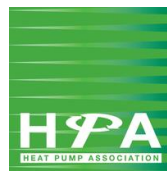


Installer Survey Results

October 2019

Background

- In August 2019, a survey was launched by low carbon heating industry member associations – listed below – and supported by government.
- The survey was sent to 130,000 fossil fuel heating system installers.
- The survey aimed to give installers, plumbers and heating engineers the opportunity to share their views to help ensure Government understands and listens to the opportunities and risks that face installers in the transition to low carbon heating.

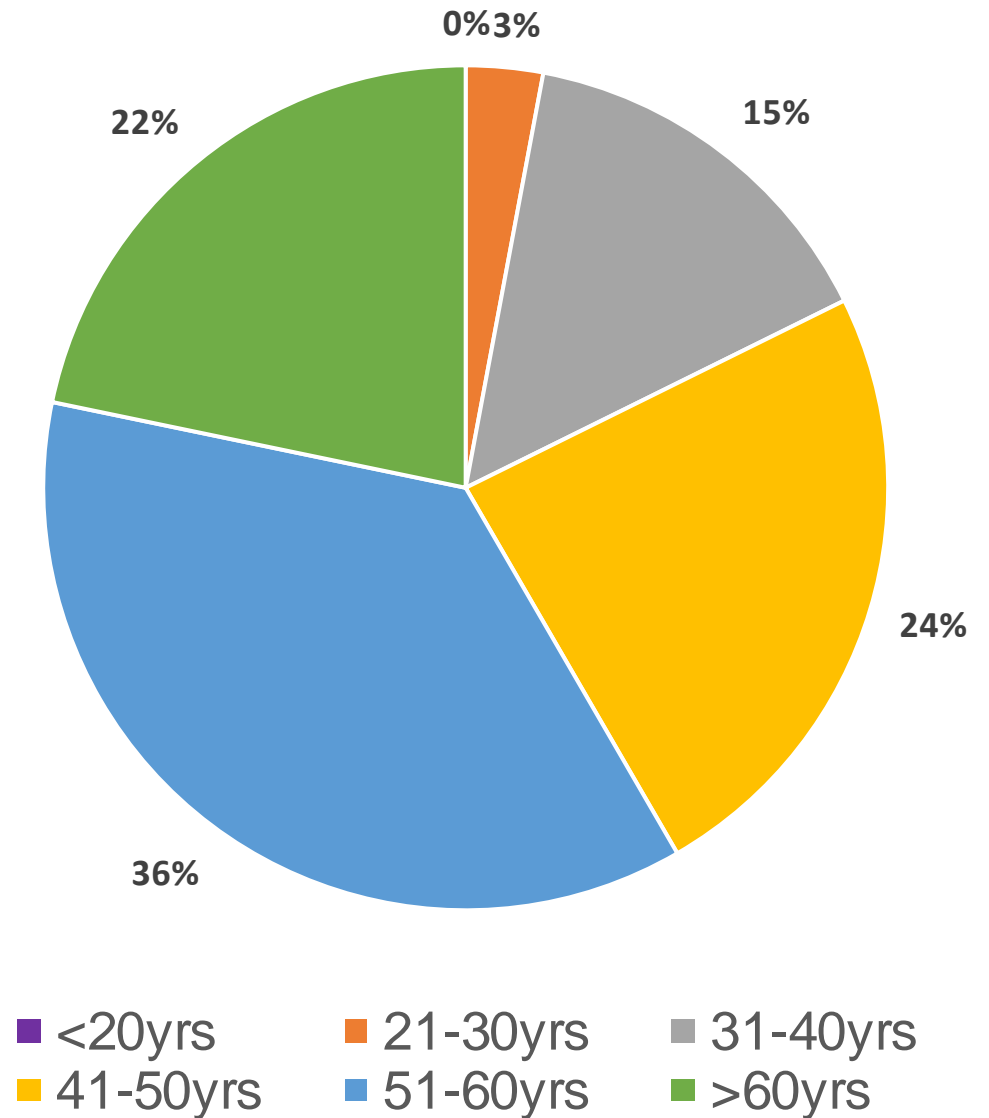


Sample

- The survey closed on 30 Sept 2019 and yielded 827 responses.

