

RAF063/2122

Understanding the role of residential sales and lettings (RSLs) professionals in home decarbonisation

Technical Annex

Conducted by Verian (formerly Kantar Public) for the Department for Energy Security and Net Zero prior to the general election in the United Kingdom in July 2024. As such, any references to government policies, commitments, or initiatives may reflect the stance of the previous administration and were accurate at the time of fieldwork and writing.

Views expressed in this report are from the relevant research agencies, based on data collected from research participants and other evidence, and not necessarily those of the UK government.

This document includes the technical annex to accompany the main report produced by Verian (formerly Kantar Public). Please note, that Verian underwent a brand change in November 2023 which means some of the research materials in this technical annex reference 'Kantar Public' and others 'Verian'.



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Technical Annex A: Recruitment Approach

To recruit participants for Phase 2 of the research, we used a combination of our partner recruitment agency to free-find respondents and snowball sampling from the stakeholder interviews in Phase 1. All participants for Phase 3 focus groups were recruited using our partner recruitment agency. A screener survey was used (see questions in Technical Annex C) to select participants through the recruitment agency for both Phase 2 and 3.

Technical Annex B: Methodology

Sample tables

Across all phases of fieldwork – and in the reporting of the findings – estate agents, letting agents and property managers were defined as follows:

- **Estate agents:** Usually specialise in one area of estate agency – those with a focus on residential sales were recruited for this research. Estate agents’ primary focus tends to be on marketing homes for sale, although some also offer property management and letting services.
- **Letting agents:** Letting agents help consumers rent a property and act as a facilitator between landlords and tenants. Letting agents help landlords find tenants and can perform a range of services and duties (e.g., conducting viewings, marketing rentals, performing repairs and maintenance, creating an inventory checklist, collecting rent, looking after rental paperwork and even conducting evictions if necessary). There are three ‘tiers’ of service provided: fully managed (i.e., conduct most if not all responsibilities listed above), rent collection or let only.
- **Property managers:** Typically hired for rental properties to solely focus on managing a property. Property managers bridge the gap between the landlord and the tenant living in the property. Property managers’ responsibilities include ensuring rental properties are well maintained and adhere to health and safety regulations and other letting legislations.

Table 1: Phase 2 sample overview

Sector	Role	Number of interviews	Key characteristics
Owner-occupier	Estate agents	15	Had customers looking for a range of property values (from under £250k to £2million+)
Private rented sector	Property managers	7	Had customers with a range of portfolio sizes, property types, ages and tenant types
Private rented sector	Letting agents	7	Had customers with a range of portfolio sizes, property types, ages and tenant types

Private rented sector	Independent landlords	3	Had customers with a range of portfolio sizes, property types, ages and tenant types
Private rented sector	Block managers	2	Had customers with a range of portfolio sizes, property types, ages and tenant types

Additional characteristics of phase 2 sample:

- **Energy efficiency attitudes and behaviours:** frequency energy efficiency was discussed with customers (maximum of 5 never or rarely mentioned)
- **Practice experience:** diversity of seniority level, time in industry, business size
- **Location:** diversity across England and Wales

Table 2: Phase 3 sample overview

Sector	Role	Number of groups	Key characteristics
Owner-occupier	Homeowners (buyers and sellers)	1	Bought and sold their homes within last 2 years – included first time buyers
Private rented sector	Landlords using letting agents	1	Range of portfolio size, value, EPC ratings and tenant types
Private rented sector	Landlords using property managers	2	Range of portfolio size, value, EPC ratings and tenant types

Additional characteristics of phase 3 sample:

- **Energy efficiency attitudes and behaviours:** diversity of attitudes towards climate change and influence of energy efficiency in property purchase and improvement decisions.
- **Demographics:** diversity of age, socio-economic groups and gender.
- **Location:** diversity across England and Wales

Technical Annex C: Screening Criteria

To recruit participants for each phase of research, we developed a screener questionnaire covering our primary and secondary research objectives. For Phase 2, some participants were recruited through snowball sampling so did not respond to this screener. Due to the struggle of recruiting through snowball only and finding the full sample, Phase 2 was conducted in two separate waves – this meant that a couple of questions in the screening questionnaire as well as the topic guide were amended during recruitment – though this was minimal.

Phase 2: In-depth Interviews (professionals)

Overall specification

- 34x 60-minute online in-depth interviews
- 2x – managing agents/block managers (2)
- 26x – senior lettings agents (7), property managers (7), and estate agents (15)
- 3x – independent landlords

Representing a mix of those:

- Working with customers with a variety of portfolio types, sizes and tenant affluence; or property values
- Years of experience in industry
- Working in different business sizes
- Those working in different regions (England and Wales)
- Working in customer facing and non-customer facing roles

All to be:

- Working within the residential sector
- Managing full-service accounts with landlords (property managers only)

Q1. Introductions

"Good morning/afternoon, my name is X, and I am calling from X, an independent research organisation.

We have been asked to carry out research on behalf of DESNZ, the Department for Energy Security and Net Zero, and Kantar Public, an independent research agency.

We have talked to a number of stakeholders regarding the role of residential and lettings sector professionals in supporting home decarbonisation and would now like to speak to individuals

like yourself to find out your views on this topic. This call is a 10-minute questionnaire to find out if you would be suitable to take part in the research, which will take part at a later date.

- The research is completely voluntary
- You will not incur any costs by taking part in the research and will receive an £80 incentive for your time
- Research is conducted in accordance with the MRS code of conduct
- KANTAR PUBLIC is completely independent from DESNZ
- Your information will be used for research purposes only
- KANTAR PUBLIC will not pass your personal details on to anyone outside of the research team and your name will not be used in the reporting for this project
- Anonymised transcripts of the interviews may be passed onto DESNZ if requested, although any identifying details will be removed from these
- You can choose to withdraw from the research at any point from now up until and during the research interview – and you can opt for your data to be removed from the study after you have been interviewed, as long as we receive notification in time for this to be feasible

Would you be interested in taking part?

1. Yes
2. No

DO NOT RECRUIT IF ANSWER 'NO'

Q2. Zoom tech

The research involves an online video call and so you will need to have access to:

- a current and working email account that you check regularly
- broadband internet (in other words, not dial-up) from your home
- a laptop or PC that has a camera and built-in mic and can connect to the internet. A mobile phone or tablet will not work, as we will be showing on-screen images we would like you to look at in detail.

Do you have access to all of these?

DO NOT RECRUIT IF ANSWER 'NO', OR IF NO ACCESS TO PC OR LAPTOP.

Q3. Zoom consent

Participation in the online interviews will involve the following:

- Ahead of the interview date, you will receive an email with a link to join the online discussion at the set date/time. This email will also contain Zoom's terms and conditions of use for your information.
- In order to test the Zoom link works and to make sure you have what's needed, a member of the research team will call you to test the link a day or two before the discussion date. You will not need to download anything to your device to join this call.
- You will also be sent a Zoom consent form by email for the session – please can you read it and reply to the email stating that you have read and understood it.
- At the time of the interview, please click on the emailed Zoom link to join the discussion - you will be asked to enter your name (this should just be your first name and the first initial of your surname)
- The video call will be with one researcher and last 60 minutes. It will be an open-ended discussion, within which you can discuss and explain your experiences and views in detail.

On this basis, are you comfortable and happy to take part in this research?

DO NOT RECRUIT IF ANSWER 'NO' If no, please record reason above

Q4. Job Role

Which of the following best describes the industry you work in?

1. Estate agency
2. Property Management
3. Lettings Agency
4. Managing Agency or Block Management
5. Conveyancing
6. Surveying
7. Property Development
8. Architecture

A mix of the above (please specify)

PHASE 1 - RECRUIT 6-8X ESTATE AGENTS, 3-4X PROPERTY MANAGERS, 3-4X LETTINGS AGENTS ONLY. DO NOT RECRUIT IF ANSWER 5-8

PHASE 2- RECRUIT, 1X MANAGING AGENTS, 1 LETTINGS AGENT, 1 PROPERTY MANAGER, 4X ESTATE AGENTS. DO NOT RECRUIT IF ANSWER 5-8

Which area of the property sector do you work in?

1. Residential only
2. Commercial only
3. A mix of residential and commercial

RECRUIT CODES 1 ONLY

What is the name of the organisation that you work for?

INFORMATIONAL PURPOSES ONLY

How many employees are there in the organisation you work in?

RECRUIT A MIX

How many years of experience in the residential sales and lettings sector do you have?

PHASE 1 - DO NOT RECRUIT <1, RECRUIT 2X 1-5, RECRUIT 2X 6-15, RECRUIT 2X 15+

PHASE 2 - AIM TO RECRUIT >12YEARS

What is your current job title?

PHASE 1 - PRIMARILY RECRUIT NEGOTIATORS AND MANAGERS RATHER THAN DIRECTORS

PHASE 2 - PRIMARILY RECRUIT MANAGERS AND DIRECTORS AS WELL AS OTHER MORE SENIOR ROLES

Do you mainly work in a branch or a head office?

1. Branch
2. Head Office

What does your role primarily involve?

