



Scottish consumer attitudes to Energy Performance Certificates and regulation of energy efficiency



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Executive Summary

Energy Efficient Scotland (EES) is an ambitious Scottish Government programme which aims to improve the energy efficiency of Scotland's housing stock over the next 20 years in a bid to reduce carbon emissions and fuel poverty. One of the proposed strands of the programme is the regulation of minimum standards of energy efficiency in both rented and owner occupied domestic properties. This would take the form of mandatory Energy Performance Certificate (EPC) standards to be achieved by respective sectors by a target date. The Scottish Government has undertaken a number of consultations on EES and regulation of domestic energy efficiency, the most recent of which proposes to bring forward the target date for mandatory EPC bands in the owner occupied sector¹. Originally, the proposed target was for all properties to reach EPC band C or higher by 2040², with the following standards for the private and social rented sectors:

- > Privately rented homes: All privately rented properties must reach EPC band C by 2030. Starting in 2025, any property let to a new tenant must be EPC band C
- > Socially rented homes: All social rented properties must reach EPC band B by 2032. This is in line with the Energy Efficient Standard for Social Housing

The new proposed timeframe for the owner occupier sector is:

- > All owner occupied homes must reach EPC band C by 2030.

All of these regulations would apply to properties for which reaching EPC band C is technically feasible and cost effective.

Our Research

Citizens Advice Scotland (CAS) commissioned an omnibus survey by YouGov in March 2019 in order to seek consumer insights to inform the current consultation on accelerating the target dates for regulation. The aim was to: better understand levels of awareness about EPCs; what homeowners are currently doing, if anything, to upgrade the energy efficiency of their homes; what would motivate homeowners to install more energy efficiency measures; and how Scottish homeowners and renters feel about potential regulation of energy efficiency.

The survey was conducted online and surveyed a nationally representative sample of 1002 Scottish adults. The figures have been weighted by age, gender and geographical region, social grade and highest education level. The results are potentially subject to statistical errors associated with sample-based research. Please note that certain questions were asked of all 1002 respondents, whereas other questions that were specific to either home owners or renters were asked to a smaller sample of home owners (n=620) or renters/ those who live rent free respectively (n=360). These smaller samples are therefore filtered down from the nationally representative sample.

¹ <https://www.gov.scot/publications/energy-efficient-scotland-consultation/>

² <https://www.gov.scot/publications/consultation-analysis-energy-efficient-scotland-making-homes-buildings-warmer-greener-more-efficient/>

Executive Summary - Findings

This paper summarises the results of this omnibus survey, and some of the key findings are as follows:

- > **EPC recognition:** Less than half (44%) of Scottish adults surveyed had heard of EPCs before taking the survey. Awareness was highest in the Highlands and Islands compared with other regions and among adults aged 55+, compared with other age groups. Homeowners were more familiar with EPCs than renters. Most respondents recognised EPCs from the home report of the home that they currently own.
- > **EPC use:** Most respondents who had prior knowledge of EPCs knew that EPCs are used to assess the energy efficiency of a property and that they are required in the home report when a home is sold.
- > **Energy Efficiency measures:** The most common energy efficiency measures installed by homeowners were putting in a new boiler, double or triple glazing, and topping up existing loft insulation. A quarter of homeowners had not fitted any improvements. Solar photovoltaics and heat pumps were the least common installations.
- > **Motivation:** When asked what would motivate them to install energy efficiency (EE) measures, a grant from the Scottish Government to cover the cost of an EE installation was the most popular option (62%), followed by a council tax rebate of £500 in the first year following an EE measure (49%), and knowing how much could be saved in fuel bills by installing the EE measure (42%).
- > **Support for mandatory EPC band C by 2040 (Homeowners):** There was net support among homeowners for a mandatory EPC Band C by target date 2040. **62% of home owners supported the regulation**, of which 23% said ‘strongly agree’ and 39% said ‘tend to support’. 23% were opposed, and 11% strongly opposed to the policy. Of those who supported it, **77% were in support for environmental reasons**. Saving on fuel bills (71%) was another strong motivator, along with making the home more comfortable (63%). The main reasons for opposing the mandatory standard were not wanting to be told what to do with one’s property (66%) and not feeling able to afford the improvements (48%).
- > **Support for mandatory EPC band C by 2032 (Homeowners):** There was net support for this measure among homeowners. **59% of homeowners supported the regulation with the accelerated timeframe**. 21% indicated strong support, and 39% indicated ‘tend to support’. The only region of Scotland that did not have majority support was Central Scotland.
- > **Importance of energy efficiency (Renters):** Energy efficiency was an important consideration for Scottish renters when looking for a new home. Energy efficiency was most important to private tenants (84%) followed by those who rent from a housing association (79%) and those who rent from a local authority (76%).
- > **Support for mandatory EPC band C by 2030 (Renters):** There was strong support for making EPC C mandatory for landlords by 2030. 79% of renters and those who live rent free supported the idea of regulation, with only 7% opposed. 86% of housing association tenants, 81% of private tenants, and 73% of local authority tenants supported the regulation.

Background

What is an Energy Performance Certificate (EPC)?

An Energy Performance Certificate (EPC) rates the energy efficiency of a building³. EPCs are issued by an accredited energy assessor who is listed with an approved organisation and is on the Scottish EPC register⁴. The assessor conducts a (reduced) Standard Assessment Procedure (RdSAP) which assigns a numerical score between 1-100 based on the size and layout of the building, how and when it was constructed, and the way it is insulated, heated, ventilated, and lit.

An EPC band from G (least efficient) to A (most efficient), similar to a letter grade, is assigned to the building based on the SAP score. When they issue an EPC, the energy assessor suggests measures that will help make the home or building more energy efficient. EPCs are valid for ten years, and must be made available when buying, selling, or letting a property. In Scotland, the law requires EPCs to be displayed in the home or building⁵.

How energy efficient are Scottish homes?

The 2017 Scottish Home Condition Survey found that Scottish homes are getting more efficient - 42% of Scottish homes rated EPC band C or higher, an increase from 39% in 2016. The most efficient group is social housing, while the least efficient group is owner occupied. Lower rates of fuel poverty were associated with more energy efficient homes; 13% of households living in dwellings rated C or above were fuel poor⁶.

Energy Efficient Scotland and EPC Standards

Energy Efficient Scotland is a Scottish Government programme which commenced with a pilot phase in 2018. It aims to reducing emissions by 23% in domestic buildings and 59% in non-domestic

buildings by 2032 (from 2015 levels) and to remove poor energy efficiency in the domestic sector as a driver for fuel poverty⁷. The Scottish Government set a goal for all homes to reach EPC band C by 2040 (where technically feasible and cost effective) in conjunction with the EPC band B standard set for Social Housing by the Energy Efficient Standard for Social Housing (EESSH) in 2014⁸. Scottish Government is currently consulting on moving the deadline forward a decade for owner occupied homes.

In the private rented sector, the target for regulation was originally proposed to be EPC band E from April 2020 and EPC band D from April 2022. In order to achieve the proposed 2030 deadline, any property let to a new tenant would be required to reach EPC band C or higher starting in 2025.

Approximately 40,000 homes in the owner occupied sector are upgraded to EPC band C or higher each year, a rate in line with achieving the original 2040 target. This speed of change would have to double to fulfil the fast-tracked time frame, which would increase demand for government funding. The average estimated cost per home to bring all owner occupied homes to standard is £6000 (£6 billion total), but 75% attainment (60% in rural areas and 80% in urban) is possible with an investment of £3500 on average. There are a number of funding schemes (including interest free loans and government grants) available to homeowners, landlords, and business owners to help with the initial costs of installation⁹.

Installation costs are higher in rural areas, but so are savings on fuel costs, making the average payback period for the cost of the upgrade fairly equal in both rural and urban areas. Failure of owner occupiers or landlords who do not have a valid exemption to meet the new standards where cost effective and technically feasible could result in civil fines.

³ Scottish Government (2017) Scottish Home Condition Survey Results. Scottish Government

⁴ Scottish Government. (2016). Guidance on EPCs.

⁵ UK Government. (n.d.). Buying and Selling Your Home.

⁶ Scottish Government. (2017) Scottish Home Condition Survey Results

⁷ Scottish Government. (2018). Energy Efficient Scotland Route Map. Scottish Government.

⁸ Scottish Government (2019). Energy Efficient Scotland Consultation Report. Scottish Government.

⁹ Scottish Government. (2017). Energy efficiency and condition standards in private rented housing: A Scotland's Energy Efficiency Programme Consultation. Scottish Government.

Figure 1: Percentage of homes in highest and lowest EPC Bands, Scottish Housing Condition Survey 2017

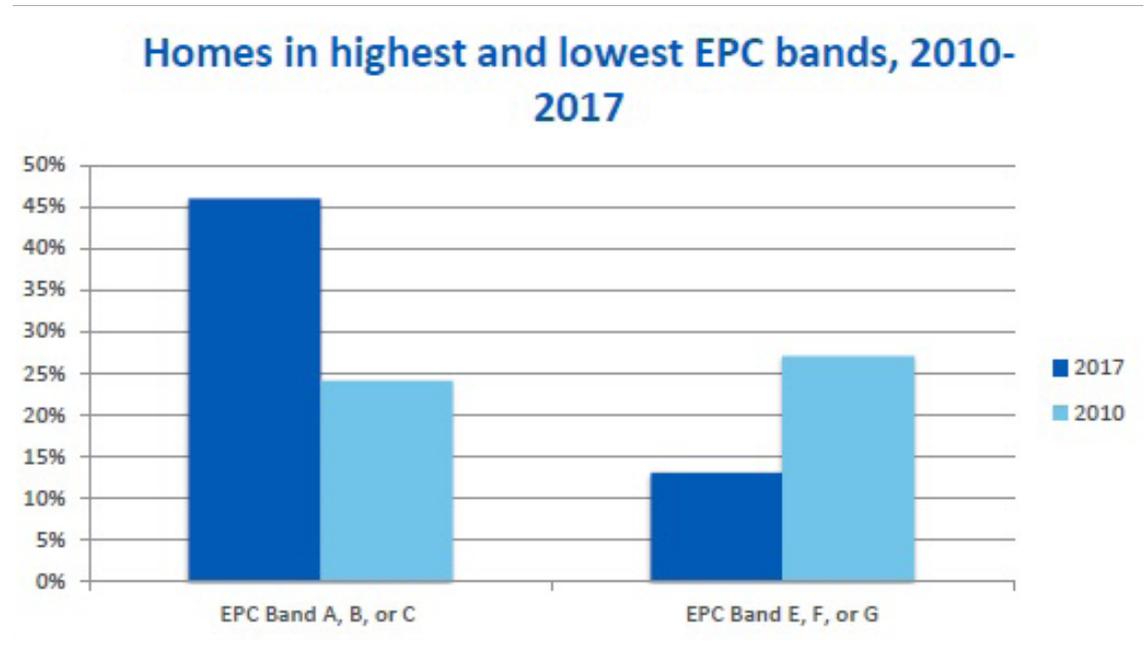
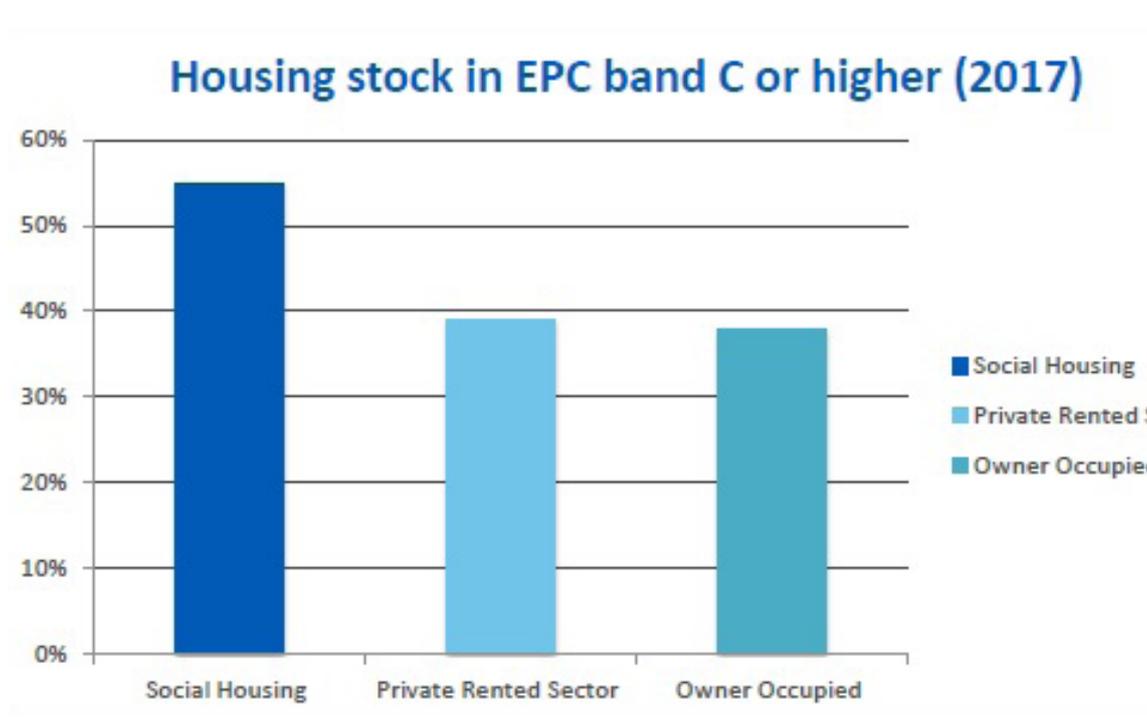


Figure 2: Percentage of housing stock in highest and lowest EPC Bands, Scottish Housing Condition Survey 2017



Survey Findings: Methodology

Citizens Advice Scotland commissioned an omnibus survey from YouGov in March 2019 to learn how Scottish consumers might feel about mandatory EPC standards with backstop dates of 2040 or 2032¹⁰. It is important to note the following caveats to ensure that data is interpreted correctly and in context.

The survey was conducted online and sampled the 800,000 members of the YouGov Plc UK panel who have agreed to take part in surveys. The respondents were selected at random and sent an email inviting them to take part in the survey. All figures, unless otherwise stated, are from YouGov Plc. Total sample size was 1002 adults, of which 620 were home owners and 360 were renters/ those who live rent free. 22 were neither home owners nor renters/those who live rent free, and were categorized as “other.”