Of those sampled:

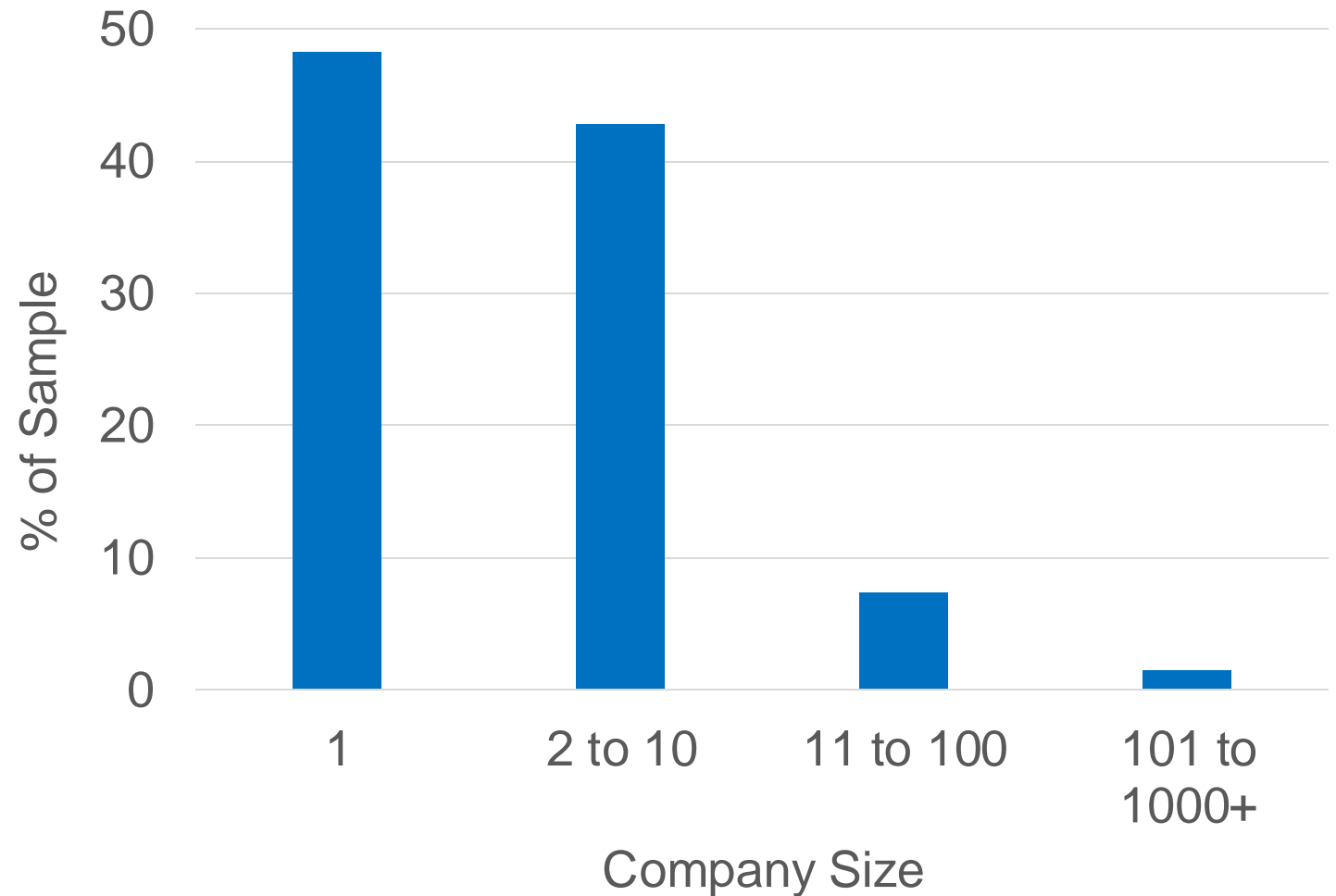
- There were no installers under the age of 20.
- A large proportion were close to reaching retirement age. This is broadly reflective of the wider fossil fuel heating system installer market.