1. Core Operations (e.g. buying/letting properties)
2. Sustainability
3. HR
4. Finance and accounts
5. Marketing
6. Other

THOSE WHO WORK IN HEAD OFFICE, ENSURE THEY SELECT 1

How would you describe your role level?

1. Junior
2. Mid-Level
3. Senior

DO NOT RECRUIT CODE 1

What percentage of your role is customer facing versus other internal business priorities (e.g., marketing, accounting, recruitment, management etc.)?

1. 0-20%
2. 21-40%
3. 41-60%
4. 61-80%
5. 80-100%

PHASE 1 - AIM TO RECRUIT THOSE WITH OVER 60% CUSTOMER FACING

PHASE 2 - AIM TO RECRUIT THOSE WITH UNDER 60% CUSTOMER FACING

Are you, or your business, members of any professional residential sales or lettings agent bodies?

AIM TO RECRUIT MAINLY THOSE WHO ARE NOT

PROPERTY MANAGERS/LETTING AGENTS ONLY – **What type of accounts do customers have with the company you work for? (select all that apply)**

1. Let Only
2. Rent Collection and Let
3. Full Managed Lettings Service

PROPERTY MANAGERS – ALL TO CODE 3 (CAN HAVE ADDITIONAL CODES)

How often do you personally discuss, or do you believe that agents discuss, energy efficiency or low-carbon heating, beyond mentioning the EPC rating of a property, e.g. heat pumps and insulation measures.

1. Often
2. Sometimes
3. Rarely

4. Never

DO NOT RECRUIT ANY WHO ANSWER RARELY/NEVER

Q5. Portfolio

LETTINGS/PROPERTY MANAGERS ONLY – **Typically, what size are your customer's portfolios?**

1. Smaller (e.g., 1-3 properties)
2. Medium (4-9 properties)
3. Larger (10+ properties)
4. A mix of all

RECRUIT A MIX

LETTINGS/PROPERTY MANAGERS ONLY - **What best describes the types of tenants that your customers have?**

1. Lower incomes (e.g., might have tenants who are fuel poor, or social housing)
2. Low-medium incomes (e.g., private renters, might be students, HMOs)
3. Medium incomes (e.g., private renters, might be families, single tenants, couples)
4. High incomes (e.g., affluent tenants, high-end of the market)
5. Other (please specify)
6. A mix of all

RECRUIT A MIX

LETTINGS/PROPERTY MANAGERS ONLY – **What best describes your customers?**

1. Episodic – might be reluctant / accidental landlords, might only have properties in short-medium term (e.g., cannot sell property)
2. Pension landlords – properties to in medium to long-term as an investment to top up income, but unlikely to have recent property transactions
3. Portfolio landlords - those whose property portfolio is their main income and are likely to be actively investing in properties
4. Other (please specify)
5. A mix of all

RECRUIT A MIX

LETTINGS/PROPERTY MANAGERS ONLY – What type of properties do your customers typically have?

1. Mainly those that are off plan or new build
2. Mainly older properties
3. A mix of both

RECRUIT A MIX

ESTATE AGENTS ONLY – What value properties are your customers typically look for? Please provide a range.

RECRUIT A MIX

MANAGING AGENTS ONLY – What size of properties do you manage?

1. Smaller (e.g., 1-10 units)
2. Medium (11-49 units)
3. Larger (50+ units)
4. A mix of all

RECRUIT A MIX

Q7. Region

Which part of the country do you live in?

3. Greater London
4. South East
5. South West
6. West Midlands
7. North West
8. North East
9. Yorkshire and the Humber
10. East Midlands
11. East of England
12. Scotland
13. Wales

14. Northern Ireland

RECRUIT A MIX CODED 1 –9, 11

Which part of the country are your customers renting or buying in?

1. Greater London
2. South East
3. South West
4. West Midlands
5. North West
6. North East
7. Yorkshire and the Humber
8. East Midlands
9. East of England
10. Scotland
11. Wales
12. Northern Ireland
13. A mixture within the UK
14. Mainly outside the UK

RECRUIT A MIX, DO NOT RECRUIT 10 OR 12

Q8. Invitation

We would like to invite you to take part in a 60-minute online interview with an independent Kantar Public researcher.

As a thank you for your participation, you will receive [£xxx per participant]. The incentive is paid for attendance at the discussion interview.

With your permission, we will be video recording the discussions. The discussion will be confidential and anonymous – and will only be shared with members of the research team and research steering group. These recordings will be deleted at most a year after recording.

We will not be testing people's knowledge, but simply asking for people's views and opinions on their experiences.

Q9. Confirmation

Are you happy to participate in this research?

Confirmation:

IF ANSWER NO, PLEASE RECORD REASON THEN THANK AND CLOSE

Q10. Interview preparation

Are there any adjustments we could make to ensure that you can access the research in a way that is right for you? This may include things like sending questions over beforehand so you can prepare, providing a BSL interpreter, or something else.

Any support that could be provided:

LET THE RESEARCH TEAM KNOW WHAT THEY WILL NEED TO DO IF THIS IS RELEVANT FOR ANY PARTICIPANTS

Q11. Interview availability

Please can you let us know the best slots for you for attending the interview (days, time of day), for 4th to 12th of January.

Best days/time of day:

Q12. Privacy policy

Read out: As part of our commitment to protecting your rights, please note that Kantar Public's privacy policy can be accessed on our website, uk.kantar.com/surveys. We can also provide you with a written copy of the policy

I confirm that the participant has been made aware of how to access the privacy policy:

Q13. Recontact

Would you be happy to be recontacted in relation to this project? You would not be obligated to take part in any future research if you were contacted.

Recontact wishes:

Thank and close

Phase 2: In-depth Interviews (independent landlords)

Q1. Introductions

"Good morning/afternoon, my name is X and I am calling from X, an independent research organisation.

We have been asked to carry out research on behalf of DESNZ, the Department for Energy Security and Net Zero, and Kantar Public, an independent research agency.

We have talked to a number of stakeholders regarding the role of residential and lettings sector professionals in supporting home decarbonisation and would now like to speak to individuals like yourself to find out your views on this topic. This call is a 10-minute questionnaire to find out if you would be suitable to take part in the research, which will take part at a later date.

- The research is completely voluntary
- You will not incur any costs by taking part in the research and will receive an £80 incentive for your time
- Research is conducted in accordance with the MRS code of conduct
- KANTAR PUBLIC is completely independent from DESNZ
- Your information will be used for research purposes only
- KANTAR PUBLIC will not pass your personal details on to anyone outside of the research team and your name will not be used in the reporting for this project
- Anonymised transcripts of the interviews may be passed onto DESNZ if requested, although any identifying details will be removed from these
- You can choose to withdraw from the research at any point from now up until and during the research interview – and you can opt for your data to be removed from the study after you have been interviewed, as long as we receive notification in time for this to be feasible

Would you be interested in taking part?

1. Yes
2. No

DO NOT RECRUIT IF ANSWER 'NO'

Q2. Zoom tech

The research involves an online video call and so you will need to have access to:

- a current and working email account that you check regularly
- broadband internet (in other words, not dial-up) from your home
- a laptop or PC that has a camera and built-in mic and can connect to the internet. A mobile phone or tablet will not work, as we will be showing on-screen images we would like you to look at in detail.

Do you have access to all of these?

DO NOT RECRUIT IF ANSWER 'NO', OR IF NO ACCESS TO PC OR LAPTOP.

Q3. Zoom consent

Participation in the online interviews will involve the following:

- Ahead of the interview date, you will receive an email with a link to join the online discussion at the set date/time. This email will also contain Zoom's terms and conditions of use for your information.
- In order to test the Zoom link works and to make sure you have what's needed, a member of the research team will call you to test the link a day or two before the discussion date. You will not need to download anything to your device to join this call.
- You will also be sent a Zoom consent form by email for the session – please can you read it and reply to the email stating that you have read and understood it.
- At the time of the interview, please click on the emailed Zoom link to join the discussion - you will be asked to enter your name (this should just be your first name and the first initial of your surname)
- The video call will be with one researcher and last 60 minutes. It will be an open-ended discussion, within which you can discuss and explain your experiences and views in detail.

On this basis, are you comfortable and happy to take part in this research?

DO NOT RECRUIT IF ANSWER 'NO' If no, please record reason above

Q4. Job Role

Are you a landlord?

1. Yes
2. No

DO NOT RECRUIT IF ANSWER 'NO'

What type of lets do you primarily own?

1. Long-term lets
2. HMOs
3. Short-term lets
4. Holiday lets
5. Airbnb

DO NOT RECRUIT CODES 3-5

As a landlord, do you use property managers or lettings agents?

1. Yes
2. No

DO NOT RECRUIT IF ANSWER 'YES'

As a landlord, what tasks do you complete for your properties yourself (without the help of lettings agents, property managers, or other individual/business)?

1. Rent collection
2. Advertisement of property
3. Let agreement
4. Property upkeep
5. Health and safety checks
6. Provision of EPC
7. Protection of tenant deposit

ENSURE PARTICIPANT COMPLETES ALL TASKS

How many years of experience do you have as a landlord?

INFORMATIONAL PURPOSES ONLY

How often do you discuss energy efficiency or low-carbon heating, beyond mentioning the EPC rating of a property, e.g. heat pumps and insulation measures.

