MAYOR OF LONDON

Communal Heating Consumer Survey

October 2018

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Executive Summary

As part of the Mayor's ambitions to make London a zero-carbon city, the current London Plan requires major developments to investigate the feasibility of decentralised energy based on heating and cooling networks, and combined heat and power (CHP). Where connection to an existing or planned district heating network is not currently feasible, developments are required to install a communal heating network, typically with CHP where this is appropriate.

The new draft London Plan, which is expected to be adopted in 2019, continues to require major developments to investigate connection to a district heating network where the development is in a Heat Network Priority Area. Where this is not currently possible, a communal heating network should be installed to enable future connection to a district heating network. The heat source for the communal system should be selected in line with the updated heating hierarchy which has been expanded to include zero and low emission technologies, such as heat pumps.

The London Environment Strategy (May 2018) Policies 6.2.1 and 6.2.2 also promote the transformation of London's energy systems that will result in building heating being supplied from clean, low carbon and renewable sources, and distributed to end-users via district heating networks.

The GLA is aware that residents in some developments where CHP heat networks have been installed have expressed concerns about aspects of their heating arrangements.

To better understand the issues, the GLA has undertaken a customer experience survey (the Survey) of residents of housing developments in London whose heating arrangements incorporate a communal heating system / on-site district heating network supplied by CHP. This has involved schemes installed both pre- and post-London Plan (2009).

The Survey was conducted in October 2017 by Kantar TNS UK on behalf of the GLA, to collect feedback from consumers on their views on the quality and satisfaction of the communal heating scheme which provides space heating and hot water to their properties.

Along with feedback from other consumers, the Survey was aimed at providing data and information that could assist organisations to enhance the quality of communal heating schemes in London.

The questionnaire was developed by the GLA and is included in Appendix B. A total of 384 responses were gained from 44 sites across London[1]. The key findings of the Survey were:

- Respondents are generally satisfied with their communal heating systems. 82% said they were satisfied, compared to 6% who were dissatisfied
- Satisfaction is highest among social renters (89%) and private renters (87%), lower among homeowners (68%)
- There is little difference in satisfaction levels by the age of the site (84% pre-2009, 81% post-2009)
- Most respondents did not raise any issues with the running and control of their community heating systems, or with their supply of heating. The most common issue was unplanned interruptions to domestic hot water – experienced by 21% of respondents a few times a year or more regularly [2]
- A minority of respondents (21%) say they are dissatisfied with the cost of their heating and hot water system, and most state that their bills were about the same as or cheaper than the bills for their previous heating and hot water systems

[1] Between 7 to 14 participants per site where interviewed across the 44 sites to ensure an acceptable sample size(384) for analysis. The information for individual sites was not analysed because the small sample size would not produce representative results. The selection of the 44 sites was based on ease of access, geographic area, tenure, and age spread to reflect the different types of schemes to be found across London. The number of sites visited, and interviews undertaken on each site, was limited by the available budget the research.

[2] This is broadly equivalent to interruptions experienced by consumers not on communal heating systems - 24% of consumers in England and Wales reported an interruption or loss of heating in the last year (BEIS, Heat Network Consumer Survey, 2017).

(57%)[3]. 31% say their bills are more expensive than from their previous supplier and 28% think they pay too much for the cost of heating their home[4]
- 71% said they were likely to recommend this system of heating and hot water to a friend or colleague, whilst 14% said they would not.

The Survey conclusions have been contrasted with those of similar recent studies carried out by other organisations. The BEIS Heat Network Consumer Survey (2017) and the Survey both conclude that heat customers served by communal heating systems and heat networks, including CHP, are generally satisfied with their heating arrangements.

Since the Survey was undertaken, the Competition and Markets Authority's (CMA) has published the findings of its market study into domestic heat networks to ensure consumers get a good deal. This highlighted that one of the key problems driving poor outcomes for heat customers was the absence of a regulator for this part of the energy sector.

In light of the findings of this Survey and other reports, it is concluded that benefit for heat network customers could be achieved from further regulation of district heating networks, particularly on consumer protection and minimum technical standards. Although a balance needs to be sought between ensuring affordable consumer energy prices and ensuring viable business cases for heat network developers, there is a role for the regulator to review heat network pricing and intervene where necessary. Benefit could also be achieved from greater transparency of tariffs as well as better information and education for consumers on how heat networks operate and how bills are structured ahead of them moving into affected developments.

