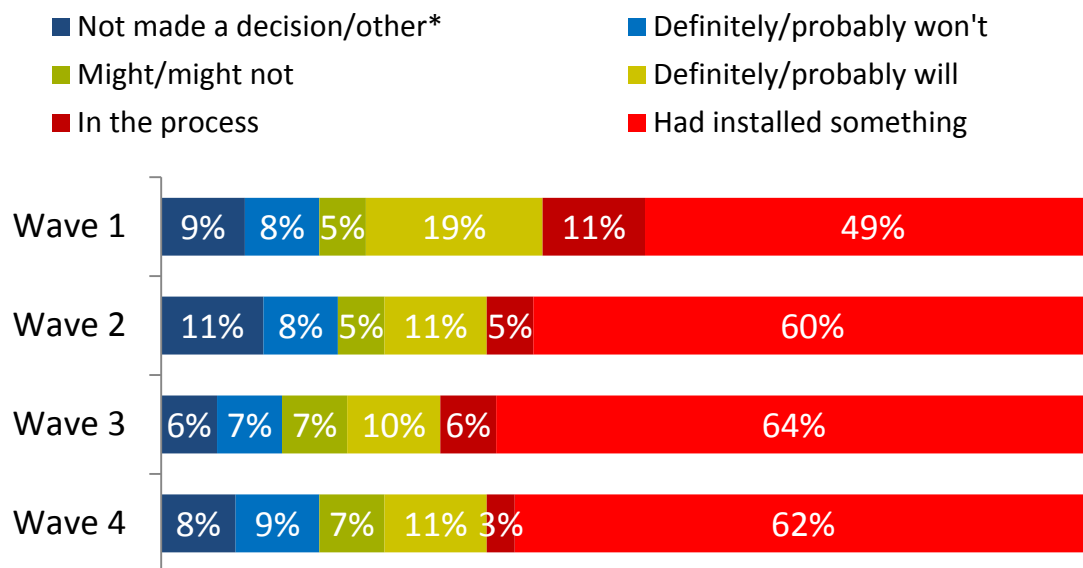
At wave 4, 47% of households reported having received their Green Deal Advice Report (43% in wave 3, 37% in wave 2 and 43% in wave 1).

Over a third (37%) had not received a copy of their advice report: 6% claimed to have seen a copy during the assessment, 26% had not seen a copy at all and 6% stated that it had been sent directly to a landlord/housing association/other organisation. The remaining 15% of households did not know, or were not sure, whether they had received their report.

Post-assessment actions and intentions

In all waves, at least three quarters of households reported either having already installed, being in the process of installing or intending to install at least one energy saving home improvement recommended by their Green Deal Assessment (76% in wave 4, 81% in wave 3, 76% in wave 2 and 78% in wave 1).

Figure 6: The furthest point in the Green Deal customer journey that respondents had reached (all waves comparison)



Base: All respondents (wave 1: 439; wave 2: 946; wave 3: 904; wave 4: 878)

* 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.

In wave 4, 62% of households had installed at least one measure, maintaining the levels observed at waves 2 and 3, which were significantly higher than in wave 1; however, it should be noted that the wave 1 survey only included households that had a Green Deal Assessment during a single month (October 2013), so respondents may have had less time between their assessment and interview to take action and install measures compared with waves 2 to 4 (which all covered a 3-month period).

If we only look at households which had their assessment in September to make it more comparable with wave 1 (September was the final month covered in wave 4), only 56% of these households had installed something, compared with 49% which was observed in wave 1. This difference is not significant at the reduced base size of 266 for respondents who were assessed in September 2014 only.

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 from all four waves of the survey indicated that most households that had installed a

core²⁴ energy saving improvement were funded fully or partially by a third party: 77% in wave 4, 76% in wave 3, 67% in wave 2 and 62% in wave 1²⁵.

The third party funding sources mentioned by households that had installed a core measure were as follows:

- The Energy Company Obligation (24%), that is, energy companies delivering energy saving improvements for free under the obligation
- Other Green Deal providers: not including energy companies²⁶ (14%)
- The local authority (10%)
- A landlord (7%)
- A housing association (2%)
- Twenty-three per cent of households which had installed a core measure said the measure was free (that is, it was paid for by a third party but they did not know exactly who).