Company size

Of those sampled:

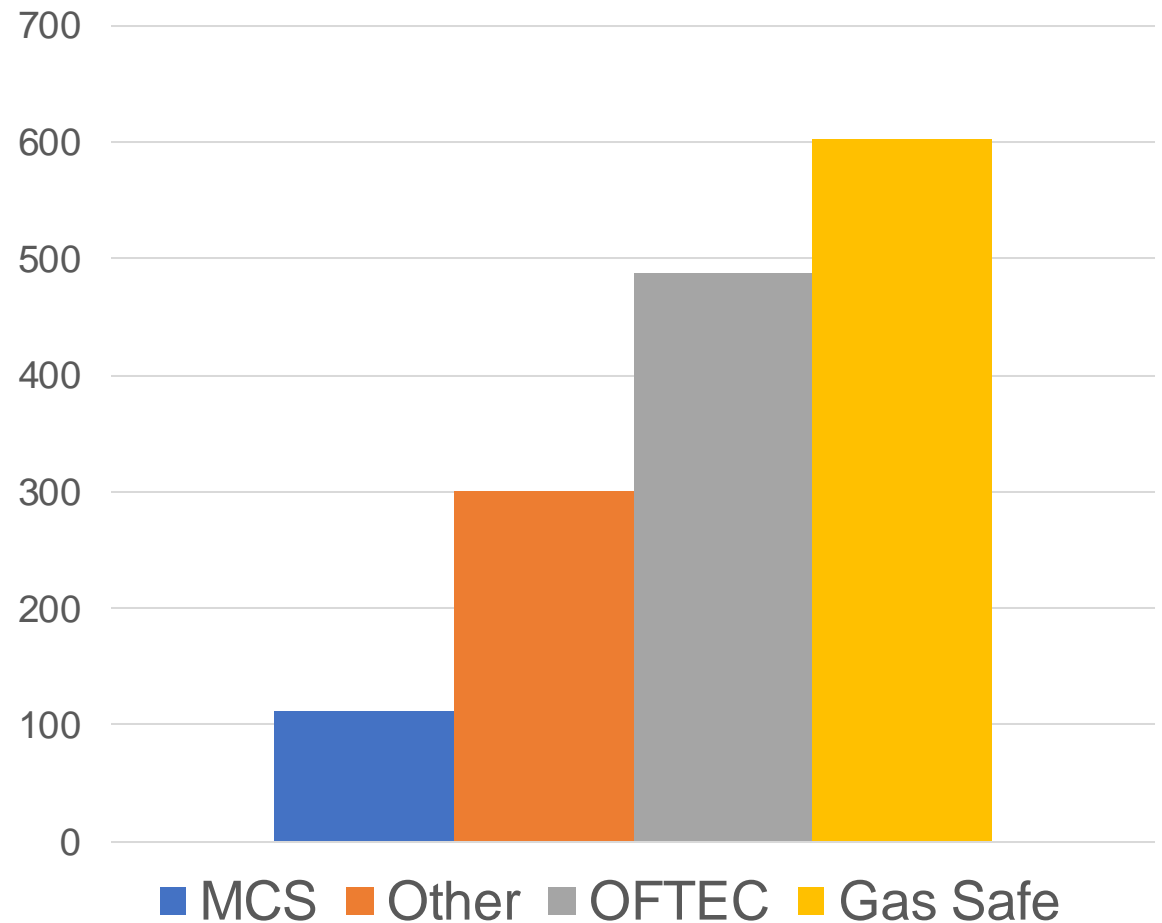
- Most were sole traders or worked in very small companies.