[3] The average UK household dual fuel bill has decreased by £109 between 2012 and 2016. The Clean Growth Strategy, BEIS, 2017.
[4] This compares to 34% of non–heat network users in England and Wales, who say that the price they pay for heating and hot water is unfair. (BEIS, Heat Network Consumer Survey, 2017).

Introduction and Background

Combined Heat and Power (CHP) is a form of energy generation that simultaneously produces heat and electricity. The technology is highly efficient in that it makes use of the heat created during electricity generation, which would otherwise be wasted. Such systems can be built in to new developments or retrofitted to existing buildings.

When connected to heat distribution networks, whether on-site or at district scale, the recovered heat can be used to provide domestic hot water and space heating, displacing the need for homes to have their own gas boilers.

District heating is a key component of the Mayor's London environment strategy and an important technology that will contribute towards the Mayor's ambition for London to be a zero-carbon city by 2050.

The London Plan requires major developments to investigate the feasibility of decentralised energy, such as district heating and cooling. Where connection to an existing or planned district heating network is not currently feasible, developments are required to install a communal heating system, and this can be with CHP where appropriate.

Approximately 300 sites in London employ CHP for both domestic and non-domestic installations. The GLA is currently working to establish a sound database of these sites, with a focus on residential schemes.

The technology is mature and widely-used internationally to provide building heating. However, there are reports in the UK that some systems have been implemented poorly, causing challenges and poor experiences for the users. However a recent Department of Business Energy and Industrial Strategy (BEIS) report[5] suggests that heat networks are at

[5] The Heat Network Consumer Survey (BEIS, 2017) suggested that both heat network customers and customers not on heat networks view their service as reliable. 93% of heat network customers and 90% of customers who were not on heat networks said their heating system was either 'very reliable' or 'fairly reliable'.

least as reliable as other means of heating. The expectation is that the installation of schemes should have improved over time as design and installation expertise has improved.

The GLA is aware that residents in some new developments where CHP systems have been installed have expressed concerns about aspects of their heating arrangements.

Poor performance has been reported in several areas, including:

- Energy costs and the expectation of cheaper energy costs that are not met in some cases
- A lack of control over the heat supplied to homes leading to overheating
- A lack of helplines meaning complaints are not handled correctly and faulty services are difficult/slow to be fixed
- Unplanned interruptions to hot water and space heating.

To further investigate, the GLA has undertaken a customer experience survey of residents of housing developments in London whose heating arrangements incorporate a communal heating system / on-site district heating network supplied by CHP.

Objectives

The aim of the survey was to provide insight that supports consumer interests and the GLA's development and optimisation of low carbon district and communal heating systems by understanding its relative successes and failures for users.

The work looked at both experiences of certain issues and perceptions of the system in providing a heating service.

The GLA developed the questionnaire and competitively procured the research agency Kantar TNS to deliver the fieldwork. A total of 44 sites were surveyed[6], including some constructed before the London Plan requirements came into effect in 2009.

The Survey was conducted with the aim of:

- Obtaining a top-level gauge on resident's experiences of using communal heating systems, including their overall satisfaction
- Further understanding any issues affecting residents
- Obtaining first-hand information on the nature of dissatisfaction and establishing the extent of the issues across the surveyed schemes; and how these could be resolved;
- Recommending to the Mayor the next steps to address the issues.

The GLA has complemented this with data analysis as well as a review of similar studies carried out by other organisations in recent years.

[6] Note: a total of 50 sites where heating is supplied by communal systems with CHP have been identified, although 6 of them were either in construction/unoccupied or access was prohibited for security reasons.

Methodology

The Survey was conducted by Kantar TNS on behalf the GLA between 18th September and 6th October 2017.

A total of 384 responses from residents where communal heating systems supplied by CHP are in place were gained from 44 sites across London.

7 to 14 participants per site where interviewed across the 44 sites to ensure an acceptable sample size (384) for analysis. The information for individual sites was not analysed because the small sample size would not produce representative results. The number of sites visited, and interviews undertaken on each site, was limited by the available budget the research. For the purpose of this report, the data for multiple sites has been amalgamated in the analysis.

