

Londoners' awareness and understanding of retrofitting

April 2022



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Executive summary

1. Londoners understand the correlation between energy use and climate change – but don't automatically think of reducing their energy use as something they can or should do to benefit the environment.
 - Concern about the environment is reasonably high, but behaviours such as recycling and avoiding car use are much more prevalent than anything to do with domestic energy use or retrofitting.
2. Londoners lack an understanding of what retrofitting *is*. 56% have heard of the term; but only 30% know at least a bit about it. 46% of Londoners have never heard of the term at all.
 - However, both the focus groups and the polling indicate that the majority are undertaking at least some retrofitting measures (e.g. using energy efficient lightbulbs), even if they don't refer to them as such.
3. Where Londoners *are* aware of retrofitting, they readily understand the benefits, both to the planet and in making their houses more comfortable.
4. The biggest drivers for retrofitting one's home are the individual benefits it provides – cheaper energy bills (by far the most biggest motivator) and more even temperatures in one's home.
 - Environmental benefits are considered more of a 'nice to have' – but are still important in making people feel they are 'doing the right thing'.
5. Overall, the biggest barrier to retrofitting is the upfront cost (45% say this). However, this differs by tenure: the biggest barrier for renters is being restricted in the changes they can make to their property (61% say this, vs. 18% of homeowners)
 - However, focus groups reveal that there is a **general lack of knowledge** about the cost of retrofittings and their value for money. **Whilst cost may be a barrier, at this stage it is more people don't know what the cost will be (so assume it will be expensive), or the potential savings to be made**
6. **Londoners are receptive to the idea of retrofitting**, and view this as the 'right' thing to do, both for the monetary savings but also the environmental benefits.
 - But more information is now required, firstly to 'demystify' retrofitting, and, secondly, to help Londoners explore the different options possible for their homes and budgets



Objectives, Sample and Methodology



Research objectives and background context

1. To what extent are Londoners aware of/understand retrofitting (including misconceptions)?
2. To what extent are Londoners currently willing to retrofit their homes?
 - Biggest drivers for this? E.g. reducing energy consumption/greener, warmer home, lower energy bills...
 - Biggest barriers? E.g. cost, lack of knowledge, inconvenience/mess
3. How can Londoners be encouraged to consider retrofitting?
4. What information do Londoners have access to on retrofitting? What else do they need?

Context: On 3rd February, Ofgem announced the energy price cap would increase by £693 from April 2022, for c. 22 million customers. Focus groups were undertaken very shortly after this announcement (on 4th and 8th February). This information will likely have impacted participants' responses.



Sample and methodology: qualitative research

Qualitative research:

- x4 90m **focus groups** conducted on 4th and 8th February 2022
- 5-6 respondents per focus group (= x21 respondents in total)
- Groups split by **social grade** and **tenure** (either homeowners or renters. Please note all renters were private renters)
- Within each group:
 - All participants able to retrofit/make changes to their home to some extent
 - Mix of accommodation type – i.e. house; flat in commercial building; purpose-built flat etc.
 - Mix of those concerned / not concerned by environmental issues (half per group, at least x2 concerned and x2 concerned)
 - Mix per group of age, gender, and ethnicity where possible

Quantitative research:

- Survey carried out by YouGov for the GLA between 31st January – 4th February 2022, with a response of 1,122 London residents aged 18+
- Figures have been weighted to be representative of all London adults
- Respondents completed the surveys online from an email link



Quantitative research sample: breakdown by housing situation

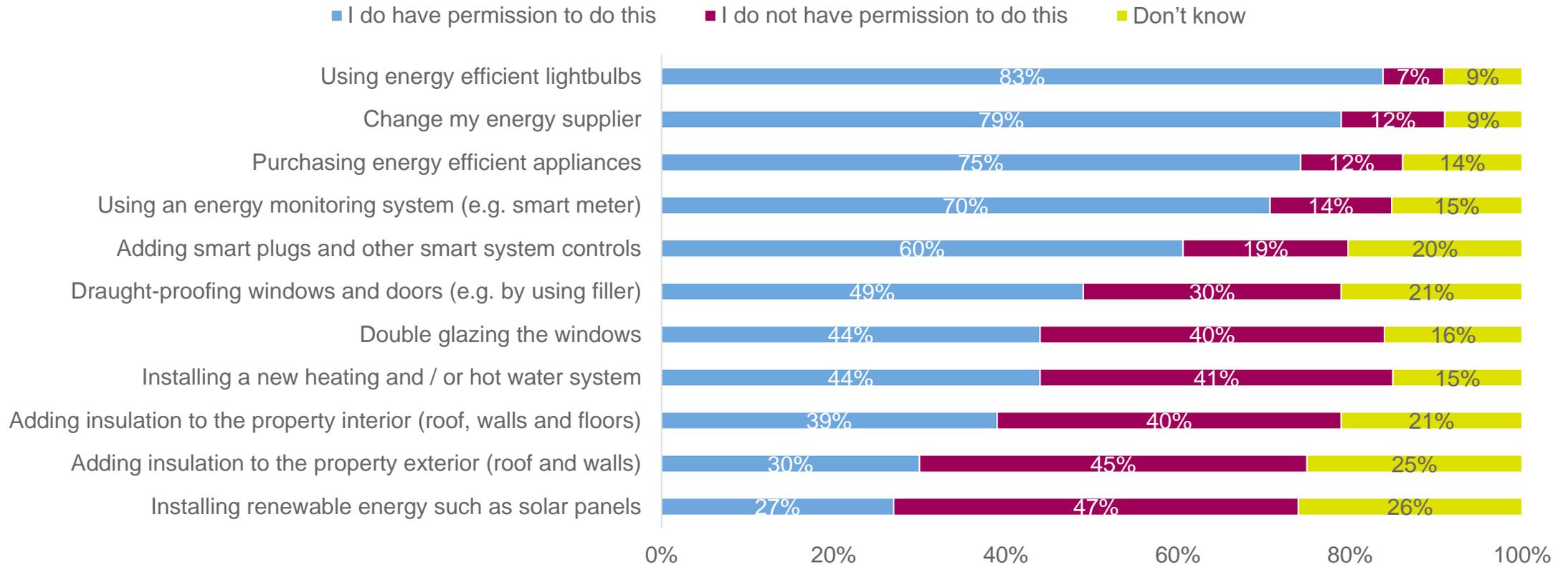
- Over half (55%) of the sample live in a house whereas 40% live in some sort of flat
- Two thirds (67%) of the sample have lived in their current home for more than 5 years
- Half the sample (49%) own in some capacity; 36% rent
- When comparing responses between home-owners and renters, the sample has been rebased to exclude those who neither rent nor own. This results in the following sample: 58% own; 43% rent
 - *To note: external tenure data states that in 2020, 53% of houses in London were owner occupied; 48% rented (21% social rented; 27% privately rented)**

For further breakdown of the quantitative research sample, please see the Appendix

Londoners are most likely to have permission to change lightbulbs (83% say they can do this), change energy supplier (79%), and purchase energy efficient appliances (75%).

Londoners are least likely to have permission to install renewable energy or add insulation.

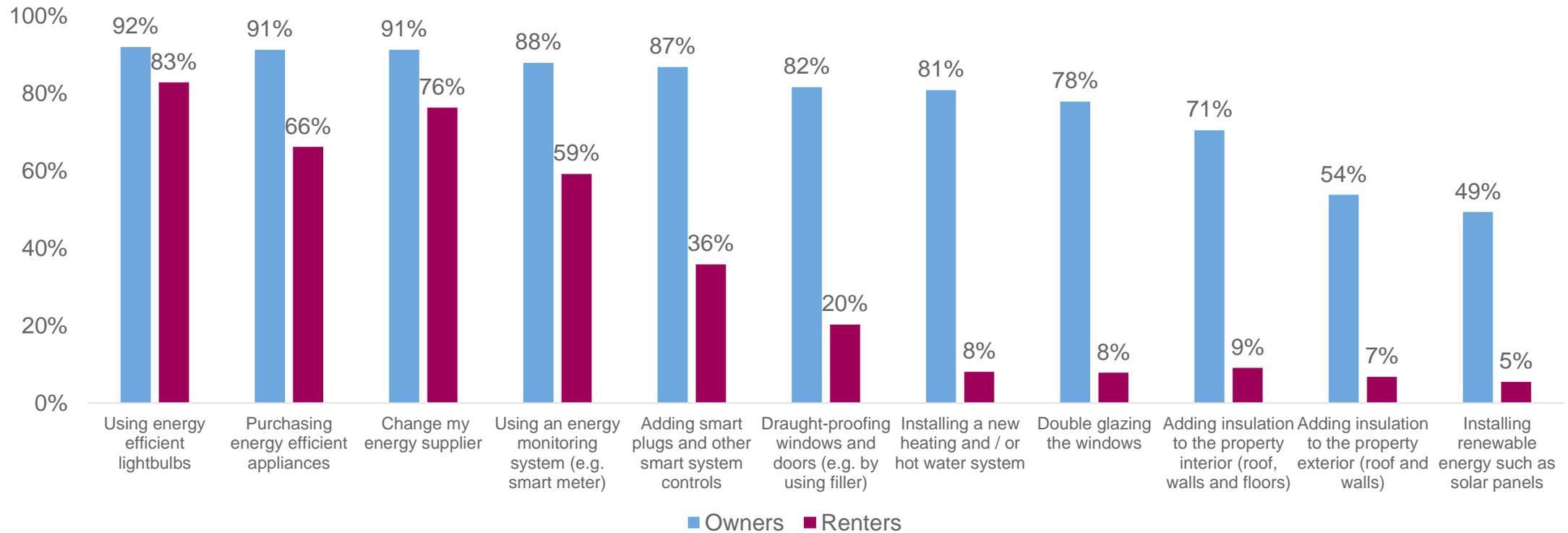
Permission to carry out different retrofitting



Question: The following is a list of improvements that can be made to homes in order of major to minor changes. Which, if any, of the following changes do you have permission to make to your property? If you rent your property, please answer thinking of changes you can make without seeking your landlord's permission.

