



Department for  
Business, Energy  
& Industrial Strategy

# Evaluation of the Domestic Private Rented Sector Minimum Energy Efficiency Standard Regulations

2019 Interim Report Appendices

August 2020



**OGL**

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# Appendix 1 Evaluation questions

The questions the overall evaluation of the domestic private rented sector minimum energy efficiency standard regulations is seeking to address are:

## 1. To what extent are landlords complying with the regulations?

- What proportion of landlords are aware of the regulations and their associated obligations?
- What proportion of landlords/properties have complied with the regulations [compliance means either having improved a property to EPC E or having registered a valid exemption]?
- For what reasons/in what circumstance is compliance not taking place?
- What factors influence landlord awareness of the regulations and knowledge of their associated obligations and actions they can take?
- How easy or difficult do landlords find it to respond to the regulations and why?
- What role are market stakeholders playing in the implementation of the regulations?
- What changes to the policy, or supporting policies, could be implemented to increase compliance?

## 2. To what extent have the regulations achieved their aims?

- How many energy efficiency installations have taken place in inefficient properties in the PRS sector?
- What are the reasons why landlords have installed energy efficient measures in their properties and how many of those installations can be attributed to the PRS regulations?
- What are the carbon, energy and bills impacts of the installations?
- What are the wider impacts on air quality and health outcomes?
- What impact have the regulations had on tenants, including energy bills, warmer homes and increases in rental costs?

## 3. Have the regulations had wider impacts on the private rental market?

- What level of additional cost or burden is being placed on landlords? How and why are these costs falling across different landlord or property types?
- How many landlords are leaving the market, or changing property ownership/management practices as a result of the regulations?
- How are the policies influencing the market for private rental properties, including property prices and movement of properties between PRS to Owner Occupier Sector?

- How are the policies influencing the market for property rental, including rental prices and demand for inefficient rental properties?

The 2019 interim evaluation has not attempted to fully address all these questions. In particular, the questions concerning whether the regulations have achieved their aims and their impacts will only be fully addressed in later phases of the evaluation - after the regulations have been extended to all tenancies in F and G properties in 2020 and robust quantitative impact data becomes available.

Nonetheless the research and analysis conducted for the interim evaluation provides early indicators on some of the impact questions and more detailed evidence on the questions concerning awareness of the regulations and the factors determining compliance.

The questions the interim evaluation addresses are:

- What proportion of landlords are aware of the regulations and their associated obligations?
- What proportion of landlords/properties have complied with the regulations [compliance means either having improved a property to EPC E or having registered a valid exemption]?
- For what reasons/in what circumstance is compliance not taking place?
- What factors influence landlord awareness of the regulations and knowledge of their associated obligations and actions they can take?
- How easy or difficult do landlords find it to respond to the regulations and why?
- What role are market stakeholders playing in the implementation of the regulations?
- What changes to the policy, or supporting policies, could be implemented to increase compliance?
- What are the reasons why landlords have installed energy efficient measures in their properties and how many of those installations can be attributed to the PRS regulations?
- What level of additional cost or burden is being placed on landlords? How and why are these costs falling across different landlord or property types?
- How many landlords are leaving the market, or changing property ownership/management practices as a result of the regulations?
- How are the policies influencing the market for private rental properties, including property prices and movement of properties between PRS to Owner Occupier Sector?
- How are the policies influencing the market for property rental, including rental prices and demand for inefficient rental properties?

## Appendix 2 Evaluation methodology

### Overall evaluation methodology

As described in the report, the overall evaluation methodology combines a process evaluation and an impact evaluation to address its different aims. Table 2.1 illustrates the methodological elements of the overall evaluation and when they are currently planned to be conducted.

**Table 2.1: Overall evaluation methodology**

|   | 2018       | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 |
|---|------------|------|------|------|------|------|------|
| <b>Process evaluation:</b>                |            |      |      |      |      |      |      |
| English landlord surveys                  | X          | X    | X    | X    | X    | X    |      |
| Welsh landlord survey                     | X          |      | X    |      |      |      |      |
| Landlord and letting agent interviews     | X          | X    | X    | X    | X    |      |      |
| Tenant interviews                         |            |      | X    | X    | X    |      |      |
| Review of local authority enforcement     | timing tbc |      |      |      |      |      |      |
| <b>Impact evaluation:</b>                 |            |      |      |      |      |      |      |
| Scoping study                             |            |      | X    |      |      |      |      |
| Assessment of compliance                  |            |      | X    |      |      | X    |      |
| Assessment of impact on energy efficiency |            |      |      |      |      | X    |      |
| Assessment of impact on property market   |            |      |      |      |      | X    |      |
| <b>Synthesis and reporting:</b>           |            |      |      |      |      |      |      |
| Interim and final reports                 |            | X    | X    |      | X    |      | X    |

Table 2.2 illustrates how the different elements of the evaluation methodology will address the evaluation questions set out in Appendix 1.

**Table 2.2: Overview of how questions will be addressed through overall evaluation**

|   | Process evaluation       |                       |                                      |                           |                         | Impact evaluation                  |                          |                                 |                              |
|---|--------------------------|-----------------------|--------------------------------------|---------------------------|-------------------------|------------------------------------|--------------------------|---------------------------------|------------------------------|
|   | English landlord surveys | Welsh landlord survey | Analysis of English landlord surveys | Interviews with landlords | Interviews with tenants | Local authority enforcement review | Assessment of compliance | Assessment of energy efficiency | Assessment of market impacts |
| <b>1. To what extent are landlords complying with the regulations?</b>  |                          |                       |                                      |                           |                         |                                    |                          |                                 |                              |
| What proportion of landlords are aware of the regulations and their associated obligations?   | ✓                        | ✓                     | ✓                                    |                           |                         | ✓                                  |                          |                                 |                              |
| What proportion of landlords/properties have complied with the regulations?   | ✓                        | ✓                     | ✓                                    |                           |                         |                                    | ✓                        |                                 |                              |
| For what reasons/in what circumstance is compliance not taking place?   | ✓                        | ✓                     | ✓                                    | ✓                         |                         | ✓                                  | ✓                        | ✓                               | ✓                            |
| What factors influence landlord awareness of the regulations and knowledge of their associated obligations and actions they can take?                     | ✓                        | ✓                     | ✓                                    | ✓                         |                         | ✓                                  |                          |                                 |                              |
| How easy or difficult do landlords find it to respond to the regulations and why?   |                          |                       |                                      | ✓                         |                         |                                    |                          |                                 |                              |
| What role are market stakeholders playing in the implementation of the regulations?   |                          |                       |                                      | ✓                         | ✓                       | ✓                                  |                          |                                 |                              |
| What changes to the policy, or supporting policies, could be implemented to increase compliance?  |                          |                       |                                      | ✓                         | ✓                       | ✓                                  |                          |                                 |                              |
| <b>2. To what extent have the regulations achieved their aims?</b>  |                          |                       |                                      |                           |                         |                                    |                          |                                 |                              |
| How many energy efficiency installations have taken place in inefficient properties in the PRS sector?  |                          |                       |                                      | ✓                         |                         |                                    | ✓                        | ✓                               |                              |
| What are the reasons why landlords have installed energy efficient measures and how many of those installations can be attributed to the PRS regulations? |                          |                       |                                      | ✓                         |                         | ✓                                  |                          | ✓                               |                              |
| What are the carbon, energy and bills impacts of the installations?   |                          |                       |                                      |                           | ✓                       |                                    |                          | ✓                               |                              |
| What are the wider impacts on air quality and health outcomes?  |                          |                       |                                      |                           | ✓                       |                                    |                          | ✓                               |                              |
| What impact have the regulations had on tenants, including energy bills, warmer homes and increases in rental costs?                                      |                          |                       |                                      |                           | ✓                       |                                    |                          |                                 |                              |
| <b>3. Have the regulations had wider impacts on the private rental market?</b>  |                          |                       |                                      |                           |                         |                                    |                          |                                 |                              |
| What level of additional cost or burden is being placed on landlords? How and why are these costs falling across different landlord or property types?    | ✓                        | ✓                     | ✓                                    | ✓                         |                         |                                    |                          |                                 |                              |
| How many landlords are leaving the market, or changing property ownership/management practices as a result of the regulations?                            | ✓                        | ✓                     | ✓                                    | ✓                         |                         |                                    |                          |                                 |                              |
| How are the policies influencing the market for private rental properties, including property prices and movement of properties between PRS to OO Sector? |                          |                       |                                      | ✓                         |                         |                                    |                          |                                 | ✓                            |

|  | Process evaluation       |                       |                                      |                           |                         | Impact evaluation                  |                          |                                 |                              |
|--|--------------------------|-----------------------|--------------------------------------|---------------------------|-------------------------|------------------------------------|--------------------------|---------------------------------|------------------------------|
|  | English landlord surveys | Welsh landlord survey | Analysis of English landlord surveys | Interviews with landlords | Interviews with tenants | Local authority enforcement review | Assessment of compliance | Assessment of energy efficiency | Assessment of market impacts |
| How are the policies influencing the market for property rental, including rental prices and demand for inefficient rental properties? |                          |                       |                                      | ✓                         | ✓                       |                                    |                          |                                 | ✓                            |

The different elements of the evaluation methodology are being conducted by members of the evaluation consortium with relevant specialist expertise in that area:

- **Kantar Public** are conducting the Welsh landlord survey, the landlord and letting agent interviews, and the tenant interviews.
- **Professor Peter Kemp** is conducting the analysis of landlord survey results.
- **Ereda Consultants** are conducting all of the elements of the impact evaluation.
- **ICF** are conducting the review of local authority enforcement, and the synthesis and reporting for the evaluation.

An overview of each element of the evaluation methodology is provided here and then further details are provided on the elements that have been drawn on in the 2019 interim report in the next section.

#### Process evaluation:

- **English landlord surveys.** The evaluation draws on evidence from three pre-existing surveys of private landlords in England: the English Private Landlord Survey, the Landlord Panel Survey and the Small Landlord Panel Survey. Each survey includes questions concerning the regulations. Their results provide quantitative evidence on levels of awareness and responses to the regulations for landlords in England. Subject to their continuation, the results of the surveys will be used throughout the evaluation.
- **Welsh landlord survey.** There was no pre-existing survey of landlords in Wales equivalent to the surveys of English landlords prior to the commissioning of this evaluation. To address this evidence gap a bespoke survey of private landlords in Wales is being conducted as part of the evaluation. The survey includes several of the same questions as the English landlord surveys and will provide quantitative evidence on levels of awareness and responses to the regulations for landlords in Wales. The survey will be conducted twice during the evaluation, in 2018/19 and 2020/21.
- **Analysis of landlord survey results.** Results from the English and Welsh landlord surveys are being analysed at regular intervals during the evaluation. The analysis will provide consolidated findings on the prevalence of different levels of awareness and responses to the regulations for landlords in England and Wales, and analyse how



these compare between different types of landlord. The findings of the analysis will feed into the interim and final evaluation reports.

- **Interviews with landlords and letting agents.** The evaluation includes five planned waves of interviews with landlords and letting agents, between 2018 and 2022. Up to 300 interviews will be conducted in total. The interviews will provide detailed qualitative insights into how the regulations are operating in practice and how landlords and other market actors are responding to them. They will also provide qualitative evidence to supplement and support the interpretation of the quantitative impact findings.
- **Interviews with tenants.** The evaluation includes three planned waves of interviews with tenants, between 2020 and 2022. 50 interviews will be conducted in total. The interviews will provide detailed qualitative insights into the potential role of tenants in compliance with the regulations, any impacts of home improvements (e.g. on bills), how far landlords are passing on costs to tenants (e.g. via increases in rents), and wider market impacts.
- **Review of local authority enforcement.** The timing and design of this element of the evaluation is yet to be decided upon but the intention is that it will provide additional evidence on the role of local authorities in the enforcement of the regulations. This is likely to draw on outputs from the local authority enforcement pilots BEIS is currently funding and recent other studies in this area<sup>1</sup>.

#### Impact evaluation:

- **Scoping study.** The scoping study will assess the availability, quality and suitability of data sources for potential use in the analysis of compliance and impact. It will also assess the feasibility of different quasi-experimental methods and test assumptions required in the analysis. The scoping study will be conducted in 2020 and its findings will determine the design and conduct of the subsequent analysis.
- **Assessment of compliance.** Subject to the findings of the scoping study, data from the English Housing Survey, the Welsh Housing Conditions Survey, the EPC database, and the PRS Exemptions Register will be used to measure the proportion of private rented properties complying with the regulations since their introduction. This assessment will initially be conducted in 2020, before the data is available to support a full impact assessment. The assessment of compliance can be used to understand any improvements in the housing stock, without being able to attribute these to the policy.
- **Assessment of impact on energy efficiency.** This assessment will measure the extent to which any improvements in the energy efficiency of the PRS housing stock can be attributed to the introduction of the regulations. Subject to the findings of the scoping study, a Difference-in-Difference model appears feasible for the assessment of the impact of the regulations on energy efficiency using data sources such as the English Housing Survey, the Welsh Housing Conditions Survey, and the EPC database.
- **Assessment of impact on property market.** This assessment will measure the impact of the regulations on the rental and sales price of PRS properties as well as non-price market dynamics. Subject to the findings of the scoping study, data sources for this analysis include sales prices from the UK Land Registry and data providers such as

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<sup>1</sup> For example: Association for the Conservation of Energy and CAG Consultants (2018) The Warm Arm of the Law: Tackling fuel poverty in the private rented sector; and RSM UK Consulting for the Committee on Fuel Poverty (2019) Enforcing regulations to enhance energy efficiency in the private rented sector.

HomeCo and Calnea Analytics, the EPC database, and socioeconomic datasets from the Office for National Statistics.

### Synthesis and reporting:

- **Interim and final reporting.** Results from the different elements of the evaluation will be synthesised and reported at regular intervals to provide BEIS with robust evidence to inform the ongoing implementation of the regulations and policy development in this area more generally. In addition to this 2019 report, interim reports will be produced in 2020 and 2022, and a final report in 2024.

## Evaluation methods drawn on in 2019 interim report

The 2019 interim report is based on evidence from:

- **English and Welsh landlord surveys** conducted before and in the 12 months after the introduction of the regulations.
- The first wave of **qualitative interviews with landlords and letting agents** conducted as part of the evaluation.
- **Data from the PRS exemptions register** was also incorporated into the 2019 interim report to provide evidence of how landlords are responding to the regulations.

The following sections provide details of the methodology for each of these elements.

### English and Welsh landlord surveys

The 2019 interim report draws on results from three pre-existing surveys of English landlords and the first survey of Welsh landlords conducted by Kantar Public as part of the evaluation:

- **The 2018 English Private Landlord Survey**
- **Three waves of the Landlord Panel Survey (quarter 3 2017, quarter 1 2018, and quarter 3 2018)**
- **Three waves of the Small Landlord Panel Survey (quarter 3 2017, quarter 1 2018, and quarter 3 2018)**
- **The 2018/19 Welsh Landlord Survey**

At the start of the evaluation a review of the feasibility of combining the results of the different surveys was conducted by Professor Peter Kemp. The aim was to understand whether the surveys from different sources could be combined to provide “combined English landlord” or “combined English and Welsh landlord”. The review concluded that due to differences in the sample characteristics and timing of each survey it would not be feasible to combine the survey results in this way. Therefore the results of each survey are reported separately in the 2019 interim report.

Table 2.3 summarises the main features of the English and Welsh landlord surveys.