In addition, 16% mentioned paying towards the installation of energy saving improvements through the Green Deal finance scheme, cashback or GD HIF and 18% self-financed the improvements.

The installation experience

As at previous waves, satisfaction levels amongst those households which reported having had core energy saving improvements installed²⁷ were very positive, with over four in five saying they were satisfied with respect to the following elements of the installation:

- Time taken to install (90%)
- How long they had to wait for an appointment (90%)
- The professionalism of the installer (86%)
- The quality of the installer's work (85%)
- How clean and tidy the property was left after the installation (84%)
- The quality of the improvement installed (82%)

At wave 4, 12% of households which had had a core energy saving improvement installed reported an issue or problem with the installation. This differed considerably by type of measure; for example, issues or problems were reported in relation to 21% of boiler

²⁴ 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

²⁵ Base: wave 1: 204; wave 2: 568; wave 3: 537; wave 4: 502

²⁶ 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.

²⁷ Base: Households that had had an energy saving improvement installed by a company (493)

installations²⁸, while issues or problems were reported in relation to just 9% of loft insulation installations²⁹ and the same proportion of cavity wall insulation installations³⁰.

Of those who had had core energy saving improvements installed³¹, 87% said they had either already recommended having one or more of the measures installed to family and friends or would recommend it to them in future. Three quarters of all respondents (76%) said they had either already recommended making energy saving home improvements in general or would recommend doing so in future.

²⁸ Note: Low base size (Base: 73)

²⁹ Base: 265

³⁰ Base: 139

³¹ Base: 532

Technical notes

The results shown here are based on 878 interviews. These interviews were conducted with a clustered sample of households which had a Green Deal Assessment between the start of July and end of September 2014. Fieldwork was conducted between 11 November and 7 December 2014 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 26% of addresses were excluded from the sample. A stratified random sample was then drawn from the clustered addresses using house type, tenure, region, urbanity and energy rating as stratification variables.

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 which was carried out prior to wave 1.

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 1,800 letters were sent and 878 completed the survey, giving an unadjusted response rate of 49%. Responses were split between online completion (232) and CAPI completion on the interviewer's laptop (646). The average interview length was 33 minutes.

The profile of those interviewed looked similar to that of all households which had a Green Deal Assessment during July-September 2014 (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 July to September 2014 by region, property type, tenure, urbanity and energy band (EPC rating).

Analysis was undertaken on the data using statistical tests to determine statistically significant differences. This means that any differences between results are likely to be down to an actual change, rather than survey error associated with the sampling or methodology. As surveys sample the population and don't ask everyone, then there is scope for a small amount of error. Significance tests account for this and can show when there are likely to be real changes.

Please refer to the full technical report for further details³².

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

³² Available at <https://www.gov.uk/government/publications/green-deal-customer-journey-survey-summary-report-quantitative-survey-wave-4>

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 each wave of the survey for various survey estimates (calculated based on the effective sample size³³ at each wave). 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 for waves 1 to 4

Wave	Sample size	Survey response		
		10% / 90%	30% / 70%	50% / 50%
Wave 1	439	3.3	5.0	5.4
Wave 2	946	2.0	3.0	3.3
Wave 3	904	2.1	3.1	3.4
Wave 4	878	2.1	3.1	3.4

The table shows that at wave 4 for example, the confidence interval for a 50% response would be up to $\pm 3.4\%$. 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 46.6% and 53.4%.

Table 3 below shows the confidence intervals for a range of sub-group sizes between 100 and 500 at waves 2 and 3.

Table 3: Confidence intervals for various sub-group sizes (wave 4)

Sub-group size	Survey response		
	10% / 90%	30% / 70%	50% / 50%
100	6.1	9.3	10.1
200	4.3	6.6	7.2
300	3.5	5.4	5.8
400	3.0	4.6	5.1
500	2.7	4.2	4.5

³³ 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 sizes: wave 1 (325); wave 2 (870); wave 3 (820); wave 4 (822))

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