Unsurprisingly, renters are generally much less likely to have permission to retrofit their homes – but **there are still areas in which renters can make changes**, such as using energy efficient lightbulbs (83% have permission to do this), purchasing green appliances (66%) and using smart meters (59%)

Permission to carry out different retrofitting by tenure % that 'have permission to do this'





1. Londoners' environmental concerns



In general, Londoners are notably concerned about the environment – chiefly, climate change. Concern is compounded by a perception that ‘not enough is being done’ by government or by industry.

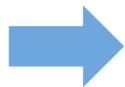
Concern about the environment has risen in the last few years, as we’ve learnt more and the extent of climate change has become apparent.

Respondents were slightly more concerned about climate change than pollution – there are clear actions being taken in terms of air pollution (ULEZ; congestion charge), whereas climate change:

- Doesn’t seem to be taken seriously, by industry or government
- Is dependent on actions been taken by large businesses, which don’t seem to be forthcoming
- Is leading to serious and irreversible changes, e.g. extreme weather events – which we can see are getting much worse (especially the case for those who have family abroad, e.g. California; South Africa)

They’re building council flats in Southwark now, and no one can live on the ground floor because of the threat of the Thames rising. That’s really scary.

Lower income home owner



Respondents are concerned by climate change, but think **only so much can be done by individuals** – real change needs to come from the top (which is currently not happening). Retrofitting messaging should be careful not to place the onus of climate change on individuals.



There was only minor spontaneous mention of reducing energy use in relation to environmentally-friendly behaviours.

Whilst concern about the environment is reasonably high, individual actions don't always match up. It is easy for individuals to feel overwhelmed and helpless – 'What difference will one individual make, if large companies don't change?'

Actions tend to be restricted to those which aren't too inconvenient/don't require too much of a change to one's lifestyle or routine, e.g. recycling; walking instead of taking the car; reusing/limiting use of single-use plastic. There was no mention of major changes or sacrifices, e.g. giving up flying. Respondents were more likely to mention these actions than anything to do with heating use or retrofitting. That said, there was minor spontaneous mention of 'putting on a jumper' before switching on the heating, or turning off lights that have been left on. There was also some minor mention of using smart meters or LED light bulbs

The cost of energy is usually the primary driver of these behaviours; however, there is an understanding that using too much energy is wasteful and bad for the environment.

Respondents are slightly more likely to think of water use in relation to the environment than they are energy use – due to the recent work by water companies giving out showerheads and providing info on this.



Respondents *understand* the correlation between energy use and climate change – but don't automatically think of reducing their energy use as something they can/should do to benefit the environment. Other actions are more front of mind.

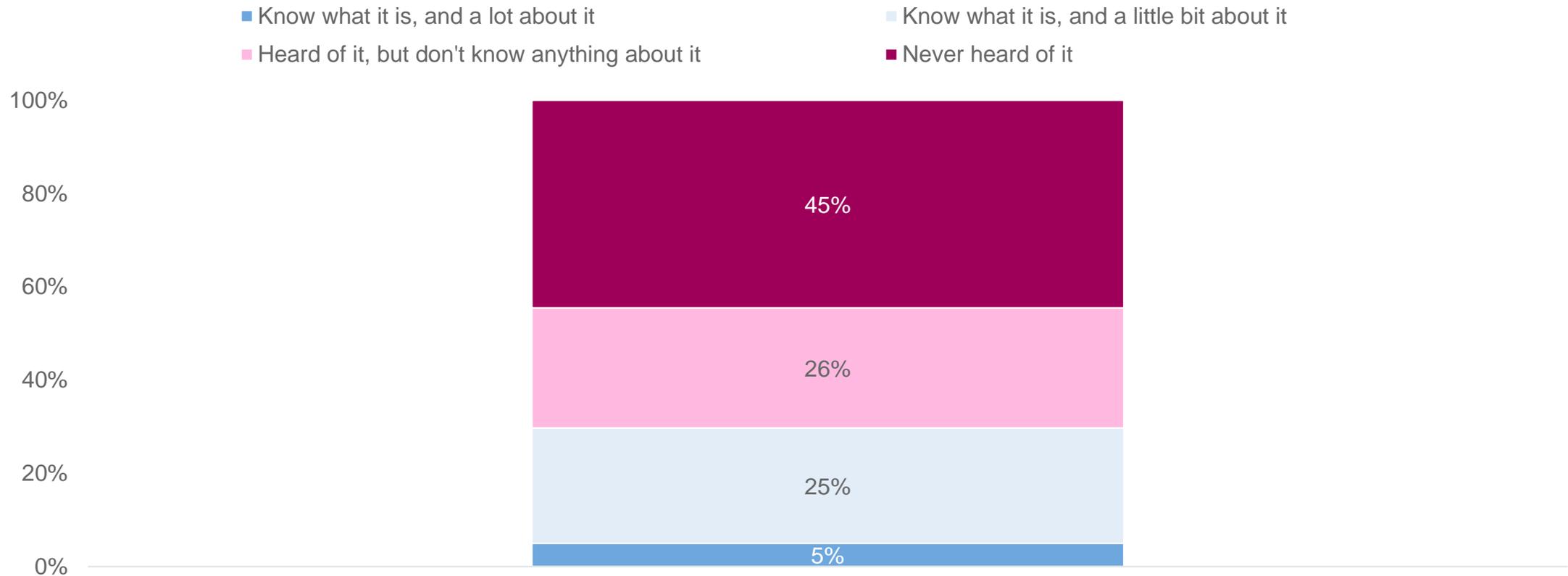


2. Knowledge of retrofiting

Over half (56%) of Londoners have heard of the term 'retrofitting', though only 30% of Londoners know at least a little bit about it whereas 26% have heard of it but don't know anything about it.

45% of Londoners have never heard of retrofitting.

Awareness of 'retrofitting'



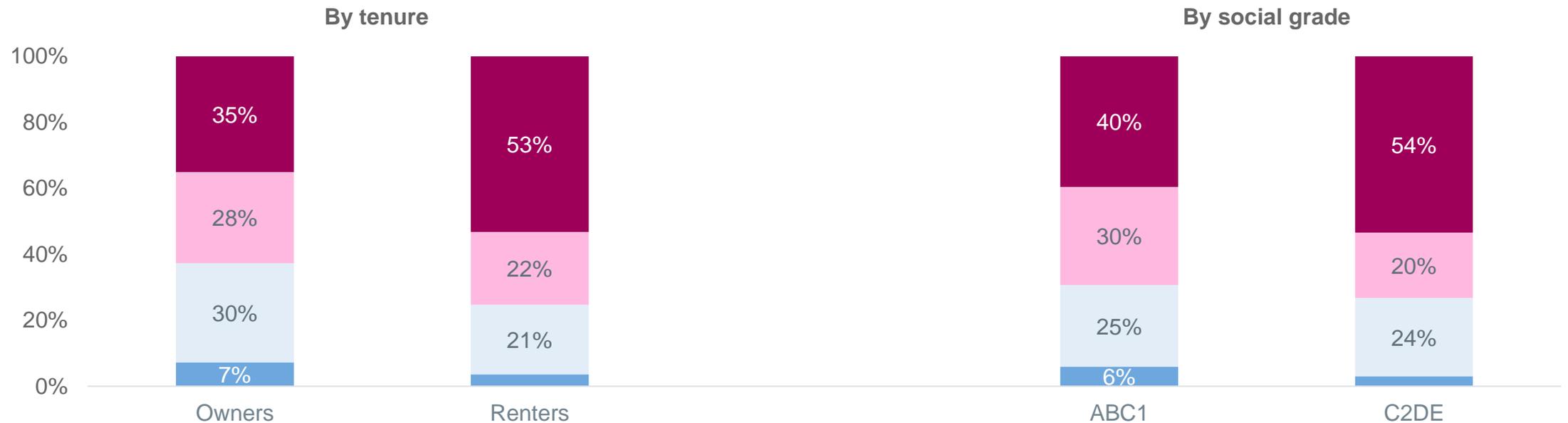
Question: Before taking this survey, how much, if anything, would you say you knew about the term 'retrofitting'?

Homeowners and higher social grade (ABC1) Londoners display higher levels of awareness of retrofitting than renters or lower social grade (C2DE) Londoners.

37% of homeowners know at least a little about retrofitting, vs. 25% of renters. 53% of renters have never heard of retrofitting vs. 35% of homeowners. Similarly, 54% of C2DE Londoners have never heard of retrofitting, vs. 40% of ABC1 (the difference in levels of awareness between the two groups lessens when including figures for 'heard of but don't know anything about')

Awareness of 'retrofitting'

- I know what it is, and a lot about it
- I know what it is, and a little bit about it
- I have heard of it, but I don't know anything about it
- I have never heard of it



Question: Before taking this survey, how much, if anything, would you say you knew about the term 'retrofitting'?



The majority in the focus groups were already undertaking some retrofitting measures – even if they didn't refer to this as 'retrofitting'

'Retrofitting' did not seem to be a commonly used phrase: about half in each group had *heard* of retrofitting, but only 1-2 per group knew what it was. However, the majority, if not all, in each group were undertaking some retrofitting measures. The main measures taken are: using LED lightbulbs, double glazing, radiator reflectors and using smart meters. All of these, aside from double glazing, are used by renters as well as homeowners.