The figures have been weighted and are nationally representative of all Scottish adults (aged 18+) by age, gender, region, and social grade and highest education level.

It is not nationally representative of households. Field work for the survey was carried out between 2 and 4 April 2019. All results are potentially subject to statistical errors associated with sample-based research. All visual depictions were created by CAS using this data.

Responses were split into several sub sections, including dwelling type, region, and age. These categories were used in the discussion of results.

Dwelling types and the number of respondents in each were as follows:

	Unweighted base	Weighted Base
Own: Outright	355	331
Own: Mortgage	263	260
Own: Part own through shared ownership scheme	2	2
Rent: Private Landlord	134	141
Rent: Local Authority	80	84
Rent: Housing Association	69	67
Live with friends or family: Pay some rent	33	39
Live with friends or family: Pay no Rent	44	54
Other	22	24

¹⁰ At the time of commissioning the current consultation was not yet published and therefore the date of 2032 was picked in anticipation of a proposed accelerated target. In actuality, the consultation suggests 2030.

Homeowners who own their homes through a part ownership scheme, respondents who live with friends or family, and respondents who marked “other” had base numbers that were too small to be considered statistically representative. As such, they are not included here as categories in the analysis of results by subsections. They are included in net responses.

Regions and the number of respondents from each were as follows:

	North East Scotland	Highlands and Islands	South Scotland	West Scotland	Central	Mid-Scotland and Fife	Lothians	Glasgow
Unweighted Base	147	97	140	83	147	120	152	116
Weighted Base	141	91	137	100	158	114	145	116

The total number of Scottish adults was representative of each region. When broken down into smaller groupings by question some regions had too small a number of homeowners or renters to be statistically representative of the region for that question. In that case, the region is left out of the analysis for that question.

Age groups and the number of respondents in each were as follows:

	18-24	25-34	35-44	45-54	55+
Unweighted Base	73	140	177	181	431
Weighted Base	109	138	176	180	399

The 18-24 age group had too small a sample of homeowners to be a statistically representative sample for many questions. As such, it was left out of the discussion of results when the sample size was too small.



Question 1

(All respondents; n = 1002 weighted base): Before taking this survey, had you ever heard of an Energy Performance Certificate (EPC)?

Overall, less than half (44%) [n = 439] of Scottish adults had heard of EPCs before taking the survey (See figure 3). The distribution of knowledge varied by age, region, and housing sector, with adults over 55 being the most aware (47%) and adults aged 18-24 being the least aware (32%) (See figures 4 and 5). Regional familiarity of EPCs was highest in the Highlands & Islands, where 61% of adults had previously heard of EPCs, and lowest in

Central Scotland, where only 33% had (See figure 6). About half of owner occupiers with (52%) and without (51%) a mortgage had prior knowledge of EPCs. In the rented sector, private rental tenants had the highest level of prior knowledge (47%) while those who rent from their local authority had the lowest level (23%).

Question 2

(All respondents; n = 1002 weighted base): Which, if any, of the following do you think Energy Performance Certificates (EPCs) are used for?

Respondents were able to select multiple answers for this question. Most Scottish adults (71%) [n = 721] were aware that at least one use of EPCs was assessing the energy efficiency of a home. More than a third (37%) knew that EPCs were included as part of the home information pack when a home is sold (See figure 7).

The correct uses and the number of respondents who selected them (counts and percentages) were:

- > To assess the energy efficiency of a property: 721 (71%)
- > To assess the energy efficiency of a boiler: 280 (28%)
- > To assess the energy efficiency of a central heating system: 177 (18%)
- > It is required by law when you sell your home as part of the home information pack: 366 (37%)
- > To help house buyers estimate fuel costs: 263 (26%)
- > To encourage householders to make their home more energy efficient: 293 (29%)

The incorrect uses and the number of respondents who selected them (counts and percentages) were:

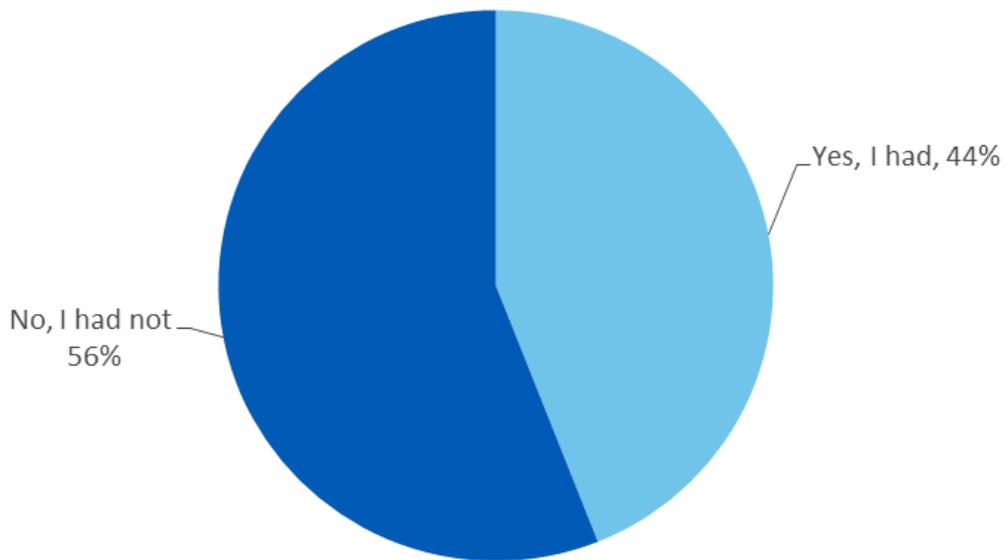
- > To assess how much energy someone uses in a home: 146 (15%)
- > To assess the energy efficiency of white goods: 236 (24%)
- > It is required by law when you buy a property (i.e., the buyer must pay for an EPC assessment): 200 (20%)
- > Other: 11 (1%)
- > Don't know: 157 (16%)

Overall, the correct uses of an EPC were selected more than incorrect uses. Results were somewhat varied across age groups, regions, and housing sector. 36% (40) of adults aged 18-24 thought EPCs were used to assess the energy efficiency of a boiler, compared to between 25% and 28% of adults from other age groups (35-44 and 55+'s respectively, see figure 8). Almost a quarter (23%) of Scottish adults living in Central Scotland did not know what an EPC was used for, compared to only 9% in South Scotland.

23% and 19% respectively of homeowners who own their home outright and own their home with a mortgage believed, incorrectly, that EPCs are required by law when you buy a property, and that the homebuyer was responsible for its cost.

Figure 3: EPC Awareness, Scottish Adults

Before this survey, had you heard of Energy Performance Certificates?



Homeowners with a mortgage had the highest percentage of respondents who correctly stated that EPCs are required by law when selling a property (44%) while renters who rent their homes from a local authority or housing association were the least aware (19%). A quarter (26%) of renters who rent their home from a Local Authority or a Housing Association did not have an idea of what an EPC is used for.

Figure 4: EPC Awareness, Scottish adults by age group

Before this Survey, had you heard of Energy Performance Certificates?

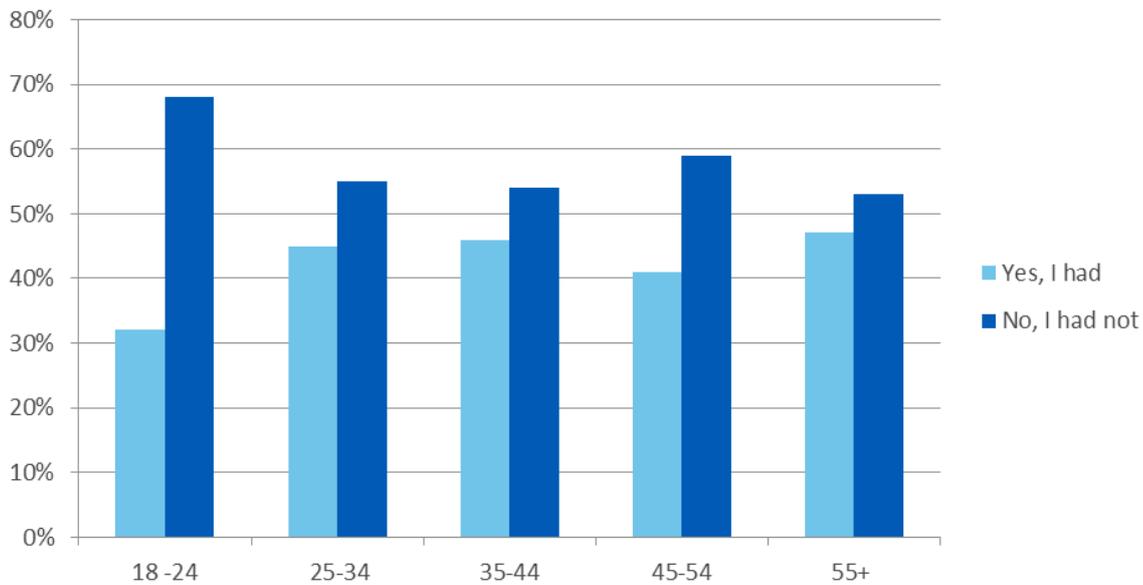


Figure 5: EPC Awareness, Scottish adults by housing sector

Before this survey, had you heard of Energy Performance Certificates?

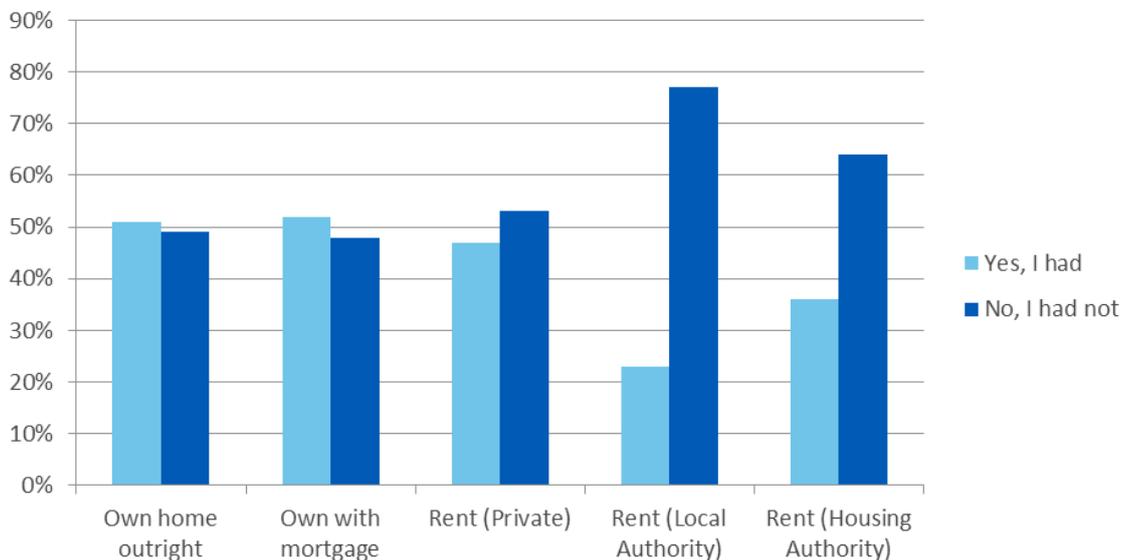


Figure 6: EPC Awareness, Scottish adults by region

Before this survey, had you heard of Energy Performance Certificates?

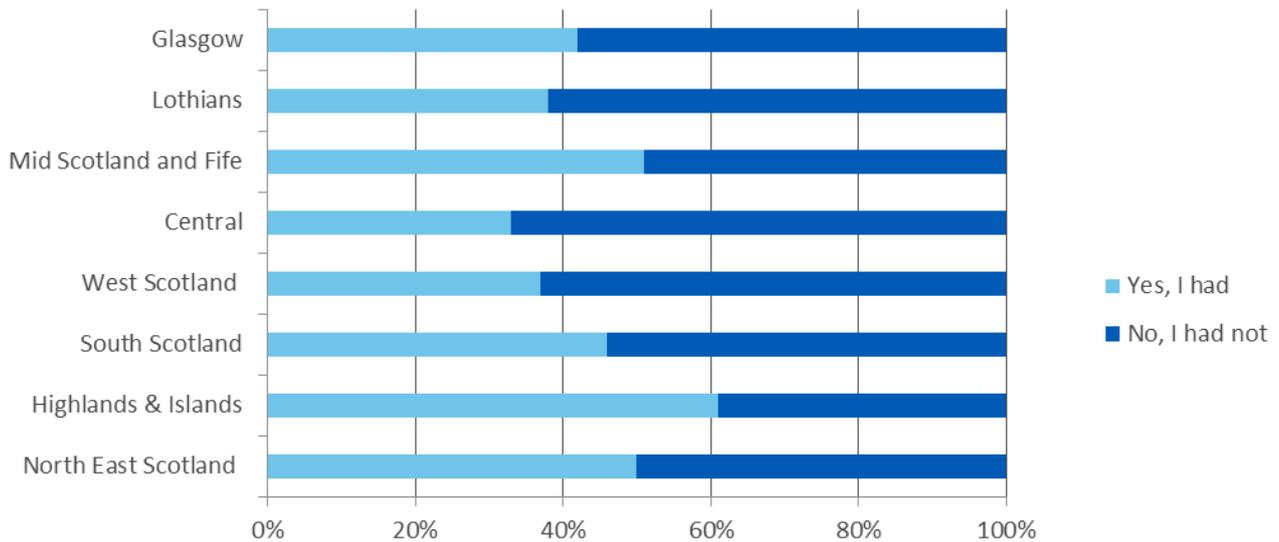


Figure 7: EPC use, Scottish adults. (Correct answers indicated with an asterisk)

Which, if any of these do you think an EPC is used for?