**Table 2.3: Overview of English and Welsh landlord surveys**

| Survey  | Country and commissioner  | Fieldwork Timing  | Sample size <sup>2</sup>                       | Source of sample   | Other sample characteristics  |
|---|---|-------------------|--|--|---|
| <b>English Private Landlord Survey (EPLS)<sup>3</sup></b> | England – Ministry of Housing, Communities and Local Government | Mar-Apr 2018      | 6,212 (all landlords)<br>1,514 (EFG landlords) | Landlords placing deposits with Tenancy Deposit Protection scheme <sup>4</sup> | Mix of individual and company landlords<br>Mostly landlords with 1 or 2-4 properties<br>Sample weighted to be representative of English Landlords |
| <b>Landlord Panel Survey (LPS)<sup>5</sup></b>            | England – BVA BDRC  | Sep 2017 (Q3)     | 856 (all landlords)<br>179 (EFG landlords)     | Members of the National Landlords Association <sup>6</sup>                     | Mostly individual landlords<br>Mostly landlords with 2-4 or 5+ properties<br>Sample unweighted  |
|   |   | Mar 2018 (Q1)     | 1,043 (all landlords)<br>314 (EFG landlords)   |  |   |
|   |   | Sep 2018 (Q3)     | 690 (all landlords)<br>176 (EFG landlords)     |  |   |
| <b>Small Landlord Panel Survey (SLPS)<sup>7</sup></b>     | England – BVA BDRC  | Sep 2017 (Q3)     | 249 (all landlords)<br>70 (EFG landlords)      | Dynata consumer research panel accessed by BVA BDRC                            | Mostly individual landlords only<br>Mostly landlords with 1 or 2-4 properties<br>Sample unweighted  |
|   |   | Mar 2018 (Q1)     | 251 (all landlords)<br>96 (EFG landlords)      |  |   |
|   |   | Sep 2018 (Q3)     | 249 (all landlords)<br>84 (EFG landlords)      |  |   |
| <b>Welsh Landlord Survey (WLS)</b>                        | Wales - BEIS  | Nov 2018-Jan 2019 | 1,119 (all landlords)<br>392 (EFG landlords)   | Landlords registered with Rent Smart Wales and unregistered landlords          | Mix of individual and company landlords<br>Mostly landlords with 1 or 2-4 properties  |

<sup>2</sup> Survey sample sizes are provided for all landlords and specifically for landlords who said they had a property with an EPC rating of E, F or G at the point they were surveyed.

<sup>3</sup> <https://www.gov.uk/government/publications/english-private-landlord-survey-2018-main-report>

<sup>4</sup> It is estimated that 75% of private landlords in England have placed a deposit with a Tenancy Deposit Protection scheme.

<sup>5</sup> <https://www.bva-bdrc.com/products/landlords-panel/>

<sup>6</sup> There are over 40,000 landlords registered with the National Landlords Association.

<sup>7</sup> <https://www.bva-bdrc.com/products/landlords-panel/>

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| Survey | Country and commissioner | Fieldwork Timing | Sample size <sup>2</sup> | Source of sample                         | Other sample characteristics                            |
|--------|--------------------------|------------------|--------------------------|--|---|
|        |                          |                  |                          | recruited from Kantar panel <sup>8</sup> | Sample weighted to be representative of Welsh Landlords |

Table 2.4 provides more information on the composition of the samples in each of the surveys – both in terms of all the landlords in the sample and the subset of landlords who said they had E, F or G rated properties at the point they were surveyed.

**Table 2.4: Survey sample characteristics**

| Survey                               |               | Aged under 55 | Individual landlord | Have an E, F or G property | Have > 4 properties | Let and manage all properties themselves | Self-employed as landlord |
|--------------------------------------|---------------|---------------|---------------------|----------------------------|---------------------|--|---------------------------|
| 2018 English Private Landlord Survey | All landlords | 42%           | 94%                 | 20%                        | 17%                 | 52%                                      | 13%                       |
|                                      | EFG landlords | 38%           | 92%                 | N/A                        | 23%                 | 53%                                      | 15%                       |
| 2018 Q3 Landlord Panel Survey        | All landlords | 32%           | 84%                 | 26%                        | 50%                 | 42%                                      | 25%                       |
|                                      | EFG landlords | 37%           | 79%                 | N/A                        | 60%                 | 42%                                      | 31%                       |
| 2018 Q3 Small Landlord Panel Survey  | All landlords | 32%           | 82%                 | 34%                        | 11%                 | 29%                                      | 25%                       |
|                                      | EFG landlords | 55%           | 73%                 | N/A                        | 13%                 | 23%                                      | 5%                        |
| 2018/19 Welsh Landlord Survey        | All landlords | N/A           | 90%                 | 35%                        | 7%                  | N/A                                      | N/A                       |
|                                      | EFG landlords | N/A           | 83%                 | N/A                        | 11%                 | N/A                                      | N/A                       |

Table 2.5 provides a summary of the core questions that have been used in two or more of the landlord surveys. The full questionnaire used in the Welsh Landlord Survey conducted for this evaluation is also reproduced in Appendix 4. Further details on each survey are provided in the sections below, in addition to the details already provided in the interim report.

<sup>8</sup> It is estimated that 95% of private landlords in Wales are registered with Rent Smart Wales.

**Table 2.5: Core questions used in landlord surveys**

| Question  | English Private Landlord Survey | Landlord Panel Survey | Small Landlord Panel Survey | Welsh Landlord Survey   |
|---|---------------------------------|-----------------------|-----------------------------|---|
| <p>An Energy Performance Certificate (EPC) provides home buyers and tenants with a rating of the energy efficiency of the property. An A rating is the most energy efficient and a G rating the least efficient.</p> <p>Do any of your rental properties have an Energy Performance Certificate (EPC) rating of “E”, “F” or “G”?</p> <ul style="list-style-type: none"> <li>- Yes</li> <li>- No</li> <li>- I don't know the EPC rating of my property(ies)</li> </ul>   | Yes                             | Yes                   | Yes                         | Yes   |
| <p>From April 2018, there will be a new legal requirement for all properties rented out to have a minimum “E” rating on the Energy Performance Certificate (EPC). Before this survey, how aware, if at all, were you of this new legal requirement?</p> <ul style="list-style-type: none"> <li>- I was not aware of this at all</li> <li>- I was aware of it, but I did not understand the details</li> <li>- I was aware of it and fully understood the details</li> </ul>   | Yes                             | Yes                   | Yes                         | Yes   |
| <p>The new minimum energy standard requirement will be enforced by Local Authorities and non-compliant properties could incur a fine of up to £5,000. If you had a rental property that did not meet the required standard, would you...</p> <ul style="list-style-type: none"> <li>- Carry out works at the minimum cost required to comply, and continue to let it out</li> <li>- Carry out the works that maximise the long term value of my property, and continue to let it out.</li> <li>- Carry out works to bring it up to standard then sell it</li> <li>- Not carry out any works, continue to let it out</li> <li>- Not carry out any works and either sell the property or not re-let it</li> <li>- Other [please specify]</li> <li>- Don't know</li> </ul> | No                              | Yes                   | Yes                         | Yes, with additional response option:<br>- apply for an exemption |
| <p>[Ask if would take any action]</p> <p>Have you undertaken or started to undertake this work / applied for an exemption?</p> <ul style="list-style-type: none"> <li>- Yes</li> <li>- No</li> </ul>  | No                              | No                    | No                          | Yes   |
| <p>[Ask if would undertake works]</p> <p>If you carried out such work to bring a rental property up to standard, how would you fund this work? (Select all that apply)</p> <ul style="list-style-type: none"> <li>- Savings</li> <li>- Loan</li> <li>- Mortgage</li> <li>- Borrow from friends / family</li> </ul>  | No                              | Yes                   | Yes                         | Yes   |

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| Question  | English Private Landlord Survey | Landlord Panel Survey | Small Landlord Panel Survey | Welsh Landlord Survey |
|---|---------------------------------|-----------------------|-----------------------------|-----------------------|
| <ul style="list-style-type: none"> <li>- By putting up the rent</li> <li>- Government grant or funding</li> <li>- Other [please specify]</li> <li>- Don't know</li> </ul>   |                                 |                       |                             |                       |
| <p>Thinking about the barriers to improving the energy efficiency of the properties in your portfolio, do you think there are any barriers other than the financial costs?</p> <ul style="list-style-type: none"> <li>- Yes</li> <li>- No</li> <li>- Don't know</li> </ul>  | No                              | Yes                   | Yes                         | Yes                   |
| <p>[Ask if think there are non-financial barriers]</p> <p>Which of the following barriers do you believe exist in relation to improving the energy efficiency of properties in your portfolio? (Tick all that apply) (randomise if possible)</p> <ul style="list-style-type: none"> <li>- Lack of knowledge of what suits my properties</li> <li>- The characteristics of my properties make improvements unsuitable</li> <li>- Time and effort required to arrange improvements</li> <li>- Disruption caused to tenants</li> <li>- Lack of tenant support</li> <li>- Harms the value or attractiveness of the property</li> <li>- Planning permission limitations</li> <li>- Other [please specify]</li> </ul> | No                              | Yes                   | Yes                         | Yes                   |

## The English Private Landlord Survey

The 2018 English Private Landlord Survey (EPLS) is a national survey of private landlords and letting agents. It was conducted by NatCen, an independent social research company on behalf of the Ministry of Housing, Local Government and Communities.

In the development of the PRS evaluation, BEIS agreed with MHCLG that a limited number of questions would be added to the EPLS regarding the minimum energy efficiency regulations. Adding the questions to this survey allowed the PRS evaluation to access a nationally representative sample of landlords.

The 2018 EPLS is the latest of a series of seven national surveys of private landlords in England commissioned by the government, the first of which was undertaken in 1993/94 (the others were conducted in 1998, 2001, 2003, 2006 and 2010). Although these surveys covered similar topics, the 2018 EPLS was different from its predecessors in two important respects.

The first difference relates to the way in which interviews were conducted. Previous landlord surveys involved face-to-face or telephone interviews with sampled landlords or their letting agents. In contrast, the 2018 EPLS was administered online.

The second difference concerns the sampling frame. The previous EPLS surveys involved interviews with the landlords and letting agents of a nationally representative sample of private tenants. In contrast, the 2018 EPLS involved a survey of landlords and letting agents who had placed tenant deposits with one of three Government mandated tenancy deposit protection (TDP) schemes in England. Landlords who did not charge a deposit, or who charged a deposit but did not register it with one of the TDP schemes, were not part of the sampling frame. It is not known how many deposits were not registered, but the English Housing Survey suggests that about a quarter of private tenants in 2017/18 had not been charged a deposit when they moved into their current tenancy. Lower income tenants were less likely to be charged a deposit than better off tenants.

The 2018 EPLS had an achieved sample size of 6,694 landlords and a response rate of 7.7%.

On average the survey took landlords 19 minutes to complete. There were 67 questions in the survey questionnaire for landlords, two of which concerned the minimum energy efficiency regulations.

The survey results were weighted by the number of properties landlords had placed a deposit for (used as a proxy for portfolio size) and region to provide findings representative of the wider population of English landlords.

Further details of the 2018 EPLS methodology and questionnaire are published online: <https://www.gov.uk/government/collections/english-private-landlord-survey>.

## **The Landlord Panel Survey**

The Landlord Panel Survey (LPS) is conducted by BVA-BDRC (a consumer research and consultancy firm) to provide insight into the market dynamics of the private rental and buy-to-let sectors. The panel operates a subscription model to a core survey, with the option for subscribers to add bespoke confidential questions. It is an online survey. A summary of the method is provided below, more information is available from BVA-BDRC<sup>9</sup>.

The survey is run quarterly with a sample frame consisting of English landlords who are members of the National Landlords Association (NLA), one of several organisations representing private landlords. The main alternative to the NLA is the Residential Landlords Association (RLA), the members of which are not included in the LPS<sup>10</sup>. The survey sample is also derived from the marketing subset of NLA's membership, that is, members who have agreed to be contacted for marketing purposes. It is possible, therefore, that the survey respondents are not representative of NLA members as a whole.

Achieved sample sizes for the waves of the LPS included in this report vary from 690 to 1,043 per wave. It is not possible to calculate precise response rates for the LPS, as invitations to participate in the survey are issued to its members by the NLA rather than by BVA-BDRC who administer the survey. However, it is known that there are circa 37,000 NLA members who have agreed to be contacted for marketing purposes. Assuming all of these were invited to participate in the survey each quarter, this suggests a response rate of 1.9% - 2.8% for the waves of the LPS included in this report.

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<sup>9</sup> <https://www.bva-bdrc.com/products/landlords-panel/>

<sup>10</sup> The NLA and RLA offer a similar set of services to their members and the members are expected to be similar. In August 2019 the NLA and RLA announced they are merging, future work under this evaluation will explore whether a combined sample is available for surveys.



The questionnaire used in the waves of the LPS included in this report took landlords circa 15 minutes to complete, on average. There were 53 questions in the survey, six of which concerned the minimum energy efficiency regulations.

The results of the LPS are not weighted. Weighting is not applied as the survey is not designed to be representative of the landlord population, the primary aim is provision of market insight for the panel subscribers.

### **The Small Landlord Panel Survey**

The Small Landlord Panel Survey (SLPS) is also conducted by BVA-BDRC as a subscription survey panel. It has the same aims and content as the LPS, however, the sample frame is targeted to fill gaps identified in the LPS around smaller landlords who may not be members of landlord associations.

The SLPS is conducted quarterly and the sample is drawn from English landlords on a commercial online consumer survey panel accessed by BVA-BDRC. Details of this panel are commercially confidential to BVA-BDRC so it is not clear how representative the larger consumer panel sample (from which the SLPS is drawn) is of the general household population. A summary of the method is provided below, more information is available from BVA-BDRC<sup>11</sup>.

Achieved sample sizes for this survey are consistently around 250 per wave. It is not possible to calculate response rates for the SLPS, as BVA-BDRC do not report the number of eligible landlords on the panel or what proportion of these are invited to participate in the survey each wave. Table 2.4, however, demonstrates that the SLPS delivers against the aims to sample landlords who have smaller portfolios and are less likely to be 'professional' in nature.

The questionnaire used in the waves of the SLPS included in this report took landlords circa 15 minutes to complete, on average. There were 53 questions in the survey, six of which concerned the minimum energy efficiency regulations.

The results of the SLPS are not weighted. Weighting is not applied as the survey is not designed to be representative of the landlord population, the primary aim is provision of market insight for the panel subscribers.

### **The Welsh Landlord Survey**

The Welsh Landlord Survey (WLS) is the first national survey of private landlords in Wales. It is being conducted by Kantar Public, an independent research company, as part of this evaluation. The intention is to undertake the survey twice during the evaluation: in 2018/19 and 2020/21. The survey is being conducted online, with a target achieved sample size of 2,000 in each wave.

#### ***Survey process***

The primary sample frame for the 2018/19 WLS was landlords on the Welsh Landlord Register, maintained by Rent Smart Wales (RSW), who have previously given their agreement to RSW to be contacted for research and other purposes (40,000-45,000 landlords). Landlord registration is mandatory in Wales<sup>12</sup> and it is estimated that the Register covers around 95% of Welsh landlords<sup>13</sup>. There is not a robust existing source of evidence on the number or

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<sup>11</sup> <https://www.bva-bdrc.com/products/landlords-panel/>

<sup>12</sup> See the Housing (Wales) Act 2014

<sup>13</sup> Estimates provided by Rent Smart Wales



characteristics of the unregistered Welsh Landlord population but provision has been made for including a proportion of this population in this survey (see below).

In order to ensure compliance with GDPR requirements, no RSW data on individual landlords was shared with the research consortium. Instead all invitations to participate in the survey were issued by RSW on our behalf.

The survey was initially piloted in early September 2018. Invitations to participate were included in a RSW newsletter issued in w/c 3rd September to registered landlords in two areas (Denbighshire: 1,698; and Pembrokeshire: 1,650 recipients). The purpose of the pilot was to test understanding of the survey questions, response rates and sample characteristics. Response rates were a particular area of interest as landlords are recognised as a hard to engage group. A response rate of c5% would be required to achieve the target sample size of 2,000. The initial pilot achieved a sample size of 45 and a response rate of 1.3%.

To test options for increasing the survey response rate, a second trial was instigated in w/c 24 September 2018. Three modified versions of the invitation to take part in the survey were included in RSW newsletters issued to registered landlords in four areas (Torfaen and Monmouthshire: 2,205 recipients; Ceredigion: 1,163 recipients; Anglesey: 826 recipients; and Powys: 1,794 recipients). At 9th October 2018 the second pilot had achieved a sample size of 73 and a response rate of 1.2%.

In order to maximise the survey sample size it was then agreed that, in the mainstage of the survey, RSW would send a bespoke email inviting landlords to participate in the survey rather than just publicising this through their newsletters. The email was sent out to 10,000 landlords in November and December 2018. Due to IT issues within RSW it was not possible to send out the email to the remaining registered landlords in January 2019 as hoped.

Invitations to participate in the survey (both through RSW newsletters and by bespoke email) were issued in English and Welsh. They provided an online link to a survey landing page, which gave the respondent the option of completing the survey in English or Welsh. The landing page also included answers to frequently asked questions, a link to information about the new regulations and contact details for Kantar researchers for further assistance. Respondents entered the survey questionnaire hosted by Kantar Public via a secure (https) web link. The survey took 5 minutes to complete on average. There were 15 questions in the survey, eight of which directly concerned the minimum energy efficiency regulations.