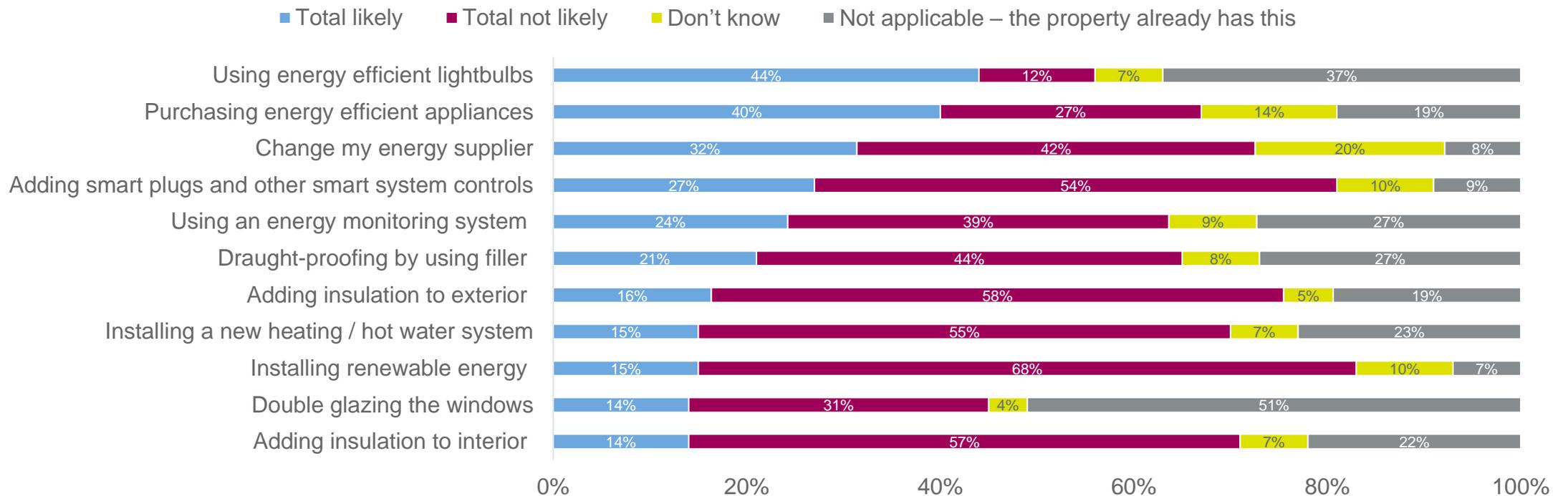
Unsurprisingly, homeowners are much more likely to make larger changes, such as double glazing their property – renters are very much aware that the 'investment does not pay off' for them, as they don't know how long they will be in the property. Mainly these measures are taken to save money on energy bills / increase the comfort of the home – but the positive impact on the environment is acknowledged and considered a 'nice to have'.

There was some – but not much – awareness of retrofitting schemes. Awareness was higher amongst homeowners. One mentioned their had started to put a grant application in, but the process was so long – and they heard that builders were abandoning projects as the government was not paying them – that they gave up.

Similarly, despite 45% of Londoners previously having said they had ‘never heard’ of retrofitting, 44% say they are likely to change to more energy efficient lightbulbs in the next six months (and 37% already have these) and 40% to purchase more energy efficient appliances (19% already have).

Londoners are unlikely, however, to make changes to their homes in the short-term. This is especially true of larger changes, such as installing renewable energy (68% unlikely) and adding external or internal insulation (58% and 57% unlikely, respectively). These are also the measures renters are least likely to have permission to carry out.

Likelihood to do the following in the next six months



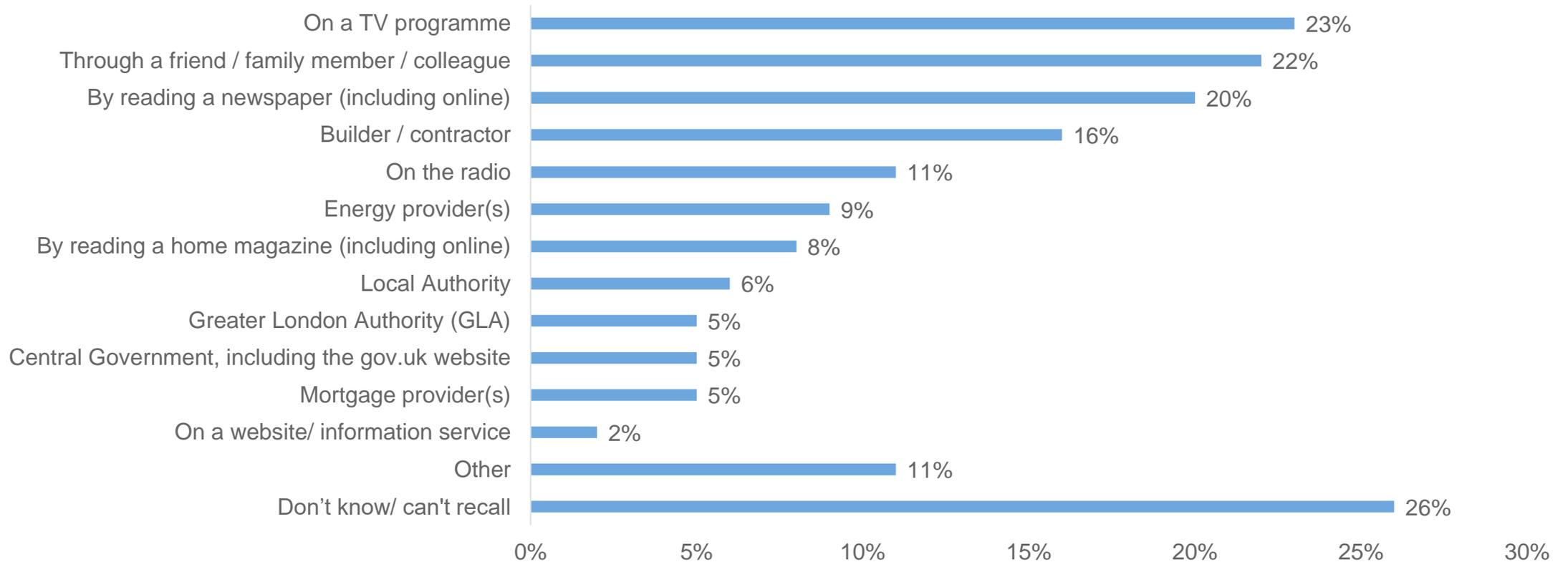
Question: And how likely, if at all, are you to make the following changes to your home in the next six months?

Note: Only asked to those who said they had permission to make these changes

Londoners have mostly heard about retrofitting on TV, through somebody they know, or newspapers/news sites.

Few Londoners heard about retrofitting from national or local government.

Where Londoners have heard about retrofitting

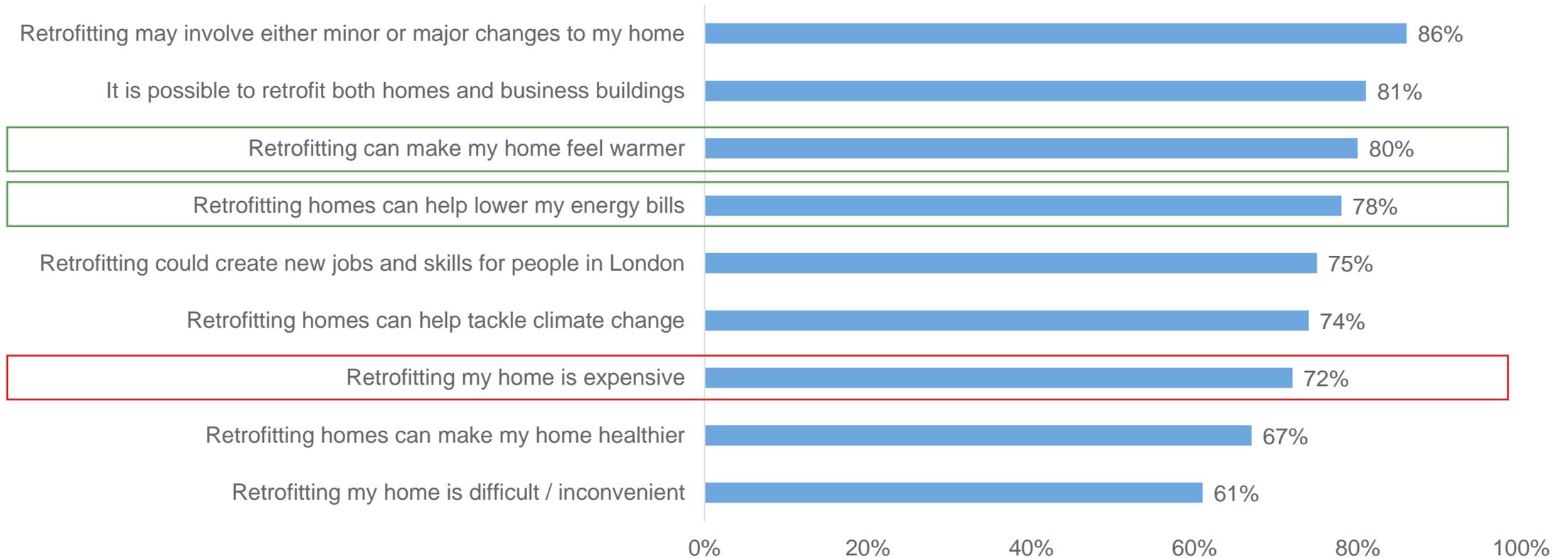




3. Willingness to retrofit homes

Where people have heard of retrofitting, there is a good understanding of the benefits: 80% agree that it will make their home feel warmer and 78% that it will lower their energy bills. However, 72% agree that retrofitting is expensive.