1. Often
2. Sometimes
3. Rarely
4. Never

DO NOT RECRUIT ANY WHO ANSWER NEVER OR RARELY

Q5. Portfolio

How many properties are in your portfolio?

1. 1 property
2. 2-4 properties
3. 5-7 properties
4. 7+ properties

RECRUIT A MIX

What best describes the types of tenants residing in your properties?

1. Lower incomes (e.g., might have tenants who are fuel poor, or social housing)
2. Low-medium incomes (e.g., private renters, might be students, HMOs)
3. Medium incomes (e.g., private renters, might be families, single tenants, couples)
4. High incomes (e.g., affluent tenants, high-end of the market)
5. Other (please specify)
6. A mix of all

RECRUIT A MIX

What type of properties do you have?

1. Mainly those that are off plan or new build
2. Mainly older properties
3. A mix of both

RECRUIT A MIX

Q7. Region

Which part of the country do you live in?

1. Greater London
2. South East
3. South West
4. West Midlands
5. North West
6. North East
7. Yorkshire and the Humber
8. East Midlands
9. East of England
10. Scotland
11. Wales

12. Northern Ireland

RECRUIT A MIX CODED 1 –9, 11

Which part of the country are your let properties in?

1. Greater London
2. South East
3. South West
4. West Midlands
5. North West
6. North East
7. Yorkshire and the Humber
8. East Midlands
9. East of England
10. Scotland
11. Wales
12. Northern Ireland
13. A mixture within the UK
14. Mainly outside UK

RECRUIT A MIX, DO NOT RECRUIT IF ONLY 10, 12, 14

Q8. Invitation

We would like to invite you to take part in a 60-minute online interview with an independent Kantar Public researcher.

As a thank you for your participation, you will receive [£xxx per participant]. The incentive is paid for attendance at the discussion interview.

With your permission, we will be video recording the discussions. The discussion will be confidential and anonymous – and will only be shared with members of the research team and research steering group. These recordings will be deleted at most a year after recording.

We will not be testing people's knowledge, but simply asking for people's views and opinions on their experiences.

Q9. Confirmation

Are you happy to participate in this research?

Confirmation

IF ANSWER NO, PLEASE RECORD REASON THEN THANK AND CLOSE

Q10. Interview preparation

Are there any adjustments we could make to ensure that you can access the research in a way that is right for you? This may include things like sending questions over beforehand so you can prepare, providing a BSL interpreter, or something else.

Any support that could be provided

LET THE RESEARCH TEAM KNOW WHAT THEY WILL NEED TO DO IF THIS IS RELEVANT FOR ANY PARTICIPANTS

Q11. Interview availability

Please can you let us know the best slots for you for attending the interview (days, time of day), for 4th to 12th of January.

Best days/time of day

Q12. Privacy policy

Read out: As part of our commitment to protecting your rights, please note that Kantar Public's privacy policy can be accessed on our website, uk.kantar.com/surveys. We can also provide you with a written copy of the policy

I confirm that the participant has been made aware of how to access the privacy policy

Q13. Recontact

Would you be happy to be recontacted in relation to this project? You would not be obligated to take part in any future research if you were contacted.

Recontact wishes:

Phase 3: Focus Groups

Participant Quotas

- 3x 90-minute online focus groups (6 participants per group)

Characteristic of interest

- Group 1: Owner-occupier – purchasers and sellers (x2 first time buyers)
- Group 2: Landlords – using letting agents
- Group 3: Landlords – using property managers

All to:

- Have a mix of gender, age, and SEG

To include a range of following characteristics:

- Incomes and experiences with buying/selling properties for group 1 - including some first time buyers
- Portfolio sizes, tenant income, property EPC ratings (landlords only)
- Property values
- Environmental attitudes

Recruitment screener

Q1. Introductions

"Good morning/afternoon, my name is X and I am calling from X, an independent research organization.

We have been asked to carry out research on behalf of DESNZ, the Department for Energy Security and Net Zero and Verian, an independent research agency.

DESNZ would like to explore how people feel about estate agent's roles in home decarbonisation and so want to invite you to participate in an online group discussion.

- The research is completely voluntary
- You will not incur any costs taking part in the research and will receive an incentive for your time
- Research is conducted in accordance with the MRS code of conduct
- Verian is completely independent from DESNZ
- Your information will be used for research purposes only
- Verian will not pass your personal details on to anyone outside of the research team – this includes the research team at Verian and the core DESNZ research team – and your name will not be used in the reporting for this project
- One or more members of the DESNZ team may attend the research session to hear your views directly

Would you be interested in taking part?

1. Yes
2. No

DO NOT RECRUIT IF ANSWER 'NO'

Q2. Zoom tech

The research involves an online video call and so you will need to have access to:

- a current and working email account that you check regularly
- broadband internet (in other words, not dial-up) from your home
- a device that has a camera and built-in mic and can connect to the internet. Most smartphones and tablets will work.

Do you have access to all of these?

DO NOT RECRUIT FOR ONLINE RESEARCH IF ANSWER 'NO'

Q3. Zoom consent

Participation in the online discussion groups will involve the following:

- Ahead of the interview and group discussion date, you will receive an email with a link to join at the set date/time. This email will also contain Zoom's terms and conditions of use for your information.
- In order to test the Zoom link works and to make sure you have what's needed, a member of the research team will call you to test the link a day or two before the discussion date. You will not need to download anything to your device to join this call.
- You will also be sent a Zoom consent form by email for the session – please can you read it and reply to the email stating that you have read and understood it.
- At the time of the interview or group, please click on the emailed Zoom link to join the discussion - you will be asked to enter your name (this should just be your first name and the first initial of your surname).
- The call will be you, up to five other participants, and one researcher and last 90 minutes. It will be an open-ended discussion, within which you and the other five members of the group can discuss and explain your views in detail.

On this basis, are you comfortable and happy to take part in this research?

DO NOT RECRUIT IF ANSWER 'NO'

If no, please record reason above

Q4. Characteristic

Which of the following best describes your current living situation?

1. I do not own a property
2. I own one property, which I live in

3. I own one or more properties, some of which I rent out

RECRUIT 6X CODE 2 ONLY FOR GROUP 1, RECRUIT 12X CODE 3 FOR GROUPS 2 AND 3

Who is the key decision maker in the purchase of new property(ies)?

1. I am the key decision maker
2. I own one of the key decision makers
3. Somebody else is the key decision maker

DO NOT RECRUIT CODE 3

Group 1 only - **Which of the following reflects your current property sale?**

1. Currently selling a property
2. Sold within last year
3. Sold within last 1-2 years
4. Sold 2-3 years ago
5. Sold 3-4 years ago
6. Sold over 4 years ago.

ALL PARTICIPANTS IN GROUP 1 TO BE SELLING OR HAVE SOLD THEIR PROPERTY WITHIN THE PAST 2 YEARS

Group 1 only - **Which of the following reflects your most recent property purchase?**

1. Currently looking to buy a property
2. Bought within last year
3. Bought within last 1-2 years
4. Bought within the last 2-3 years
5. Bought within the last 3-4 years
6. Bought over 4 years ago.

ALL PARTICIPANTS IN GROUP 1 TO BE BUYING OR HAVE BOUGHT THEIR PROPERTY WITHIN THE PAST 2 YEARS

Group 1 only – **Is this the first time you are buying or have bought a property?**

1. Yes

2. No

RECRUIT 2X CODE 1

Group 1 only – **How old is the property you are currently buying/or have recently bought?**

1. New Build (under 10 years old)
2. 11-50 years old
3. 51-100 years old
4. 101+ years old

RECRUIT A MIX

Group 1 only – **What is the value of the property you are buying/ have recently bought?**

1. Under £100,000
2. £110,000-250,000
3. £251,000-500,000
4. £500,000-750,000
5. £751,000-1,000,000
6. £1,000,000+

RECRUIT A MIX

Groups 2&3 only – **Do you use any of the following external organisations in your lets?**

1. Letting Agents
2. Property Managers
3. Managing Agents
4. A Mix

RECRUIT 6X CODE 1, 6X CODE 2

Groups 2&3 only – **As a landlord, what tasks do you complete for your properties yourself (without the help of lettings agents, property managers, or other individual/business)?**

1. Rent collection
2. Advertisement of property

3. Let agreement
4. Property upkeep and maintenance
5. Health and safety checks
6. Provision of EPC
7. Protection of tenant deposit

ENSURE THOSE IN GROUP 3 ALL SELECT 4

Groups 2&3 only – **How many properties do you currently let?**

1. 1
2. 2-4
3. 5-7
4. 7+

RECRUIT A MIX

Group 1 only – **What kind of property do you currently reside in/are currently buying?**

1. Flats
2. Maisonettes
3. Houses
4. Bungalows
5. A Mix

RECRUIT A MIX

Groups 2&3 only – **What kind of properties do you primarily let?**

1. Flats
2. Maisonettes
3. Houses
4. Bungalows
5. A Mix

RECRUIT A MIX

Groups 2&3 only – **On average, how much is one of your let properties worth?**

1. Under £100,000
2. £110,000-250,000
3. £251,000-500,000
4. £500,000-750,000
5. £751,000-1,000,000
6. £1,000,000+

RECRUIT A MIX

Groups 2&3 only – **On average, what are the EPC ratings of your properties?**

1. A
2. B
3. C
4. D
5. E-F
6. A mix

RECRUIT A MIX

Groups 2&3 only – **On average, what is the age of your properties?**

1. New Build (under 10 years old)
2. 11-50 years old
3. 51-100 years old
4. 10+1 years old

RECRUIT A MIX

What type of lets do you primarily own?