The selection of the 44 sites was based on ease of access, geographic area, tenure, and age spread to reflect the diverse nature of the schemes to be found across London. The number of sites visited, and the number of interviews per site, were subject to budget constraints on this research. Surveys were conducted face to face in the respondents' homes.

Sites were obtained from a combination of internal and external resources, including the London Heat Map, the London Development Database, as well as information supplied by Local Authorities and BEIS.

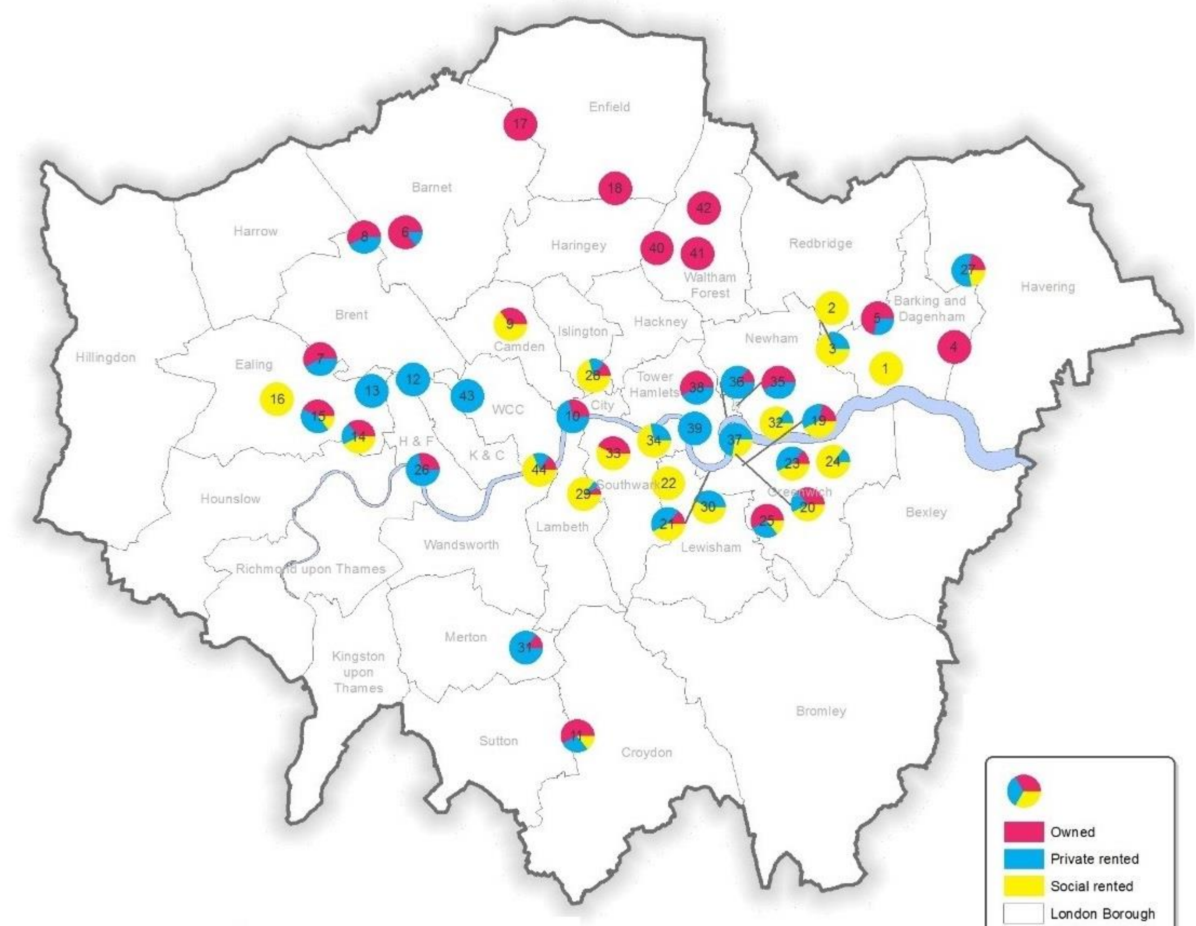
The questionnaire, developed by the GLA with inputs from external stakeholders, was primarily aimed at determining the level of satisfaction of residents regarding their heating arrangements, and included questions related to:

- Tenure, size, type and age of the properties surveyed
- Experience of the consultation process, and satisfaction with information provided
- Functioning and quality of the heating systems, and the level of control

- Repairs and customer service
- Billing and energy costs
- General satisfaction
- Ownership and management of the heating systems.