Registration with Organisations

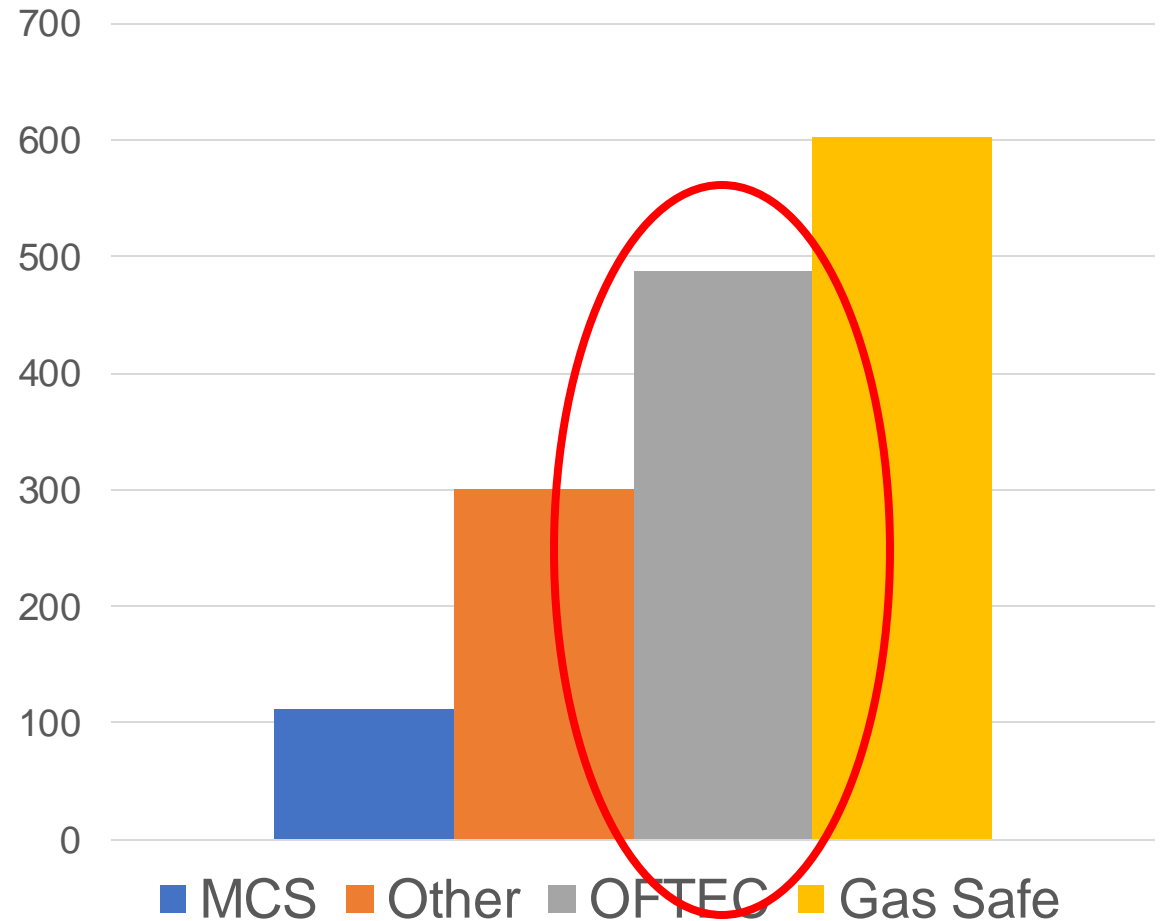
Of those sampled:

- Fewer were registered with MCS compared with OFTEC & Gas Safe.
- A significant proportion of installers were registered with other organisations (details not known).



Limitations

- Results show **60%** of installers were OFTEC registered; the trade association for the oil heating industry. In comparison, across the whole market **10%** of installers are OFTEC registered; suggesting results are skewed towards off gas grid installers.
- Participants were made aware that the survey focused on low carbon heating and results suggest response rates were highest in groups who will be most affected by the transition, i.e. oil boiler installers.



Experience



41% of installers have 20-40yrs experience installing heating systems.
32% of installers have 10-20yrs experience installing heating systems.



71% of participants rated themselves as 'very experienced' gas boiler installers and 53% as 'very experienced' oil boiler installers.
17% of participants rated themselves as 'very experienced' heat pump installers and **43% had no experience** at all in heat pumps.