Agreement with statements about retrofitting



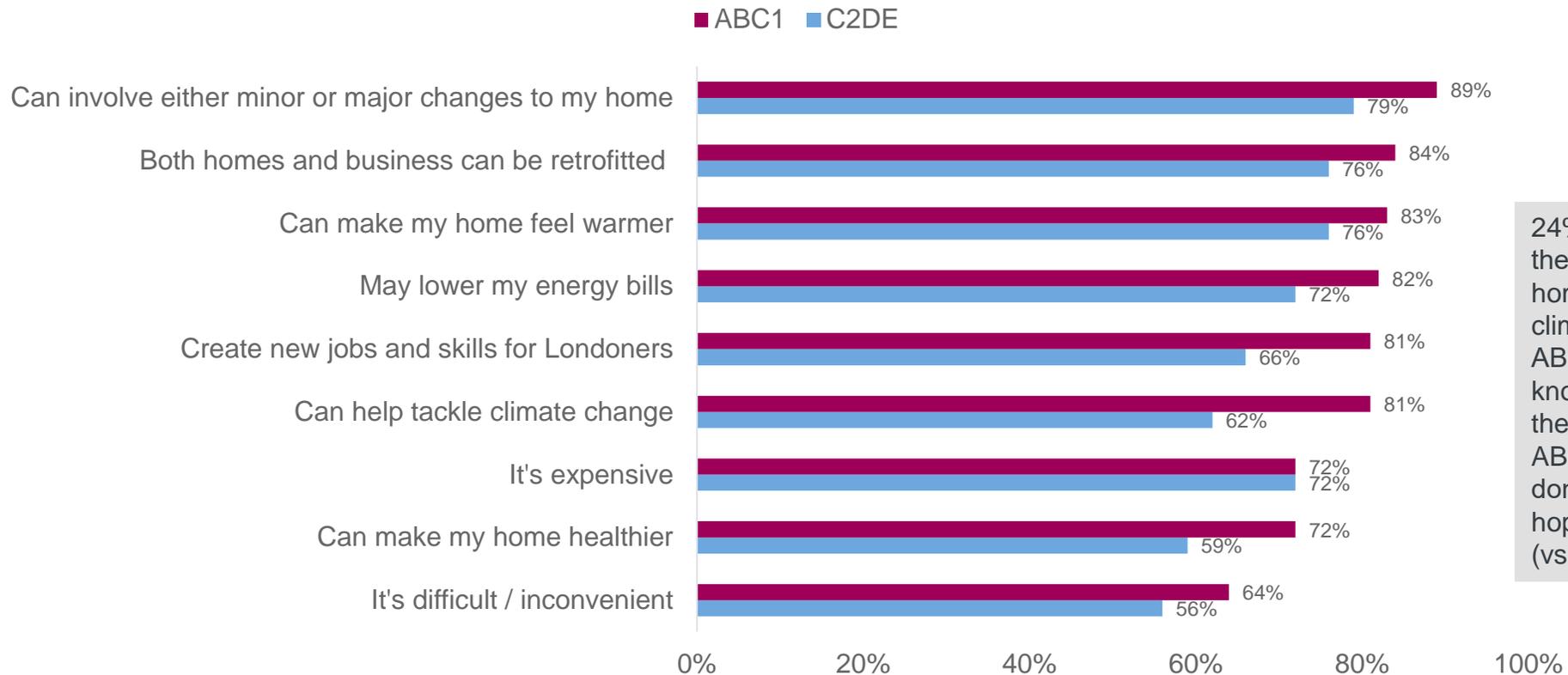
Question: To what extent, if at all, do you think the following are true or false about retrofitting?

Note: Only asked to those who have heard a lot/ a little bit about 'retrofitting'; N=321

Lower social grade Londoners are less likely to agree with statements on the benefits of retrofitting than higher social grade Londoners.

This is generally due to a **higher incidence of those saying they 'don't know' amongst C2DE Londoners**, rather than higher incidence of those stating they 'disagree'.

Agreement with statements about retrofitting by social grade



24% of C2DE Londoners say they don't know if retrofitting homes can help to tackle climate change (vs. 8% ABC1). 29% say they don't know if retrofitting will make their home warmer (vs. 10% ABC1), and 18% say they don't know if retrofitting will hope lower their energy bills (vs. 9% ABC1).

Question: To what extent, if at all, do you think the following are true or false about retrofitting?
Note: Only asked to those who have heard a lot/ a little bit about 'retrofitting'; N=321



When explained, FG respondents were receptive to the idea of retrofitting their homes – it is definitely seen as the ‘right’ thing to do. However, retrofitting measures (especially larger ones) are unlikely to be taken proactively

Both those that knew of retrofitting beforehand, and those who learnt about it in the groups, considered it a ‘positive’ thing. The dual benefits of being environmentally-friendly and saving the consumer money are readily recognised and lead to an attitude of ‘what’s not to like?’.

However, mindset is an issue (and explains why people are not looking for information on retrofitting): *domestic* energy use is not yet as *ingrained* as being ‘bad for the environment’ or, a behaviour we need to change, as much as other things are (single-use plastic, car use). Reducing energy (especially heating) use is seen as a ‘sacrifice’ – there is an immediate negative impact on the individual for uncertain gain (i.e. being cold to potentially benefit the planet at some point in the future).

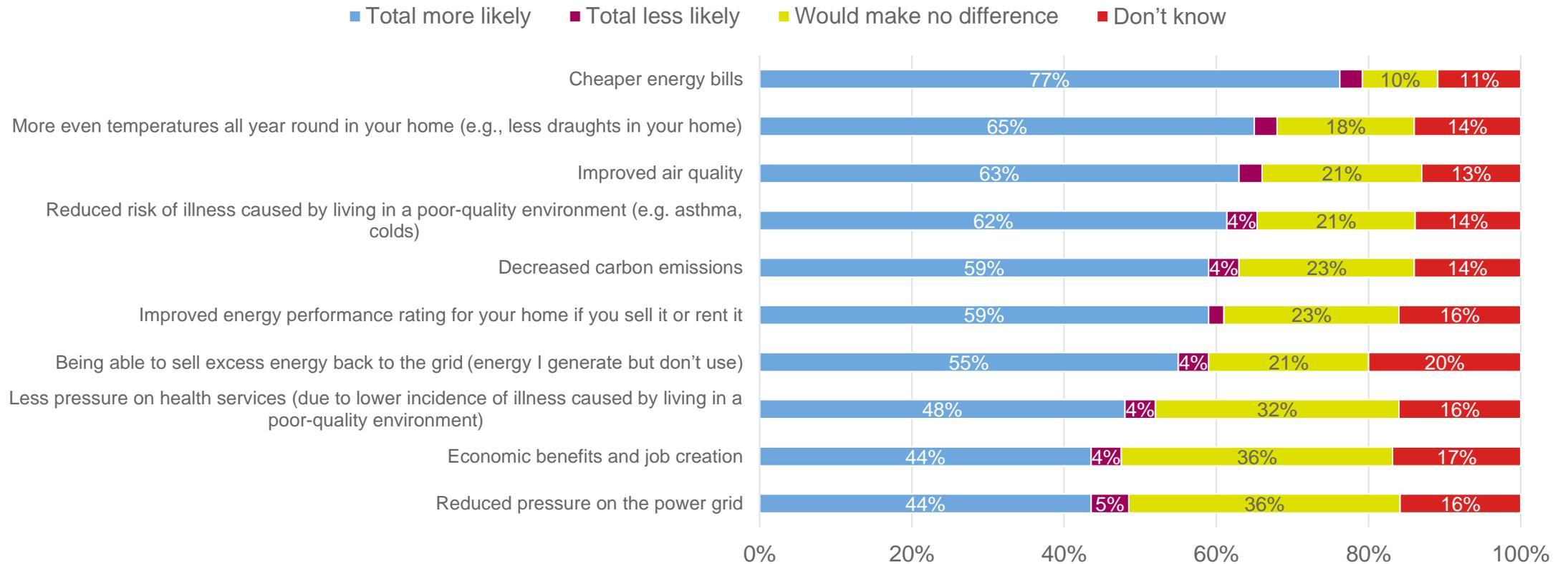
This impacts how people think of retrofitting as well – it’s back of mind, but is forgotten about once the heat is on. **Whilst people are not against retrofitting, many will not proactively implement changes.** One mentioned this is why smart meters are so effective – you can see which appliances are using the most energy (and costing the most) and change your behaviour (and reap the benefits) in ‘real time’.

There is also a feeling that *retrofitting alone will not tackle the ‘real issue’ of climate change* – that can only be done by governments and industry making major changes. It is important, therefore, that retrofitting is not positioned as an environmental cure-all – this will be viewed sceptically.

Arising from this mindset is a lack of awareness/knowledge: what retrofitting measures can I undertake? How much money will each save me? Homeowners don’t understand the extent to which this can add value to their house, whilst renters are not thinking about energy performance when considering properties (so there is no pressure on landlords to retrofit).

Biggest drivers for retrofitting: The majority (77%) of Londoners say they would be more likely to retrofit their home if it led to cheaper energy bills. This is followed by having more even temperatures (65%) and improving air quality (63%)