1. Long-term lets
2. HMOs
3. Short-term lets
4. Holiday lets
5. Airbnb

DO NOT RECRUIT CODES 3-5

Groups 2&3 only – **What is the average household income of your tenants?**

1. Less than £20,000 per annum
2. £20,000-£29,999 per annum
3. £30,000-£39,999 per annum
4. £40,000-£49,999 per annum
5. £50,000-£74,999
6. £75,000-£99,999
7. More than £100,000 per annum
8. Don't know

RECRUIT A MIX

Q5. Environmental Attitudes

How concerned, if at all, are you about current climate change, sometimes referred to as 'global warming'?

1. Very concerned
2. Fairly concerned
3. Not very concerned
4. Not at all concerned
5. Don't know

RECRUIT MIX OF 1-5 FOR ALL GROUPS

The way we live our lives will have to change substantially to address climate change.

1. Strongly agree
2. Agree
3. Neither agree nor disagree
4. Disagree
5. Strongly disagree
6. I don't know
7. Prefer not to say

RECRUIT A MIX OF 1-6 FOR ALL GROUPS

How important is it / was it to find a property with energy efficiency features already installed (e.g., insulation, double glazing, solar panels, heat pumps)?

1. Very important
2. Fairly important
3. Not very important
4. Not at all important
5. Don't know

RECRUIT A MIX OF 1-5 FOR ALL GROUPS

Have you ever previously made energy performance improvements to your property(ies)?

1. Yes
2. No
3. Don't know

RECRUIT A MIX

DEMOGRAPHIC CRITERIA

Q6. Region

Group 1 - **Which part of the country is the property you are buying/selling in or have bought/sold in?**

Groups 2&3 – **What area of the country are your properties primarily in?**

1. Greater London
2. South East
3. South West
4. West Midlands
5. North West
6. North East
7. Yorkshire and the Humber
8. East Midlands

9. East of England
10. Scotland
11. Wales
12. Northern Ireland

RECRUIT PARTICIPANTS CODING 1, 2, 3, 4, 5, 6, 7, 8, 9 AND 11

DO NOT RECRUIT PARTICIPANTS CODING 10 OR 12

Q7. Gender

How do you describe your gender?

1. A man (including trans man)
2. A woman (including trans woman)
3. Non-binary
4. In another way
5. Prefer not to say

RECRUIT A MIX, AIMING FOR EQUAL MIX OF MEN AND WOMEN ACROSS THE SAMPLE AS A WHOLE

Q8. Group 1 only – Socio-economic group

Please can you tell me about the job of the person in your household who is the chief income earner? If you live with a partner and your incomes are broadly the same, please tell me about yours.

PROBE THE FOLLOWING QUESTIONS IN DETAIL AS APPROPRIATE

What is their job title?

Who do they work for, or are they self-employed?

Approximately how many people does the organisation employ?

Do they manage any other workers? If so, how many?

What is their highest level of qualifications?

PLEASE USE YOUR JUDGEMENT TO ASSIGN THE PARTICIPANT TO AN SEG CATEGORY, USING THE TABLE BELOW FOR GUIDANCE. PLEASE REACH OUT TO THE RESEARCH TEAM IF YOU ARE IN ANY DOUBT AS TO ASSIGNING AN SEG CATEGORY.

- A

- Higher managerial and professional workers
- Professionals; very senior managers in business; top-level civil servants
- Retired people who worked in a grade A job
- People whose late spouse or civil partner worked in a grade A job
- B
 - Intermediate managerial and professional workers
 - Middle-management executives in large organisations, with appropriate qualifications
 - Principal officers in local government and the civil service; secondary school teachers
 - Top management or owners of small businesses and educational and service establishments
 - Retired people who worked in a grade B job
 - Retired people whose late spouse or civil partner worked in a grade B job
- C1
 - Junior management, owners of small establishments and all other non-manual workers
 - Jobs in this group have very varied responsibilities and educational requirements
 - Retired people who worked in a grade C1 job
 - Retired people whose late spouse or civil partner worked in a grade C1 job
- C2
 - Skilled manual workers
 - Manual workers with responsibility for other people
 - Retired people who worked in a grade C2 job and who now receive an occupational pension
 - Retired people whose late spouse or civil partner worked in a grade C2 job and who now themselves receive a pension based on that job
- D
 - Semi-skilled and unskilled manual workers, apprentices and trainees of skilled workers
 - Retired people who worked in a grade D job and who now receive an occupational pension
 - Retired people whose late spouse or civil partner worked in a grade D job and who now themselves receive a pension based on that job
- E

- Long-term recipients of state benefits
- People who have been unemployed for more than six months (otherwise classify on previous occupation) or off sick for six months or more (unless they are still being paid by their employer)
- Casual workers and people without a regular income
- Intermittent workers in receipt of income support

RECRUIT A MIX

Q9. Group 1 only – Income level

Which of the following brackets does your annual household income fall into, before tax and other deductions?

1. Less than £20,000 per annum
2. £20,000-£29,999 per annum
3. £30,000-£39,999 per annum
4. £40,000-£49,999 per annum
5. £50,000-£74,999
6. £75,000-£99,999
7. More than £100,000 per annum
8. Prefer not to say

RECRUIT A MIX AND RECORD FOR INFORMATION

Q10. Age

What age were you on your last birthday?

RECRUIT A SPREAD

Invitation and confirmation

Q11. Invitation

We would like to invite you to take part in this research, which includes a group discussion. The group discussion will be with an independent Verian researcher.

As a thank you for your participation, you will receive [£60 for owner-occupiers, £80 for landlords]. This incentive will be paid for completion of the research activities and will be paid to you after the group discussion.

The group will take place [CONFIRM DATES AND TIMES AS APPROPRIATE – groups will commence w/c 15th January]

With your permission, we will be recording the discussions. The discussions will be confidential and anonymous – and will only be shared with members of the core research team at Verian and DESNZ.

You do not need to have any prior knowledge of smart meters to take part in this research. We will not be testing people's knowledge, but simply exploring people's understanding and awareness and asking for people's views and opinions on their experiences.

Q12. Confirmation

Are you happy to participate in this research?

Confirmation

IF ANSWER NO, PLEASE RECORD REASON THEN THANK AND CLOSE

Q13. Interview preparation

Are there any adjustments we could make to ensure that you can access the research in a way that is right for you? This may include things like sending questions over beforehand so you can prepare or by providing a BSL interpreter, or something else.

Any support that could be provided

LET THE RESEARCH TEAM KNOW WHAT THEY WILL NEED TO DO IF THIS IS RELEVANT

Q14. Privacy policy

Read out: As part of our commitment to protecting your rights, please note that Verian's privacy policy can be accessed on our website, uk.kantar.com/surveys. We can also provide you with a written copy of the policy. Please note that the company has recently changed its name from Kantar Public, although the website has not yet been updated.

I confirm that the participant has been made aware of how to access the privacy policy

Q15. Recontact

Would you be happy to be recontacted in relation to this project? You would not be obligated to take part in any future research if you were contacted.

Recontact wishes

Thank and close

Technical Annex D: Topic Guides

Phase 2: In-depth Interviews

Section 1. Introduction (2 minutes)

- Introduce moderator and Verian formerly Kantar Public (an independent social research agency)
 - FREELANCERS – introduce yourselves as ‘working on behalf of Verian’ (not ‘from Verian’)
- Research on behalf of DESNZ (Department for Energy Security and Net Zero)
- The aim of the project is to understand the role of residential sales and letting professionals in enabling home decarbonisation (e.g., energy efficiency measures or low carbon heating within domestic properties of their customers).
- More specifically, we want to explore your experiences as an RSLs professional engaging with home decarbonisation and your customers.
- This information will be used to help DESNZ understand how they can support homeowners who want to decarbonise their properties via improved energy efficiency and the implementation of low-carbon heating systems.
- Interview length will be no more than 60-minutes
- Research is confidential and voluntary – your personal details will not be shared with DESNZ and participation will not affect your current or future relationship with DESNZ or any other government department
- Once completed interview – £80 payment as a thank you for your time and contribution
- Any questions?
- Recording

Section 2. Background (3 minutes)

- **Participant information**
 - Background e.g., where live/work
 - Current organisation
 - Type of business (estate agent, lettings/property management, other / mix)
 - What it is typically known for / areas of specialty (e.g., customer type, property values)
 - Size of the business (e.g. number of employees)
 - Membership of any professional bodies

- [IF ORGANISATION IS NOT] Probe whether part of any as an individual
- Current role within organisation
 - Confirm current job role and title
 - Length of time in role
 - Education or previous experience
 - Explore the key functions of role
 - Time spent in customer-facing functions
 - [IF LETTING AGENT OR PROPERTY MANAGER] Confirm what type of service they typically offer to customers e.g. fully manage, rent collection, let only
- Moderator to understand how role splits across lettings/property management, estate agency, if relevant

Section 3. Customer journey (10 minutes)

Moderator to explain: we're now going to think more generally about your engagement with customers and typical interactions through the customer's journey.