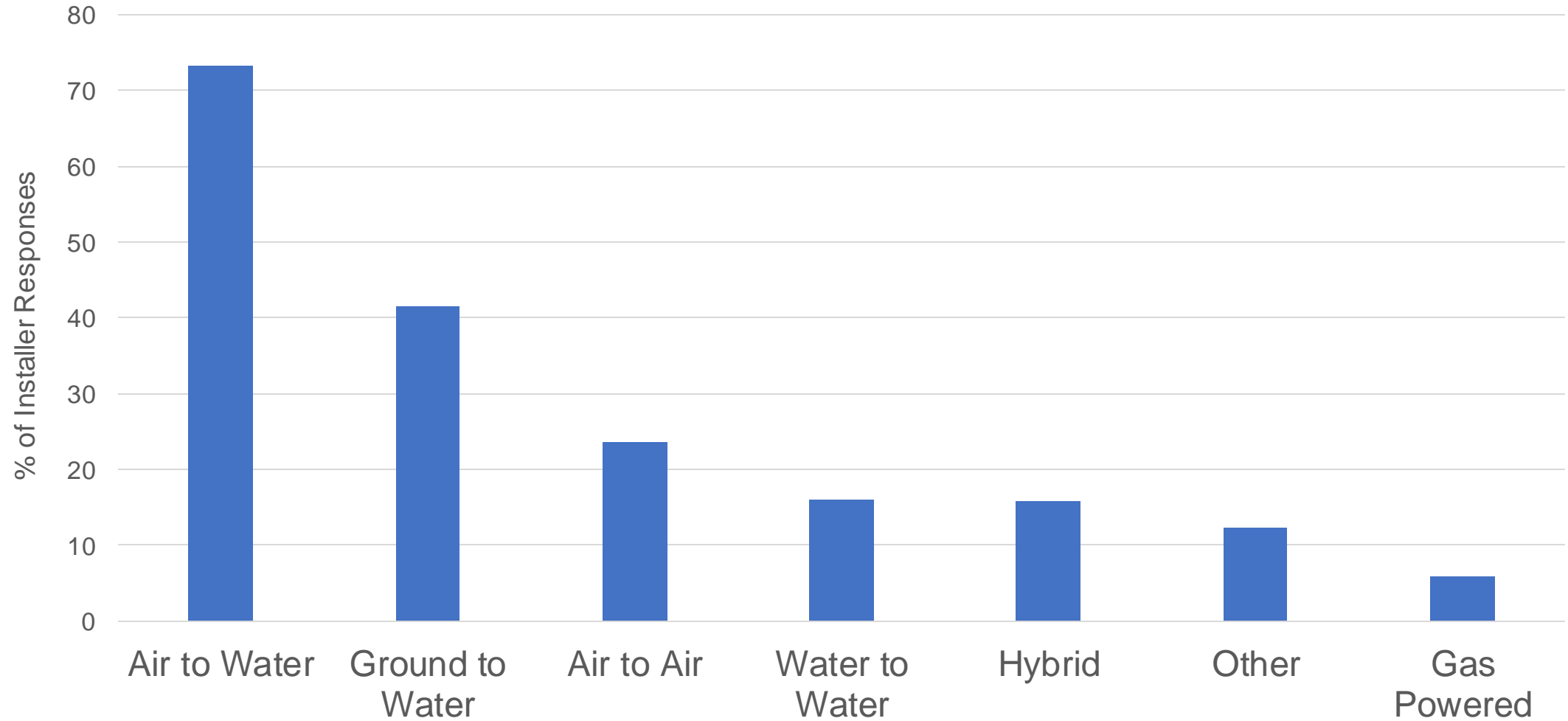


42% of installers said they would be confident installing a heat pump with manufacturer instructions (irrespective of their experience levels).



73% of installers who do have experience in heat pump installations have worked with air to water heat pumps.

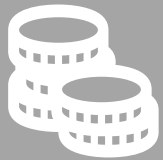
Type of Heat Pump Installed



Barriers – Consumer Demand



37% of the installers rarely get asked about low carbon heating, renewable energy or carbon emissions by their customers.
32% have never been asked.



Installers highlighted 3 main reasons for lack of consumer demand:
78% think it is due to the costs of buying and installation.
64% think it is due to lack of consumer awareness.
55% think it is speed of replacement.



74% of installers did not rate themselves as 'very confident' in recommending and choosing the **best low carbon options** to their customers.



Installers believe the best way to increase awareness about the need for renewable heating systems is through **communications and marketing.**