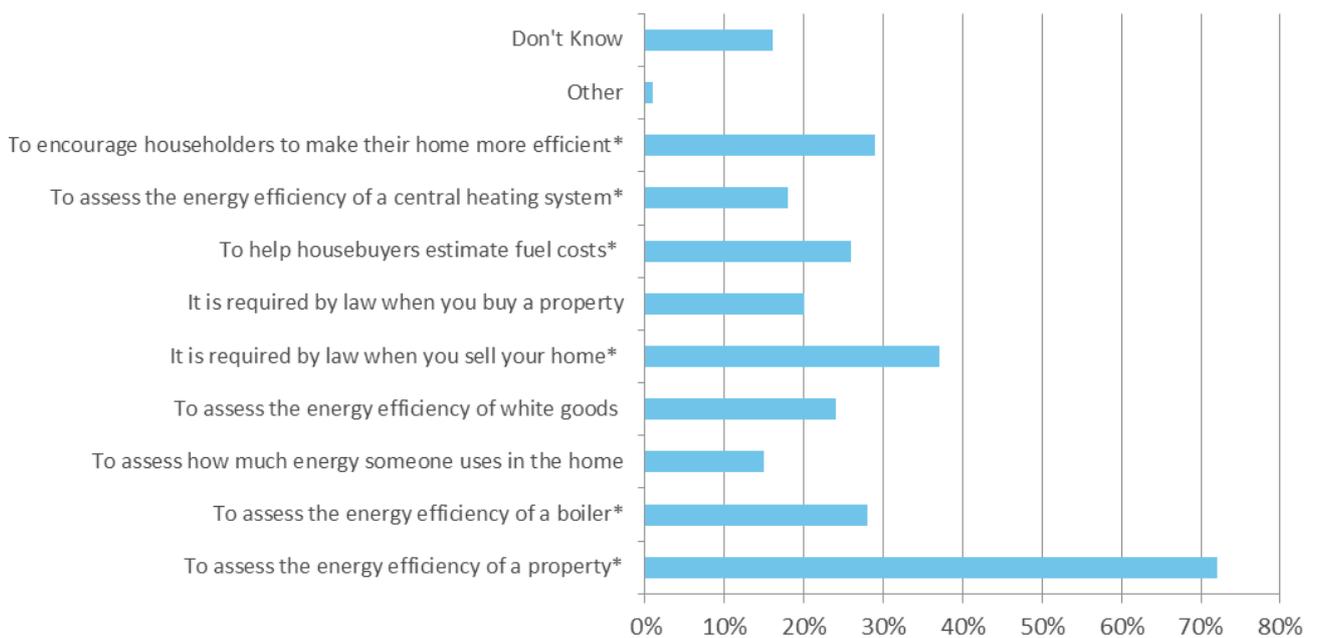


Figure 8: EPC use, Scottish adults by age group. (Correct answers indicated with an asterisk)

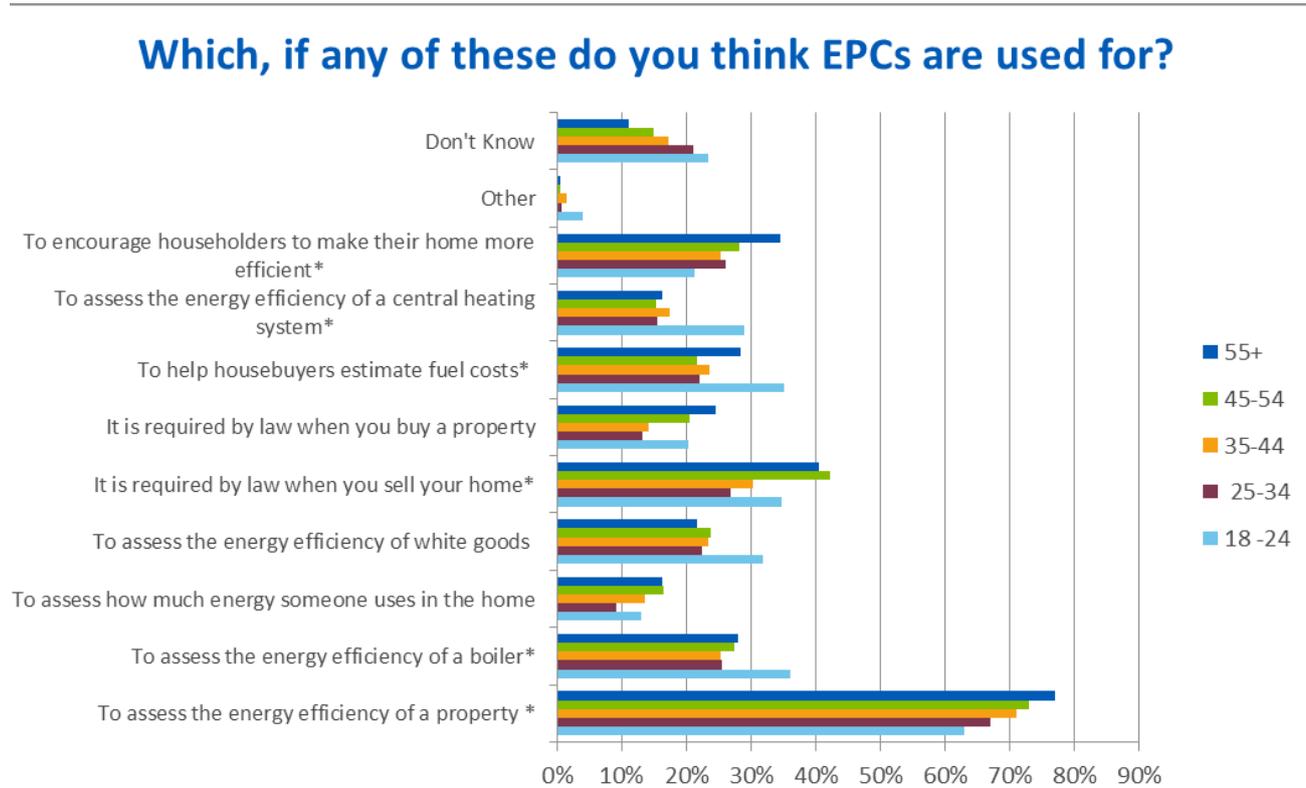
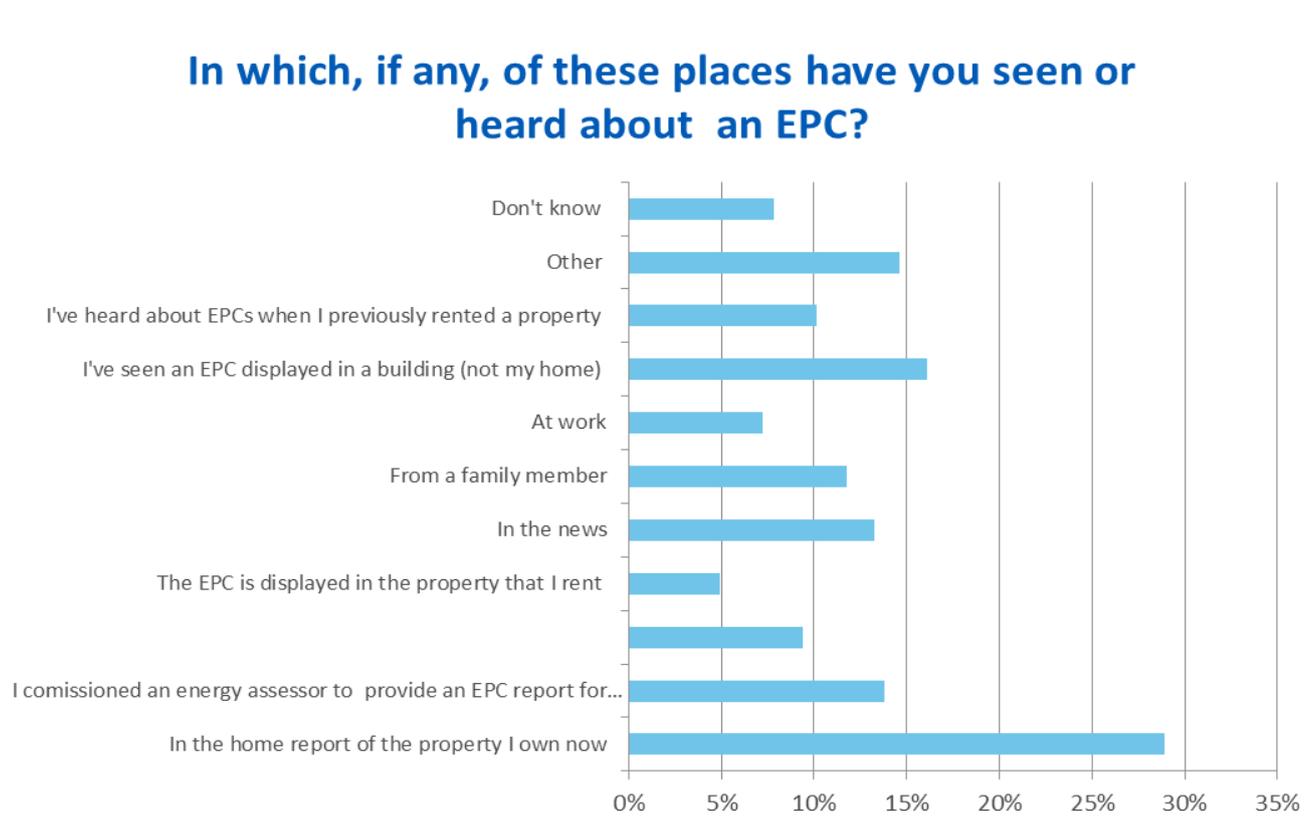


Figure 9: Places EPCs have been seen, Scottish adults



Question 3:

In which of the following places, if any, have you seen/heard about EPCs?
(All Scottish adults who have heard of EPCs: n = 439 weighted base)

Respondents were able to select more than one answer to this question, with the most common responses being in the home report of the home that they currently own (29%). This suggests that these homeowners bought their homes in the last ten years, as EPCs were introduced in 2009. Other common places were displayed in a building other than their home (16%) and somewhere other than the listed options (15%). 14% had previously commissioned an EPC for a property they owned. (See figure 9). 42% of 25-34 and 39% of 35-44 year olds had seen an EPC in the home report of the home they currently owned, compared to 25% of adults aged 45-54 and 26% of adults aged 55+. The base number of Scottish adults aged 18-24 who had/seen heard about EPCs before the survey was too small to yield statistically representative results.

Over half of homeowners who owned their home with a mortgage (56%) had seen an EPC included with their home report, while 46% of tenants of private landlords had seen EPCs in paperwork when first renting their current home, and 30% heard about EPCs when they previously rented a property. The base number of renters who rented from local authorities or housing authorities who responded to this question was too small to yield statistically representative results¹¹.

Question 4:

Which, if any, of the following have you EVER done to upgrade the energy efficiency of your home?
(Scottish homeowners, n = 593 weighted base)

The most common measures taken to upgrade energy efficiency were installation of a new, more energy efficient boiler (46%), installation of double or triple glazing (41%) and adding a top up of existing loft installation (34%). It was more common for homeowners to have topped up loft insulation than to have installed it where there was none already (20%). 25% of respondents had not undertaken any energy efficiency upgrades (See figure 10). Respondents were able to choose more than one answer to the question. It should be noted that only owner-occupiers responded to this question. Cavity wall insulation (24%) was far more common a measure than solid wall insulation (6%) or underfloor insulation (6%). Heat pumps (1%), solar thermal panels (2%) and solar photovoltaics (4%) were the rarest upgrades.

More owner occupiers who owned their home outright had installed top-ups of loft installation (43%) than owner occupiers who had a mortgage (23%) and had undertaken more upgrades in general. 34% of owner occupiers with a mortgage had not undertaken any improvements at all (See figure 11).

Other measures, written in by respondents included installing low energy lighting, including LED bulbs, upgrading central heating or radiators, draught proofing doors, making joinery and masonry airtight, and in the case of one respondent, putting on a jumper.

¹¹ The "Other" category was anywhere else not listed as an option. Respondents did not see the question.

Figure 10: Existing energy efficiency upgrades, Scottish homeowners

Which of the following have you done to upgrade the energy efficiency of your home?

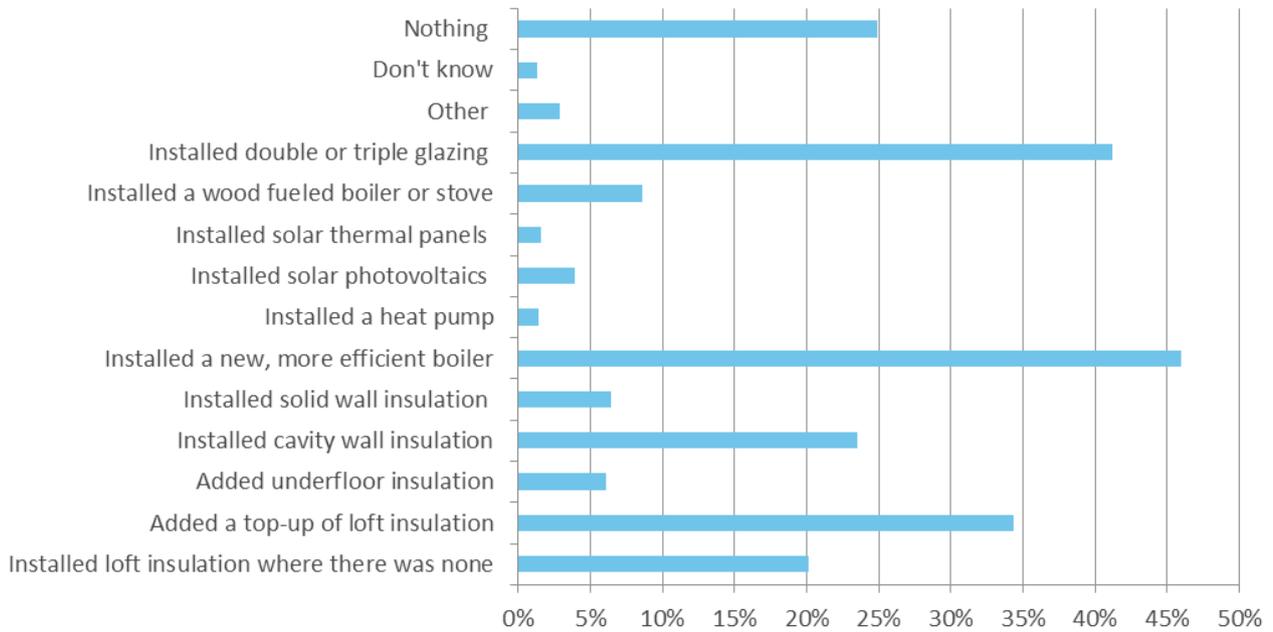
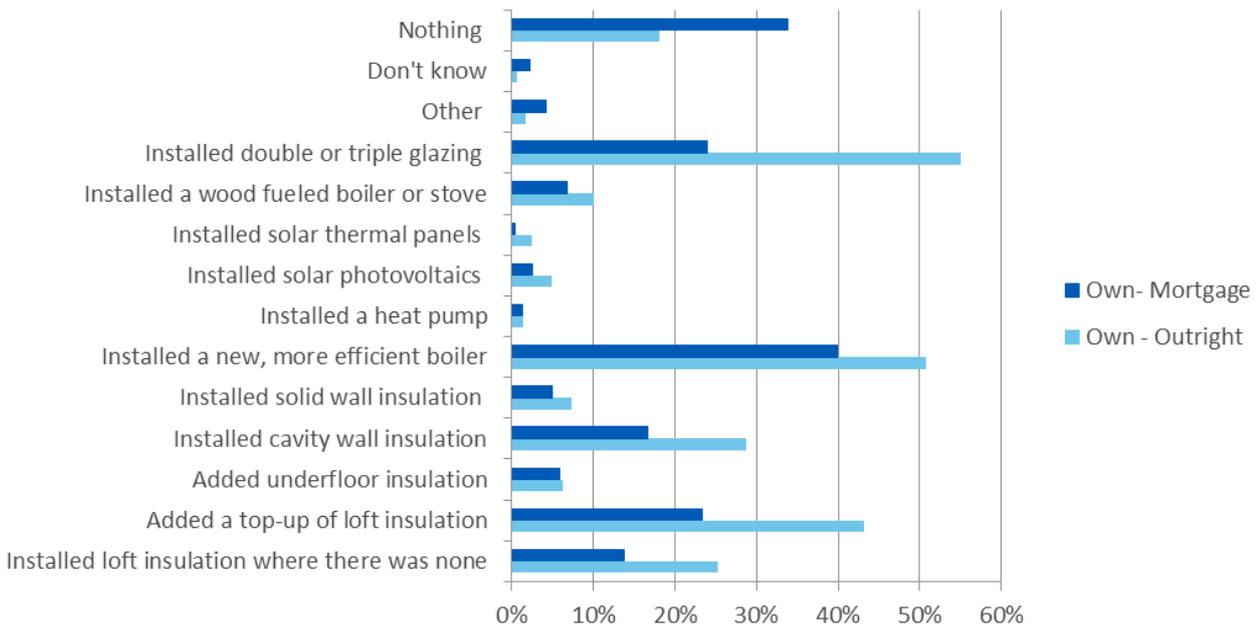