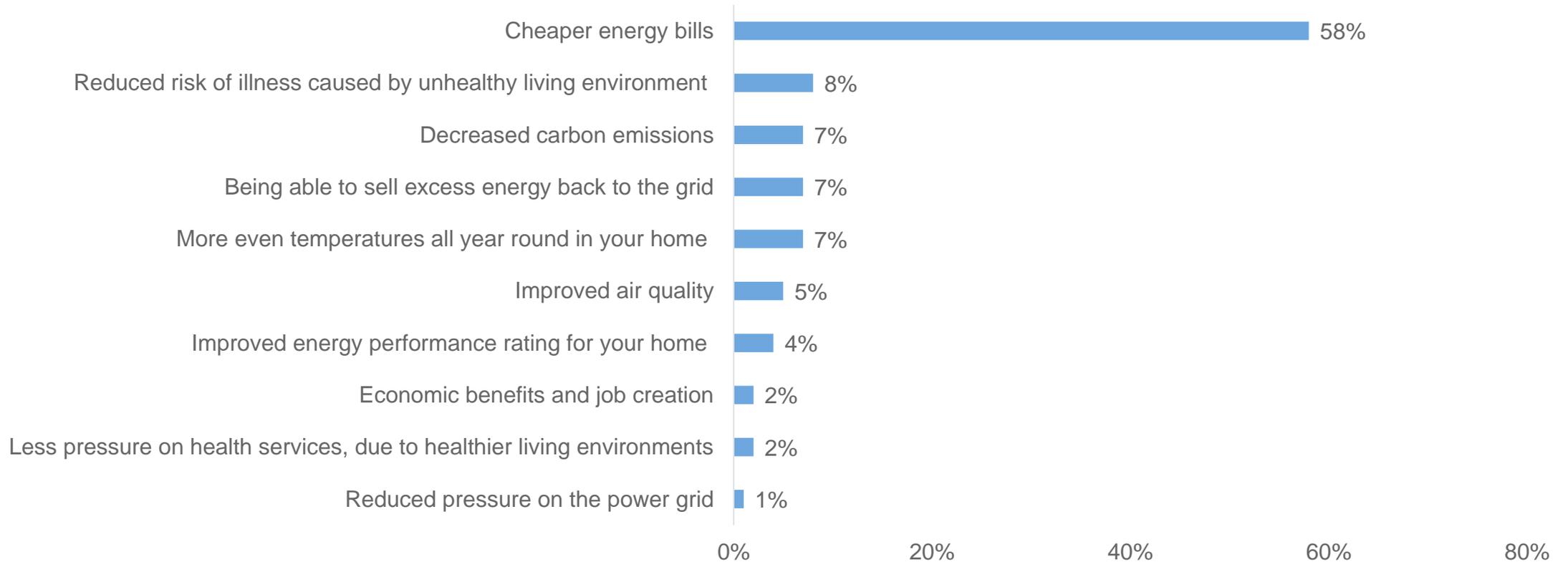
Increasing the likelihood of retrofitting



Question: The following are possible benefits that can result from retrofitting your home. How much more or less likely, if at all, would you be to retrofit your home if it resulted in...

Biggest drivers for retrofitting: When asked to pick the *most* motivating reason to retrofit their home, cheaper energy bills was by far the most popular (58%). **This was the same for all demographic groups, and by tenure.**

Main reason for retrofitting



Question: And which of following possible benefits would motivate you MOST to retrofit your home? Please choose one.



Biggest drivers for retrofitting: Reducing cost of energy bills was the biggest driver, regardless of income or tenure – but focus groups highlighted that environmental benefits are still important

The biggest driver for retrofitting is **cheaper energy bills** – especially given the recent price rises. This was true of all groups, regardless of income or tenure. However, respondents would want to know how much their energy bills *would* decrease and how long it would take for the decreased bills to ‘pay back’ the cost of retrofitting measures. Renters mentioned that – whilst decreased energy bills is the main draw – many of the larger retrofitting measures would require their landlord’s permission/funding – however, there would be little incentive for their landlord to do this, as they are not the ones benefitting from the cheaper energy bills...

But the benefits to the environment are still a motivating factor – it is a ‘nice feeling’ to think you are doing something good for the planet. **Environmental factors should not be overlooked in messaging.** Again, people want to hear specifics – what is the impact of different retrofitting measures on carbon emissions? It would also be encouraging to hear how large business (including local and central government) are retrofitting their buildings to set an example and demonstrate this issue is being taken seriously.

The promise of a **healthier and more comfortable home** is also motivating – especially for those who have had problems with damp. However, energy performance is not something that is thought about enough for improvements in this to be considered motivating.

Economic benefits (i.e. job creation) are considered positive, but are not enough to motivate individuals to consider retrofitting their homes – people need to understand how measures will benefit *them* first of all.

Cheaper energy bills is always the winner... I didn’t know that the grid were obligated to buy back excess energy – I think this would encourage landlords [to retrofit].

Higher income renter

Cost is a very real thing – but it’s also nice to do something for the environment

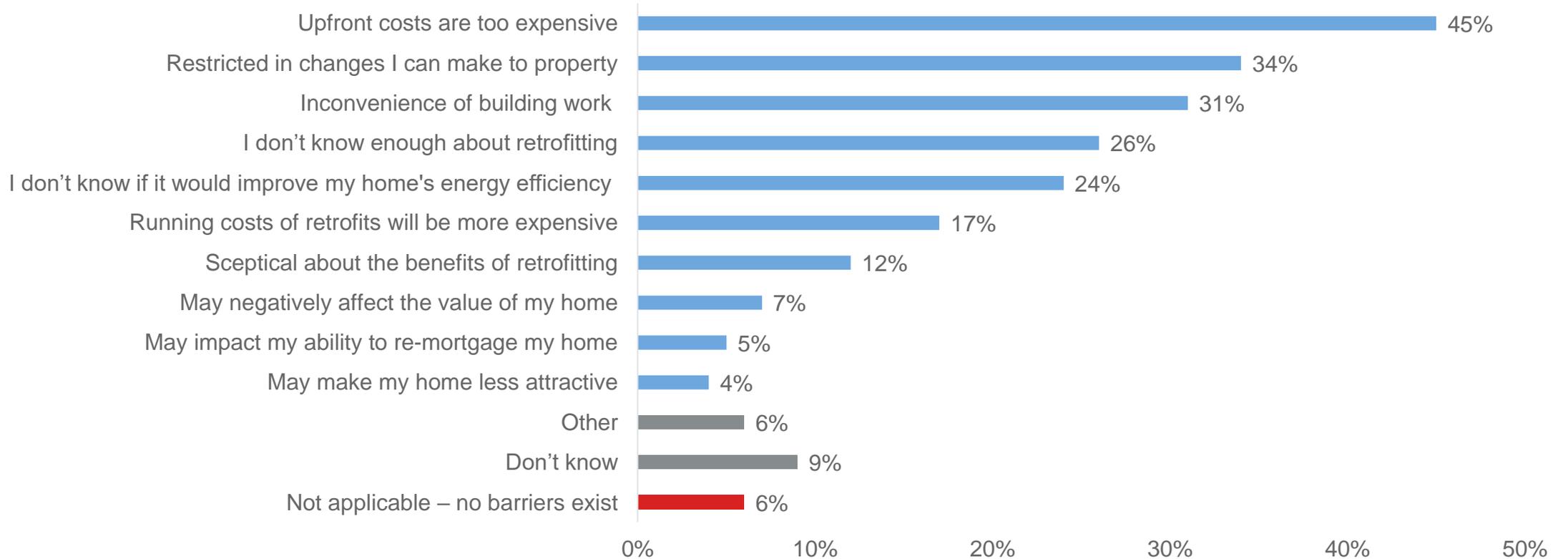
Higher income home owner

I wouldn’t know enough about energy performance [for this to motivate me].

Higher income home owner

Biggest barriers for retrofitting: The upfront cost is the main barriers to retrofitting a home (45%), followed by restrictions as to what they can do (34%), the inconvenience (31%), and a lack of knowledge about retrofitting measures (26%)

Barriers to retrofitting

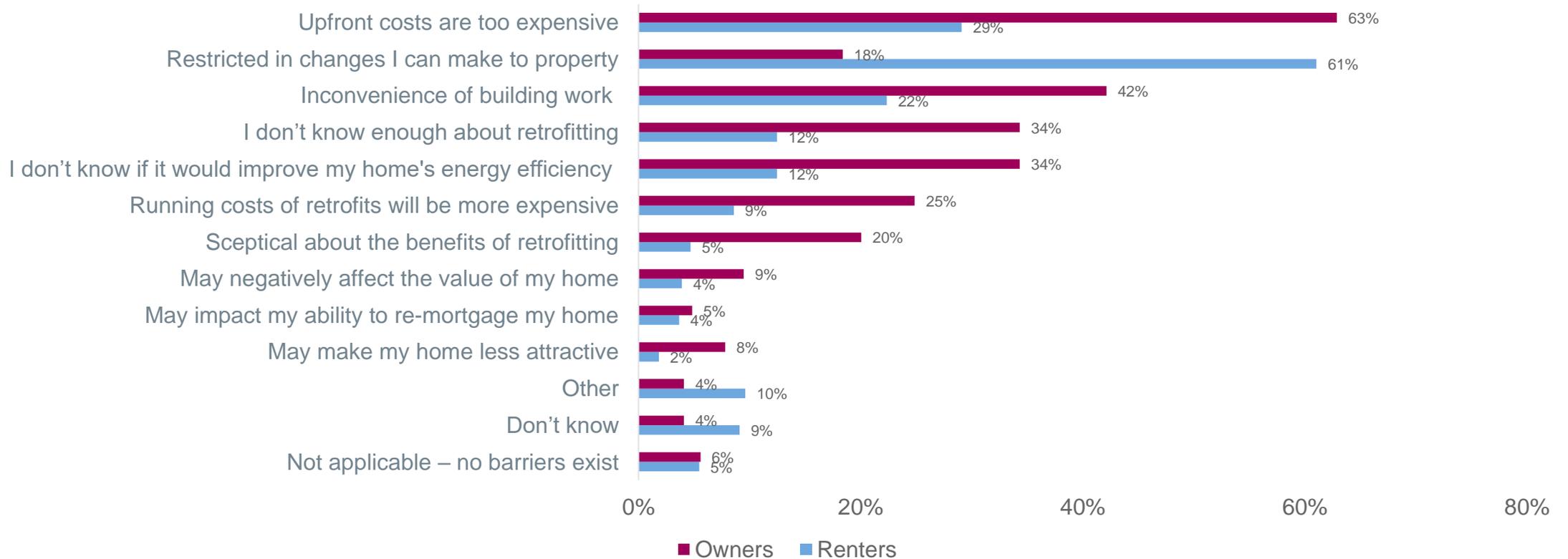


Question: Which, if any, of the following, are barriers to you retrofitting your home? Please tick all that apply.

Barriers differ by tenure. 63% of homeowners see the upfront costs of retrofitting as a barrier, vs. 29% of renters.

Unsurprisingly, the main barrier to retrofitting for renters is being restricted in the changes they can make to their property (61%, vs. 18% homeowners).