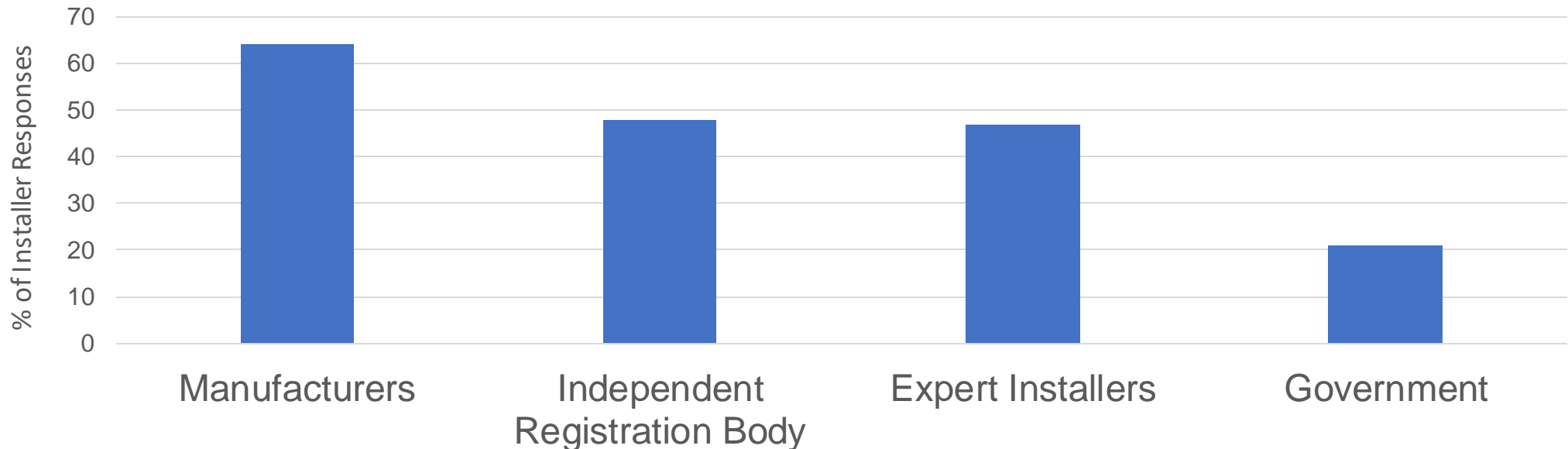
Barriers - Training



Installers highlighted the most important factors in making the decision to retrain:

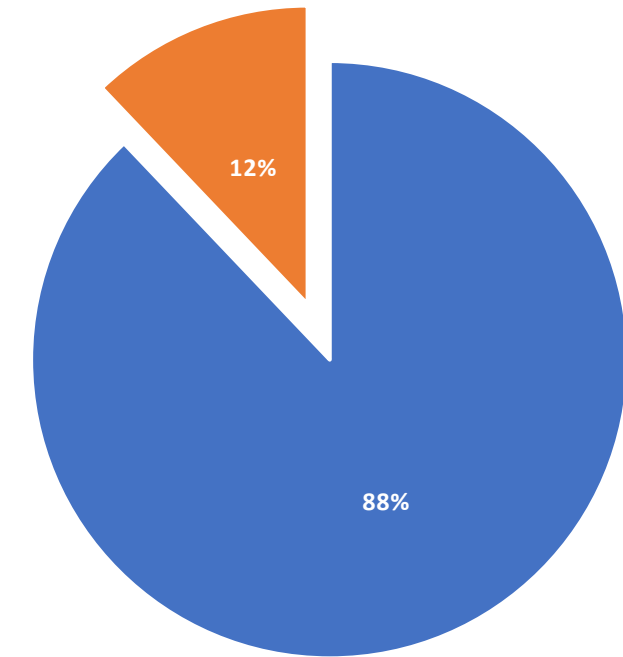
- 58% rated 'obligatory training for organisation membership' as very important.
- 50% rated 'new mandatory installation standards' as very important.
- 42% rated 'future mandatory installation standards' as very important.
- 38% rated 'demand from customers' as very important.

Who should design training courses?