- **Customer context**

- Establish who their main customers are e.g., home-owners (sellers and purchasers), tenants, landlords
- Number of customers
- What their customers' (e.g., landlords) typical portfolios are:
 - FOR LETTINGS/PROPERTY MANAGERS:
 - Number of properties
 - Property values
 - Reason for investing (e.g., short-long, term; pension, or main income)
 - Type and age of properties / EPC rating (e.g., new builds vs. older)
 - Tenants (e.g., fuel poor vs. affluent, HMOs, students, families, etc.) – moderator to understand they types of tenants that they work with
 - FOR ESTATE AGENTS:
 - Property values
 - What they are looking for / reason for buying
 - Type of property - age / EPC rating (e.g. new builds vs. older)
 - Length of time landlords tend to keep properties for

- Main role with customers
 - [IF ESTATE AGENT] establish whether they work with property managers
 - [IF LETTINGS AGENT/PROPERTY MANAGER] establish whether they fully manage the property, handle rent collection or let only

Note for moderators: we want to better understand the customer journey so we are able to identify when conversations about energy efficiency and low carbon heating happen or if they are not yet taking place, when would be most appropriate for RSLs professionals to raise this with their customers. Please use Stim 1 (a, b or c depending on who you are interviewing) as a starting point to create a more detailed customer journey map.

- **Customer journey**

- Moderator to explain that we now want to understand what a typical customer journey might look like from initial interaction and beyond. Moderator to walk through each of the following stages with stimulus on screen – and add to it.
 - First interaction with customers
 - Key milestones/touchpoints throughout
 - Final interactions (where relevant)
- For each stage moderator to probe:
 - Prompts/scenarios for getting in touch
 - What is typically discussed at this point – what the customer's priorities are
 - How it is dealt with and any next steps
 - Whether anyone else is involved and if so, their role and when they are involved (e.g., surveyors, conveyancers, EPC assessors, lenders, tenants, others)
 - Specifically probe: damp/mould complaints
- Understand how different factors might impact the journey, dependent on:
 - Customer type
 - Property value / rental or owner-occupier income
 - Portfolio size
 - Property type / age
 - Tenancy type
 - Anything else?
 - [LETTING AGENTS]: Preference to keep same tenants or turnover (due to additional onboarding fees of new tenants)

- **Customer relationships**

- Perceived level of trust customers have in them
 - How this varies customer to customer (e.g., customer type, tenants, landlords, home purchasers and sellers)
 - What do they think customers specifically trust them for
- Extent of their influence on customer decision-making
 - Specific decisions they feel they have offer most support on – when and why
- [FOR LETTINGS / PROPERTY MANAGERS] Moderator to also briefly cover relationships with tenants.
 - [IF PROPERTY MANAGER] Explore the mediating role they play between landlords and tenants e.g., passing tenant requests onto landlords
 - If not, why

Section 4. Home decarbonisation perceptions (5 minutes)

- **Perceptions and understanding of home decarbonisation**

- Three words they immediately associate with ‘energy efficiency’
 - Understand what they perceive energy efficiency to mean
 - Moderator to explain: Energy efficiency measures includes improvements to the home, such as insulation, double glazing, draft-proofing, that reduce the amount of energy needed to heat a home.
- Three words they immediately associate with ‘low carbon heating’
 - Understand what they perceive low carbon heating to mean
 - Moderator to explain: Low-carbon heating systems covers implementation of heating systems, such as, heat pumps, solar panels, electric combi or biomass boilers.
- For each, moderator to understand:
 - Initial reactions to this description
 - How knowledgeable / aware they feel of these
 - What specifically feels most relevant to them in terms of what is listed
 - Gaps in knowledge
 - Where understanding comes from / sources of information

Moderator to explain that many of these actions, would help customers decarbonise their homes. In addition to reducing carbon emissions, installing energy efficiency measures or low carbon heating systems can reduce energy bills, improve the warmth and comfort of the home, and mitigate damp issues.

- Extent to which idea of decarbonising homes is perceived as a priority within the RSLs and by their business
- How this compares to other benefits of taking these actions...
 - Energy bill decreases
 - Increased comfort
 - Lessening issues of damp
 - Anything else?
 - Whether level of importance has changed over time, probe COL

Section 5. Customer views on home decarbonisation (18 minutes)

Note to moderator: be guided by the participant's language around home decarbonisation / energy efficiency / low carbon heating and use what feels most relevant to get the most out of the conversation.

- **Current home decarbonisation practices**

- When are energy efficiency improvements or low carbon heating considered in their own practice
 - Probe: when determining rental/sales price points, when taking on new properties/customers (i.e. landlords)

- **Perception of customer views on home energy efficiency and low-carbon heating in decision-making role of RSLs professionals**

- What are customers' perceptions of low carbon heating / energy efficiency improvements
- For both energy efficiency measures and low carbon heating, probe:
 - Whether customers (including tenants, landlords, and owner-occupiers) think it's important
 - Extent to which "energy efficient" or "decarbonised homes" are desired – why / why not
 - Impact of COL crisis / increasing energy bills on customer interest
 - Any differences between specific energy efficient measures, probe:
 - Insulation
 - Draught proofing
 - Solar panels / photovoltaic
 - Or low carbon heating measures e.g., heat pumps, energy efficient boilers (electric combi, biomass)
- [FOR PROPERTY MANAGERS] Explore how tenants' perceptions of energy efficiency and low carbon heating measures compare with their landlords'

- Whether they ever receive complaints or requests from tenants related to energy efficiency / heating
 - Subject of complaints e.g. complaints about damp, cold, energy bills, draughtiness etc.
- [If yes] Typical response to complaints/requests
 - Probe whether these requests are passed onto on to the landlord
 - [If no] Why not
 - [If yes] Landlords response to requests
 - Type of advice typically given to landlords on complaints of this type
- Role customers expect them (as RSLs professionals) to play in their decision-making process around energy efficiency / low carbon heating
 - Explore whether this has changed overtime
- **Customer's perception of EPC ratings**
 - Awareness of EPC ratings
 - Whether EPC ratings influence customer's buying/selling/letting decisions
 - Whether customers have become more or less interested in EPC ratings over time
 - Probe: impact of COL
 - Probe: recent talk of EPC ratings changing in rentals from E to C (even though Govt. have confirmed this won't be happening at the moment)
- **Role on decision-making as part of customer journey**

Note to moderators: please show Stim 1 (either a, b or c depending on who you are interviewing) again and bring out customer journey map created in section 3 – add home decarbonisation details that come up here to the customer journey map.

- When is property energy efficiency or low carbon heating systems discussed with customers
- At what point in the customer journey do these conversations take place
- Understand whether conversations take place with tenants or any other roles mentioned
- How do these conversations take place – what is discussed
- Any variation in when property energy efficiency and low carbon heating systems are discussed
- [If not currently talking to customers about this] Explore how energy efficiency / low carbon heating could be incorporated into the customer journey
- After discussing the journey, explore perceived role they have on supporting landlord / owner-occupier decision-making around these improvements and why

- Areas they have more influence on e.g., specific energy efficient measures
- What needs to change so they can more easily support customer decision-making on home decarbonisation
- Explore the role of the tenant

Section 6. Drivers and barriers to home decarbonisation (12 minutes)

• Barriers to greater promotion and facilitation of home decarbonisation

- Explore key barriers for energy efficiency measures and low carbon heating separately – spontaneous and then prompt:
 - Rules and regulations
 - Technology
 - Nature of the sector
 - Knowledge and awareness
 - Relationship between customers and RSLs professionals
 - Perceived role of RSLs professionals
 - Costs
- Explore why these are barriers
- Any differences between energy efficiency measures and low carbon heating systems
- Most / least prominent barrier

• Drivers to greater promotion and facilitation of home decarbonisation

- Explore key drivers for energy efficiency measures and low carbon heating separately – spontaneous and then prompt:
 - Rules and regulations
 - Technology
 - Incentives, funding or schemes
 - Attitude / meaning
 - Variation within sector
- Explore why these are drivers
- Any differences between energy efficiency measures and low carbon heating systems
- Most / least prominent driver

• Home decarbonisation and wellbeing

- Understand if any links made between these energy efficiency improvements and tenant / home-owner wellbeing

- Identify benefits
- Anticipated customer reaction to home decarbonisation being presented through a wellbeing lens
 - Prompt if needed: e.g. installing wall insulation could make a home warmer to live in

Section 7. Potential role (10 minutes)

Note to moderator: draw on some of the barriers identified in the previous section to explore how these could be overcome and the role professionals could play.