It was recognised that a small proportion of Welsh domestic landlords were still not registered (c5%). The survey of registered landlords was supplemented with a booster survey of unregistered landlords to provide coverage of this group and explore whether there are any substantive differences in the attitudes and behaviour and attitudes of registered and unregistered landlords. It also helped to increase the coverage of registered Welsh domestic landlords given the challenges with recruiting via RSW.

The booster survey was conducted via Kantar's online panel, run by their sister company Kantar Profiles. The UK panel numbers over 150,000 adults including over 6,000 in Wales. The panel is recruited from a diverse range of sources and carefully screened to ensure it comprises a good cross-section of UK adults. All members of the panel have given their prior consent to be contacted by Kantar for research purposes. Invitations to participate in surveys are carefully controlled so panellist are not over interviewed and strict controls and checks are applied to ensure the quality and integrity of survey responses.

The booster survey was conducted in parallel with the survey administered through RSW. Screening questions were used to identify landlords on the panel who were renting properties in Wales. These landlords were then routed to the same landing page and questionnaire as used in the RSW administered survey, with the addition of a question at the end to determine if they were registered with RSW or not.

It was recognised that the sample of unregistered Welsh domestic landlords will be small and may not be wholly representative of the target group. Findings should thus be treated as indicative, but might help to explore whether there are any substantive difference in the attitudes and behaviour and attitudes of registered and unregistered landlords.

### ***Achieved survey sample***

The survey had a total achieved sample size of 1,119 landlords (20 respondents that were “Agents only” were screened out). 999 of the achieve sample took part in the survey administered through RSW and 120 through the Kantar online panel. 1,107 of the achieved sample were registered landlords, nine were unregistered landlords and three were landlords who said they didn’t know whether they were registered or unregistered.

**Table 2.6: Breakdown of achieved sample**

|                                  | <b>Number of achieved interviews</b> |
|----------------------------------|--------------------------------------|
| <b>Total achieved interviews</b> | 1,119                                |
| <b>Sample source:</b>            |                                      |
| RSW                              | 999                                  |
| Kantar online panel              | 120                                  |
| <b>Whether Registered:</b>       |                                      |
| Registered landlords             | 1,107                                |
| Unregistered landlords           | 9                                    |
| Did not know                     | 3                                    |

The achieved response rate for the survey was 5.2%.

### ***Weighting strategy***

Results were weighted to correct for non-response bias and ensure they were representative of Welsh domestic landlords. If the results were not weighted there is an increased risk that the survey estimates could be biased, for example, if unregistered landlords or landlords with one property have different views and behaviours to landlords with 2+ properties that are over-represented in the unweighted sample.

The two variables used to weight the survey results were registration with RSW and landlord portfolio size. The registration weight was applied to reflect that a small proportion of Welsh domestic landlords are not yet registered (estimated incidence 5%). The portfolio weight was applied as existing evidence suggests that landlords with smaller portfolios are less likely to be ‘professional’ in nature and may face different barriers to awareness and compliance. RSW provided population figures for the proportion of registered landlords by number of properties rented in Wales.

Given the opt-in process that landlords are required to go through to register with RSW it is unlikely that registered landlords would not know whether or not they are registered. The three “don’t know” landlords in the sample were consequently treated in the weighting as

unregistered landlords. The unweighted sample profile was therefore 99% registered landlords and 1% unregistered landlords. RSW statistics for December 2018 indicated that 95% of private landlords in Wales were registered with RSW, and this proportion was used in the weighting.

In terms of portfolio size, the survey sample slightly under-represented smaller landlords and slightly over-represented larger landlords, as illustrated in Table 2.7.

**Table 2.7: Portfolio size of all registered landlords and achieved survey sample of registered landlords**

| Number of Properties | All registered landlords (RSW statistics) | Registered landlords in survey sample |
|----------------------|---|---------------------------------------|
| 1                    | 70%                                       | 57%                                   |
| 2-4                  | 23%                                       | 30%                                   |
| 5-9                  | 5%  | 9%                                    |
| 10+                  | 2%  | 4%                                    |

Weightings were therefore applied to compensate for these two imbalances – the under-representation of unregistered landlords and the under-representation of the smallest registered landlords. Table 2.8 shows the unweighted sample profile and the sample profile once these weightings are applied.

While weighting aims to reduce bias it also reduces the precision of survey estimates. We can quantify this loss of precision by calculating the effective sample size of the weighted sample. The effective sample size is c.920 (compared with an achieved sample size of 1,119) which means that overall estimates are still very precise.

**Table 2.8: Unweighted and weighted sample profile**

|                                  | Unweighted n | Unweighted % | Weighted n | Weighted % |
|----------------------------------|--------------|--------------|------------|------------|
| <b>Unregistered</b>              | 12           | 1%           | 56         | 5%         |
| <b>Registered 1 property</b>     | 628          | 56%          | 744        | 67%        |
| <b>Registered 2-4 properties</b> | 334          | 30%          | 245        | 22%        |
| <b>Registered 5-9 properties</b> | 99           | 9%           | 53         | 5%         |
| <b>Registered 10+ properties</b> | 46           | 4%           | 21         | 2%         |

## Analysis and significance testing

Data from each survey was analysed to generate results for all landlords and results just for landlords with E, F or G rated properties in each survey sample<sup>14</sup>. Unless otherwise stated, all of the findings in the interim report are based the survey results for landlords with E, F or G rated properties. Data tables for the survey results for both all landlords and just landlords with E, F or G rated properties are provided in Appendix 3.

<sup>14</sup> The regulations only require landlords of F and G properties to comply with the regulations, however, the small number of F and G properties in the housing stock suggested that using the survey to identify only F and G landlords would have led to unusably small sub-group sample sizes. Given the similarity between E and F rated properties it was decided that survey questions and subsequent analysis would be conducted for all E, F and G landlords.

Subgroup analysis was also conducted to explore whether survey results varied according to other variables, such as how many properties landlords own. Where differences were identified, these were tested for statistical significance using Pearson's chi-squared test. This tests the extent to which differences in the survey responses for two variables (e.g. landlord type and awareness of the PRS regulations) may be simply due to chance or reflect an actual relationship between the variables. For example, if differences in the survey responses for two variables are found to be statistically significant at the 95% level using the test it means there is only a five per cent probability that this is due to chance, and a 95% chance that it reflects an actual relationship between the variables. The main report indicates where reported findings are found to be statistically significant.

The statistical testing was carried out using a chi-squared test. This test provides a robust overall test of the relationship between two variables rather than a test of the differences between two individual categories within these variables. For this reason the survey data tables presented in Appendix 3 present statistical significant for the whole table only. To illustrate the conclusions that can be drawn from these findings, consider the test for whether awareness of the regulations varies by landlord type. If the chi-squared test identifies that there is a statistically significant relationship between landlord type and awareness, and the data shows that awareness is higher for landlord type A than landlord type B, this is indicative of a genuine difference in awareness between landlord type A and landlord type B. The findings do not confirm whether differences in awareness specifically between landlord type A and landlord type B are statistically significant.

Significance testing has only been applied to responses for variables collected in the same survey. It is not appropriate methodologically to test for significance between the responses collected in two different surveys, or different waves of a repeat survey. This is because the sample compositions of these surveys and waves vary due to the self-selecting sampling approach, and these variations may therefore account for any differences that are observed.

The report presents findings against all of the relevant evaluation questions. The report narrative, and tables in Appendix 3, clearly state which findings are statistically significant and which are not. Statistically significant findings are those at the 95% level or higher. In the survey data tables in Appendix 3 the following notation is used to represent statistical significance:

- ns - not statistically significant at the 95% level
- \* - statistically significant at the 95% level
- \*\* - statistically significant at the 99% level
- \*\*\* - statistically significant at the 99.9% level

The unweighted sample size is also provided for each data table in Appendix 3 using the notation "N=".

### **Strengths and weaknesses of the survey evidence**

The main strength of the survey evidence is that it provides quantitative results on the prevalence of different attitudes and behaviours, collected from samples of landlords in both England and Wales. The English Private Landlord Survey and Welsh Landlord Survey in particular have large sample sizes – even when this is restricted to just landlords with an E, F or G rated property. Weightings are applied to the English Private Landlord Survey and Welsh Landlord Survey results to ensure they are representative and less affected by the achieved

sample makeup than the other surveys drawn on in this evaluation. The Landlord Panel Survey and Small Landlord Panel Survey have smaller sample sizes and the results are not weighted to correct for any bias in the sample composition.

The use of multiple surveys in this evaluation delivers several benefits:

- The English Private Landlord Survey and Welsh Landlord Survey provide large representative samples of landlords affected by the regulations. This provides robust evidence of awareness and reactions to the regulations.
- The Landlord Panel Survey and Small Landlord Panel Survey are repeated every 6 months, allowing for changes over time to be observed as well as explicitly targeting a range of landlord types.
- The Welsh Landlord Survey, Landlord Panel Survey, and Small Landlord Panel Survey allowed scope for more questions to be included, giving more evidence than was available from the English Private Landlord Survey.

However, caution should be taken when interpreting apparent differences between the results of the different surveys. These variations may well reflect the differing timings and sampling of the surveys as much as or more so than actual differences between, for example, English and Welsh landlords.

## Qualitative interviews with landlords and letting agents

The 2019 interim report draws on evidence from on the first of the five planned waves of landlord and letting agent interviews, conducted in late 2018 and early 2019 by Kantar Public.

### Sampling approach

The original ITT and proposal for undertaking the evaluation were predicated on sampling and interviewing landlords in each of the following four categories:

1. Landlords who have registered an exemption
2. Landlords who are aware of the PRS regulations
3. Landlords who have improved their properties
4. Landlords who have not taken action

However, based on the review of the theory of change undertaken at the start of the evaluation and further discussions with BEIS it was agreed to make certain modifications to this sampling approach and apply these on a trial basis in the first wave interviews in 2018/19.

Firstly, it was agreed to substitute a small number of landlord interviews with letting agent interviews. This will allow the evaluation to better explore the role letting agents play in informing landlords about regulation changes, and whether some landlords defer responsibility for complying with regulations to letting agents (particularly those landlords who have not taken action). It was therefore agreed to conduct a small number of interviews with letting agents in the first wave (2018/19) and to review the value of substituting further letting agent interviews in later waves.

Secondly, it was agreed to reconfigure the original four landlord categories into the following three:

1. Landlords who have registered an exemption
2. Landlords who have improved their properties
3. Landlords who have not taken action

The rationale for this change was that the original “landlords who are aware of the PRS regulations” category would overlap with landlords who have registered an exemption and landlords who have improved their properties. It can reasonably be assumed that these two groups will all be aware of the regulations.

Equally, awareness and understanding is still clearly a potentially important determinant of how landlords respond (or do not respond) to the regulations. For example, landlords may be aware of the regulations but not fully understand them, and this lack of understanding may mediate how they respond. Landlords may also be completely unaware of them, and not respond in any way as a consequence. In order to ensure these nuances could be explored through the interviews, it was agreed to monitor levels of awareness within each of the three landlord groups and aim to recruit landlords with differing levels of awareness.

The sampling and recruitment approach will be revisited to ensure it is fit for purpose in each year of the evaluation but at this stage the plan for the distribution of interviews is set out in Table 2.9.

Table 2.9: Planned distribution of landlord and letting agent interviews across the evaluation

| Interviewee group                  | Wave 1 | Wave 2 | Wave 3 | Wave 4 | Wave 5 | Total |
|------------------------------------|--------|--------|--------|--------|--------|-------|
| Landlords who registered exemption | 25     | 25     | 25     |        |        | 75    |
| Landlords who improved property    | 20     |        | 30     | 50     | 25     | 125   |
| Landlords who took no action       | 20     |        | 20     | 25     | 25     | 90    |
| Letting agents                     | 10     |        |        |        |        | 10    |
| Total                              | 75     | 25     | 75     | 75     | 50     | 300   |

Sampling quotas for each group in the wave one interviews were also agreed with BEIS and used in the recruitment, with the aim of representing different landlord and letting agent characteristics likely to influence attitudes and responses to the regulations. Details of these quotas are provided later in this section in Table 2.10.

## Recruitment

A mixed-method approach was used to recruit the different types of landlords and letting agents to participate in an interview:

- **Landlords who had registered an exemption:** These were recruited from landlords who had registered an exemption on the PRS exemptions register. Landlord details are available to BEIS and landlords are asked for consent to be recontacted for research as part of the registration process.



- **Landlords who had improved (or intended to improve) their properties:** These were recruited from landlords who had previously participated in a survey (either the English Private Landlord Survey, Landlord Panel Survey, Small Landlord Panel Survey or Welsh Landlord Survey) and gave their consent to be recontacted for research purposes.
- **Landlords who had not taken action:** A small number of these were recruited through the landlord surveys mentioned above. However the survey samples were exhausted without recruiting the target number of interviews for this group. Landlords who had indicated they had taken no action at the point they were surveyed typically said they now had registered an exemption, improved, or intended to improve, their properties when they were contacted about being interviewed. In agreement with BEIS, further methods were employed to identify and recruit landlords in this group:
  - A small group of landlords (5) who had taken part in the Welsh landlord survey via the Kantar panel were targeted specifically based on their responses. This group were approached a number of times over a three-week period.
  - In house leads: This method was also employed to combat the slow progress in recruiting this group. The Kantar team circulated requests to the wider business to ask of any contacts that individuals might have with landlords that fall into this category. A number of leads were suggested, but these were commonly outside of the remit of the research (often because of the EPC rating of their property). As a result, no further recruits were gained from this method.
  - Snowballing: Researchers were asked to check with each participant if they had any contacts that would be willing to participate in the research. Participants were reluctant to suggest any potential participants, and as a result no further recruits were gained this way.

Despite the employment of these additional methods it was only possible to recruit 10 of the targeted 20 no action landlords. Achieved samples are provided in table 2.10.

- **Letting agents:** These were all recruited from the PRS exemptions register.

A minimum of 12 attempts were made to contact potential respondents before they were discounted from the sample. An initial screening questionnaire was administered with those who were successfully contacted to ascertain their eligibility for inclusion in the research. They were also assured of their anonymity and offered an incentive of £70 to encourage participation.

## Fieldwork

The interviews were conducted between November 2018 and February 2019<sup>15</sup> by Kantar Public's experienced interview team. They were conducted by telephone, digitally recorded, and transcribed for subsequent analysis. Topic guides (see Appendix 4) were used in the interviews to ensure coverage of key areas of interest. The topic guides were piloted in the first ten interviews and were found to be working well, so no subsequent amendments were made. The average interview length was circa 38 minutes.

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<sup>15</sup> The fieldwork was intended to complete in December 2019, however due to initial challenges recruiting landlords a 2 week break was implemented over the Christmas period, with fieldwork resuming in January.

## Achieved sample

Table 2.10 provides the characteristics of the achieved sample against the sampling targets and quotas. All target numbers of interviews and most quotas were met for landlords who registered an exemption, landlords who made improvements, and letting agents.

However, despite the additional methods employed with this group, the target for landlords who had taken no action were not met. Ten were recruited and interviewed rather than the target of 20. This was always expected to be a small and hard-to-reach group in the evaluation (with survey evidence suggesting only 1-5% of landlords do not intend to comply with the regulations – see interim report). Nonetheless, further efforts will be made in future waves of the evaluation to represent this group.