Barriers to retrofitting by tenure



Question: Which, if any, of the following, are barriers to you retrofitting your home? Please tick all that apply.



Biggest barriers for retrofitting: Underpinning many of the barriers is a lack of knowledge and information. In addition, homeowners focus on (perceived) cost; renters (and some leaseholders) on a lack of ability to make changes

Unsurprisingly, the biggest barriers differ by tenure: homeowners are dissuaded by the upfront costs, and renters (and leaseholders) by being unsure of what they can and can't change within their property.

Generally, amongst all tenures, there is a general lack of knowledge – people don't know the cost of different measures (but there is a perception these are expensive); when these will 'pay for themselves'; how much value they will add to a property; how much time they'd take; where they go to find out about these things...

Whilst the cost of retrofittings are potentially a barrier, at this stage it is more people don't know what the cost will be, or the potential savings to be made. They also don't understand where to find this information. Even for homeowners, some may not see this as their 'forever home' and therefore be reluctant to make expensive changes.

Because of the general lack of awareness, there is a general lack of motivation to retrofit. Retrofittings are often viewed as luxuries to add, rather than essentials. Similarly, when things (e.g. heating system; boiler) are working fine, people are not looking to replace them – thus, retrofitting is rarely considered proactively.

There is very low awareness of the grants available for retrofitting – where people had heard of these, it was usually negatively (e.g. government not paying builders so works being left unfinished).

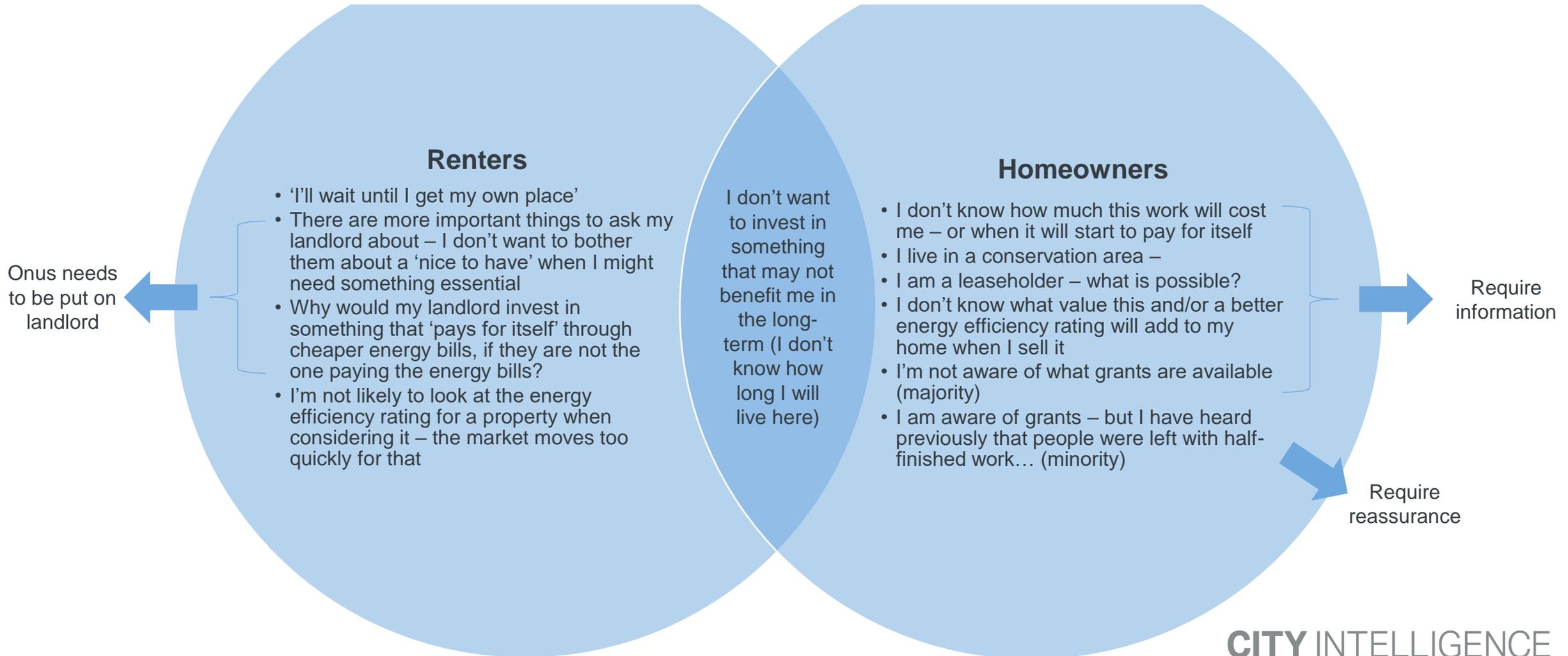
We're leaseholders so we're limited in what we can and can't do – but we've done all the small changes – smart meter, smart plugs...

Lower income homeowner

I live with 5 other people... Even if the landlord gave us permission, it would be logistically challenge to arrange retrofitting to take place...

Lower income renter

Biggest barriers for retrofitting: Homeowners have a lot of questions around the retrofitting process – whilst renters don't think it's something their landlord would be willing to undertake

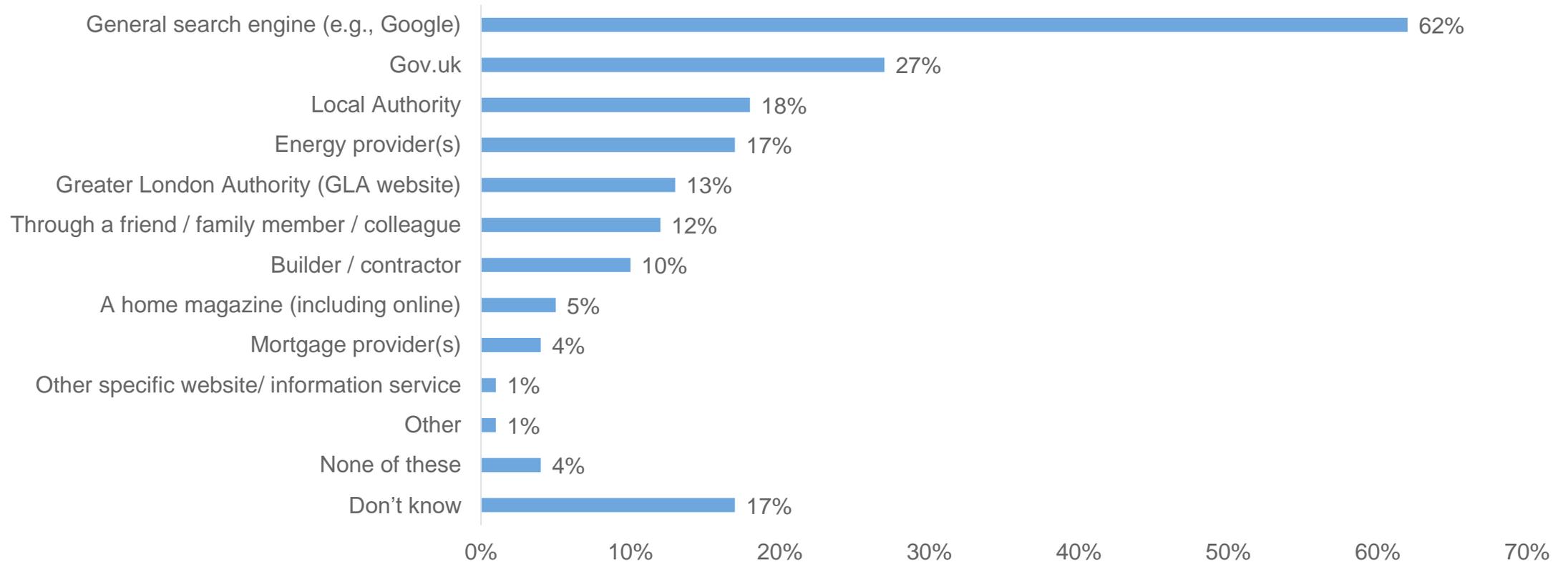




4. How can support for retrofitting be encouraged?

To find out more about retrofitting, almost two thirds (66%) of Londoners would search online. 13% would check the GLA website.

Where to go for information on retrofitting



Question: Where would you go to find out more about retrofitting? Please tick all that apply.



Currently knowledge of retrofitting is fairly low – therefore, primarily, awareness of what retrofitting involves needs to be increased

Before talking to Londoners about the *benefits* of retrofitting, a better understanding of what it *is* and what it involves is needed – **general awareness raising is required first of all**. The phrase ‘retrofitting’ was not readily understood – despite many respondents already undertaking retrofitting measures in their homes. **It may be that retrofitting is not the right term to use – several in the focus groups remarked this sounded technical, and like something ‘old-fashioned’**. Other suggestions were, ‘future-proofing’; ‘modernising’; ‘upgrading’; ‘smart-fitting’.

Energy efficiency’ and ‘energy performance ratings’ did not seem to be commonly referred to when speaking about properties – more research would need to be done on this, but it may be that people do not think of their homes in this way.

Once there is a better awareness of retrofitting and it’s benefits, the GLA may wish to support Londoners in deciding to make these changes to their homes. Focus groups suggested a depository of retrofitting information would be useful – one website where Londoners can find everything they need, such as:

- A simple guide to retrofitting measures – the process involved for each; how much time/mess they will cause; cost calculator (**showing initial cost vs. how much you will save over X amount of time**)
- Flow-charts or mini-self assessments, where you can input your housing tenure (renter / freehold / leasehold) and other information about your house to see which are the best options for you
- Information for those in blocks of flats on how they can group together with neighbours to undertake large scale retrofitting, e.g. solar panels
- Recommended products (boilers etc.) and suppliers to fit these. Especially if local / central government provided an endorsement or warranty for these
- Financing options to pay for retrofitting measures

There is currently very low awareness of grants – and when people are aware of these, it is usually because they have gone wrong in the past (government failing to pay builders).