- **How RSLs professionals can be supported to play a more active role in home decarbonisation**
 - Immediate thoughts on how they could be better supported / what they would like to see government do to support them in this space
 - Probe: funding / grants, regulations, training
 - If mention regulations, probe whether mean rules/regs for homeowners or professionals
 - Moderator to use barriers / drivers from previous section to understand how these could be overcome
 - How could interest in home decarbonisation (energy efficiency or low carbon heating systems) be increased among customers
 - What could be done to make customers view home decarbonisation (energy efficiency or low carbon heating systems) as a priority
 - The role they could play in advising customers about EPC ratings of a property and any other energy efficient measures / clean heating systems, including 'home decarbonisation' status in advertising, taking home decarbonisation into consideration when buying / listing properties
- **Possible ways government could support RSLs professionals**

Note to moderator: if the participant is unsure how they could be better supported, probe on the following theoretical ways.

- Monetary incentives
 - [FOR ESTATE AGENTS] Estate agent targets relating to the carbon emissions of properties in their mortgage portfolios
 - [FOR LETTING AGENTS /PROPERTY MANAGERS] Tax credits / tax deductions for having a certain % of properties in their portfolios above a certain EPC rating
- Education/training
 - Guidance for RSLs professionals on the range of home improvements available and their associated costs (to improve knowledge)

- Probe: guidance for consumers too, personalisation for homes
- ‘Green’ accreditation for property professionals
- ‘One-stop-shop’ for information/guidance on energy efficiency and low carbon heating from government
 - What would this include
 - Probe: EPC calculator, guidance for landlords/homeowners, personalised home surveys
- Who they would like to receive training from / anyone they don’t want to receive training from
- Encouraging links to technology companies that fit energy efficient measures
- Regulations/legislation
 - Mandates that state no selling/letting of properties below a certain EPC rating
- For each of the ideas above, probe:
 - Immediate reaction
 - Whether it would make them feel more or less supported
 - Any challenges/barriers they foresee
- **Future of home decarbonisation within residential sales and letting sector**
 - Expected changes within the sector, organisation and/or role
 - Probe impact these changes will have on engagement with home decarbonisation
 - Any predictions to the role home decarbonisation will play in RSLs in the future and why
- **Response to green badge concept**
 - Whether they think in future that customers will feel proud of having an energy efficient/decarbonised home
 - Why/why not
 - Is this something customers will want to display to on their home e.g. for others to see (e.g., guests, neighbours) or when selling/letting a home

Moderator to read out (or alternatively show Stim 2 if needed): *“A possible idea from government of how energy efficiency/decarbonised properties could be displayed or emphasised is to introduce a green badge system. The idea is that homes which are energy efficient, or Net Zero ready would be awarded a ‘green badge’. The principle is similar to the one used for EV green number plating, which signals that the vehicle is a low emission vehicle.”*

- Immediate response – likes/dislikes
- How they envisage it working in practice
- Explore perceived customer interest in buying/renting or selling/letting a property with a green badge
- Interest in displaying green badge status in property adverts
- Potential for motivating homeowners to undertake energy efficiency improvements in order to obtain a green badge
- Likelihood of discussing green badge with customers

Section 8. Close (2 minutes)

- **Any final thoughts**
 - Anything else to add
 - Anything else expected to cover in discussion but hasn't come up
- **Thanks and close**
 - Reassure re. receiving an incentive payment of £80 from recruiter
 - Thank

Phase 3: Focus Groups

Section 1. Introduction (10 minutes)

- Introduce moderator and Verian (an independent social research agency)
 - FREELANCERS – introduce yourselves as 'working on behalf of Verian' (not 'from Verian')
- Research on behalf of DESNZ (Department for Energy Security and Net Zero)
- You have all been invited to attend tonight as you [have recently bought/sold your home / you are a landlord] and we want to explore your experiences. We want to understand your relationships with residential property professionals [e.g., estate agents, letting agents or property managers] as [homeowners or landlords]
- More specifically, the aim of the project is to understand the role of residential sales and lettings sector professionals in supporting homeowners and landlords to decarbonise their homes (e.g., energy efficiency measures or low carbon heating within domestic properties) – so, the discussion will be focussed here
- This information will be used to help DESNZ understand how they can support homeowners who want to decarbonise their properties via improved energy efficiency measures and the implementation of low-carbon heating systems
- Discussion will last 90-minutes

- Research is confidential and voluntary – your personal details will not be shared with DESNZ and participation will not affect your current or future relationship with DESNZ or any other government department
- Once completed interview – [£60 for owner-occupiers, £80 for landlords] payment as a thank you for your time and contribution
- Ground rules
 - Mobiles off, cameras on
 - Listen to everyone’s point of view and be mindful that this can be trickier over Zoom as we may talk over each other unintentionally
 - Moderator is there to make sure everyone gets chance to share their views. Please use the ‘raise your hand’ function on Zoom if you haven’t been noticed
 - If facing technical difficulties, please log out of the call and log back in
- Any questions?
- **Recording**

Section 2. Background (3 minutes)

- **Participant introduction**
 - Background, living situation, and...
 - **LANDLORDS:** length they have been a landlord, and brief overview of how they use lettings/property managers
 - **HOMEOWNERS:** reason for recently buying/selling their home

Section 3. Relationship with property professionals (15 minutes)

- **HOMEOWNERS relationship with estate agents:**
 - Thinking about your recent home purchase...
 - How many estate agents were used in the process
 - Whether trusted some more than others and why
 - How this varied when selling their home
- **LANDLORDS relationships with letting agents/property managers:**
 - Establish whether they have always used a letting agent/property manager
 - If they did not previously work with an agent, probe when started and why
 - Whether they have changed agents or not previously and reasons for doing so
 - [WORK WITH PROPERTY MANAGERS] Establish whether properties are fully managed, rent collection or let only – and why
 - How often they typically interact with their lettings agent / property manager

- What interaction do they therefore have with tenants

Customer journey

Note for moderators: we want to better understand the customer journey to identify when conversations about energy efficiency and low carbon heating happen / when would be most appropriate for agents to raise this with their customers. Please use Stim 1 (a, b or c depending on who you are interviewing) created during Phase 2 briefly explore whether these steps match with their experiences / whether there is anything else they would add in.

Moderator to explain that we now want to understand what a typical customer journey might look like from initial interaction and beyond. Show respondents Stim 1 and explain that this was developed in a previous phase of the research where we spoke to property professionals and that we are now interested to get the customer's [homeowner's/landlord's] perspective.

Moderator to walk through each of the following stages with stimulus on screen – and add to it.

1. First interaction
 2. Key milestones/touchpoints throughout
 3. Final interactions (where relevant)
- Moderator to probe:
 - Whether agree with the customer journey steps
 - Whether anything is missing
 - Whether anyone else is involved (e.g., surveyors, conveyancers, EPC assessors, mortgage lenders, tenants, accountants, others)
 - [FOR LANDLORDS]. Explore touchpoints with tenants.
 - What are key reasons for getting in touch with property professionals
 - What is typically discussed at this point
 - Any key decision-making factors
 - Moderator to listen out for any differences in views on journey among the group and probe to understand reasons behind differences: property value / type / age, portfolio size or tenancy type, or others
 - **Level of influence in decision making**
 - FOR HOMEOWNERS:
 - “Thinking about this journey...”
 - Influence estate agents have in their decision making when buying/selling property – probe any examples, key information wanted from them
 - FOR LANDLORDS:
 - “Thinking about this journey...”

- Influence letting agents/property managers have in their decision-making about their portfolio
 - Probe: property maintenance/changes, future property investments/legislation
 - Overall what expect or look for in them
- [IF USE PROPERTY MANAGERS] Explore the mediating role they play between them as the landlords and their tenants e.g., passing tenant requests onto landlords
 - Explore whether trust property managers to handle tenant requests
 - If feel tenant requests aren't always passed onto them, explore why

Section 4. Home decarbonisation in decision-making (22 minutes)

- Establish understanding of home decarbonisation
 - Moderator to show definition (Stim 2) of home decarbonisation on screen:
 - *Home decarbonisation is when changes are made to the home which help to reduce household energy consumption. This produces key benefits, including reduction of energy bills, improving the warmth and comfort of the home, and mitigation of damp issues, as well as decreasing the overall amount of carbon emissions that are produced.*
 - *Typically approaches to do this can be categorised in two ways:*
 - *Making homes more energy efficient: installing measures such as insulation, double glazing, draft-proofing, that reduce the amount of energy needed to heat a home.*
 - *Changing the way homes are heated: installing cleaner heating systems, such as, heat pumps, solar panels, electric combi or biomass boilers.*
 - Moderator to ask if there are any questions and clarify as needed
- **Influence of home decarbonisation on decision-making as part of customer journey**

Note to moderators: please show Stim 1 (either a, b or c depending on who you are interviewing) again and bring out customer journey map created in section 3 – add home decarbonisation details that come up here to the customer journey map.

Throughout moderator to remind participants of specific examples of energy efficiency / low carbon heating: insulation, double glazing, draught proofing, solar panels, heat pumps, energy efficient boilers (electric combi, biomass). Also to probe on related topics: draught, damp, mould, warmth/cold/comfort of properties, energy bills.

- Thinking back to the customer journey...