**Table 2.10: Achieved wave one sample**

| Landlords who registered exemption |   | Quota                    | Achieved  |
|------------------------------------|---|--------------------------|-----------|
| <b>Primary criteria:</b>           |   |                          |           |
| Exemption reasons                  | Financial exemptions (no cost test, 7 year payback test)          | 8-10                     | 8         |
|                                    | Home improvements exemptions (improvements made, wall insulation) | 8-10                     | 10        |
|                                    | Other (consent, devaluation, new landlord)                        | 6-8                      | 7         |
| Country                            | England   | Monitor (aim for spread) | 20        |
|                                    | Wales   |                          | 5         |
| Number of properties               | < 5   | Monitor (aim for spread) | 20        |
|                                    | 6-15  |                          | 3         |
|                                    | > 15  |                          | 2         |
| Landlord type                      | Individual/couple   | Monitor (aim for spread) | 20        |
|                                    | Private company   |                          | 5         |
|                                    | Public company  |                          | 0         |
|                                    | Other   |                          | 0         |
| <b>Secondary criteria:</b>         |   |                          |           |
| Awareness of regulations           | Aware but didn't understand details                               | Monitor (aim for spread) | 8         |
|                                    | Aware and fully understood  |                          | 2         |
|                                    | Unknown   |                          | 15        |
| <b>Total</b>                       |   | <b>25</b>                | <b>25</b> |

| Landlords who improved property |   | Quota         | Achieved |
|---------------------------------|---|---------------|----------|
| <b>Primary criteria:</b>        |   |               |          |
| EPC rating pre-improvement      | F                                       | Min 5         | 8        |
|                                 | G                                       | Min 5         | 12       |
| Improvement status              | Intend to improve                       | Min 5         | 2        |
|                                 | Completed improvements                  | Min 5         | 18       |
| Scale of improvement            | Minimum improvements intended/completed | Min 5         | 6        |
| Funding source                  | Savings                                 | Min 2 of each | 12       |
|                                 | Loan/grants/mortgages                   |               | 4        |
|                                 | Others                                  |               | 4        |
| Number of properties            | < 5                                     | Min 2 of each | 8        |



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| Landlords who improved property |   | Quota                    | Achieved  |
|---------------------------------|---|--------------------------|-----------|
|                                 | 6-15                                    |                          | 5         |
|                                 | > 15                                    |                          | 7         |
| Landlord type                   | Individual/couple                       | Min 2 of each            | 14        |
|                                 | Private company                         |                          | 5         |
|                                 | Public company                          |                          | 1         |
|                                 | Other                                   |                          | 0         |
| <b>Secondary criteria:</b>      |   |                          |           |
| Awareness of regulations        | Aware but didn't understand details     | Monitor (aim for spread) | 8         |
|                                 | Aware and fully understood              |                          | 12        |
| Country                         | England – rural/semi-rural              | Monitor (aim for spread) | 4         |
|                                 | England – urban                         |                          | 11        |
|                                 | Wales                                   |                          | 5         |
| Investment purpose              | For capital growth                      | Monitor (aim for spread) | 4         |
|                                 | For rental income                       |                          | 6         |
|                                 | Temporary investment                    |                          | 0         |
|                                 | Long-term pension investment            |                          | 10        |
|                                 | Providing housing as an employer        |                          | 0         |
|                                 | Providing housing as relative of tenant |                          | 0         |
|                                 | Other                                   |                          | 0         |
| <b>Total</b>                    |   | <b>20</b>                | <b>20</b> |

| Landlords who took no action              |  | Quota                    | Achieved |
|---|--|--------------------------|----------|
| <b>Primary criteria:</b>                  |  |                          |          |
| EPC rating pre-improvement                | F  | Min 5                    | 7        |
|   | G  | Min 5                    | 3        |
| Awareness and action (at point of survey) | Unaware  | Min 3                    | 1        |
|   | Aware but continuing to let without improvements | Min 3                    | 0        |
|   | Aware but selling property with no improvements  | Min 3                    | 7        |
|   | Other  |                          | 2        |
| Number of properties                      | < 5  | Mix                      | 5        |
|   | 6-15   |                          | 4        |
|   | > 15   |                          | 1        |
| Landlord type                             | Individual/couple                                | Mix                      | 7        |
|   | Private company                                  |                          | 3        |
|   | Public company                                   |                          | 0        |
| <b>Secondary criteria:</b>                |  |                          |          |
| Awareness of regulations                  | Unaware  | Monitor (aim for spread) | 1        |
|   | Aware but didn't understand details              |                          | 4        |
|   | Aware and fully understood                       |                          | 5        |
| Country                                   | England - Rural                                  | Monitor (aim for spread) | 1        |
|   | England - Semi Rural                             |                          | 0        |
|   | England - Urban                                  |                          | 4        |
|   | Wales  |                          | 5        |

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| Landlords who took no action |   | Quota                    | Achieved  |
|------------------------------|---|--------------------------|-----------|
| Investment purpose           | For capital growth                      | Monitor (aim for spread) | 5         |
|                              | For rental income                       |                          | 0         |
|                              | Temporary investment                    |                          | 4         |
|                              | Long-term pension investment            |                          | 0         |
|                              | Providing housing as an employer        |                          | 0         |
|                              | Providing housing as relative of tenant |                          | 1         |
|                              | Other                                   |                          | 0         |
| <b>Total</b>                 |   | <b>20</b>                | <b>10</b> |

| Letting agents           |                             | Quota     | Achieved   |
|--------------------------|-----------------------------|-----------|--|
| <b>Primary criteria:</b> |                             |           |  |
| Role                     | Fully manage properties     | Min 2     | 10 who both fully and partially managed properties |
|                          | Partially manage properties | Min 2     |  |
| <b>Total</b>             |                             | <b>10</b> | <b>10</b>  |

### Analysis

All interview transcripts were analysed using the software package NVivo. Two tailored coding frameworks were developed for the landlord and letting agent interview transcripts. Data from the transcripts was coded under themes and subthemes in the relevant framework. This was then used as the basis for between- and within-case analysis to explore how responses to the regulations varied according to individual respondent characteristics and between different respondent groups. The outcomes of this analysis were reviewed jointly in a debrief session by ICF and Kantar Public to test and refine the key findings from the interviews for subsequent inclusion in the interim report.

### Strengths and weaknesses of the interview evidence

A strength of the interview evidence is that it provides good representation of landlords who had complied with the regulations - either by making energy efficiency improvements (20) or registering an exemption (25). The characteristics of the landlords interviewed are also sufficiently diverse to provide scope for exploring qualitatively how decision-making and experiences compare between different landlord types, landlords with large and small portfolios, and landlords in different areas.

The 10 letting agent interviews provide further insight into their potential role in mediating landlord awareness and decision-making.

The main weakness of the interview evidence is that the target number of interviews with landlords who had taken no action in response to the regulations (20) was not achieved, meaning there is more limited qualitative insight into the reasons and circumstances surrounding non-compliance with the regulations.

Landlords who had either made energy efficiency improvements or taken no action in response to the regulations were also recruited to take part in an interview through their previous participation in surveys which included questions about the regulations. This may have made

landlords more conscious and aware of the regulations than they would otherwise have been prior being interviewed. The potential bias introduced by this sampling approach should be considered alongside interpretation of the interview findings, primarily that the disengaged or disinterested landlords are unlikely to have been included.

### Exemptions register data

Northgate provide monthly reports for BEIS on the volume and characteristics of the exemptions registered on the PRS exemptions register. Data from the January 2019 monthly report has been drawn on in this interim evaluation.

## Appendix 3 Survey data tables

This appendix provides data tables for the four landlord surveys that have been drawn on in the interim evaluation. This includes data tables for landlords who were aware they had a property with an EPC rating of E, F or G at the point they were surveyed and data tables for all landlords who were surveyed (i.e. including those with higher rated properties and those who weren't aware of the rating of their properties).

The following notation is used to represent statistical significance:

- ns - not statistically significant at the 95% level
- \* - statistically significant at the 95% level
- \*\* - statistically significant at the 99% level
- \*\*\* - statistically significant at the 99.9% level

The unweighted sample size is also provided for each data table using the notation "N=".

### English Private Landlord Survey 2018: Landlords with E/F/G properties

| <b>Before this survey, how aware, if at all, were you of this new legal requirement?</b> |            |
|--|------------|
|  | <b>%</b>   |
| Not at all   | 35         |
| Aware but did not understand the details   | 19         |
| Aware and fully understood the details   | 47         |
| <b>Total</b>   | <b>100</b> |

N=1514

Column percentages may not sum to exactly 100 due to rounding

| <b>Type of landlord</b> | <b>Before this survey, how aware, if at all, were you of this new legal requirement?</b> |  |   | <b>Total</b> |
|-------------------------|--|--|---|--------------|
|                         | <b>Not aware</b>   | <b>Aware but didn't understand the details</b> | <b>Aware and fully understood the details</b> |              |
|                         | <b>%</b>   | <b>%</b>                                       | <b>%</b>                                      | <b>%</b>     |
| Individual(s)           | 37   | 19   | 45  | 100          |
| Company                 | 11   | 18   | 71  | 100          |
| All                     | 35   | 19   | 47  | 100          |

N=1514

Row percentages may not sum to exactly 100 due to rounding

Significance: \*\*\*

Evaluation of the Domestic Private Rented Sector Minimum Energy Efficiency Standard Regulations: 2019 Interim Report Appendices

| Number of rental properties owned by landlord | Before this survey, how aware, if at all, were you of this new legal requirement? |   |  | Total |
|---|---|---|--|-------|
|   | Not aware   | Aware but didn't understand the details | Aware and fully understood the details |       |
|   | %   | %                                       | %                                      | %     |
| 1 only  | 45  | 19                                      | 36                                     | 100   |
| 2 to 4  | 36  | 20                                      | 44                                     | 100   |
| 5+  | 15  | 15                                      | 70                                     | 100   |
| All   | 35  | 19                                      | 47                                     | 100   |

N=1491

Row percentages may not sum to exactly 100 due to rounding

Significance: \*\*\*

| Does your most recent tenant receive HB? + | Before this survey, how aware, if at all, were you of this new legal requirement? |   |  | Total |
|--|---|---|--|-------|
|  | Not aware   | Aware but didn't understand the details | Aware and fully understood the details |       |
|  | %   | %                                       | %                                      | %     |
| Yes  | 36  | 14                                      | 50                                     | 100   |
| No   | 34  | 18                                      | 48                                     | 100   |
| Don't know                                 | 40  | 23                                      | 37                                     | 100   |
| All  | 35  | 19                                      | 47                                     | 100   |

N=1503

Row percentages may not sum to exactly 100 due to rounding

+ Housing Benefit, Local Housing Allowance or Universal Credit

Significance: \*

## English Private Landlord Survey 2018: All landlords

| Before this survey, how aware, if at all, were you of this new legal requirement? |     |
|---|-----|
|   | %   |
| Not at all  | 43  |
| Aware, but did not understand the details   | 16  |
| Aware and fully understood the details  | 41  |
| Total   | 100 |

N=6212

Column percentages may not sum to exactly 100 due to rounding

| Type of landlord | Before this survey, how aware, if at all, were you of this new legal requirement? |   |  | Total |
|------------------|---|---|--|-------|
|                  | Not aware   | Aware but didn't understand the details | Aware and fully understood the details |       |
|                  | %   | %                                       | %                                      | %     |
| Individual(s)    | 44  | 16                                      | 39                                     | 100   |
| Company          | 19  | 19                                      | 61                                     | 100   |
| Other            | 30  | 14                                      | 57                                     | 100   |

Evaluation of the Domestic Private Rented Sector Minimum Energy Efficiency Standard Regulations: 2019 Interim Report Appendices

| Type of landlord | Before this survey, how aware, if at all, were you of this new legal requirement? |   |  | Total |
|------------------|---|---|--|-------|
|                  | Not aware   | Aware but didn't understand the details | Aware and fully understood the details |       |
|                  | %   | %                                       | %                                      | %     |
| All              | 43  | 16                                      | 41                                     | 100   |

N=6212

Row percentages may not sum to exactly 100 due to rounding

Significance: \*\*\*

| Number of rental properties owned by landlord | Before this survey, how aware, if at all, were you of this new legal requirement? |   |  | Total |
|---|---|---|--|-------|
|   | Not aware   | Aware but didn't understand the details | Aware and fully understood the details |       |
|   | %   | %                                       | %                                      | %     |
| 1 only  | 54  | 15                                      | 31                                     | 100   |
| 2 to 4  | 41  | 18                                      | 41                                     | 100   |
| 5+  | 19  | 15                                      | 66                                     | 100   |
| All   | 43  | 16                                      | 41                                     | 100   |

N=6141

Row percentages may not sum to exactly 100 due to rounding

Significance: \*\*\*

| Age group of landlord | Before this survey, how aware, if at all, were you of this new legal requirement? |   |  | Total |
|-----------------------|---|---|--|-------|
|                       | Not aware   | Aware but didn't understand the details | Aware and fully understood the details |       |
|                       | %   | %                                       | %                                      | %     |
| Under 35              | 41  | 20                                      | 39                                     | 100   |
| 35 to 44              | 46  | 20                                      | 34                                     | 100   |
| 45 to 54              | 46  | 15                                      | 39                                     | 100   |
| 55 to 64              | 43  | 16                                      | 42                                     | 100   |
| 65+                   | 44  | 16                                      | 40                                     | 100   |
| All                   | 44  | 16                                      | 39                                     | 100   |

N=5523

Row percentages may not sum to exactly 100 due to rounding

Significance: ns

| Does your most recent tenant receive HB? + | Before this survey, how aware, if at all, were you of this new legal requirement? |   |  | Total |
|--|---|---|--|-------|
|  | Not aware   | Aware but didn't understand the details | Aware and fully understood the details |       |
|  | %   | %                                       | %                                      | %     |
| Yes  | 43  | 16                                      | 42                                     | 100   |
| No   | 42  | 17                                      | 42                                     | 100   |

Evaluation of the Domestic Private Rented Sector Minimum Energy Efficiency Standard Regulations: 2019 Interim Report Appendices

| Does your most recent tenant receive HB? + | Before this survey, how aware, if at all, were you of this new legal requirement? |   |  | Total |
|--|---|---|--|-------|
|  | Not aware   | Aware but didn't understand the details | Aware and fully understood the details |       |
|  | %   | %                                       | %                                      | %     |
| Don't know                                 | 56  | 14                                      | 30                                     | 100   |
| All  | 43  | 16                                      | 41                                     | 100   |

N=6181

Row percentages may not sum to exactly 100 due to rounding  
 + Housing Benefit, Local Housing Allowance or Universal Credit  
 Significance: \*

Landlord Panel Survey 2018 Q3: Landlords with E/F/G properties

| Before this survey, how aware, if at all, were you of this new legal requirement? |     |
|---|-----|
|   | %   |
| Not at all  | 6   |
| Aware but did not understand the details  | 12  |
| Aware and fully understood the details  | 82  |
| Total   | 100 |

N=176

Column percentages may not sum to exactly 100 due to rounding

| Number of rental properties owned by landlord | Before this survey, how aware, if at all, were you of this new legal requirement? |   |  | Total |
|---|---|---|--|-------|
|   | Not aware   | Aware but didn't understand the details | Aware and fully understood the details |       |
|   | %   | %                                       | %                                      | %     |
| 1 only  | 10  | 30                                      | 60                                     | 100   |
| 2 to 4  | 12  | 13                                      | 75                                     | 100   |
| 5+  | 2   | 10                                      | 89                                     | 100   |
| All   | 6   | 12                                      | 82                                     | 100   |

N=176

Row percentages may not sum to exactly 100 due to rounding  
 Significance: \*

| What landlords would do if they had a rental property that was EPC E, F or G rated    |     |
|---|-----|
|   | %   |
| Carry out works at the minimum cost required to comply & continue letting it          | 46  |
| Carry out works to maximise the long-term value of the property & continue letting it | 38  |
| Carry out works to bring it up to standard & then sell it                             | 3   |
| Not carry out any works & continue letting it   | 1   |
| Not carry out any works & either sell or not re-let the property                      | 3   |
| Other   | 4   |
| Don't know  | 5   |
| Total   | 100 |

N=176

Column percentages may not sum to exactly 100 due to rounding

Evaluation of the Domestic Private Rented Sector Minimum Energy Efficiency Standard Regulations: 2019 Interim Report Appendices

| <b>How landlords would fund the work</b> |    |
|--|----|
|  | %  |
| Savings                                  | 64 |
| Loan                                     | 8  |
| Mortgage                                 | 4  |
| Borrow from friends / family             | 1  |
| By putting up the rent                   | 21 |
| Government grant or funding              | 12 |
| Other                                    | 4  |
| Don't know                               | 1  |

N=176

Because landlords could give more than one response, column percentages may not sum to exactly 100

### Landlord Panel Survey 2018 Q1: Landlords with E/F/G properties

| <b>Before this survey, how aware, if at all, were you of this new legal requirement?</b> |     |
|--|-----|
|  | %   |
| Not at all   | 12  |
| Aware but did not understand the details   | 17  |
| Aware and fully understood the details   | 71  |
| Total  | 100 |

N=314

Column percentages may not sum to exactly 100 due to rounding

| <b>Number of rental properties owned by landlord</b> | <b>Before this survey, how aware, if at all, were you of this new legal requirement?</b> |  |   | <b>Total</b> |
|--|--|--|---|--------------|
|  | <b>Not aware</b>   | <b>Aware but didn't understand the details</b> | <b>Aware and fully understood the details</b> |              |
|  | %  | %  | %   | %            |
| 1 only   | 18   | 24   | 58  | 100          |
| 2 to 4   | 13   | 26   | 62  | 100          |
| 5+   | 11   | 11   | 79  | 100          |
| All  | 12   | 17   | 71  | 100          |