Figure 11: Existing energy efficiency upgrades, Scottish homeowners

Which of the following have you done to upgrade the energy efficiency of your home?



Question 5:

As a reminder, by ‘upgrade the energy efficiency’, we mean reduce the amount of energy required for your home... Still thinking about your MAIN home (i.e. the one you spend most of your time in)... Which, if any, of the following forms of support would motivate you to further upgrade the energy efficiency of your home? (Multiple Choice) (Scottish homeowners, n = 593 weighted base)

Respondents were again asked to select multiple answers. The most popular option was a grant from the Scottish government to partly cover the costs of the measure (62%), followed by a council tax rebate of £500 in the first year following the upgrade (49%) and knowing how much could be saved on fuel bills (42%). Interest free loans from the Scottish government and advice tailored to the homeowner and their property both received interest (32%), while respondents were less motivated by a council tax rebate of £1000 over ten years following upgrading the home by two EPC bands (24%), knowing how much their carbon footprint could be reduced (20%), and knowing the equipment, measurement, and installer were accredited (24%). The incentive respondents found the least motivational was having quotes and installation arranged for them (15%). 12% of homeowners surveyed said there was no incentive that would motivate them to install further upgrades (See figure 12).

Deliberative research commissioned by CAS and published in 2017 concurred that the one time council tax rebate of £500 was a popular incentive¹². Participants in the research were offered a range of incentives including interest free loans, a £500 council tax rebate in the first year, and a £1000 council tax rebate over ten years, among others¹³. The £500 incentive proved the most popular, with one male participant from Perth commenting that “It’s free cash, who doesn’t like that?”

¹² https://www.cas.org.uk/system/files/publications/consumer_participation_in_energy_policy_-_ipsos_mori_involvement_technical_report.pdf

¹³ The research was conducted through a series of focus groups, a citizen’s jury, and in-depth focus groups known as structured dialogues. The research was carried out on behalf of Citizens Advice Scotland by Ipsos Mori and Involve in 2017.

And if you have got a house down at the lower end of those EPC ranges you may not need to do much”¹⁴. Participants did raise questions about who would conduct the energy assessment, how homeowners would provide evidence of an improved EPC rating, and who would pay any related fees.

From the YouGov survey, home owners with a mortgage were more motivated by the grant (65%), interest free loan (40%), £500 council tax rebate (50%), and £1000 council tax rebate (28%) than owner occupiers who own their homes outright. The largest difference was the response to the interest free loan – while 40% of owner occupiers with a mortgage responded this would help incentivise them to make upgrades, only 26% of owner occupiers who own their homes outright said the same (See figure 13).

Responses varied by age group. 68% of home owners aged 35-44 indicated that a grant from the Scottish Government would motivate them to make energy efficiency upgrades to their homes. Respondents aged 25-34 and 55+ were the groups most reluctant to make any upgrades, with 13% of the younger age group and 15% of the 55+ responding that nothing in particular would motivate them to upgrade the energy efficiency of their home. By contrast, only 4% of respondents aged 35-44 and 9% of respondents aged 45-54 said that nothing would incentivise them. The sample size for the 18-24 age group was too small to be statistically representative for this question.

¹⁴ Ipsos Mori and Involve 2017, pg. 29

Figure 12: Motivations to install energy efficiency upgrades, Scottish homeowners

Which, if any of these would motivate you to further update the energy efficiency of your home?

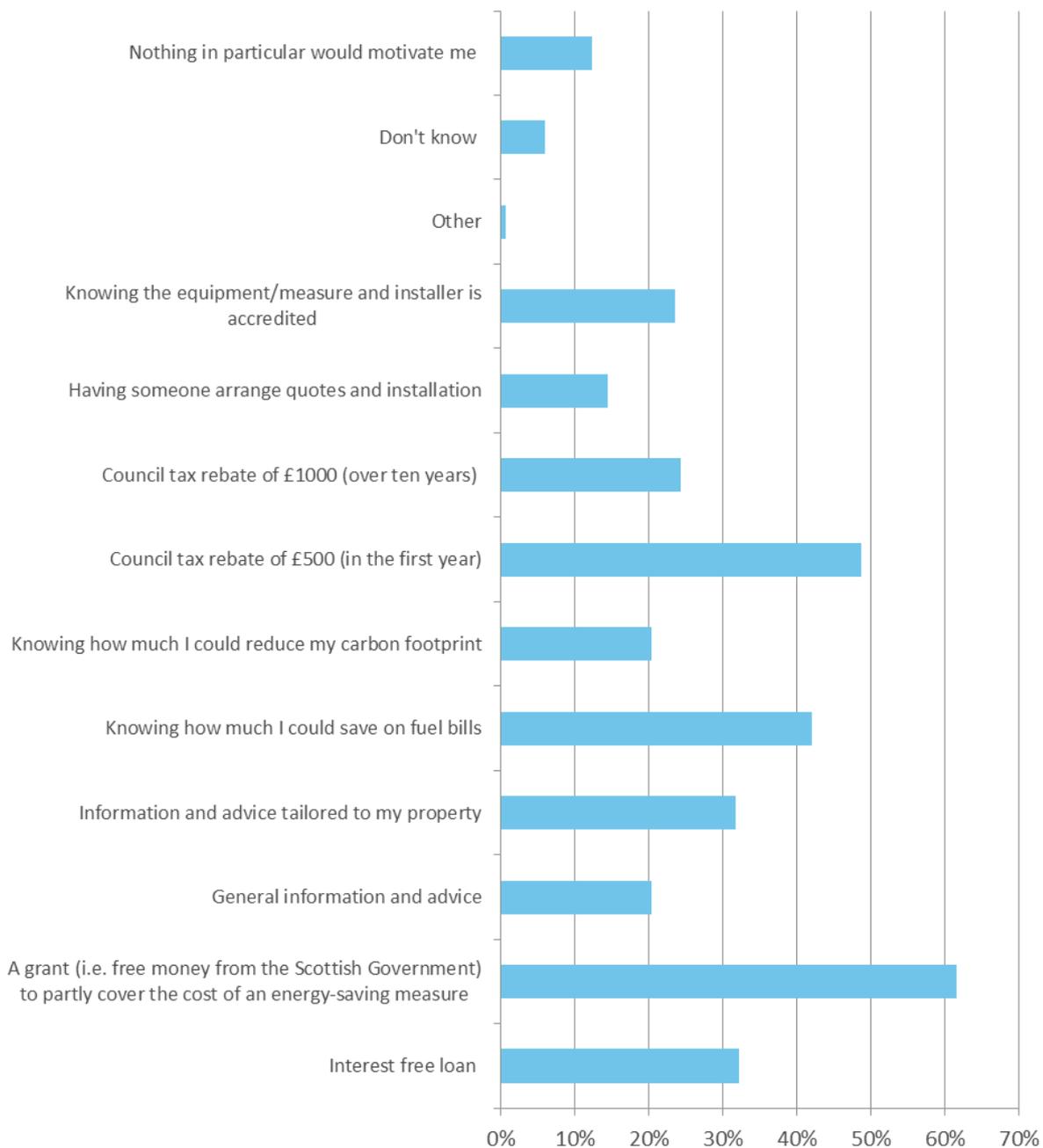
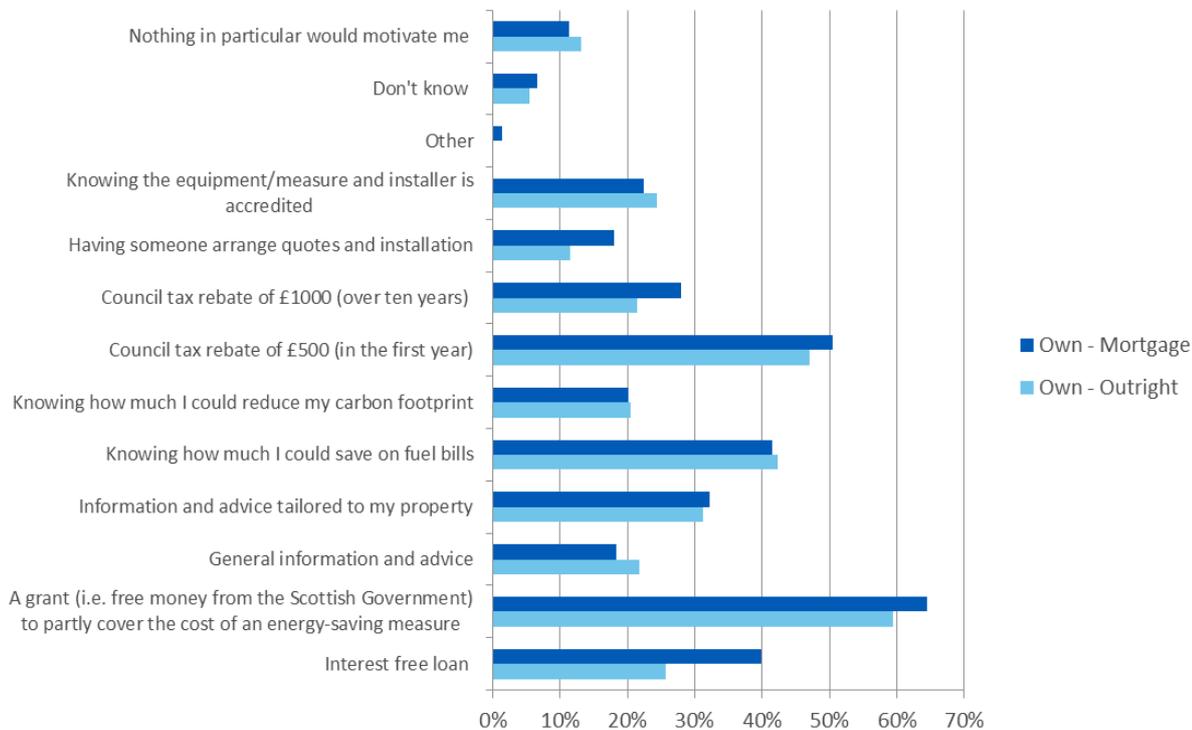


Figure 13: Motivations to install energy efficiency upgrades, Scottish homeowners by owner type

Which, if any of these would motivate you to further update the energy efficiency of your home?



Question 6:

The Scottish Government may decide to make it mandatory for all homes to reach an Energy Performance Certificate (EPC) ‘Band C’ as a minimum rating by 2040. To what extent would you support or oppose this legislation? (Scottish homeowners, n = 593 weighted base)

Overall, there was support for this policy. 62% [n= 370] of respondents indicated that they would support the regulation, with 23% [n =138] saying they strongly support it, and 39% saying they tend to support it [n=232]. 23% [n = 135] of respondents opposed it, with 11% [n = 66] strongly against it. 15% [n= 88] replied that they were not sure or did not know if they supported or opposed the policy. Only owner occupiers answered this question (See figure 16).

Support was strongest (69%) in the 35-44 age group, though net support was strong in every group. Net opposition was lowest in the 25-34 age group (11%), which also had the largest percentage of strong supporters (36%), and respondents who did not know (23%). It should be noted that the 25-34 age group was the smallest of the statistically representative groups (n = 51 weighted base). Respondents 55+ were the largest group of respondents and were somewhat more moderate in their support, with 22% strong support, 38% tending to support, 12% tending to oppose, 14% strongly opposed, and 15% unsure. Overall, 60% of the 55+ age group supported the measure to some extent (See figure 15).