- Have they ever spoken to property professionals about energy efficiency measures / low-carbon heating and what discussion was.
 - If not, why not?
 - If yes, who raised the conversation and what was the prompt
- Whether property professionals raise energy efficiency/low carbon heating measures with them
 - If discussed: probe for examples and what is discussed
 - If not discussed: why do they think this is, who else might they discuss this with
- When they think it makes most sense to discuss energy efficiency improvements or low carbon heating with property professionals and how
 - FOR LANDLORDS, probe: when taking on new properties or tenants, when determining rental price points, others
 - FOR HOMEOWNERS, probe: when viewing a property, when understanding wants from a property, when having a survey, when making changes to sell their homes others
- How do or would they feel overall discussing energy efficiency / low carbon heating with property professionals. Probe: benefits/concerns.
- FOR HOMEOWNERS (if not covered):
 - Whether energy bills / monthly costs are discussed – how and when
 - Whether estate agents ask about previous experiences of cold, damp, mould draughts, and general comfort when viewing properties
 - Probe: how would they feel if they did ask and impact of this
- FOR LANDLORDS (if not covered):
 - Whether they have ever had any issues with energy efficiency / heating. Probe: damp, cold, energy bills/cost of living, draughtiness, mould.
 - If so, have tenants complained about it?
 - Understand what is discussed by who and any actions taken – reasons for this. Probe: property managers role
 - What they believe tenants view of energy efficiency measures and/or low carbon heating systems is and whether they have raised them
- **Perceptions of EPC ratings (if not previously covered)**
 - Awareness of EPC ratings
 - Whether EPC ratings influence their buying/selling/letting decisions – reasons why/why not

- Whether had conversations about EPC ratings with property professionals and what was discussed
- [LANDLORDS ONLY] Probe talk of EPC ratings changing in rentals from E to C (even though Govt. have confirmed this won't be happening at the moment)

Section 5. Potential role of RSLs professionals in future (15 minutes)

- **Role customers expect property professionals to have in their decision-making about home decarbonisation**
 - Extent to which they feel property professionals currently influence around home decarbonisation measures and role they expect them to play around energy efficiency / low carbon heating
 - Whether want them to play a great role in future around energy efficiency / low carbon heating
 - What they want to know from them and when
 - Any areas they expect property professionals to have more influence on e.g., any specific energy efficient measures
 - Reasons they would want to know about energy efficiency measures / low carbon heating from a property professional
 - Probe: Energy bill decreases, increased comfort, homeowner/tenant wellbeing, lessening issues of damp/mould
 - Concerns they would have about property professionals' role in supporting homeowners/landlords with energy efficiency
 - Level of trust they would have overall
 - Knowledge/awareness generally around measures
 - Knowledge and awareness in terms of impact to rental/property value
 - Connections to those that install measures

Section 6. Testing potential ideas/interventions (25 minutes)

- **How property professionals can be supported to play a more active role in home decarbonisation (spontaneous)**
 - What could property professionals do to support home-occupiers/landlords more around making decisions on decarbonising their homes
 - Immediate thoughts on how property professionals could better support landlords/homeowners. Probe:
 - Knowledge and awareness e.g., of potential measures, benefits, costs
 - Understanding EPC ratings of properties
 - Consideration of home decarbonisation when buying/listing properties

- What needs to be in place for them to consider making these changes as homeowners/ landlords. Probe:
 - Incentives e.g. monetary
 - Legislation changes / changes within the sector
- **Possible ways government could support home-occupiers and landlords in decarbonising their homes (ideas to test)**

Moderator to explain that we are now going to introduce some ideas which could help property professionals could better support landlords/homeowners. These are initial ideas, which have not been developed by the Moderator which we want honest views on. The idea is to see how these could work in practice and create and build on ideas. Moderator to show each as stimulus (Stim 3 a-d) and rotate order that each are shown in the groups.

- Incentives
- Increasing knowledge
- Regulations and legislation
 - For each of the ideas above, probe as relevant:
 - Immediate reaction – likes / dislikes
 - How they would see this working and the role of property professionals
 - Likelihood of discussing this with property professionals
 - Whether it would make them feel more or less supported to decarbonise their homes
 - Any challenges/barriers they foresee
 - Overall interest in it. Probe: benefits
 - For Stim 3.a. property professionals applying for grants, specifically:
 - FOR LANDLORDS, probe: feasibility to do at scale for those with multiple properties
 - For Stim 3.d. green badge concept, specifically:
 - Once seen stim:
 - Immediate response – likes/ dislikes
 - Potential advantages and disadvantages of the green badge
 - Any that could be associated with displaying a badge
 - Potential impact of the green badge on the appeal of a property which is up for sale (for owner occupiers and landlords) or rent (just landlords)
 - Potential negative feelings or outcomes that could be associated with ineligibility e.g., where homes are technically unable to meet

the required standard, or owners cannot afford the required upgrades

- Potential for motivating those currently ineligible to undertake energy efficiency improvements (e.g., insulation or double glazing) or install a low carbon heating system (e.g., heat pump)
 - e.g., scenario for owner occupiers – after seeing a neighbour who has one, would this make you investigate what it is? Would it make you want to upgrade your home to get one too?
 - e.g., scenario for landlords – would seeing other rental properties with a green badge make you want one for yours too?
- Preferences in terms of the badge design
 - Whether it is designed for inside or outside the home
 - Whether it is easily removable
- Whether the green badge is something they would want
 - Why/why not
- Whether they would display the badge if their property was awarded one
 - Where it would be displayed: inward facing within the home or outward facing

- **Summary on ideas**

- What do they think of these
- Most helpful or interesting and why
- Is there anything else they can think of that that would support the role of property professionals in helping their customers decarbonise their homes not discussed

Section 8. Close (3 minutes)

- **Any final thoughts**

- If you could give one piece of advice to government about how property professionals could better support them as the home-occupiers/landlords in making homes more energy efficient, what would it be?
- What had stood out in discussion today
- Anything else to add

- **Thanks and close**

- Reassure re. receiving an incentive payment of £80 from recruiter
- Thank

Technical Annex E: Stimulus

Across fieldwork, participants were shown some stimuli to aid discussion. During Phase 2, the typical customer journey was mapped out with estate agents, lettings agents and property managers. Diagrams were populated across the duration of interviews and then used again in Phase 3.

Phase 2: In-depth Interviews

Stimulus 1: customer journey maps

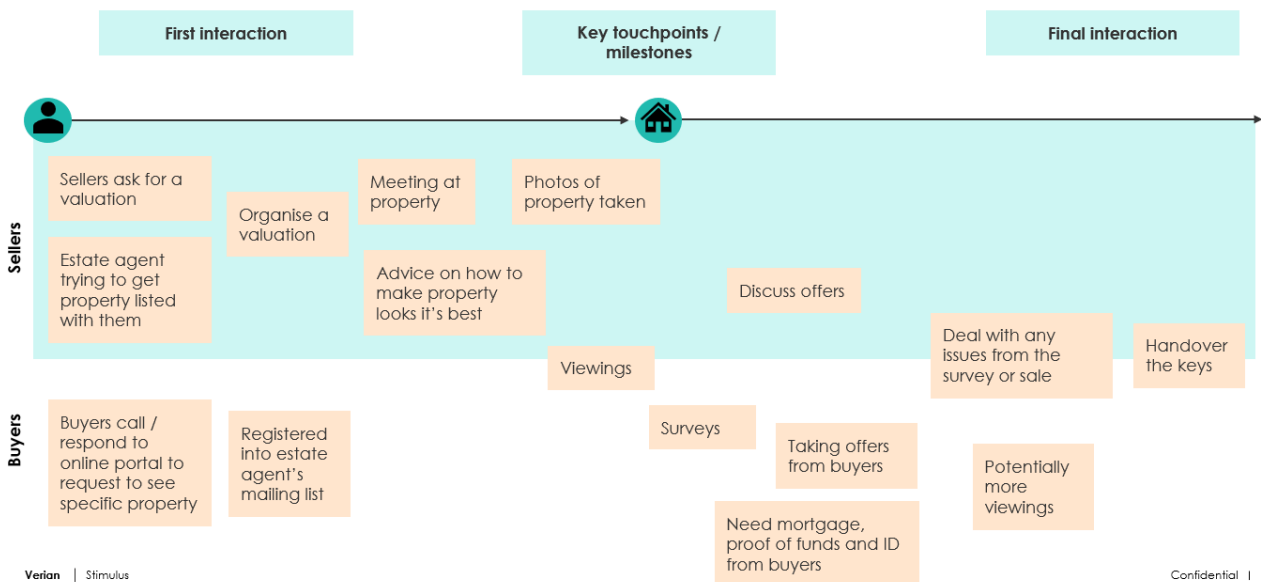


Figure 1: Stimulus 1.a. mapping out the customer journey with estate agents (for sales)