N=314

Row percentages may not sum to exactly 100 due to rounding

Significance: \*

| <b>What landlords would do if they had a rental property that was EPC E, F or G rated</b> |     |
|---|-----|
|   | %   |
| Carry out works at the minimum cost required to comply & continue letting it              | 41  |
| Carry out works to maximise the long-term value of the property & continue letting it     | 36  |
| Carry out works to bring it up to standard & then sell it                                 | 3   |
| Not carry out any works & continue letting it   | 1   |
| Not carry out any works & either sell or not re-let the property                          | 10  |
| Other   | 6   |
| Don't know  | 4   |
| Total   | 100 |

N=314



## Evaluation of the Domestic Private Rented Sector Minimum Energy Efficiency Standard Regulations: 2019 Interim Report Appendices

Column percentages may not sum to exactly 100 due to rounding

### Landlord Panel Survey 2018 Q1: All landlords

| <b>Before this survey, how aware, if at all, were you of this new legal requirement?</b> |            |
|--|------------|
|  | <b>%</b>   |
| Not at all   | 14         |
| Aware but did not understand the details   | 13         |
| Aware and fully understood the details   | 74         |
| <b>Total</b>   | <b>100</b> |

N=1043

Column percentages may not sum to exactly 100 due to rounding

| <b>Number of rental properties owned by landlord</b> | <b>Before this survey, how aware, if at all, were you of this new legal requirement?</b> |  |   | <b>Total</b> |
|--|--|--|---|--------------|
|  | <b>Not aware</b>   | <b>Aware but didn't understand the details</b> | <b>Aware and fully understood the details</b> |              |
|  | <b>%</b>   | <b>%</b>                                       | <b>%</b>                                      | <b>%</b>     |
| 1 only   | 23   | 14   | 63  | 100          |
| 2 to 4   | 14   | 16   | 70  | 100          |
| 5+   | 11   | 9  | 80  | 100          |
| <b>All</b>   | <b>14</b>  | <b>13</b>                                      | <b>74</b>                                     | <b>100</b>   |

N=1043

Row percentages may not sum to exactly 100 due to rounding

Significance: \*\*

| <b>What landlords would do if they had a rental property that was EPC E, F or G rated</b> |            |
|---|------------|
|   | <b>%</b>   |
| Carry out works at the minimum cost required to comply & continue letting it              | 37         |
| Carry out works to maximise the long-term value of the property & continue letting it     | 41         |
| Carry out works to bring it up to standard & then sell it                                 | 3          |
| Not carry out any works & continue letting it   | 1          |
| Not carry out any works & either sell or not re-let the property                          | 7          |
| Other   | 5          |
| Don't know  | 5          |
| <b>Total</b>  | <b>100</b> |

N=1043

Column percentages may not sum to exactly 100 due to rounding

| <b>Number of rental properties</b> | <b>What landlords would do if they had a rental property that was EPC E, F or G rated</b> |  |                                       | <b>Total</b> |
|------------------------------------|---|--|---------------------------------------|--------------|
|                                    | <b>Carry out work at minimum cost to comply &amp; continue letting</b>                    | <b>Carry out work to maximise long-term value &amp; continue letting</b> | <b>Other actions &amp; don't know</b> |              |
|                                    | <b>%</b>  | <b>%</b>   | <b>%</b>                              | <b>%</b>     |
| One                                | 33  | 41   | 27                                    | 100          |
| 2 to 4                             | 39  | 41   | 21                                    | 100          |

Evaluation of the Domestic Private Rented Sector Minimum Energy Efficiency Standard Regulations: 2019 Interim Report Appendices

| Number of rental properties | What landlords would do if they had a rental property that was EPC E, F or G rated |   |                            |       |
|-----------------------------|--|---|----------------------------|-------|
|                             | Carry out work at minimum cost to comply & continue letting                        | Carry out work to maximise long-term value & continue letting | Other actions & don't know | Total |
|                             | %  | %   | %                          | %     |
| 5+                          | 37   | 42  | 22                         | 100   |
| All                         | 37   | 41  | 22                         | 100   |

N=1043

Row percentages may not sum to exactly 100 due to rounding

Significance: ns

| How landlords would fund the work |    |
|-----------------------------------|----|
|                                   | %  |
| Savings                           | 76 |
| Loan                              | 7  |
| Mortgage                          | 4  |
| Borrow from friends / family      | 1  |
| By putting up the rent            | 20 |
| Government grant or funding       | 9  |
| Other                             | 5  |
| Don't know                        | 3  |

N=1043

Because landlords could give more than one response, column percentages may not sum to exactly 100

| Number of rental properties | How landlords would fund the work |                     |
|-----------------------------|-----------------------------------|---------------------|
|                             | Savings                           | Putting up the rent |
|                             | %                                 | %                   |
| One                         | 82                                | 16                  |
| 2 to 4                      | 77                                | 17                  |
| 5+                          | 74                                | 23                  |
| All                         | 76                                | 19                  |

N=1043

Row percentages may not sum to exactly 100 due to rounding

### Landlord Panel Survey 2017 Q3: Landlords with E/F/G properties

| Are there any non-financial barriers to improving the energy efficiency of your properties? |     |
|---|-----|
|   | %   |
| Yes   | 59  |
| No  | 32  |
| Don't know  | 10  |
| Total   | 100 |

N=179

Column percentages may not sum to exactly 100 due to rounding

## Evaluation of the Domestic Private Rented Sector Minimum Energy Efficiency Standard Regulations: 2019 Interim Report Appendices

| <b>Perceived non-financial barriers to improving the energy efficiency of their properties</b> |    |
|--|----|
|  | %  |
| Lack of knowledge of what suits my properties  | 6  |
| Characteristics of my properties make improvements unsuitable                                  | 36 |
| Time & effort required to arrange improvements   | 16 |
| Disruption caused to tenants   | 38 |
| Lack of tenant support   | 13 |
| Harms the value or attractiveness of the property  | 14 |
| Planning permission limitations  | 12 |
| Other  | 8  |

N=179

Because landlords could give more than one response, column percentages may not sum to exactly 100

### Landlord Panel Survey 2017 Q3: All landlords

| <b>Are there any non-financial barriers to improving the energy efficiency of your properties?</b> |     |
|--|-----|
|  | %   |
| Yes  | 39  |
| No   | 47  |
| Don't know   | 13  |
| Total  | 100 |

N=856

Column percentages may not sum to exactly 100 due to rounding

| <b>Perceived non-financial barriers to improving the energy efficiency of their properties</b> |    |
|--|----|
|  | %  |
| Lack of knowledge of what suits my properties  | 10 |
| Characteristics of my properties make improvements unsuitable                                  | 30 |
| Time & effort required to arrange improvements   | 22 |
| Disruption caused to tenants   | 38 |
| Lack of tenant support   | 18 |
| Harms the value or attractiveness of the property  | 10 |
| Planning permission limitations  | 11 |
| Other  | 8  |

N=856

Because landlords could give more than one response, column percentages may not sum to exactly 100

### Small Landlord Panel Survey 2018 Q3: Landlords with E/F/G properties

| <b>Before this survey, how aware, if at all, were you of this new legal requirement?</b> |     |
|--|-----|
|  | %   |
| Not at all   | 32  |
| Aware, but did not understand the details  | 20  |
| Aware and fully understood the details   | 48  |
| Total  | 100 |

N=84

Column percentages may not sum to exactly 100 due to rounding

Evaluation of the Domestic Private Rented Sector Minimum Energy Efficiency Standard Regulations: 2019 Interim Report Appendices

| Number of rental properties owned by landlord | Before this survey, how aware, if at all, were you of this new legal requirement? |   |  | Total |
|---|---|---|--|-------|
|   | Not aware   | Aware but didn't understand the details | Aware and fully understood the details |       |
|   | %   | %                                       | %                                      | %     |
| 1   | 35  | 15                                      | 50                                     | 100   |
| 2-4   | 33  | 19                                      | 48                                     | 100   |
| 5+  | 27  | 27                                      | 46                                     | 100   |
| All   | 32  | 20                                      | 48                                     | 100   |

N=84

Row percentages may not sum to exactly 100 due to rounding

Significance: ns

| What landlords would do if they had a rental property that was EPC E, F or G rated    |     |
|---|-----|
|   | %   |
| Carry out works at the minimum cost required to comply & continue letting it          | 39  |
| Carry out works to maximise the long-term value of the property & continue letting it | 46  |
| Carry out works to bring it up to standard & then sell it                             | 5   |
| Not carry out any works & continue letting it   | 4   |
| Not carry out any works & either sell or not re-let the property                      | 2   |
| Other   | 1   |
| Don't know  | 2   |
| Total   | 100 |

N=84

Column percentages may not sum to exactly 100 due to rounding

| How landlords would fund the work |    |
|-----------------------------------|----|
|                                   | %  |
| Savings                           | 64 |
| Loan                              | 16 |
| Mortgage                          | 13 |
| Borrow from friends / family      | 7  |
| By putting up the rent            | 13 |
| Government grant or funding       | 5  |
| Don't know                        | 2  |

N=84

Because landlords could give more than one response, column percentages may not sum to exactly 100

### Small Landlord Panel Survey 2018 Q1: Landlords with E/F/G properties

| Before this survey, how aware, if at all, were you of this new legal requirement? |     |
|---|-----|
|   | %   |
| Not at all  | 24  |
| Aware, but did not understand the details   | 28  |
| Aware and fully understood the details  | 48  |
| Total   | 100 |

N=96

Column percentages may not sum to exactly 100 due to rounding

Evaluation of the Domestic Private Rented Sector Minimum Energy Efficiency Standard Regulations: 2019 Interim Report Appendices

| Number of rental properties owned by landlord | Before this survey, how aware, if at all, were you of this new legal requirement? |   |  | Total |
|---|---|---|--|-------|
|   | Not aware   | Aware but didn't understand the details | Aware and fully understood the details |       |
|   | %   | %                                       | %                                      | %     |
| 1   | 36  | 27                                      | 36                                     | 100   |
| 2-4   | 22  | 33                                      | 46                                     | 100   |
| 5+  | 16  | 16                                      | 68                                     | 100   |
| All   | 24  | 28                                      | 48                                     | 100   |

N=96

Row percentages may not sum to exactly 100 due to rounding

Significance: ns

| What landlords would do if they had a rental property that was EPC E, F or G rated    |     |
|---|-----|
|   | %   |
| Carry out works at the minimum cost required to comply & continue letting it          | 40  |
| Carry out works to maximise the long-term value of the property & continue letting it | 45  |
| Carry out works to bring it up to standard & then sell it                             | 10  |
| Not carry out any works & continue letting it   | 2   |
| Not carry out any works & either sell or not re-let the property                      | 3   |
| Other   | 0   |
| Don't know  | 0   |
| Total   | 100 |

N=96

Column percentages may not sum to exactly 100 due to rounding

### Small Landlord Panel Survey 2018 Q1: All landlords

| Before this survey, how aware, if at all, were you of this new legal requirement? |     |
|---|-----|
|   | %   |
| Not at all  | 43  |
| Aware, but did not understand the details   | 21  |
| Aware and fully understood the details  | 37  |
| Total   | 100 |

N=251

Column percentages may not sum to exactly 100 due to rounding

| Number of rental properties owned by landlord | Before this survey, how aware, if at all, were you of this new legal requirement? |   |  | Total |
|---|---|---|--|-------|
|   | Not aware   | Aware but didn't understand the details | Aware and fully understood the details |       |
|   | %   | %                                       | %                                      | %     |
| 1   | 57  | 16                                      | 27                                     | 100   |
| 2-4   | 38  | 24                                      | 38                                     | 100   |
| 5+  | 21  | 21                                      | 58                                     | 100   |
| All   | 57  | 16                                      | 27                                     | 100   |

N=251

## Evaluation of the Domestic Private Rented Sector Minimum Energy Efficiency Standard Regulations: 2019 Interim Report Appendices

Row percentages may not sum to exactly 100 due to rounding  
Significance: \*\*

| <b>What landlords would do if they had a rental property that was EPC E, F or G rated</b> |     |
|---|-----|
|   | %   |
| Carry out works at the minimum cost required to comply & continue letting it              | 39  |
| Carry out works to maximise the long-term value of the property & continue letting it     | 45  |
| Carry out works to bring it up to standard & then sell it                                 | 6   |
| Not carry out any works & continue letting it   | 1   |
| Not carry out any works & either sell or not re-let the property                          | 4   |
| Other   | 1   |
| Don't know  | 4   |
| Total   | 100 |

N=251

Column percentages may not sum to exactly 100 due to rounding

| <b>How landlords would fund the work</b> |    |
|--|----|
|  | %  |
| Savings                                  | 84 |
| Loan                                     | 19 |
| Mortgage                                 | 11 |
| Borrow from friends / family             | 4  |
| By putting up the rent                   | 12 |
| Government grant or funding              | 6  |
| Don't know                               | 1  |

N=251

Because landlords could give more than one response, column percentages may not sum to exactly 100

| <b>How landlords would fund the work</b> |    |
|--|----|
|  | %  |
| Savings                                  | 84 |
| Loan                                     | 19 |
| Mortgage                                 | 11 |
| Borrow from friends / family             | 4  |
| By putting up the rent                   | 12 |
| Government grant or funding              | 6  |
| Don't know                               | 1  |

N=251

Because landlords could give more than one response, column percentages may not sum to exactly 100

### Small Landlord Panel Survey 2017 Q3: Landlords with E/F/G properties

| <b>Are there any non-financial barriers to improving the energy efficiency of your properties?</b> |     |
|--|-----|
|  | %   |
| Yes  | 74  |
| No   | 20  |
| Don't know   | 6   |
| Total  | 100 |

N=70

## Evaluation of the Domestic Private Rented Sector Minimum Energy Efficiency Standard Regulations: 2019 Interim Report Appendices

Column percentages may not sum to exactly 100 due to rounding

| <b>Perceived non-financial barriers to improving the energy efficiency of their properties</b> |    |
|--|----|
|  | %  |
| Lack of knowledge of what suits my properties  | 17 |
| Characteristics of my properties make improvements unsuitable                                  | 24 |
| Time & effort required to arrange improvements   | 26 |
| Disruption caused to tenants   | 21 |
| Lack of tenant support   | 29 |
| Harms the value or attractiveness of the property  | 17 |
| Planning permission limitations  | 30 |
| Other  | 0  |

N=70

Because landlords could give more than one response, column percentages may not sum to exactly 100

### Small Landlord Panel Survey 2017 Q3: All landlords

| <b>Are there any non-financial barriers to improving the energy efficiency of your properties?</b> |     |
|--|-----|
|  | %   |
| Yes  | 41  |
| No   | 47  |
| Don't know   | 12  |
| Total  | 100 |

N=249

Column percentages may not sum to exactly 100 due to rounding

| <b>Perceived non-financial barriers to improving the energy efficiency of their properties</b> |    |
|--|----|
|  | %  |
| Lack of knowledge of what suits my properties  | 11 |
| Characteristics of my properties make improvements unsuitable                                  | 17 |
| Time & effort required to arrange improvements   | 17 |
| Disruption caused to tenants   | 18 |
| Lack of tenant support   | 15 |
| Harms the value or attractiveness of the property  | 11 |
| Planning permission limitations  | 15 |
| Other  | 3  |

N=249

Because landlords could give more than one response, column percentages may not sum to exactly 100

### Welsh Landlord Survey 2018/19: Landlords with E/F/G properties

| <b>Before this survey, how aware, if at all, were you of this new legal requirement?</b> |     |
|--|-----|
|  | %   |
| Not at all   | 19  |
| Aware, but did not understand the details  | 22  |
| Aware and fully understood the details   | 59  |
| Total  | 100 |

## Evaluation of the Domestic Private Rented Sector Minimum Energy Efficiency Standard Regulations: 2019 Interim Report Appendices

N=392

Column percentages may not sum to exactly 100 due to rounding

| Number of rental properties owned by landlord | Before this survey, how aware, if at all, were you of this new legal requirement? |   |  | Total |
|---|---|---|--|-------|
|   | Not aware   | Aware but didn't understand the details | Aware and fully understood the details |       |
|   | %   | %                                       | %                                      | %     |
| 1   | 22  | 15                                      | 64                                     | 100   |
| 2   | 23  | 34                                      | 43                                     | 100   |
| 3+  | 12  | 33                                      | 55                                     | 100   |
| All   | 19  | 22                                      | 55                                     | 100   |