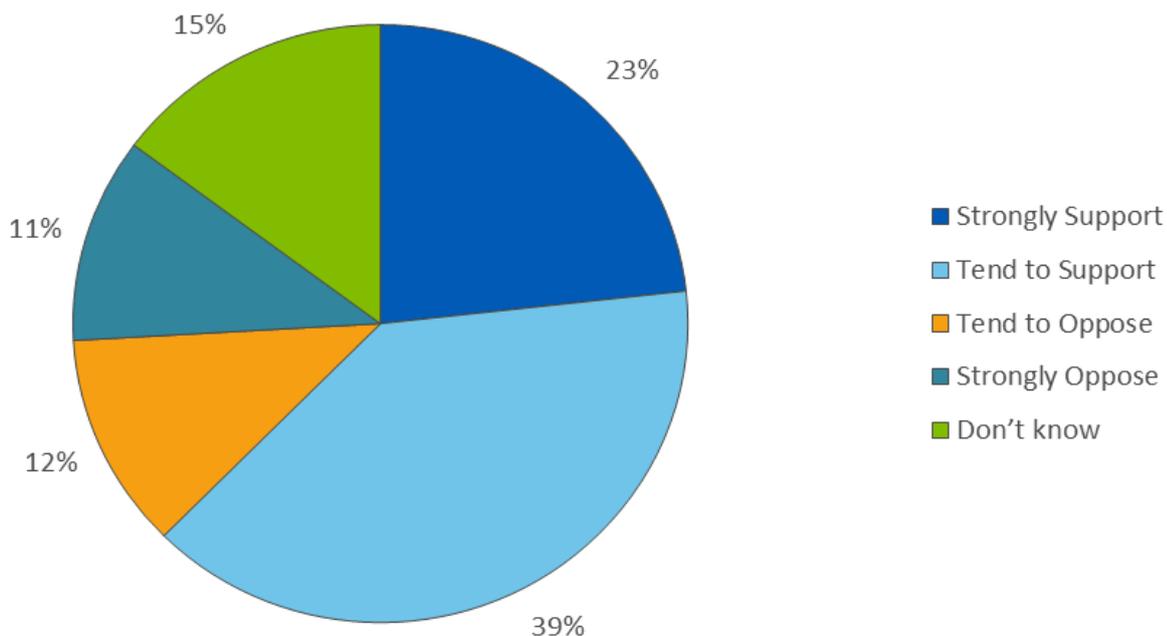
The base number of 18-24 year olds was not large enough to be statistically representative.

Support did not vary much between home owners who own their home outright and home owners who have a mortgage. 61% of homeowners without a mortgage supported the legislation, while 65% of those with a mortgage did. The largest difference between the two groups was those who were strongly opposed; 13% of homeowners without a mortgage were strongly opposed while only 9% of owners with a mortgage felt the same, perhaps reflecting the perceived additional burden of paying for measures on top of their mortgage commitment.

Regionally, support was lowest in Central Scotland, where only 53% of respondents supported the legislation, and South Scotland, where 56% did. Support was highest in North East Scotland and the Highlands and Islands, where there was 69% support, followed by West Scotland (68%), the Lothians (63%), and Mid-Scotland & Fife (60%). There was not a large enough sample size from Glasgow to be statistically representative for the question. It should be reiterated that questions posed only to homeowners or only to renters are not statistically representative of Scotland as a whole, they are filtered down from the nationally representative sample.

Figure 14: Extent of support/opposition to mandatory EPC Band C for homeowners by 2040, Scottish homeowners.

To what extent do you support or oppose mandatory EPC band C for homeowners by 2040?

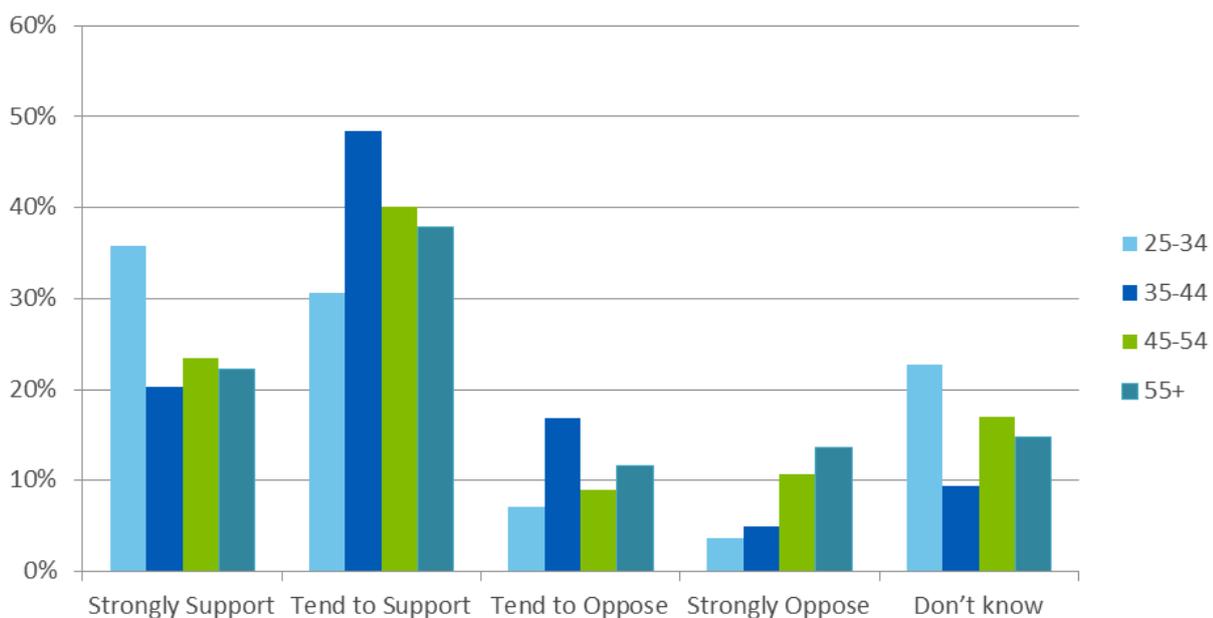


These findings are in direct contrast with the 2017 deliberative research commissioned by Citizens Advice Scotland undertaken by Ipsos Mori and Involve¹⁵. In 2017 participants in ‘structured dialogue’ focus groups were strongly (65%) opposed to the same regulation, with many describing it as “bullying”, “controlling,” and “robbery¹⁶.” This may be because participants in the 2017 research were given a more detailed scenario, in which homebuyers would be subject to a £1000 fine for not upgrading the EPC of their property within 12 months of purchase, adding a substantial and actual penalty to the regulation, while in the most recent survey, only regulation was suggested, without a concrete penalty for non-compliance.

Participants expressed concerns about the practicalities of imposing the regulation, the effect it could have on the more vulnerable members of the population, and the downstream effects the scenario posed to them could have on the housing market. The citizen’s jury in particular, became more opposed to the policy the more it was discussed. The difference in results could suggest that support could diminish when homeowners are given more information. Further research would be needed to determine this. It highlights that two different research methodologies produce very different results; the way in which a question is framed, and the information presented can significantly affect answers. Caution is therefore required when interpreting these results.

Figure 15*: Extent of support/opposition to mandatory EPC Band C for homeowners by 2040, Scottish homeowners by age group

To what extent do you support or oppose mandatory EPC band C for owner occupiers by 2040?



¹⁵ https://www.cas.org.uk/system/files/publications/consumer_participation_in_energy_policy_-_ipsos_mori-involve_technical_report.pdf

¹⁶ Ipsos Mori and Involve, 2017, pg. 31

Question 7:

You previously mentioned that you would support the decision of the Scottish Government making the minimum Energy Performance Certificate (EPC) ‘Band C’ rating mandatory for all home owners by 2040, when thinking about how it could affect you... Which, if any, of the following are your reasons for this?

(Scottish homeowners supportive of EPC C by 2040, n = 370 weighted base)

77% of homeowners said that they supported the measure for environmental reasons, making it the most popular response, followed by saving on fuel bills (71%) and making the home more comfortable (63%). 32% supported the legislation because they felt it would increase property value (See figure 16). Other respondents wrote in responses such as:

*“I think it is a good and important idea,”
“[it will] improve rental conditions, [my] own home already within EPC band C” and “I expect to be gone by then.”*

80% and 81% of the 35-44 and 44-55 age groups respectively chose environmental reasons as one of the reasons for their support, compared to 75% of the 55+ age group. 35-44 year olds were the least concerned with increasing property values as a motivation (25%), and 55+ put more importance than the other two groups on making the home warmer and more comfortable (68%) and reducing fuel bills (74%). The 55+ age group had the largest number of respondents (see figure 18). Owner occupiers who owned their home without a mortgage were more concerned with making the home warmer or more comfortable (67%) than owner occupiers with a mortgage (57%) (See figures 17- 18). The base number of 18- 24 year olds and 24-35 year olds was not large enough to be statistically representative.

Figure 16: Reasons for support of mandatory EPC Band C for homeowners by 2040, Scottish homeowners

Why do you support mandatory EPC band C for owner occupiers by 2040?

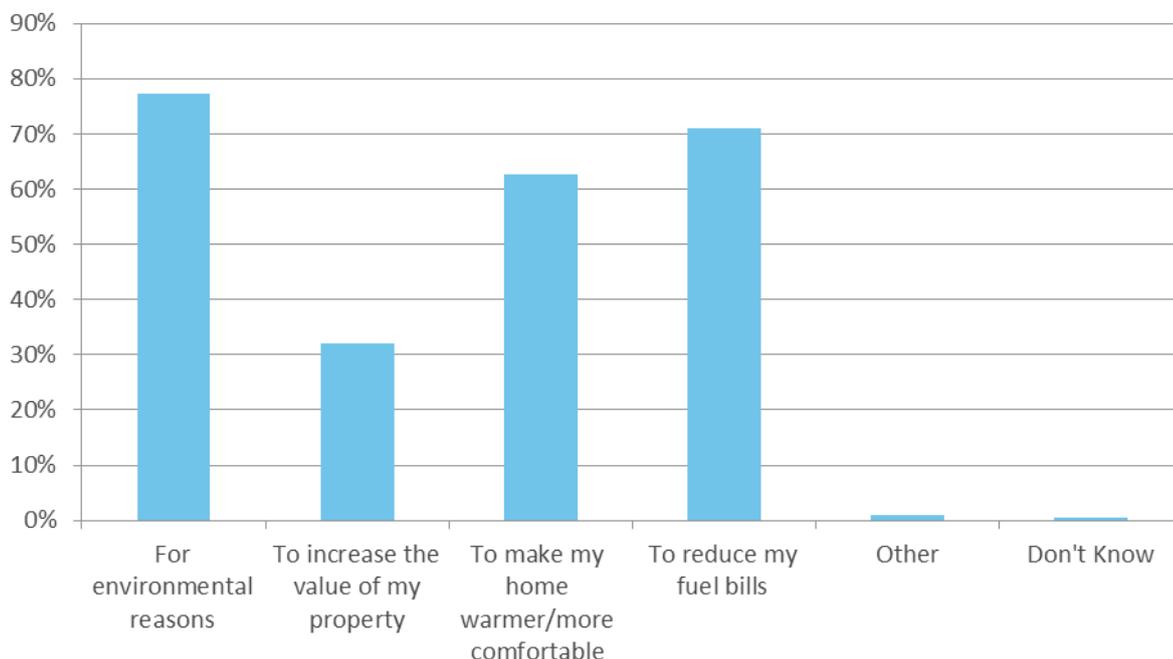


Figure 17: Reasons for support of mandatory EPC Band C for homeowners by 2040, Scottish homeowners by owner type

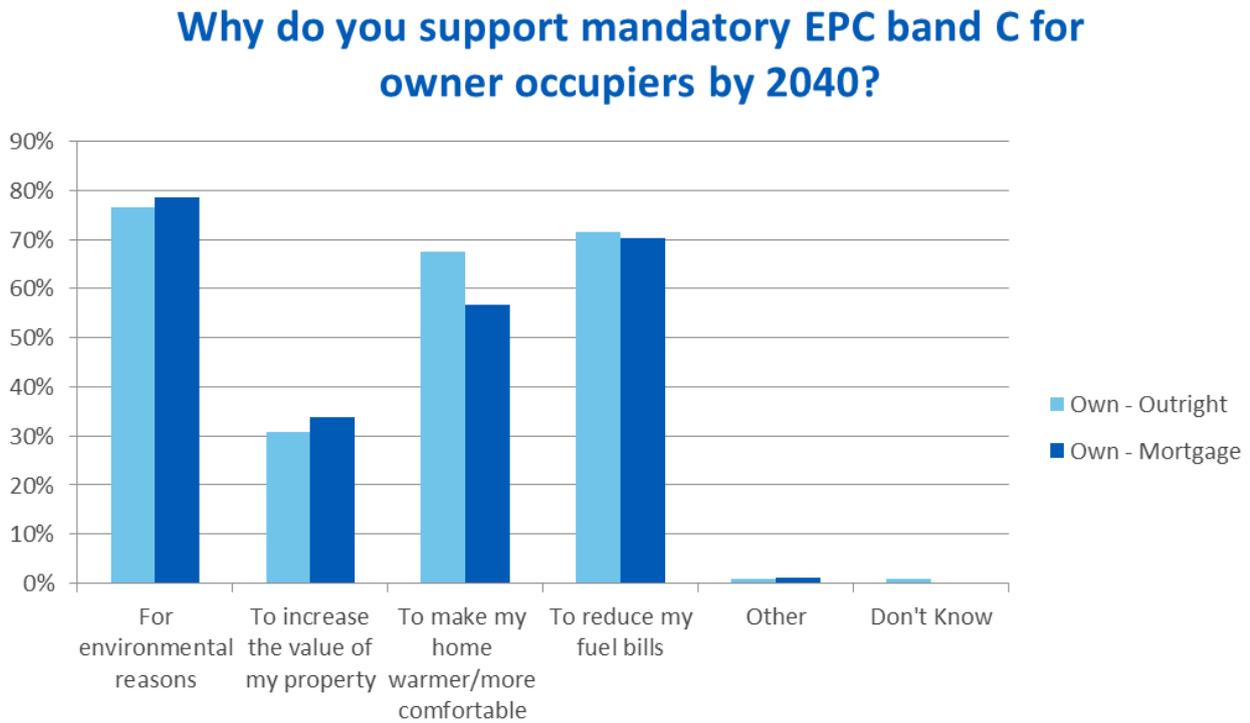
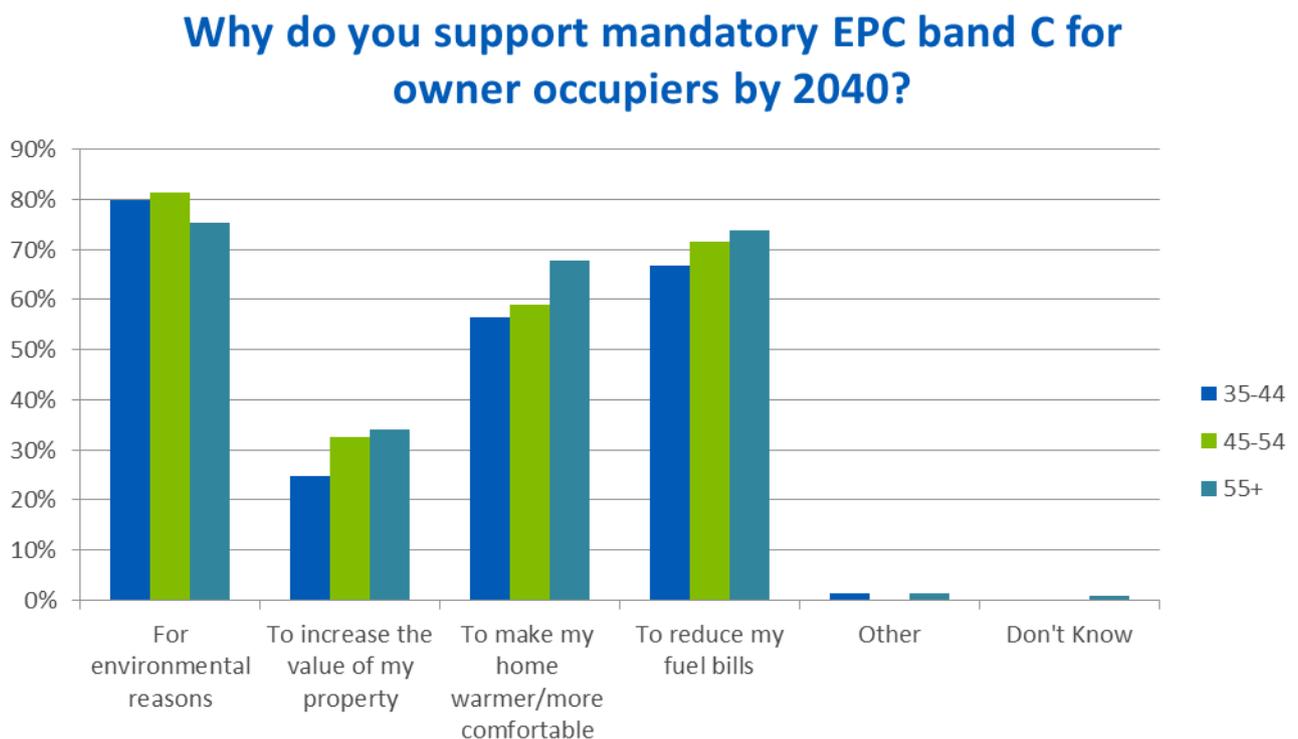