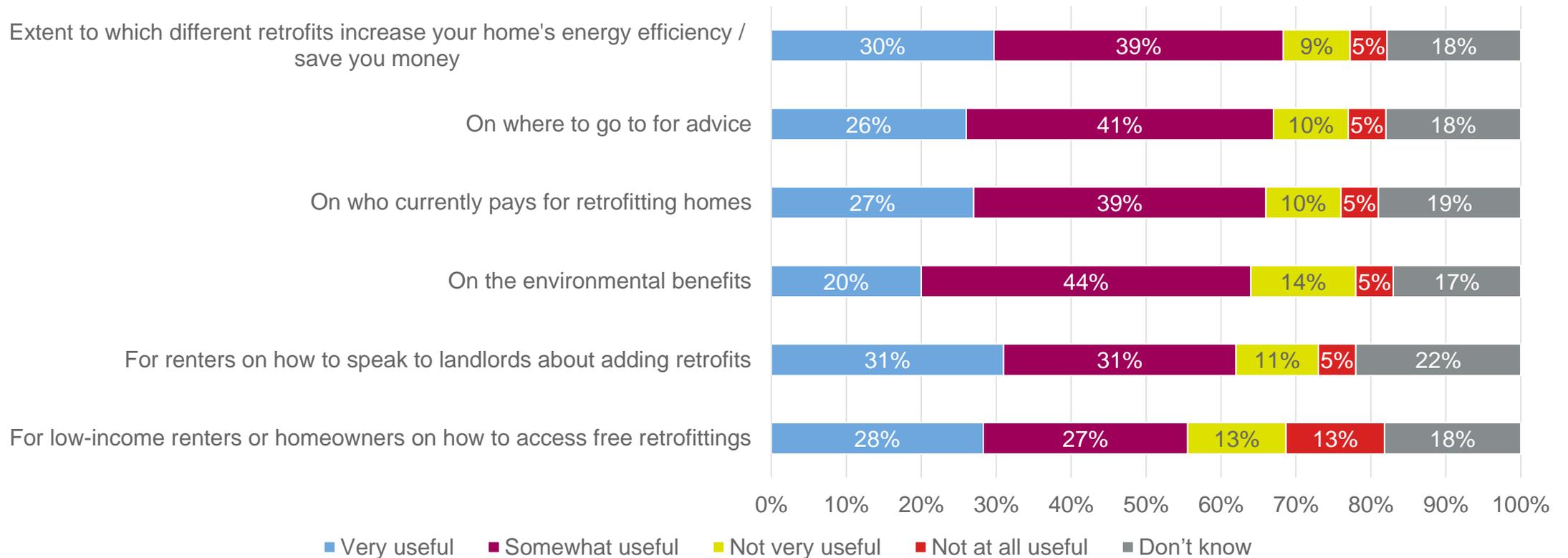
I found it helpful when the water company got in touch and gave me a shower head... You need to introduce [retrofitting] to people like that... Like with a draught -excluder to plant the seed: “here’s step one”.

Lower income homeowner

Polling indicates that information from the GLA on retrofitting would be fairly well received by Londoners. Information on the impact of different retrofitting measures is seen to be the most useful.

That said, the qualitative research indicates such information might be that this is too detailed for this stage and, instead, Londoners first require more general information on retrofitting.

Usefulness of GLA information



Question: How useful, if at all, would each of the following be to you personally? If the GLA published information...

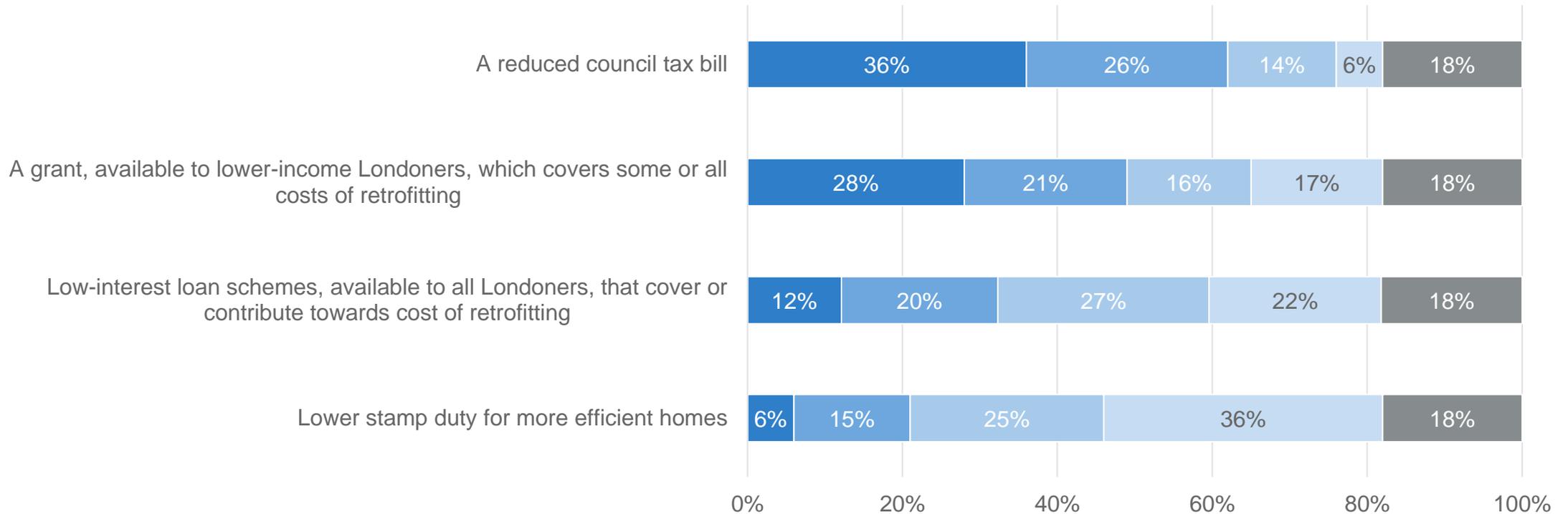
Note: *Only asked to those who rent; N=385

Londoners would be most motivated to retrofit their home if it led to a reduced council tax. This is followed by if there was a grant to cover some or all of the costs. Lower stamp duty is seen as the least motivating option.

As previously, it might be at this stage more information is needed on what retrofitting *is*, before incentives are offered.

Support to retrofit

■ Ranked first ■ Ranked second ■ Ranked third ■ Ranked fourth ■ Don't know



Question: Thinking about funding retrofitting in your home, which, if any, of the following, would motivate you to 'retrofit' your home? Please rank in order where 1 is the most motivating, and 4 is the least motivating.



I will likely be difficult to engage renters with larger retrofitting measures – therefore, the onus needs to be shifted to the landlord

Renters frequently mentioned that they would be unlikely to ask their landlord to undertake any major retrofitting changes. There is a feeling that you are ‘replaceable’ as a tenant in London, and therefore renters generally prefer to keep their landlord on good terms.

All felt that their landlord was unlikely to replace something unless it was broken – especially if the main incentive for doing so was cheaper energy bills (which the landlord doesn’t pay).

The vast majority of renters were not looking at a property’s energy performance rating before signing a tenancy agreement, due to:

- A lack of awareness as to what this is / why you might look at it
- The market moving so quickly that there is a lack of time to compare different properties before signing

Therefore, there needs to be some sort of requirement for the **landlord** to provide an energy efficient property, e.g.:

- **Minimum standards for energy efficiency – and a penalty for landlords if their property is below this**
- Tenants are usually required to keep the property mould-free – there should be something in the tenancy agreement requiring landlords to ensure the property is adhering to energy efficiency standards to prevent mould

Additionally there needs to be clear information on **retrofitting changes that tenants can make without the landlords permission.**

Renters are the people who are increasingly getting screwed – they will have to buy more expensive energy without any power to change it... I wish there was a way that the mayor’s team could enable participation on a local level.

Lower income homeowner

Like you have a gas safety certificate, rental properties should have an environmental standard in place in terms of insulation and draft proofing windows and doors... E and F [energy performance] ratings should not exist for rental properties.

Higher income renter



Conclusion and recommendations

Londoners are receptive to the idea of retrofitting. Where they are already aware of retrofitting, there is a good understanding of the benefits it offers. Focus groups reveal that, when Londoners are made aware of retrofitting, they view it as a 'good thing', both for environmental and money saving reasons.

Currently, however, awareness of retrofitting is low. There is also not enough information available (or a good 'single source' of information) for Londoners to find out about different retrofitting options, or what might be suitable for their homes or budgets.

Londoners require information on what retrofitting is and the measures it covers, and on the cost and practicalities of each of these. Roughly half of Londoners own their home, whilst a third are private renters and around a fifth social renters – with this in mind, it would be helpful to deliver messages that resonate with, or are tailored to, all audiences, and include a wide range of suggestions for retrofits.