N=392

Row percentages may not sum to exactly 100 due to rounding

Significance: \*\*\*

| Does your most recent tenant receive HB? + | Before this survey, how aware, if at all, were you of this new legal requirement? |   |  | Total |
|--|---|---|--|-------|
|  | Not aware   | Aware but didn't understand the details | Aware and fully understood the details |       |
|  | %   | %                                       | %                                      | %     |
| Yes  | 16  | 23                                      | 61                                     | 100   |
| No   | 16  | 23                                      | 61                                     | 100   |
| Don't know                                 | 38  | 18                                      | 44                                     | 100   |
| All  | 19  | 22                                      | 55                                     | 100   |

N=392

Row percentages may not sum to exactly 100 due to rounding

+ Housing Benefit, Local Housing Allowance or Universal Credit

Significance: ns

| Are you a registered landlord? | Before this survey, how aware, if at all, were you of this new legal requirement? |   |  | Total |
|--------------------------------|---|---|--|-------|
|                                | Not aware   | Aware but didn't understand the details | Aware and fully understood the details |       |
|                                | %   | %                                       | %                                      | %     |
| Yes                            | 20  | 21                                      | 59                                     | 100   |
| No or Don't know               | 18  | 32                                      | 50                                     | 100   |
| All                            | 19  | 22                                      | 55                                     | 100   |

N=392

Row percentages may not sum to exactly 100 due to rounding

+ Housing Benefit, Local Housing Allowance or Universal Credit

Significance: ns

| What landlords would do if they had a rental property that was EPC E, F or G rated    |    |
|---|----|
|   | %  |
| Carry out works at the minimum cost required to comply & continue letting it          | 30 |
| Carry out works to maximise the long-term value of the property & continue letting it | 39 |



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| <b>What landlords would do if they had a rental property that was EPC E, F or G rated</b> |     |
|---|-----|
|   | %   |
| Carry out works to bring it up to standard & then sell it                                 | 9   |
| Not carry out any works & continue letting it   | 1   |
| Not carry out any works & either sell or not re-let the property                          | 11  |
| Apply for an exemption  | 5   |
| Other   | 2   |
| Don't know  | 5   |
| Total   | 100 |

N=392

Column percentages may not sum to exactly 100 due to rounding

| <b>How landlords would fund the work</b> |    |
|--|----|
|  | %  |
| Savings                                  | 72 |
| Loan                                     | 24 |
| Mortgage                                 | 12 |
| Borrow from friends / family             | 8  |
| By putting up the rent                   | 19 |
| Government grant or funding              | 18 |

N= 392

Because landlords could give more than one response, column percentages may not sum to exactly 100

| <b>Have you undertaken that work or registered an exemption?</b> |     |
|--|-----|
|  | %   |
| Yes  | 44  |
| No   | 57  |
| Total  | 100 |

N=320

Column percentages may not sum to exactly 100 due to rounding

| <b>Are there any non-financial barriers to improving the energy efficiency of your properties?</b> |     |
|--|-----|
|  | %   |
| Yes  | 45  |
| No   | 43  |
| Don't know   | 13  |
| Total  | 100 |

N=392

Column percentages may not sum to exactly 100 due to rounding

| <b>Perceived non-financial barriers to improving the energy efficiency of their properties</b> |    |
|--|----|
|  | %  |
| Lack of knowledge of what suits my properties  | 5  |
| Characteristics of my properties make improvements unsuitable                                  | 19 |
| Time & effort required to arrange improvements   | 12 |
| Disruption caused to tenants   | 17 |

## Evaluation of the Domestic Private Rented Sector Minimum Energy Efficiency Standard Regulations: 2019 Interim Report Appendices

| <b>Perceived non-financial barriers to improving the energy efficiency of their properties</b> |   |
|--|---|
|  | % |
| Lack of tenant support   | 7 |
| Harms the value or attractiveness of the property  | 7 |
| Planning permission limitations  | 9 |
| Other  | 4 |

N=392

Because landlords could give more than one response, column percentages may not sum to exactly 100

| <b>Sources of information about the new energy efficiency requirement</b> |    |
|---|----|
|   | %  |
| Estate agent  | 24 |
| Managing agent  | 29 |
| Builders or tradespeople  | 9  |
| Landlord associations   | 27 |
| Rent Smart Wales  | 42 |
| National media  | 26 |
| Internet searches   | 22 |
| Central government guidance documents                                     | 10 |
| Local authority guidance documents  | 8  |
| EPC assessor  | 13 |
| Other landlords   | 6  |
| Other   | 2  |
| Don't know  | 1  |

N=392

Because landlords could give more than one response, column percentages may not sum to exactly 100

### Welsh Landlord Survey 2018/19: All landlords

| <b>Before this survey, how aware, if at all, were you of this new legal requirement?</b> |     |
|--|-----|
|  | %   |
| Not at all   | 35  |
| Aware, but did not understand the details  | 20  |
| Aware and fully understood the details   | 45  |
| Total  | 100 |

N=1119

Column percentages may not sum to exactly 100 due to rounding

| <b>Type of landlord</b> | <b>Before this survey, how aware, if at all, were you of this new legal requirement?</b> |  |   | <b>Total</b> |
|-------------------------|--|--|---|--------------|
|                         | <b>Not aware</b>   | <b>Aware but didn't understand the details</b> | <b>Aware and fully understood the details</b> |              |
|                         | %  | %  | %   | %            |
| Individual(s)           | 37   | 20   | 43  | 100          |
| Company                 | 17   | 22   | 61  | 100          |
| All                     | 35   | 20   | 45  | 100          |

N=1119

## Evaluation of the Domestic Private Rented Sector Minimum Energy Efficiency Standard Regulations: 2019 Interim Report Appendices

Row percentages may not sum to exactly 100 due to rounding  
Significance: \*\*\*

| Number of rental properties owned by landlord | Before this survey, how aware, if at all, were you of this new legal requirement? |   |  | Total |
|---|---|---|--|-------|
|   | Not aware   | Aware but didn't understand the details | Aware and fully understood the details |       |
|   | %   | %                                       | %                                      | %     |
| 1   | 40  | 18                                      | 43                                     | 100   |
| 2   | 32  | 26                                      | 41                                     | 100   |
| 3+  | 17  | 26                                      | 57                                     | 100   |
| All   | 35  | 20                                      | 45                                     | 100   |

N=1118

Row percentages may not sum to exactly 100 due to rounding  
Significance: \*\*\*

| Does your most recent tenant receive HB? + | Before this survey, how aware, if at all, were you of this new legal requirement? |   |  | Total |
|--|---|---|--|-------|
|  | Not aware   | Aware but didn't understand the details | Aware and fully understood the details |       |
|  | %   | %                                       | %                                      | %     |
| Yes  | 31  | 19                                      | 50                                     | 100   |
| No   | 32  | 21                                      | 47                                     | 100   |
| Don't know                                 | 49  | 19                                      | 33                                     | 100   |
| All  | 35  | 20                                      | 45                                     | 100   |

N=1118

Row percentages may not sum to exactly 100 due to rounding  
+ Housing Benefit, Local Housing Allowance or Universal Credit  
Significance: \*\*\*

| What landlords would do if they had a rental property that was EPC E, F or G rated    |     |
|---|-----|
|   | %   |
| Carry out works at the minimum cost required to comply & continue letting it          | 30  |
| Carry out works to maximise the long-term value of the property & continue letting it | 47  |
| Carry out works to bring it up to standard & then sell it                             | 5   |
| Not carry out any works & continue letting it   | 1   |
| Not carry out any works & either sell or not re-let the property                      | 11  |
| Other   | 3   |
| Don't know  | 3   |
| Total   | 100 |

N=1043

Column percentages may not sum to exactly 100 due to rounding

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| Type of landlord | What landlords would do if they had a rental property that was EPC E, F or G rated |   |   |                            |       |
|------------------|--|---|---|----------------------------|-------|
|                  | Carry out work at minimum cost to comply & continue letting                        | Carry out work to maximise long-term value & continue letting | Not carry out works & sell or not re-let it | Other actions & don't know | Total |
|                  | %  | %   | %   | %                          | %     |
| Individual(s)    | 27   | 44  | 11  | 18                         | 100   |
| Company          | 32   | 43  | 8   | 17                         | 100   |
| All              | 30   | 47  | 12  | 11                         | 100   |

N=1119

Row percentages may not sum to exactly 100 due to rounding

Significance: ns

| Number of rental properties | What landlords would do if they had a rental property that was EPC E, F or G rated |   |   |                            |       |
|-----------------------------|--|---|---|----------------------------|-------|
|                             | Carry out work at minimum cost to comply & continue letting                        | Carry out work to maximise long-term value & continue letting | Not carry out works & sell or not re-let it | Other actions & don't know | Total |
|                             | %  | %   | %   | %                          | %     |
| 1 only                      | 27   | 45  | 11  | 17                         | 100   |
| 2                           | 35   | 38  | 9   | 18                         | 100   |
| 3+                          | 24   | 47  | 10  | 20                         | 100   |
| All                         | 30   | 47  | 12  | 11                         | 100   |

N=1118

Row percentages may not sum to exactly 100 due to rounding

Significance: ns

| Does the most recent tenant receive HB? + | What landlords would do if they had a rental property that was EPC E, F or G rated |   |   |                            |       |
|---|--|---|---|----------------------------|-------|
|   | Carry out work at minimum cost to comply & continue letting                        | Carry out work to maximise long-term value & continue letting | Not carry out works & sell or not re-let it | Other actions & don't know | Total |
|   | %  | %   | %   | %                          | %     |
| Yes                                       | 27   | 43  | 10  | 20                         | 100   |
| No  | 27   | 46  | 11  | 17                         | 100   |
| Don't know                                | 31   | 39  | 11  | 20                         | 100   |
| All                                       | 30   | 47  | 12  | 11                         | 100   |

N=1119

Row percentages may not sum to exactly 100 due to rounding  
+ Housing Benefit, Local Housing Allowance or Universal Credit

Significance: ns

| How landlords would fund the work |    |
|-----------------------------------|----|
|                                   | %  |
| Savings                           | 70 |

Evaluation of the Domestic Private Rented Sector Minimum Energy Efficiency Standard Regulations: 2019 Interim Report Appendices

| <b>How landlords would fund the work</b> |    |
|--|----|
|  | %  |
| Loan                                     | 15 |
| Mortgage                                 | 7  |
| Borrow from friends / family             | 3  |
| By putting up the rent                   | 15 |
| Government grant or funding              | 15 |

N= 857

Because landlords could give more than one response, column percentages may not sum to exactly 100

| <b>Have you undertaken that work or registered an exemption?</b> |     |
|--|-----|
|  | %   |
| Yes  | 26  |
| No   | 74  |
| Total  | 100 |

N=885

Column percentages may not sum to exactly 100 due to rounding

| <b>Type of landlord</b> | <b>Have you undertaken that work or registered an exemption?</b> |           |              |
|-------------------------|--|-----------|--------------|
|                         | <b>Yes</b>   | <b>No</b> | <b>Total</b> |
|                         | %  | %         | %            |
| Individual(s)           | 25   | 75        | 100          |
| Company or other        | 33   | 67        | 100          |
| All                     | 26   | 74        | 100          |

N=885

Row percentages may not sum to exactly 100 due to rounding

Significance: ns

| <b>Number of rental properties</b> | <b>Have you undertaken that work or registered an exemption?</b> |           |              |
|------------------------------------|--|-----------|--------------|
|                                    | <b>Yes</b>   | <b>No</b> | <b>Total</b> |
|                                    | %  | %         | %            |
| 1 only                             | 25   | 75        | 100          |
| 2                                  | 23   | 77        | 100          |
| 3+                                 | 31   | 69        | 100          |
| All                                | 26   | 74        | 100          |

N=886

Row percentages may not sum to exactly 100 due to rounding

Significance: ns

| <b>Does the most recent tenant receive HB+</b> | <b>Have you undertaken that work or registered an exemption?</b> |           |              |
|--|--|-----------|--------------|
|  | <b>Yes</b>   | <b>No</b> | <b>Total</b> |
|  | %  | %         | %            |
| Yes  | 29   | 71        | 100          |
| No   | 27   | 74        | 100          |

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| Does the most recent tenant receive HB+ | Have you undertaken that work or registered an exemption? |    |       |
|---|---|----|-------|
|   | Yes   | No | Total |
|   | %   | %  | %     |
| Don't know                              | 18  | 82 | 100   |
| All                                     | 26  | 74 | 100   |

N=885

Row percentages may not sum to exactly 100 due to rounding  
 + Housing Benefit, Local Housing Allowance or Universal Credit  
 Significance: ns

| Are there any non-financial barriers to improving the energy efficiency of your properties? |     |
|---|-----|
|   | %   |
| Yes   | 35  |
| No  | 49  |
| Don't know  | 16  |
| Total   | 100 |

N=1119

Column percentages may not sum to exactly 100 due to rounding

| Type of landlord | Are there any non-financial barriers to improving the energy efficiency of your properties? |    |            |       |
|------------------|---|----|------------|-------|
|                  | Yes   | No | Don't know | Total |
|                  | %   | %  | %          | %     |
| Individual(s)    | 34  | 50 | 17         | 100   |
| Company          | 46  | 43 | 11         | 100   |
| All              | 35  | 49 | 16         | 100   |

N=1118

Row percentages (may not sum to exactly 100)  
 Significance: \*

| Number of rental properties | Are there any non-financial barriers to improving the energy efficiency of your properties? |    |            |       |
|-----------------------------|---|----|------------|-------|
|                             | Yes   | No | Don't know | Total |
|                             | %   | %  | %          | %     |
| One                         | 33  | 49 | 18         | 100   |
| 2 to 4                      | 35  | 50 | 15         | 100   |
| 5+                          | 43  | 49 | 8          | 100   |
| All                         | 35  | 49 | 16         | 100   |

N=1121

Row percentages (may not sum to exactly 100)  
 Significance: \*

| Does the most recent tenant receive HB+ | Are there any non-financial barriers to improving the energy efficiency of your properties? |    |            |       |
|---|---|----|------------|-------|
|   | Yes   | No | Don't know | Total |
|   | %   | %  | %          | %     |
| Yes                                     | 44  | 44 | 12         | 100   |
| No                                      | 33  | 52 | 15         | 100   |

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| Does the most recent tenant receive HB+ | Are there any non-financial barriers to improving the energy efficiency of your properties? |    |            |       |
|---|---|----|------------|-------|
|   | Yes   | No | Don't know | Total |
|   | %   | %  | %          | %     |
| Don't know                              | 31  | 46 | 23         | 100   |
| All                                     | 35  | 49 | 16         | 100   |

N=1120

Row percentages (may not sum to exactly 100)

+ Housing Benefit, Local Housing Allowance or Universal Credit

Significance: \*

| Are you a registered landlord? | Are there any non-financial barriers to improving the energy efficiency of your properties? |    |            |       |
|--------------------------------|---|----|------------|-------|
|                                | Yes   | No | Don't know | Total |
|                                | %   | %  | %          | %     |
| Yes                            | 25  | 59 | 16         | 100   |
| No or don't know               | 36  | 48 | 16         | 100   |
| All                            | 35  | 49 | 16         | 100   |

N=1119

Row percentages (may not sum to exactly 100)

Significance: ns

| Perceived non-financial barriers to improving the energy efficiency of their properties |    |
|---|----|
|   | %  |
| Lack of knowledge of what suits my properties   | 5  |
| Characteristics of my properties make improvements unsuitable                           | 19 |
| Time & effort required to arrange improvements  | 12 |
| Disruption caused to tenants  | 16 |
| Lack of tenant support  | 7  |
| Harms the value or attractiveness of the property                                       | 7  |
| Planning permission limitations   | 9  |
| Other   | 4  |

N=1119

Because landlords could give more than one response, column percentages may not sum to exactly 100

| Sources of information about the new energy efficiency requirement |    |
|--|----|
|  | %  |
| Estate agent   | 14 |
| Managing agent   | 23 |
| Builders or tradespeople   | 5  |
| Landlord associations  | 20 |
| Rent Smart Wales   | 43 |
| National media   | 21 |
| Internet searches  | 14 |
| Central government guidance documents                              | 6  |
| Local authority guidance documents                                 | 7  |
| EPC assessor   | 9  |
| Other landlords  | 6  |

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| <b>Sources of information about the new energy efficiency requirement</b> |          |
|---|----------|
|   | <b>%</b> |
| Other   | 4        |
| Don't know  | 3        |

N=1119

Because landlords could give more than one response, column percentages may not sum to exactly 100



## Appendix 4 Research materials

### Welsh Landlord Survey questionnaire

Hello and thank you for taking part in this survey for the Department for Business, Energy and Industrial Strategy (BEIS).