Figure 18: Reasons for support of mandatory EPC Band C for homeowners by 2040, Scottish homeowners by age group



Question 8:

You previously mentioned that you would oppose the decision of the Scottish Government making the minimum Energy Performance Certificate (EPC) ‘Band C’ rating mandatory for all home owners by 2040, when thinking about how it could affect you... Which, if any, of the following are your reasons for this? Please select all that apply.

(Scottish homeowners who oppose EPC C by 2040, n = 135 weighted base)

The most popular reason given for opposing the policy was not wanting to be told what to do with one’s property (68%) followed by feeling they could not afford to make the necessary improvements (48%). A quarter (24%) of respondents were against the idea of regulation because the only way to increase the EPC of their property involved installing measures that they did not want to, such as solar photovoltaic panels. 22% opposed because it would be practically impossible due to technical or planning restrictions to upgrade the energy efficiency of their property, or wanted to spend their money on other things. 18% of respondents did not want the hassle, and 12% planned on moving property before March of 2029. 3% of those who opposed did not know why they were against the measure (See figure 19). Owner occupiers who own their home without a mortgage were more strongly opposed to being told what to do with their property (74%) than those who owned their home with a mortgage (56%). More homeowners who had a mortgage (56%) felt that they could not afford to make the necessary improvements than homeowners who own their homes outright (43%). Additionally, more homeowners without a mortgage opposed regulation because it’s practically impossible for their property (e.g. due to technical or regulatory restraints)¹⁷ (25%) or because they would have to make upgrades they did not want (31%) than those who have a mortgage (18% and 12%) (See figure 20).

Other responses included concern that it would have an “effect on the character of historic buildings,” a feeling that “companies should deal with it not households” a mistrust of the Scottish government, an owner occupier feeling “fed up with being told how to save energy” and that they “already do my bit,” that this regulation is a “knee jerk” and apprehension over the possibility of “poor people suddenly [being] thrown into poverty with huge home upgrade bills...This does not seem right.”

The reasoning behind opposing the policy broadly reflected the reasoning behind opposing regulation in the 2017 research conducted by Ipsos Mori and Involve. The main comments in 2017 were resistance to government interference in Scottish homes (the idea of “a person’s home is their castle) which was the most popular reason for opposition in this survey. However, only one homeowner expressed concern for the costs to the most vulnerable member of society in this survey, which was a more dominant concern in the 2017 discussions. No respondents to this survey expressed concern about the practicalities of administering the regulation, which was a central debate amongst the 2017 research participants.

¹⁷ I.e. planning restrictions or technical difficulties

Figure 19*: Reasons for opposition to mandatory EPC Band C for homeowners by 2040, Scottish homeowners

Why do you oppose mandatory EPC band C for owner occupiers by 2040?

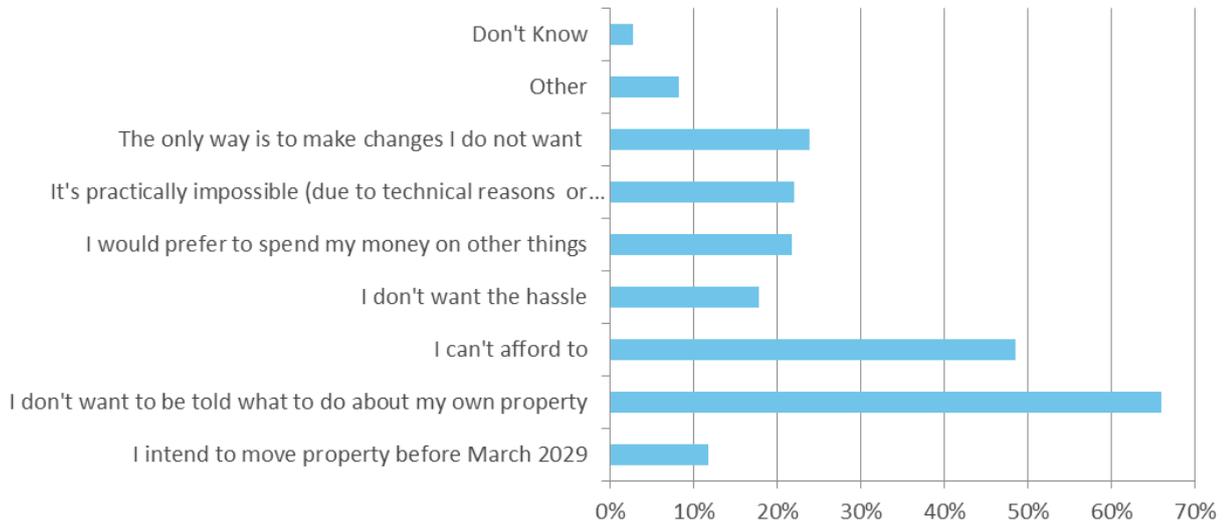
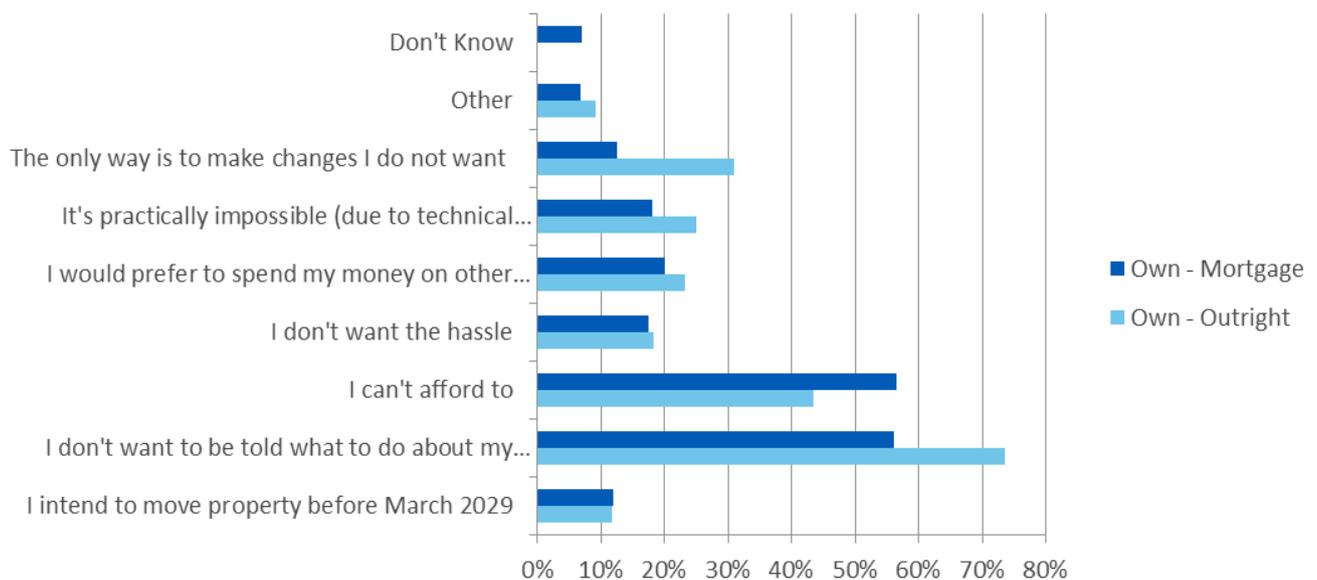


Figure 20: Reasons for opposition to mandatory EPC Band C for homeowners by 2040, Scottish homeowners by owner type

Why do you oppose mandatory EPC band C for owner occupiers by 2040?



Question 9:

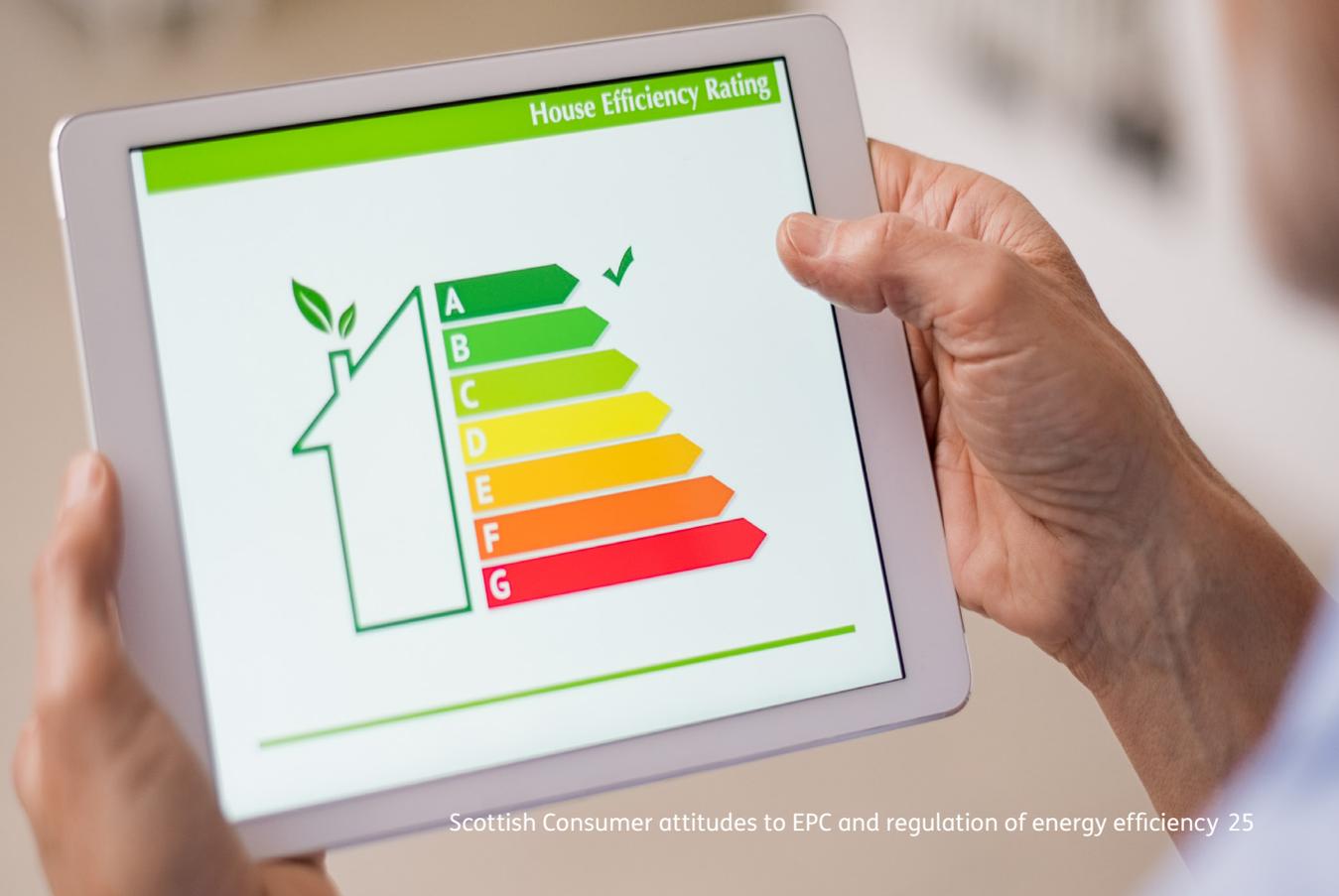
(Scottish homeowners, n = 593 weighted base): To what extent would you support or oppose the Scottish Government making this mandatory for home owners by 2032 (i.e. 13 years in the future)?

The regulation still had net support (59%) under the new timeframe. Roughly the same number of homeowners (21%) strongly supported the policy, while slightly more than strongly opposed Question 7 (14%) strongly opposed. The same number of homeowners tended to oppose (14%) as strongly opposed (14%). Roughly the same amount of homeowners (13%) chose “don’t know.” The percentage of homeowners who tended to support remained the same (39%) (See figure 21).