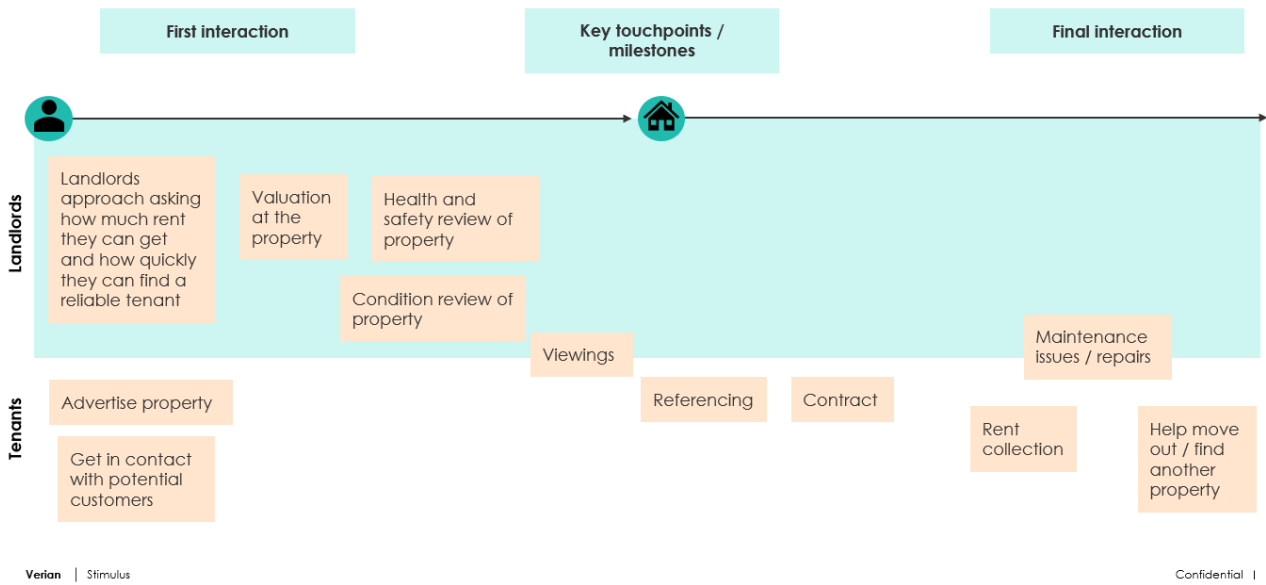


Figure 2: Stimulus 1.b. mapping out the customer journey with lettings agents

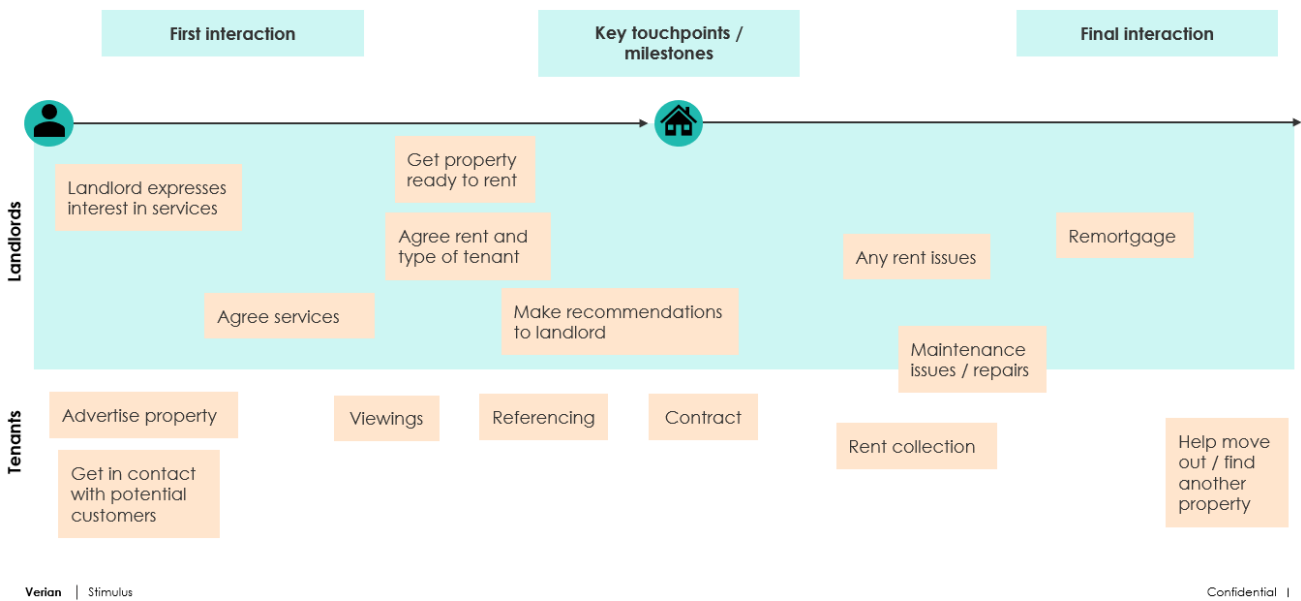


Figure 3: Stimulus 1.c. mapping out the customer journey with property managers

Stimulus 2: Green badge concept

Slide reads:

“A possible idea from government of how energy efficiency/decarbonised properties could be displayed to others is to introduce a green badge system.

The idea is that homes which are energy efficient, or Net Zero ready would be awarded a ‘green badge’ to display to others.

The principle is similar to the one used for EV green number plating, which signals to other drivers that the vehicle is a low emission vehicle.”

Phase 3: Focus Groups

Stimulus 1: Customer journey maps

The same customer journey maps shown to participants in Phase 2 were used in the Phase 3 focus groups.

Stimulus 2: Home decarbonisation definition

Slide reads:

“Home decarbonisation is when changes are made to the home which help to reduce household energy consumption. This produces key benefits, including - reduction of energy bills, improving the warmth and comfort of the home, and mitigation of damp issues, as well as decreasing the overall amount of carbon emissions that are produced.

Typically approaches to do this can be categorised in two ways:

- **Making homes more energy efficient:** installing measures such as insulation, double glazing, draft-proofing, that reduce the amount of energy needed to heat a home.
- **Changing the way homes are heated:** installing cleaner heating systems, such as, heat pumps, solar panels, electric combi or biomass boilers.”

Stimulus 3: Intervention ideas to test

Stimulus 3a. Support with incentives

Slide reads:

“Property professionals...

- Apply on behalf of landlords or homeowners for grants to install energy efficiency measures
- Provide advice around financial benefits related to owning more energy efficient homes (if in place) e.g. preferential green mortgage rates, stamp duty relief, council tax
- Offering a personalised home decarbonisation feasibility survey of home and associated costs”

3b. Increasing knowledge

Slide reads:

“Property professionals...

- Receive an accreditation for conducting training around energy efficiency and low carbon heating
- Build connections with recommended companies that install energy efficient measures or low carbon heating systems”

3c. Regulations and legislation

Slide reads:

“Property professionals...

- Introduce mandates that state no selling or letting of properties below a certain EPC rating
- Have requirements for landlords to put a percentage of money aside annually for maintenance and energy efficiency improvements”

3.d. Green badge concept

Slide reads:

“The ‘green badge’ is a new potential idea to award homes producing low carbon emissions with a badge to signify that they are energy efficient and compatible with Net Zero goals.

This badge could be displayed inside (for e.g., guests to see) or outside the home (for e.g., neighbours to see) and could also be used on any marketing materials during the sale or let of the property.

Eligible homes could include, for example, those which are well insulated, those which have solar panels or those which have a heat pump instead of gas or oil heating.”

3.e. Summary of intervention ideas

[This slide is divided into three columns]

[Column 1]

a) SUPPORT WITH INCENTIVES

Property professionals...

- Apply on behalf of landlords or homeowners for grants to install energy efficiency measures
- Provide advice around financial benefits related to owning more energy efficient homes (if in place) e.g. preferential green mortgage rates, stamp duty relief, council tax
- Offering a personalised home decarbonisation feasibility survey of home and associated costs

[Column 2]

b) INCREASING KNOWLEDGE

- Property professionals...
- Receive an accreditation for conducting training around energy efficiency and low carbon heating
- Build connections and with recommended companies that install energy efficient measures or low carbon heating systems

[column 3]

c) REGULATIONS & LEGISLATION

Property professionals...

- Introduce mandates that state no selling or letting of properties below a certain EPC rating
- Have requirements for landlords to put a percentage of money aside annually for maintenance and energy efficiency improvements

Technical Annex F: Limitations

There is a well-documented ‘action-intention’ gap encountered in behavioural research,¹ and a social desirability bias,² so responses participants gave may illustrate what they wanted to do ideally, or what they believed would make them appear in a positive light to others, rather than accurately reflecting their behaviour in a real-world encounter.

The conclusions and recommendations set out some ideas for communication and intervention based on the feedback and insight elicited in the research, but this does not constitute an exhaustive list of possible actions. Most of the findings in this report were consistently raised by participants and, where there were disparities, the range of responses has been set out. Throughout the report, verbatim quotes are used to illustrate and summarise the findings. In some cases, these quotes have been abridged for clarity.

Fieldwork was conducted in November 2023 – February 2024, and current affairs related topics at the time might have impacted their perceptions. Likewise, opinions may have since changed, for example in light of subsequent political events or media coverage. Research findings are likely to be anchored in that time period.

¹ Webb T. L., Sheeran P. (2006). Does changing behavioral intentions engender behavior change? A meta-analysis of the experimental evidence. *Psychol. Bull.* 132 249–268.

² Grimm P. (2010). Social desirability bias. *Wiley International Encyclopedia of Marketing*

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