Kantar Public – an independent social research company – is conducting this survey on behalf of BEIS about the new energy efficiency regulations for private rented properties in England and Wales.

The survey will take approximately 5 minutes to complete, dependent upon the responses you provide.

Participation in the research is entirely voluntary. Your responses will be completely confidential and nobody will be able to identify from the results that you've taken part in the research. BEIS will not be able to identify any individual from their answers, unless given your express permission to do so.

To review Kantar Public's privacy policy, please [click here](#). If you would like more information about Kantar Public, please [click here](#).

Q1 I am...

- A landlord
- An agent (→ go to re-contact question)
- Both a landlord and an agent

Q2 As a landlord, how many rental properties do you own and let in Wales?

By "rental property" we mean residential property you own and rent out, but do not live in yourself.

- [Numeric box – allow answers from 1 to 1000]

Q3 An Energy Performance Certificate (EPC) provides home buyers and tenants with a rating of the energy efficiency of the property. An A rating is the most energy efficient and a G rating the least efficient.

Do any of your rental properties have an Energy Performance Certificate (EPC) rating of "E", "F" or "G"?

- Yes, more than half are E,F or G rated
- Yes, less than half are E,F or G rated
- Yes, but I am not sure how many
- None of my properties are E, F or G rated
- I don't know the EPC rating of my property(ies).

Q4 From April 2018, there is a new legal requirement for all properties rented out on new tenancies to have a minimum “E” energy efficiency rating on the Energy Performance Certificate (EPC). Before this survey, how aware, if at all, were you of this new legal requirement?

- I was not aware of this at all
- I was aware of it, but I did not understand the details
- I was aware of it and fully understood the details

Ask if Q4=2, 3

Q5 And where did you see information about the new Energy Efficiency requirement?

Select all that apply

- Estate agent
- Managing agent
- Builders or tradespeople
- Landlord associations
- Rent Smart Wales
- National media
- Internet searches
- Central Government guidance documents
- Local Authority guidance documents
- EPC assessor
- Other landlords
- Other [please specify]
- Don't know

Q6 The new minimum energy efficiency standard requirement is enforced by Local Authorities and non-compliant properties could incur a fine of up to £5,000. If you had a rental property that did not meet the required standard, would you...

- Carry out works at the minimum cost required to comply, and continue to let it out
- Carry out the works that maximise the long term value of my property, and continue to let it out.
- Carry out works to bring it up to standard then sell it
- Not carry out any works, continue to let it out
- Not carry out any works and either sell the property or not re-let it

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- Apply for an exemption
- Other [please specify]
- Don't know

Ask if would take any action Q6=1,2,3,

Q7 If you made improvements to bring a rental property up to standard, how would you fund this work?

Please select all that apply

- Savings
- Loan
- Mortgage
- Borrow from friends / family
- By putting up the rent
- Government grant or funding
- Other [please specify]
- Don't know

Ask if would take any action Q6=1,2,3,6

Q8 Have you [IF Q6=1,2,3 undertaken or started to undertake this work] [IF Q6=6 registered an exemption] ?

- Yes
- No

Q9 Thinking about the barriers to improving the energy efficiency of the properties in your portfolio, do you think there are any barriers other than the financial costs?

- Yes
- No
- Don't know

Ask Q10 if Q9=1

Q10 Which of the following barriers do you believe exist in relation to improving the energy efficiency of properties in your portfolio?

Please select up to three

(scripter note: randomise)

- Lack of knowledge of what suits my properties

- The characteristics of my properties make improvements unsuitable
- Time and effort required to arrange improvements
- Disruption caused to tenants
- Lack of tenant support
- Harms the value or attractiveness of the property
- Planning permission limitations
- Other [please specify]

Q11 Which of the following best describes how you currently rent out your rental properties?

- As an individual or couple
- As a private company
- As a public company (plc)
- As something else

Q12 And which of the following best describes how you currently view your role as a landlord?

Please select all that apply

- As a full-time business
- As a part-time business
- As an investment for capital growth
- As an investment for rental income
- As a temporary investment
- As a long-term pension investment
- Providing housing as an employer
- Providing housing as a relative of the tenant
- As something else

Q13 Are any of your current tenants receiving Housing Benefit, the Local Housing Allowance or Universal Credit?

- Yes
- No
- Don't know

Q14 What type of properties do you let out in Wales?

Please select all that apply

- Detached house
- Semi-detached house
- Terraced house
- Purpose-built flat or maisonette
- Converted flat or maisonette
- Bedsit, room, studio or flatlet
- A House in Multiple Occupation (HMO)
- Don't know

Permission to re-contact

Q15 IF Q1=1or 3] BEIS will be carrying out further research over the next 12 months. This follow-up study will aim to find out more about your views and experiences of recent changes to rental regulations.

Q15 [IF Q1=2] This survey is only designed for landlords, but we would be pleased to speak to you about your views and experiences of recent changes to rental regulations as part of wider research we are conducting for BEIS over the next 12 months

Would you be willing for Kantar Public to keep a record of your details for up to 12 months for the purpose of re-contacting you to take part in future research on this subject in the next 12 months?

If yes, please provide your contact details

- Name
- Telephone number
- Email address
- Postal address

Your personal information will only be used to contact you about the follow-up study and will be held securely at all times.

Please be reassured that the purpose of this re-contact is for research only and that your answers remain confidential.

Closing text

Thank you for completing this survey.

If you have any further question about this research, please contact [landlords@kantarpublish.com](mailto:landlords@kantarpublish.com).

If you would like further details about the new regulations please click [here](#)

## Topic guide used in landlord interviews

### Background

The Department for Business, Enterprise and Industrial Strategy (BEIS) has introduced new legislation which means that from April 2018, private landlords renting a domestic property with an Energy Performance Certificate (EPC) rating of F-G have been required to improve this to an EPC rating of E or better for any new, renewed or extended tenancies. This requirement will be extended to all tenancies from 2020. The aim of the legislation is to improve the energy efficiency of domestic properties in the private rented sector.

Landlords can apply for an exemption from responding to the legislation, on the following grounds:

- They only recently became the new landlord of the property
- They cannot access third party finance to meet the costs of making improvements<sup>16</sup>
- It is not possible to further improve the energy efficiency of the property
- Improvements require consent from local planning authority, tenant or mortgage lender, and this consent is not granted
- Making improvements would negatively affect the value of the property
- New wall insulation is required to improve energy efficiency but this would have a negative impact on the fabric or structure of the property (or the building of which it forms a part)

Landlords are required to register an exemption by entering the reasons for this and providing supporting evidence online on the PRS Exemptions Register on GOV.UK.

There is also equivalent legislation for non-domestic properties (which some of our respondents may also rent) but the focus in these interviews should be on the domestic properties they rent.

### Aims of the interview

Kantar is part of a consortium that has been commissioned by BEIS to conduct a process and impact evaluation of the new regulations. These interviews form part of the process evaluation, which is exploring the effectiveness of the regulations and the behavioural responses of landlords (and other stakeholders) to them.

The aim of the interview is to collect detailed insights into the respondent's awareness and understanding of the new regulations, how they have decided to respond to the regulations, and why. Collecting contextual information about the landlord, and their wider experiences as a landlord, will also allow the impact of the regulations in various situations and contexts to be explored in detail.

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<sup>16</sup> The legislation was originally conceived on a "no cost to landlord" basis, with Green Deal and ECO expected to provide third party finance for most improvements. However only limited finance is now accessible from these sources, meaning that most landlords should currently be able to register an exemption on these grounds.

## Using the topic guide

This topic guide provides the key themes to be explored in the interviews. It is not a set script. The phrasing, pacing and ordering of questions should be tailored to reflect the characteristics of the respondent and the flow of the discussion. It does not include many follow-up questions, such as “How?” and “Why?”, as we expect these to be routinely explored by the interviewer. Interviewers are also not tied to the wording of the questions in the topic guide – these are for guidance only.

Main topic guide sections:

- **Background.** Confirming their characteristics and details of the properties they rent, and also getting an initial sense of their mindset towards being a landlord and towards energy efficiency.
- **Initial awareness and understanding.** Exploring their initial awareness and understanding of regulations.
- **Steps taken.** Establishing what additional information they may have sought out/encountered and any further steps taken to inform how they respond to regulations.
- **Decision-making.** Exploring the reasons why they have decided to either make improvements, register an exemption or do neither.
- **Future Plans and Reflections.** What they intend to do in future, why, and any suggestions they have for improving compliance with the regulations and energy efficiency in the private rental sector more generally.

In preparation for each interview ensure you are familiar with any information already collected about the respondent (e.g. through the recruitment and/or their previous survey responses) and the landlord process map.

Indicative timings are provided for each section in the topic guide, based on a 45 minute interview, but these should be used flexibly to reflect the individual characteristics of each respondent and the length of interview they have agreed to. Key areas of questioning, to be explored in as much depth as possible in every interview, are highlighted with a ★ in the topic guide. Interviewer instructions are provided in italics.

If at any point in the interview the respondent indicates that they would like more information about the regulations explain that you can provide a link to further information at the end.

## Introduction [5 mins]

- Introduce yourself and the evaluation: “Kantar Public is an independent research organisation. We have been asked to carry out research on behalf of the Department for Business, Energy and Industrial Strategy to understand more about new regulations which have recently been introduced affecting domestic properties in the private rental sector.”
- Describe the purpose of the interview and the topics you’d like to discuss.

- Explain confidentiality: “Your participation in the interview is completely anonymous and confidential. We will not tell the Department for Business, Energy and Industrial Strategy or anyone else the names of the individuals who have participated in an interview. The report of the findings from the research will also not name any individuals who participated.”
- Reassure that participation is voluntary and that there are not right or wrong answers.
- Ask permission to record.
- Ask them if what you have said is clear, if they have any questions, and then confirm they agree to take part in the interview.

## 1. Background [5 mins]

*Aim: to get the respondent talking and start to build up a picture of the type of landlord they are, the properties they rent, and their attitudes to energy efficiency. If appropriate, refer back to the answers they give in this section later in the discussion to explore whether their decision about how to respond to the regulations is related to their outlook on being a landlord more generally.*

All respondents (although adapt accordingly if they are a company rather than an individual landlord):

- ★Can you start off by telling me a bit about how you first became a landlord?
- What were your main reasons at the time?
- How long ago was it?
- ★How do you feel about being a landlord now? Why? Respondents may talk here about other recent government policies affecting private landlords. Acknowledge these but then try to move the discussion on.
- How many domestic properties are you currently renting?
- How involved are you in the management and maintenance of these properties? E.g. Do you manage them yourself or is it partly or wholly the responsibility of a letting/management agency?
- ★Where do you generally get information about what your legal responsibilities are as a landlord and how to go about responding to these? Are there any particular sources of information you rely on/trust the most? Why?
- How many of the properties you rent had an EPC rating of F or G before April this year? If necessary explain that an EPC rating is a rating of a property’s energy efficiency. Properties are rated on a scale of A to G, with A being the most energy efficient and G the least.
- Can you remember how you established what their EPC ratings were? E.g. was it provided by the seller/estate agent when you bought the property? And/or have you arranged to get an EPC rating yourself since then? Why? Why not?
- ★In general, as a landlord, how much thought/consideration do you give to the energy efficiency of the domestic properties you rent? Why? Probe for any influence of



environmental views, concerns for well-being of existing tenants, wanting to make property attractive to prospective new tenants, increasing value of property etc.

## 2. Initial awareness and understanding [5-10 mins]

*Aim: to explore their initial awareness and understanding of the regulations and the potential costs and benefits of responding.*

All respondents:

- Are you aware of new regulations that were introduced in April this year affecting private rented properties with an EPC rating of F or G? If they are completely unaware then describe the regulations and skip to Section 4
- How did you first hear about the regulations? (e.g. on BEIS website, local authority publicity, advice from a letting agent etc.)
- ★When you first heard about the regulations, what was your initial reaction? What did you think? What, if anything, did you do?
- What was your understanding of why they had been introduced? For whose benefit? As a landlord, do you think they are fair?
- ★How well do you think you understood the regulations at that point? Ensure the respondent doesn't feel like they are being tested here, but probe as far as possible to establish their level of understanding of the regulations, e.g. in terms of:
- Who is legally required to respond (i.e. them or the letting agent)
- When landlords are legally required to take action by (2020 unless starting/renewing a tenancy where it is 2018)
- The types of properties affected (i.e. ones with an EPC rating of F or G only – ones with a better EPC rating and ones that are not required to have an EPC, like listed buildings, are out of scope of the regulations)
- The types of tenancies affected (i.e. at the moment just new, renewed or extended tenancies)
- That there should be no costs to them of making improvements (on the basis that ECO and Green Deal should provide finance)
- The possibility of registering an exemption on other grounds (because their property value would be negatively affected, consent wouldn't be granted, etc.)
- The consequences of non-compliance (i.e. possibly up to a £5,000 fine for landlord)
- ★When you first heard about the regulations, how much would you say you knew about things like...:
- How much it would cost to improve the energy efficiency of property
- The potential availability of third party finance
- The potential impact of improvements on future value of property

- ★And when you first heard about the regulations, how did you plan to respond? Why?

### 3. Steps taken [5-10 mins]

*Aim: to explore any additional information they have sought out/encountered and any steps taken to inform how they respond to regulations.*

All respondents:

- After first hearing about the regulations did you seek out (or just come across) any more information? Why? Why not?
- Was there anything that prompted you to do this? (e.g. an existing tenancy coming up for renewal or a new one about to start)
- Where did you get this information from? (e.g. BEIS website, local authority publicity, advice from a letting agent etc.)
- What information did this provide/convey about the regulations?
- ★How easy or difficult was this information to understand? Why? Probe to try to establish whether any difficulties in understanding were due to the complexity of the regulations themselves and/or the clarity of information
- ★Did this information affect how you planned to respond to the regulations? How? Why?
- ★And after you'd heard about the regulations did you take any steps to...:
- Confirm whether regulations did apply to your property (e.g. by getting an EPC rating if not already known)
- Establish what improvements could be made and how much they would cost (e.g. by checking EPC recommendations or getting someone in to assess this)
- Establish how you could pay for improvements
- Establish whether you/your property would qualify for an exemption
- ★How easy or difficult did you find this process? Why? Which steps, if any, were difficult?
- ★Did these further steps affect how you planned to respond to the regulations? How? Why?

### 4. Decision-making [10-15 mins]

*Aim: to explore in detail how and why they have decided to respond to the regulations, and what they have done as a consequence.*

All respondents:

- ★So what have you done or intend to do in response to regulations? I.e. Have you decided to:
- Make improvements

- Register exemption
- Neither
- ★Why have you decided to do this? Ask as an open question then probe for potential influence of each of the following:
  - A belief the regulations don't apply to them / they aren't responsible for responding
  - The potential disruption / hassle of making improvements
  - The upfront costs of making improvements
  - The availability of 3rd party finance
  - Their personal finances
  - The potential impact of improvements on property value (which could act as an incentive to make improvements)
  - Their prior plans (e.g. were they already planning to make improvements anyway?)
  - Their broader attitudes (e.g. to the welfare of their tenants, the environment, etc.)
  - The perceived likelihood and severity of punishment for non-compliance
- ★What made you think this was the right course of action and how confident are you that this was right?
- What are the main sources of information or advice that have informed your decision?
- How, if at all, have these influenced what you have decided to do? Probe to try to establish extent to which may have simply done what someone advised them to do or made their own more considered decision
- Do you feel like you have understood enough about the regulations to make an informed decision about how to respond? Why? Why not? What haven't you understood?
- How, if at all, have any difficulties in understanding influenced the decision you have made?
- The next section of questions dig into how they decided on the specific action to take – e.g. not just making an improvement, but making the specific improvement they chose.

Respondents who have made improvements or intend to:

- What improvements were or will be made? (i.e. in terms of the types of measure and the EPC rating this will raise the property to)
- ★Why did you decide on this type and level of improvement? Probe for extent to which they:
  - Based this on the recommendations on the property's EPC
  - Based this on information/advice from other sources, e.g. builders, agents, etc.