Support was strongest in the 45-54 age group, with 64% net support. The 25-34 age group was close behind, with 63% overall support and 29% strong support. Only 5% of respondents aged 25-34 strongly opposed the policy. The 25-34 age group was the smallest group that was still considered statistically representative (n = 51 weighted base).

Opposition was highest (net 31%) among the 55+ age group, who were also the largest group represented in the sample. Net support amongst those aged 55+ was 57% with the accelerated timeline (See figure 22). Respondents aged 18-24 were not a large enough group to be considered statistically representative.

Central Scotland was the only region that did not have majority support of the 2032 deadline - only 48% of respondents indicated support of the policy to some extent. Homeowners in Mid-Scotland and Fife and the Lothians were in favour of the 2032 deadline (61% and 55% net support respectively). Support was strongest in the Highlands and Islands (69%), North East Scotland (68%), and West Scotland (66%). It should be noted that sample sizes were smaller in these regions (See figure 23). The Glasgow region did not have a large enough base number of respondents to be representative.



Homeowners with a mortgage supported the 2032 deadline more than homeowners who own their homes outright, though there was overall support from both groups. (62% and 57% net support, respectively). 13% of respondents from each group did not know how they felt about the faster timeframe. The level of strong support was roughly the same for each group, with 20% of those who own their home outright and 21% of those who own their home with a mortgage indicating strong support of the 2032 deadline. The base number of those who owned their home outright was larger than the sample of those who own their home with a mortgage (See figure 24).

Figure 21: Extent of support/opposition to mandatory EPC Band C for homeowners by 2032, Scottish homeowners

To what extent do you support or oppose mandatory EPC band C for homeowners by 2032?

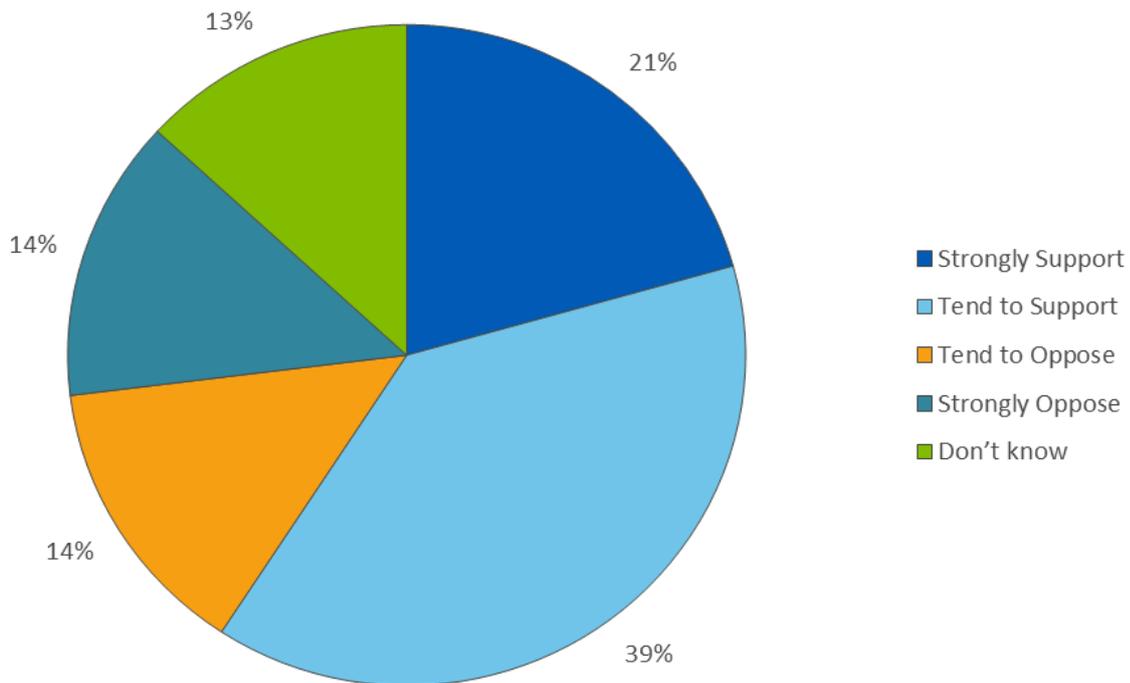


Figure 22: Extent of support/opposition to mandatory EPC Band C for homeowners by 2032, Scottish homeowners by age group

To what extent do you support or oppose mandatory EPC band C for homeowners by 2032?

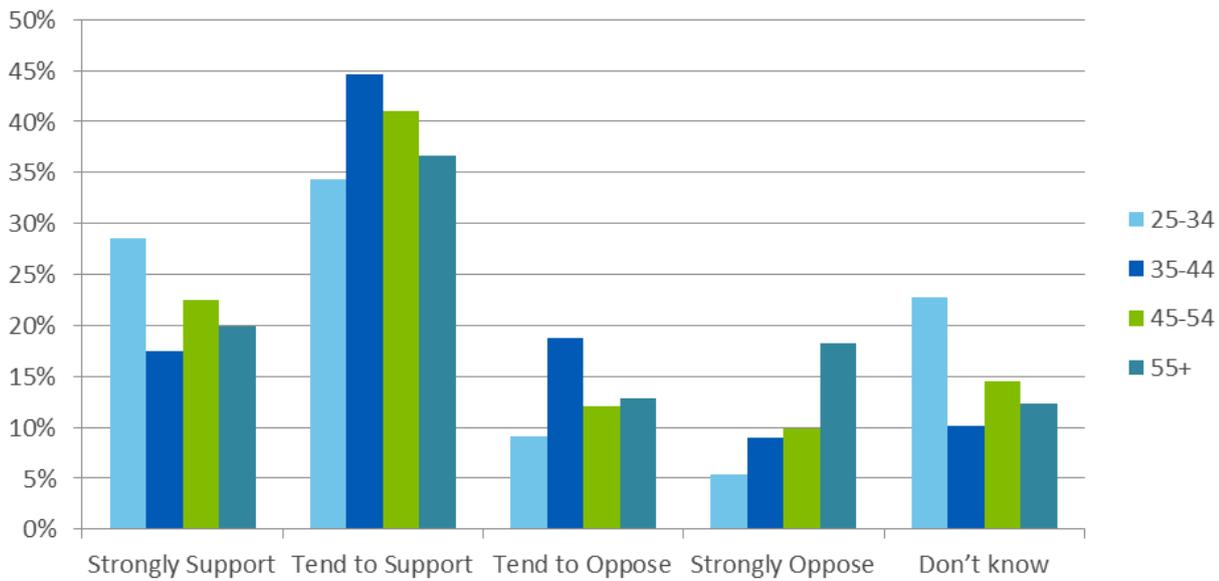


Figure 23: Extent of support/opposition to mandatory EPC Band C for homeowners by 2032, Scottish Homeowners by age group

To what extent do you support or oppose mandatory EPC C for homeowners by 2032?

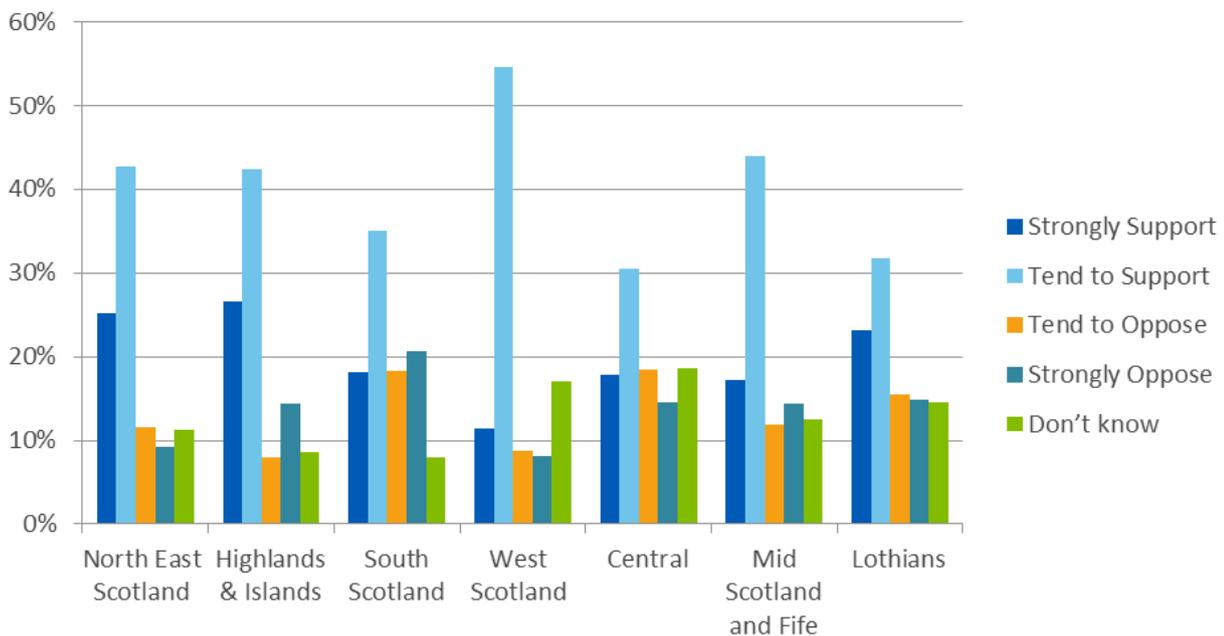
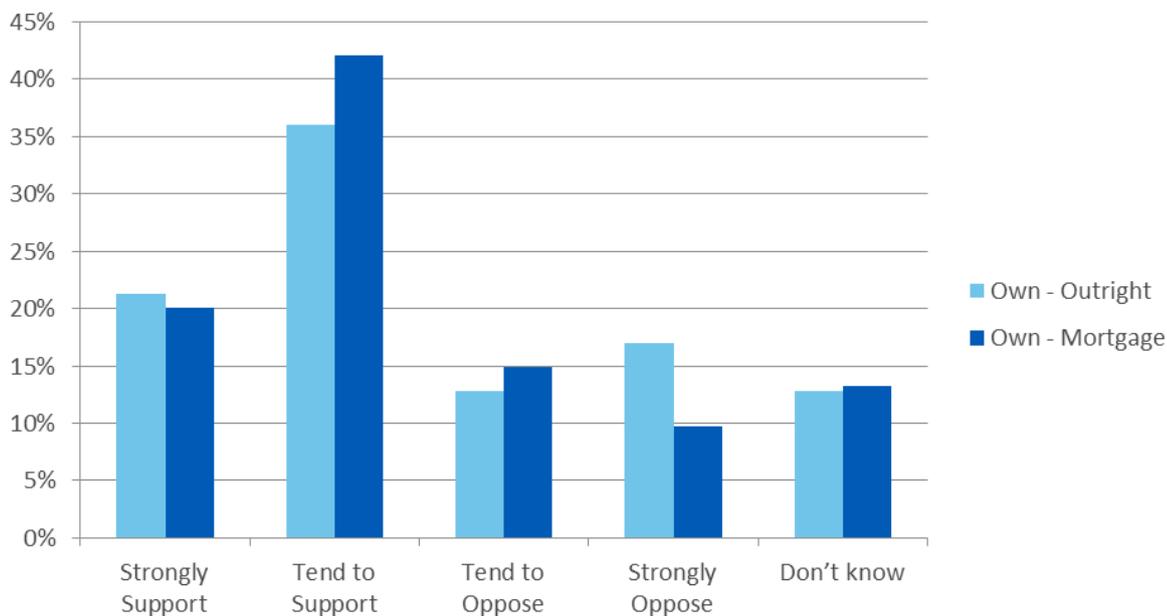


Figure 24: Extent of support/opposition to mandatory EPC Band C for homeowners by 2032, Scottish homeowners by owner type

To what extent do you support or oppose mandatory EPC C for homeowners by 2032?



Question 10:

Please imagine you were searching for a new property to rent. How important or unimportant would the energy efficiency of the property (i.e. The amount of energy used by the property) be to you?

(Scottish renters and those who live rent free, n = 385 weighted base)

Overall, 78% of renters would consider energy efficiency important if looking to rent a new home. 31% thought it was very important and 47% fairly important. 11% of renters would consider energy efficiency unimportant when looking to rent a new home, with 7% considering it fairly unimportant and 4% considering it very unimportant. 11% of renters were unsure (See figure 25).

Energy efficiency was most important to renters who rent from a private landlord. 84% of private tenants considered energy efficiency important; 27% considered it very important. There was a larger amount of uncertainty from renters who rented from housing associations – 13% of these renters answered “don’t know” compared to 6% of private tenants and 7% of local authority tenants.

76% of local authority tenants and 79% of housing association tenants regarded energy efficiency as an important factor. 6% of housing association tenants, 4% of local authority tenants, and 2% of private tenants felt that energy efficiency was very unimportant (See figure 26).

85% of renters aged 55+ considered energy efficiency to be an important factor when looking for a new home. 1% of this group considered energy efficiency very unimportant, and 6% considered it unimportant generally. Renters aged 18-24 were the largest base group, and the least concerned about energy efficiency; 71% considered energy efficiency important. 15% of renters aged 18-24 were unsure about how important they would consider energy efficiency when looking for a new home (See figure 27).

Figure 25: Importance of energy efficiency when looking for a new home, Scottish renters and those that live rent free

How important or unimportant is energy efficiency to you when looking for a new home?