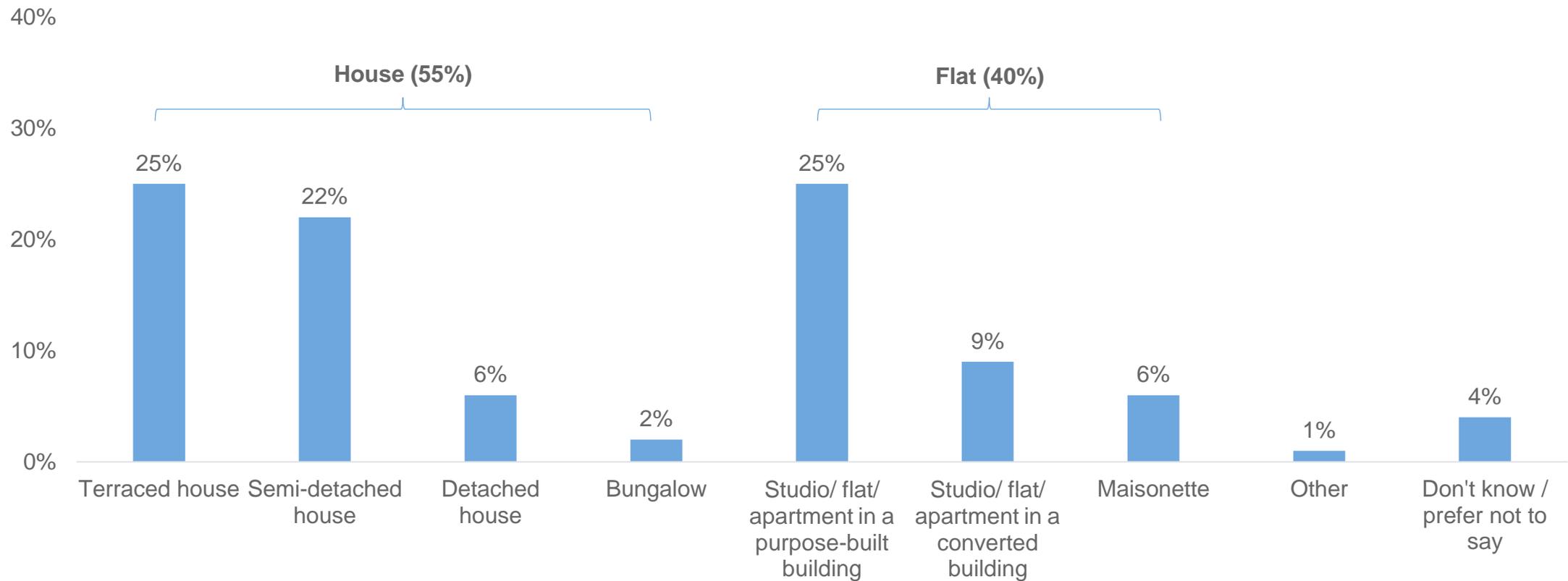
It is also important to understand that renters will likely always be constrained in the changes they are able to make to their property. Therefore, they should consider shifting the responsibility for retrofitting measures (and any accompanying incentives) to landlords.



Appendix

Quantitative research sample:
Over half (55%) of Londoners live in a house whereas 40% live in some sort of flat

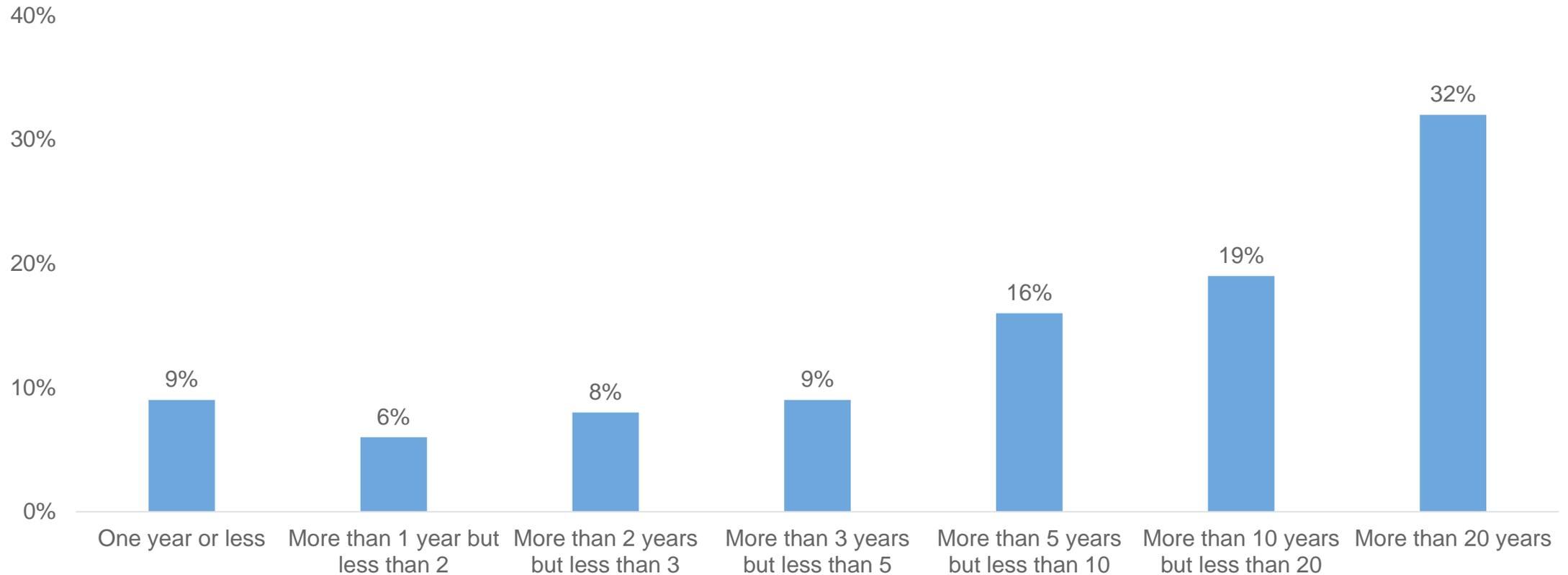
Type of housing



Question: Which, if any, of the following types of home best describes where you currently live?

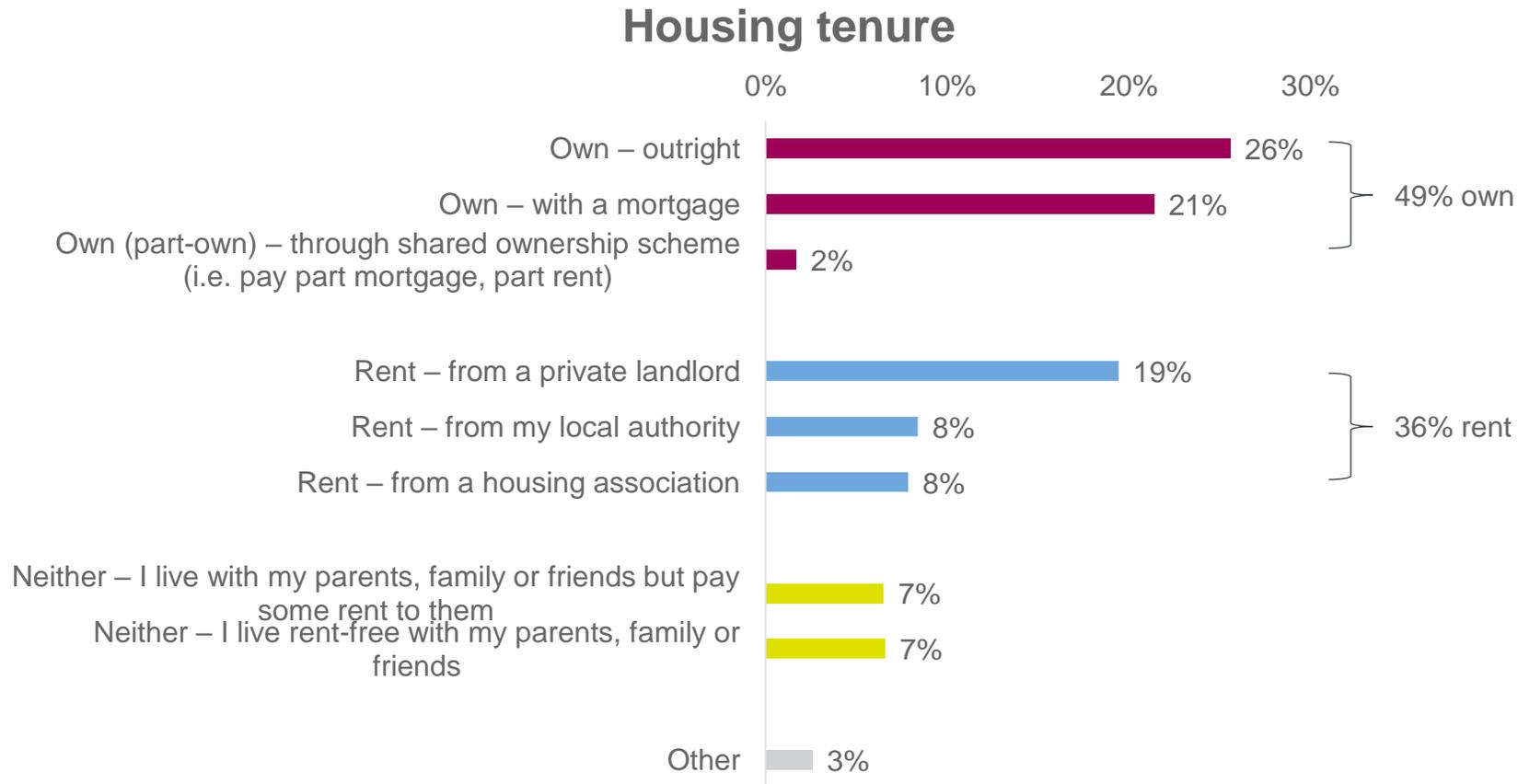
Quantitative research sample:
Two thirds (67%) of Londoners have lived in their current home for more than 5 years

Length of time in current home



Question: How long have you lived in your current home for?

Quantitative research sample:
 Half the sample (49%) own in some capacity; 36% rent. Excluding those who neither rent or own from the sample results in: 58% own; 43% rent



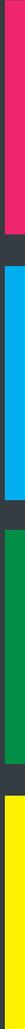
When comparing responses between home-owners and renters, the sample has been rebased to **exclude those who neither rent nor own**. This results in the following sample:

- **58% own**
- **43% rent**

*To note: in 2020, 53% of houses in London were owner occupied; 48% rented (21% social rented; 27% privately rented)**

Question: Do you own or rent the home in which you live?

*Tenure data from Trust for London: <https://www.trustforlondon.org.uk/data/housing-tenure-over-time/#:~:text=Rates%20of%20home%20ownership%20peaked,fallen%20to%2020.7%25%20in%202020.>



Londoners' awareness and understanding of retrofitting

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