- Went for the cheapest option to get E rating
- Invested in more extensive improvement to add most value to property
- How much did it/will it cost?
- How did you/will you pay for it? (e.g. personal savings, bank loan, or by increasing the rent they charge the tenant)
- ★How easy or difficult was it to meet these costs?
- What, if any, benefits do you think the improvements will have for you as the landlord?
- What, if any, benefits do you think the improvements will have for your tenants?

Respondents who have registered an exemption:

- On what grounds did you register your exemption?
- ★Why? Probe for potential influence of:
- Based on advice from a letting agent or other – what did they say? Did you seek out this advice or did they approach you?
- Awareness and understanding of the different grounds they could register an exemption on (especially their awareness of the “no third party funding” exemption – in theory most/all could currently register exemption on these grounds but many are doing so on other grounds)
- The expected ease or difficulty of establishing whether they had a valid claim for exemption on these grounds (e.g. some potential grounds for exemption could require them to have property assessed and/or engage with local planning authority)
- What, if any, evidence did you think you had to provide to support your exemption?
- How easy or difficult was it to provide this evidence?
- How confident were you that you did have legitimate grounds for an exemption?
- Has the exemption been queried or challenged in any way since you registered it? If so, Who by? How? Why? With what consequences?

Respondents who haven't registered exemption or made improvements:

- ★Do you intend to register an exemption or make improvements in the future? Why? Why not?
- ★What, if anything, could prompt you to respond to the regulations in the future?

## 5. Future Plans and Reflections [5 mins]

*Aim: to explore what they intend to do in future, why, and any suggestions they have for improving compliance with the regulations and energy efficiency in the private rental sector more generally.*

All respondents:

- ★Thinking about the properties you rent that have been or will be affected by the new regulations, what are your future plans? Do you plan to continue to rent them or sell them?
- ★Why? Probe for relative influence of:
- The new regulations (e.g. have they prompted them to sell up as a means of avoiding having to improve properties or, having invested in improvements, are they incentivised to continue renting?)
- Other recent policies and regulations affecting private landlords like you more generally (which might also be acting as an additional or more significant spur for some to leave market)
- ★Is there anything the Government or others could do to encourage more landlords to comply with the new regulations? E.g. in terms of:
- Increasing general awareness of the regulations
- Increasing knowledge/understanding of the details of the regulations (i.e. around what properties are in scope, the grounds for an exemption, how to respond, etc.)
- Simplifying the regulations themselves
- Any other measures or changes to make it easier for landlords to respond
- Who do you think should be responsible/is best placed to do this? Why? How should they do it?
- More broadly is there anything the Government or others could do to encourage more landlords to increase the energy efficiency of their properties?

### **Close**

- Thank them for sharing their views and experiences.
- Ask them if there is anything else they'd like to add.
- If they expressed an interest during the interview in accessing more information about the regulations then direct them to either:

<https://www.gov.uk/government/publications/the-private-rented-property-minimum-standard-landlord-guidance-documents> or

<https://www.rla.org.uk/landlord/guides/minimum-energy-efficiency-standards.shtml>

## Topic guide used in letting agent interviews

### Background

The Department for Business, Enterprise and Industrial Strategy (BEIS) has introduced new legislation which means that from April 2018, private landlords renting a domestic property with an Energy Performance Certificate (EPC) rating of F-G have been required to improve this to an EPC rating of E or better for any new, renewed or extended tenancies. This requirement will be extended to all tenancies from 2020. The aim of the legislation is to improve the energy efficiency of domestic properties in the private rented sector.

Landlords can apply for an exemption from responding to the legislation, on the following grounds:

- They only recently became the new landlord of the property
- They cannot access third party finance to meet the costs of making improvements<sup>17</sup>
- It is not possible to further improve the energy efficiency of the property
- Improvements require consent from local planning authority, tenant or mortgage lender, and this consent is not granted
- Making improvements would negatively affect the value of the property
- New wall insulation is required to improve energy efficiency but this would have a negative impact on the fabric or structure of the property (or the building of which it forms a part)

Landlords are required to apply for an exemption by entering the reasons for this and providing supporting evidence online on the PRS Exemptions Register on GOV.UK.

There is also equivalent legislation for non-domestic properties (which some of our respondents may also manage) but the focus in these interviews should be on the domestic properties they manage.

### Aims of the interview

Kantar is part of a consortium that has been commissioned by BEIS to conduct a process and impact evaluation of the new regulations. These interviews form part of the process evaluation, which is exploring the effectiveness of the regulations and the behavioural responses of landlords (and other stakeholders) to them.

Letting agents are not required to take any actions themselves in response to the new regulations<sup>18</sup> but may potentially play an important role in advising landlords about how to respond to them and/or in responding on their behalf.

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<sup>17</sup> The legislation was originally conceived on a “no cost to landlord” basis, with Green Deal and ECO expected to provide third party finance for most improvements. However only limited finance is now accessible from these sources, meaning that most landlords should currently be able to register an exemption on these grounds.

<sup>18</sup> Landlords are however legally required to ensure an EPC is displayed at the point of advertising a property for rent, so have some responsibility for the process and should be aware of any illegal properties.

The aim of the interview is to establish the respondent's awareness and understanding of the new regulations and collect detailed insights into what role, if any, they have played in either advising landlords about how to respond to them or responding on their behalf.

### **Using the topic guide**

This topic guide provides the key themes to be explored in the interviews. It is not a set script. The phrasing, pacing and ordering of questions should be tailored to reflect the characteristics of the respondent and the flow of the discussion. It does not include many follow-up questions, such as "How?" and "Why?", as we expect these to be routinely explored by the interviewer. Interviewers are also not tied to the wording of the questions in the topic guide – these are for guidance only.

Main topic guide sections:

- **Background.** Confirming their characteristics and details of the properties they let/manage.
- **Awareness and understanding.** Establishing their awareness and understanding of the new requirements
- **Decision-making.** Exploring in detail any involvement they have had in advising landlords about regulations or responding to them on their behalf
- **Reflections.** Any suggestions they have for either improving compliance with the regulations or more generally improving energy efficiency in the private rental sector.

Indicative timings are provided for each section in the topic guide, based on a 30 minute interview, but these should be used flexibly to reflect the individual characteristics of each respondent and the length of interview they have agreed to. Interviewer instructions are provided in italics.

If at any point in the interview the respondent indicates that they would like more information about the regulations explain that you can provide a link to further information at the end.

### **Introduction [5 mins]**

- Introduce yourself and the evaluation: "Kantar Public is an independent research organisation. We have been asked to carry out research on behalf of the Department for Business, Energy and Industrial Strategy to understand more about new regulations which have recently been introduced affecting domestic properties in the private rental sector."
- Describe the purpose of the interview and the topics you'd like to discuss.
- Explain confidentiality: "Your participation in the interview is completely anonymous and confidential. We will not tell the Department for Business, Energy and Industrial Strategy or anyone else the names of the individuals who have participated in an interview. The report of the findings from the research will also not name any individuals who participated."
- Reassure that participation is voluntary and that there are not right or wrong answers.



- Ask permission to record.
- Ask them if what you have said is clear, if they have any questions, and then confirm they agree to take part in the interview.

## 1. Background [5 mins]

*Aim: to confirm their characteristics and details of the properties they let/manage*

All respondents:

- How many domestic properties are you currently letting?
- Do you also let any non-domestic properties?
- Do you manage the domestic properties you currently let or do the landlords generally do this?
- Where do you generally get information about what your legal responsibilities are as a letting agent? Are there any particular sources of information you rely on/trust the most? Why?
- How many of the domestic properties that you currently let had an EPC rating of F or G before April this year?
- How and when do you generally establish what the EPC rating of a property is? E.g. is this something you ask landlords to provide before you take on a new property? Do you generally ask them to reconfirm rating or provide a new certificate over time? Why? Why not?
- What is your approach to providing information about the EPC rating of properties to prospective tenants? I.e. do you always display it in adverts and, if so, how prominently? Why?
- In general, as a letting agent, how much thought/consideration do you give to the energy efficiency of the domestic properties you let? Why? Probe for whether it's a consideration at all in making properties attractive to prospective new tenants.

## 2. Awareness and understanding [5-10 mins]

*Aim: to establish their awareness and understanding of the new requirements.*

All respondents:

- Are you aware of new regulations that were introduced in April this year affecting private rented properties with an EPC rating of F or G? If they are completely unaware then describe the regulations and skip to Section 4
- How have you heard about the regulations? (e.g. on BEIS website, local authority publicity, advice from a letting agent etc.)
- What information did this provide/convey about the regulations?
- How easy or difficult was this information to understand? Why? Probe to try to establish whether any difficulties in understanding were due to the complexity of the regulations themselves and/or the clarity of information



- When you heard about the regulations, what was your initial reaction? What did you think? What, if anything, did you do?
- What was your understanding of why they had been introduced? For whose benefit? As a letting agent, do you think they are fair?
- How well do you think you currently understand the requirements? Ensure the respondent doesn't feel like they are being tested here, but probe as far as possible to establish their level of understanding of the regulations, e.g. in terms of:
  - Who is legally required to respond (i.e. landlords rather than them) and when
  - The responsibilities of agents in the process
  - The types of properties affected (i.e. ones with an EPC rating of F or G only – ones with a better EPC rating and ones that are not required to have an EPC, like listed buildings, are out of scope of the regulations)
  - The types of tenancies affected (i.e. at the moment just new, renewed or extended tenancies)
  - That there should be no costs to landlords of making improvements (on the basis that ECO and Green Deal should provide finance)
  - The possibility of registering an exemption on other grounds (because the property value would be negatively affected, consent wouldn't be granted, etc.)
  - The consequences of non-compliance (i.e. possibly up to a £5,000 fine for landlord)
  - And how much would you say you know about things like...:
    - How much it would cost to improve the energy efficiency of property
    - The potential availability of third party finance
    - The potential impact of improvements on future value of property

### **3. Decision making [5-10 mins]**

*Aim: to explore in detail any involvement they have had in advising landlords about regulations or responding to them on their behalf.*

All respondents:

- Since hearing about the requirements have you had any conversations about them with the landlords who you manage/let properties for? Why? Why not?
- What has been or would be your advice to your landlords about responding to the new requirements? Why?
- Where would you or have you directed landlords to for further information/advice about responding to the requirements? Why?
- Have you been partly or wholly responsible for either registering an exemption or installing energy efficiency improvements on behalf of any of your landlords? Why? Why not? With which landlords?

- Agents who have registered an exemption or installed measures on behalf of landlord:
- What improvements were or will be made? (i.e. in terms of the types of measure and the EPC rating this will raise the property to)
- How much say have you had over the type and level of improvement? Was this dictated by the landlord or did you have some say over it?
- What have been your priorities in arranging for improvements to be made? (e.g. are they just paying the bare minimum to get E rating or going for the option that is the quickest/causes the least disruption)

All respondents:

- What, if any, benefits do you think improvements made because of the requirements will have for you as the letting agent?

#### **4. Reflections [5 mins]**

*Aim: to explore any suggestions they have for improving compliance with regulations or more generally improving energy efficiency in the private rental sector.*

All respondents:

- Is there anything the Government or others could do to encourage more landlords to comply with the new requirements? E.g. in terms of:
- Increasing general awareness of the regulations
- Increasing knowledge/understanding of the details of the regulations (i.e. around what properties are in scope, the grounds for an exemption, how to respond, etc.)
- Simplifying the regulations themselves
- Any other measures or changes to make it easier for landlords to respond
- Who do you think should be responsible/is best placed to do this? Why? How should they do it?
- Is there anything the Government could do to support letting agents to help landlords comply with the regulations?
- More broadly is there anything the Government or others could do to encourage more landlords to increase the energy efficiency of their properties?

#### **Close**

- Thank them for sharing their views and experiences.
- Ask them if there is anything else they'd like to add.
- If they expressed an interest during the interview in accessing more information about the regulations then direct them to either:

<https://www.gov.uk/government/publications/the-private-rented-property-minimum-standard-landlord-guidance-documents> or

<https://www.rla.org.uk/landlord/guides/minimum-energy-efficiency-standards.shtml>

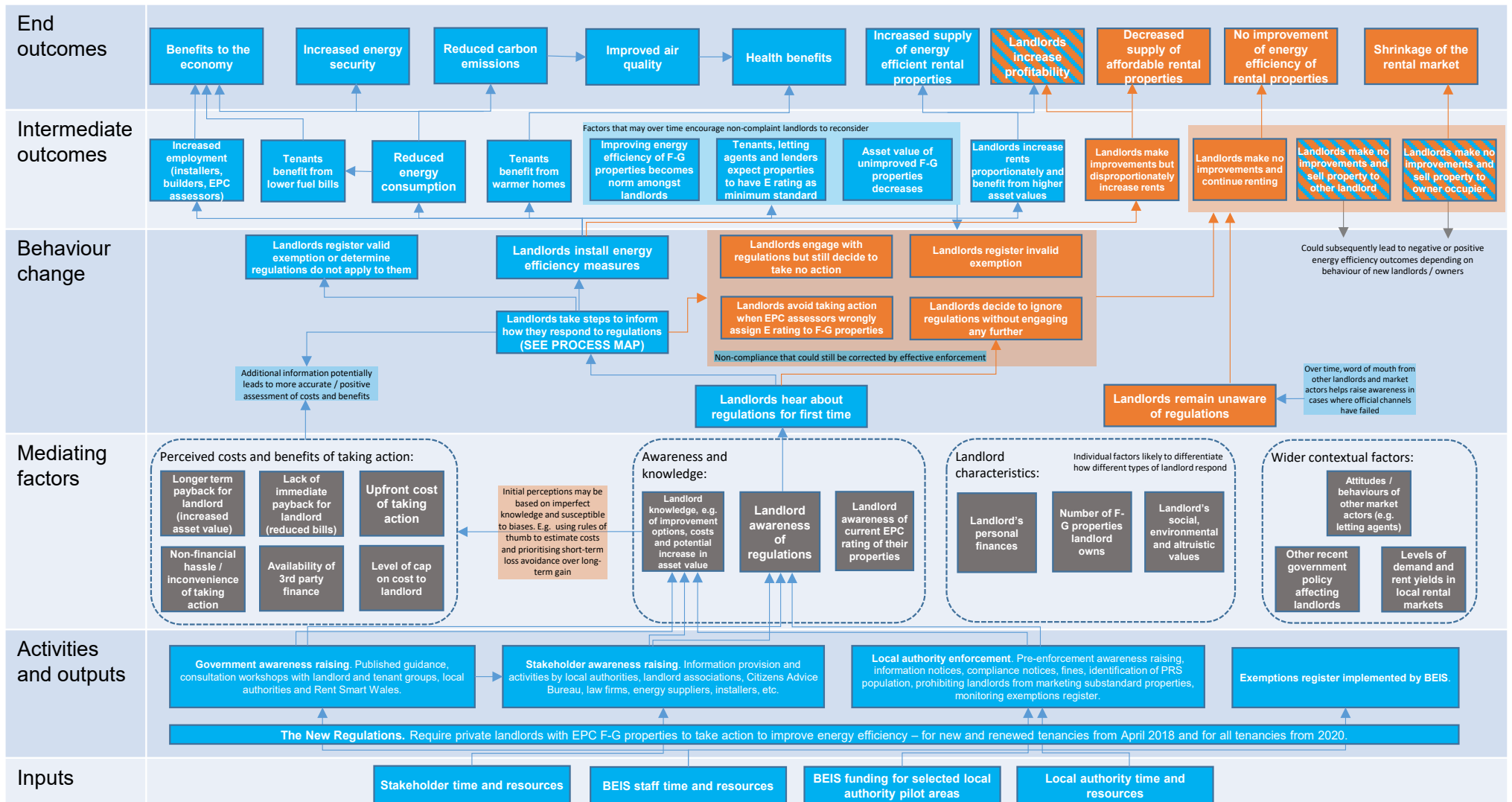
## Appendix 5 Theory of change

A theory of change is a visual representation of the mechanisms through which a policy is expected to operate, the attendant mediating factors, key actors, and intended outcomes. Its purpose is to set out the important parts of the policy and its implementation that need to be considered in an evaluation.

Figure 1 is a theory of change for the domestic private rented sector minimum energy efficiency regulations. This was developed at the start of the evaluation and has been used to inform the design and conduct of its subsequent phases.

The colour blue represents the intended inputs, activities, outputs, changes in behaviour and outcomes of the regulations while orange represents potential unintended and/or undesirable consequences.

Figure 1: Theory of change



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