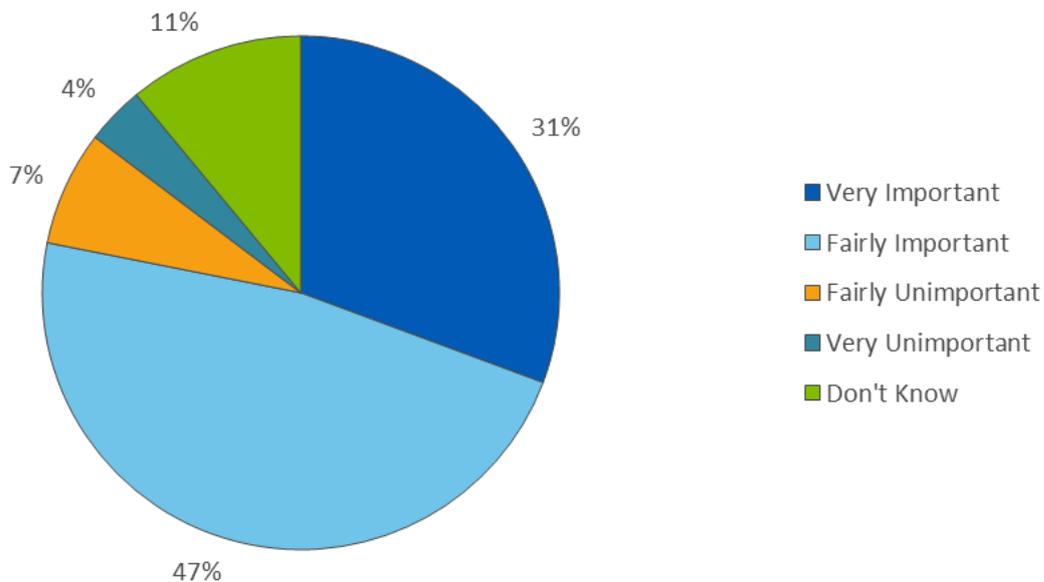


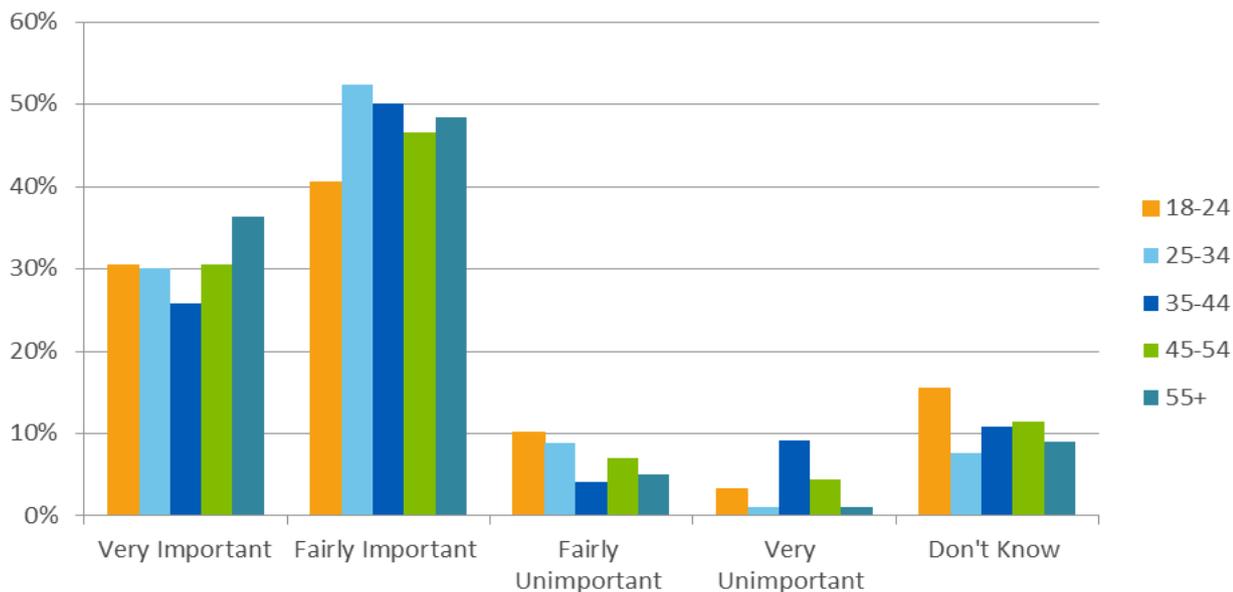
Figure 26: Importance of energy efficiency when looking for a new home, Scottish renters, landlord type

How important or unimportant is energy efficiency to you when looking for a new home?



Figure 27: Importance of energy efficiency when looking for a new home, Scottish renters by age group

How important or unimportant is energy efficiency to you when looking for a new home?



Question 11:

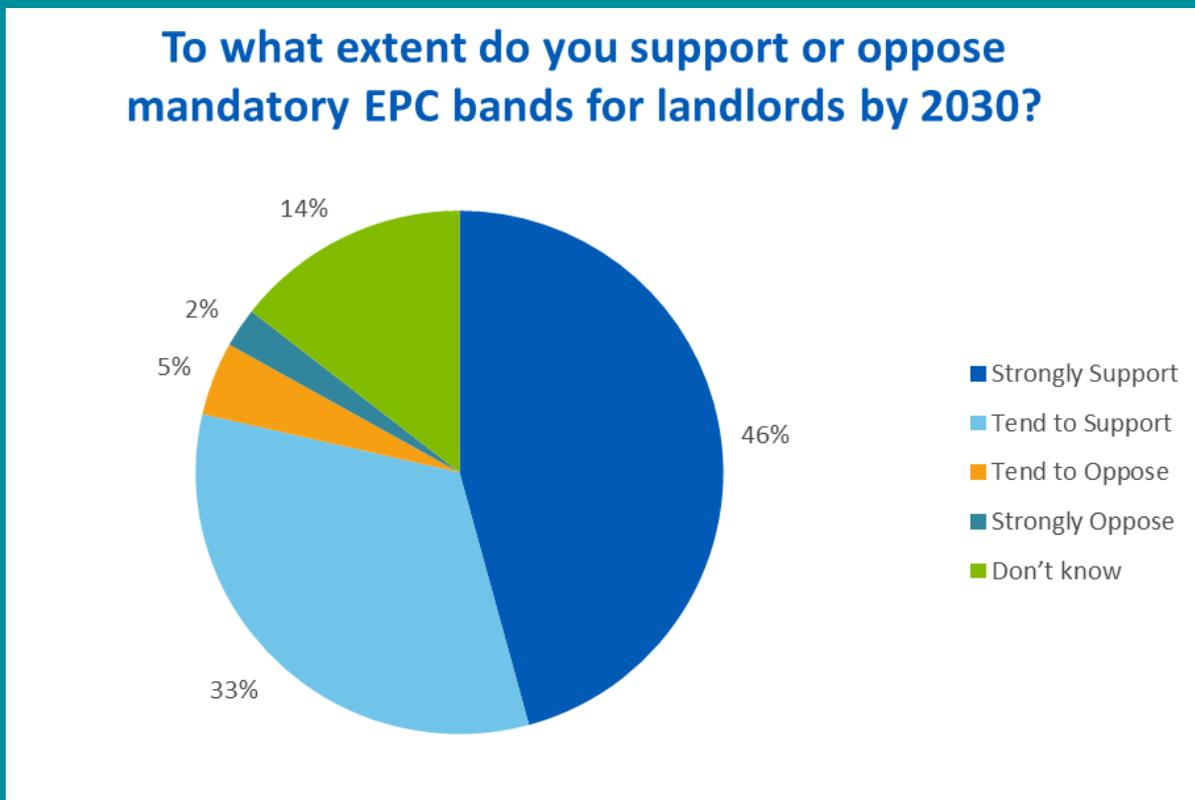
The Scottish Government may decide to make it mandatory for all privately-rented homes to reach an Energy Performance Certificate (EPC) Band C by 2030 and Band B by 2032 for rented social- housing. To what extent would you support or oppose making this mandatory for all landlords?

(Scottish renters and those who live rent free, n = 385 weighted base)

There was strong net support (79%) amongst renters for this policy. Only 7% of renters opposed the regulation. Over 4 in 10 (46%) strongly supported the policy (See figure 28).

Support was strongest amongst those who rent from a housing association. 86% supported the rule, and 14% were unsure, meaning no respondents who rent from a housing association responded that they would oppose the regulation. Support was high amongst private tenants (81%) and local authority tenants (73%). Half of private tenants indicated strong support (See figure 29).

Figure 28: Extent of support/opposition to mandatory EPC Band C for landlords by 2030, Scottish renters and those that live rent free



Tenants aged 55+ overwhelmingly supported the policy, with 89% indicating support to some degree and 3% indicating opposition. 79% of renters aged 25-34 and 35-44 supported making the levels mandatory for all landlords, followed by 74% of renters aged 18-24 and 72% of those aged 45-54. No one in the 18-24 age groups strongly opposed the policy. 14% of those aged 45-54 opposed the regulation. The 45-54 age group was the smallest sample; the 18-24 age group was the largest (See figure 30).



Figure 29: Extent of support/opposition to mandatory EPC Band C for landlords by 2030, Scottish renters by age group

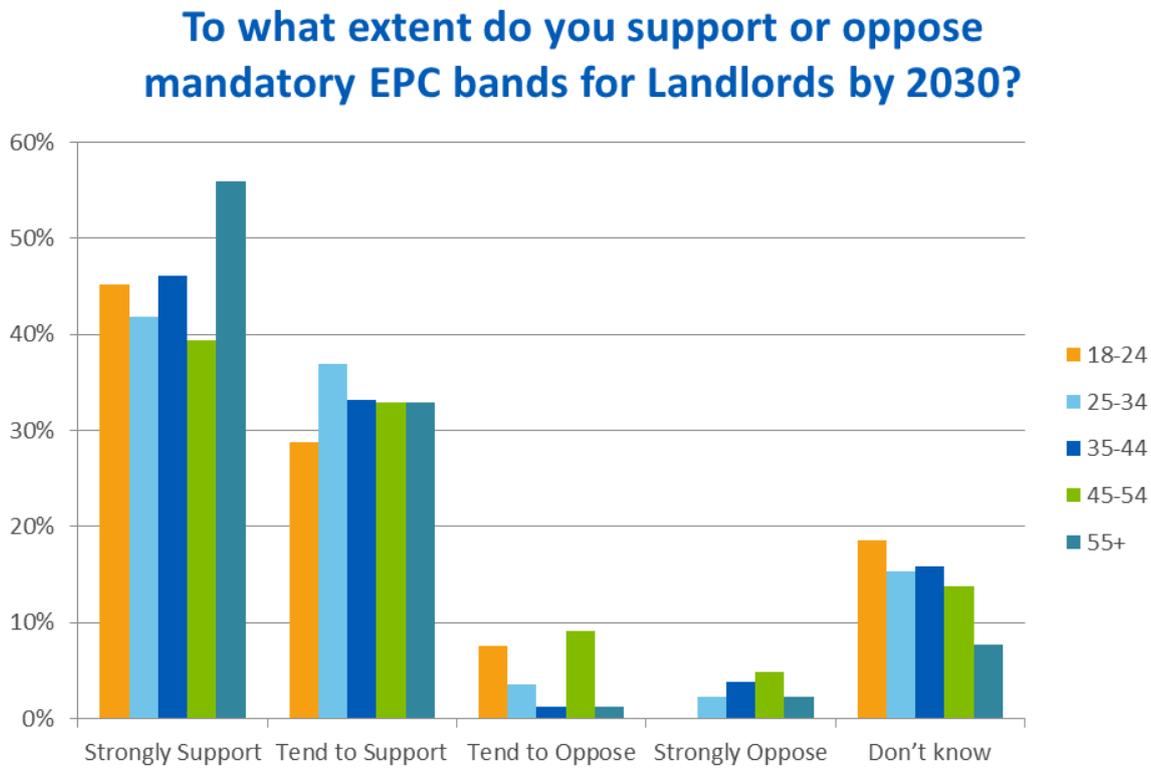
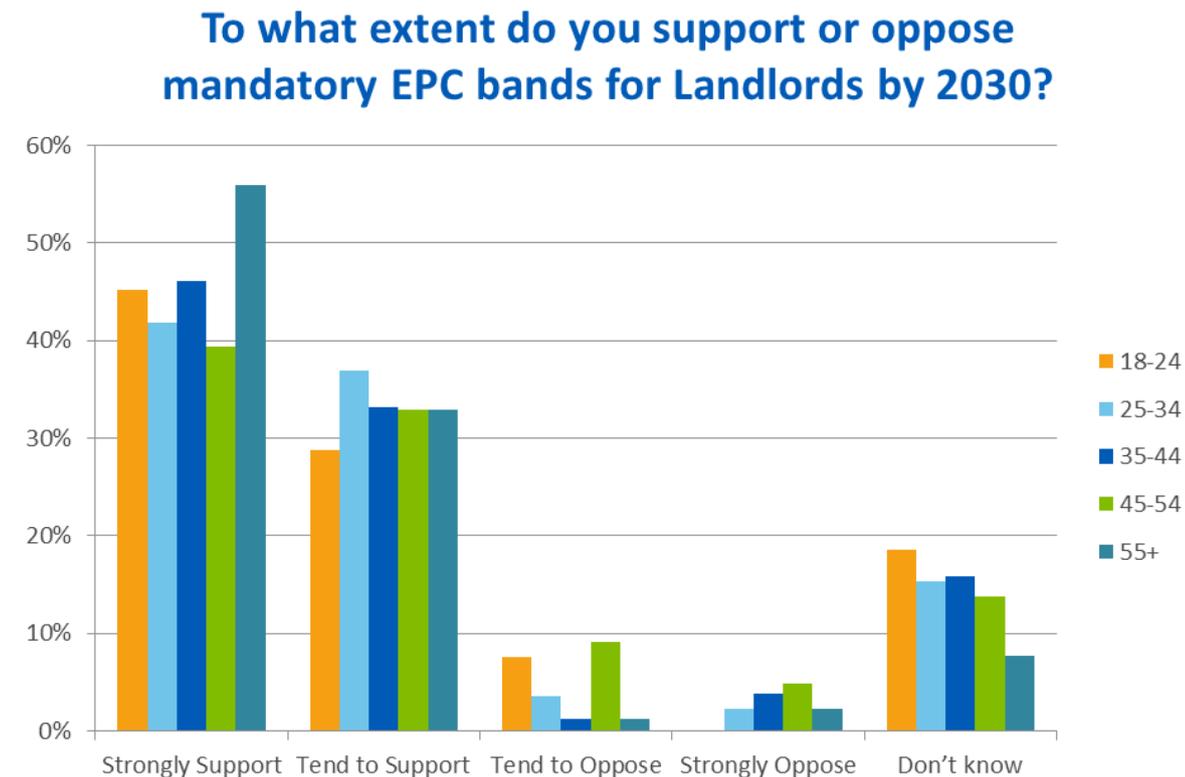


Figure 30: Extent of support/opposition to mandatory EPC Band C for landlords by 2030, Scottish renters by landlord type



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