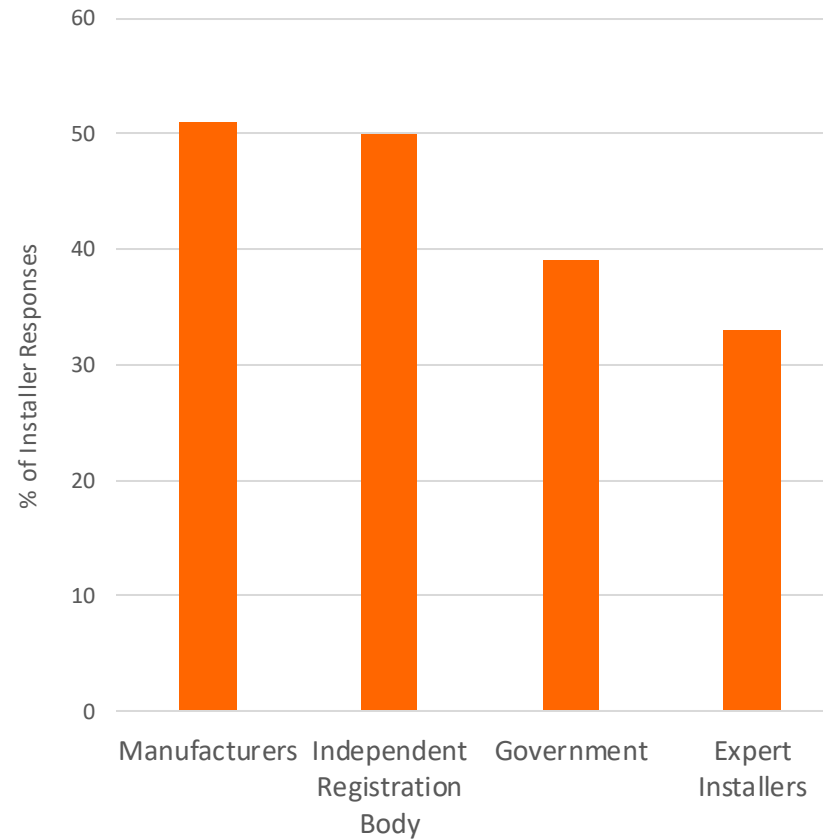
Regulations

Should the law require all heating system installers to be registered?

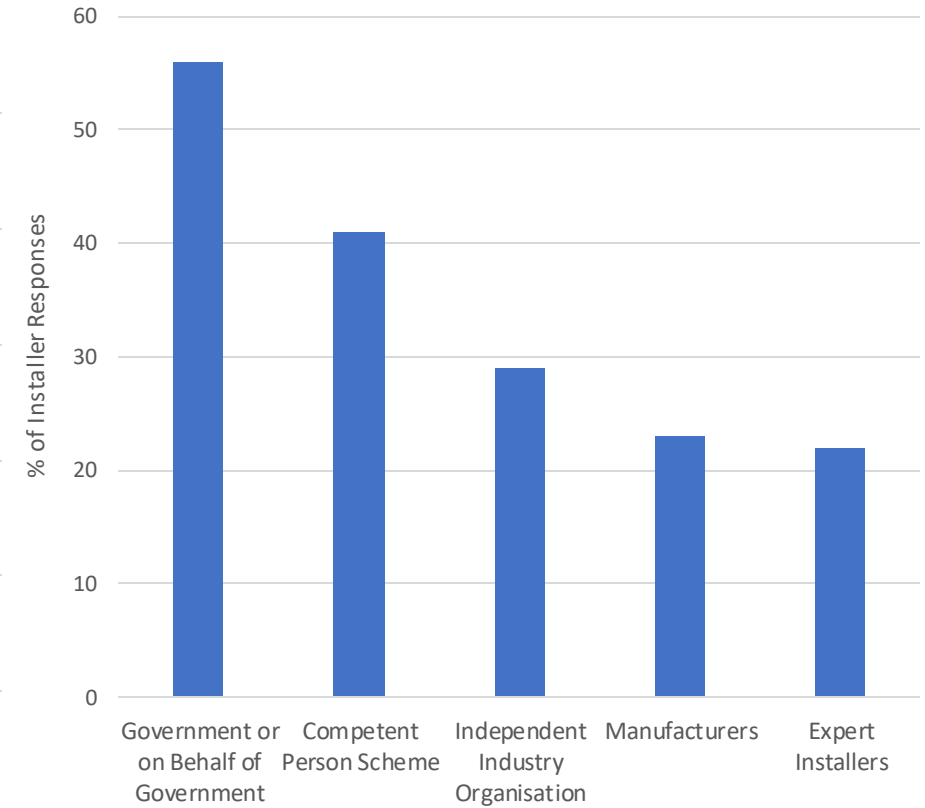


■ Yes ■ No

Who should set installation standards?



Who should be responsible for running a certification scheme?



Perceived Employment Impact

- Although many installers understand what moving away from high carbon technologies meant for their job, several advised in the survey that their organisation is already familiar with low carbon equipment.
- Therefore we assume that the sample baseline is skewed towards low carbon technologies.
- Nevertheless, a large proportion of installers still need support on what this means for them and their career.

Do you understand what moving to low carbon technologies means for you and your job?