Details of the sample can be found in the appendix.

The map below shows the location and tenure for the sites that were surveyed.



Where possible, this report draws on existing research from the sector on customer experiences of communal heating and hot water systems, such as BEIS[7], Citizens

[7] https://www.gov.uk/government/publications/heat-networks-consumer-survey-consumer-experiences-on-heat-networks-and-other-heating-systems

Advice[8], Heat Trust[9], Which?[10], the Joseph Rowntree Foundation[11] and the Competition & Markets Authority (CMA)[12].

The conclusions from the above research reports are mixed, with consumers' satisfaction levels ranging. The conclusions cannot be directly compared to the ones from the GLA 'Communal Heating Consumer Survey' as the sample groups – some reports include district heating schemes installed in the 60s and 70s - and research methodology are not the same.

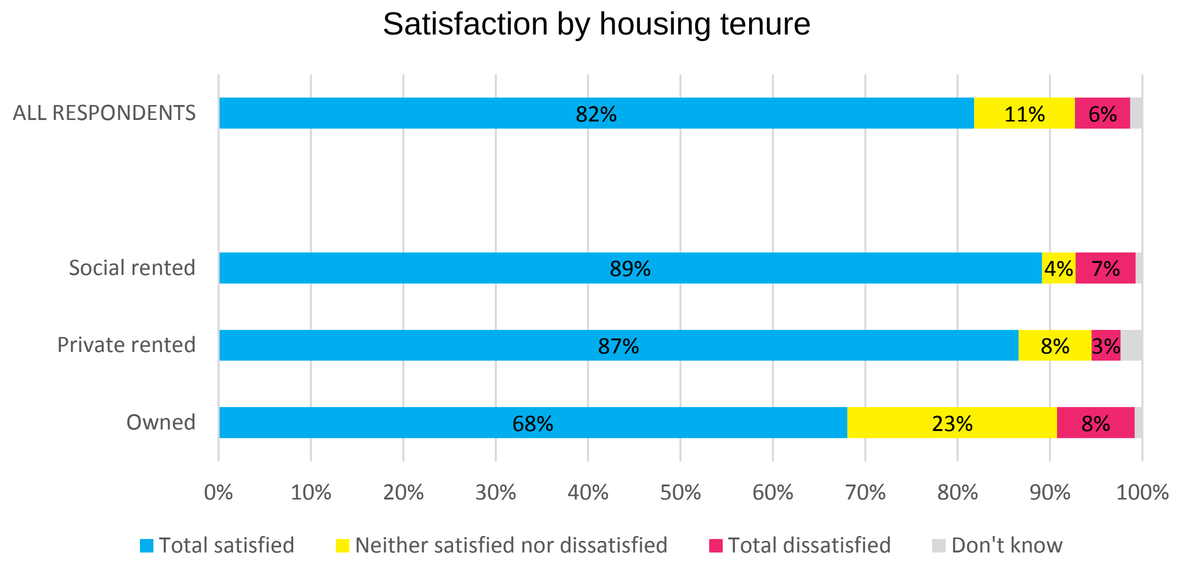
However, their results, referenced throughout the report, can be used as a guide to see how experiences of district heating networks consumers across the UK compare to those in London.

[8] https://www.citizensadvice.org.uk/Global/CitizensAdvice/Energy/District%20Heating%20Information%20Request%20-%20January%202016.pdf
[9] http://www.heattrust.org/images/docs/Heat_Trust_Annual_Report_Final_-_Web.pdf
[10] https://www.staticwhich.co.uk/documents/pdf/turning-up-the-heat-getting-a-fair-deal-for-district-heating-users---which-report-399546.pdf
[11] http://www.changeworks.org.uk/sites/default/files/District_heating_delivering_affordable_and_sustainable_energy_report.pdf
[12] https://assets.publishing.service.gov.uk/media/5af31b9640f0b622d18b2d3f/Update_paper_heat_networks.pdf

Results

Satisfaction

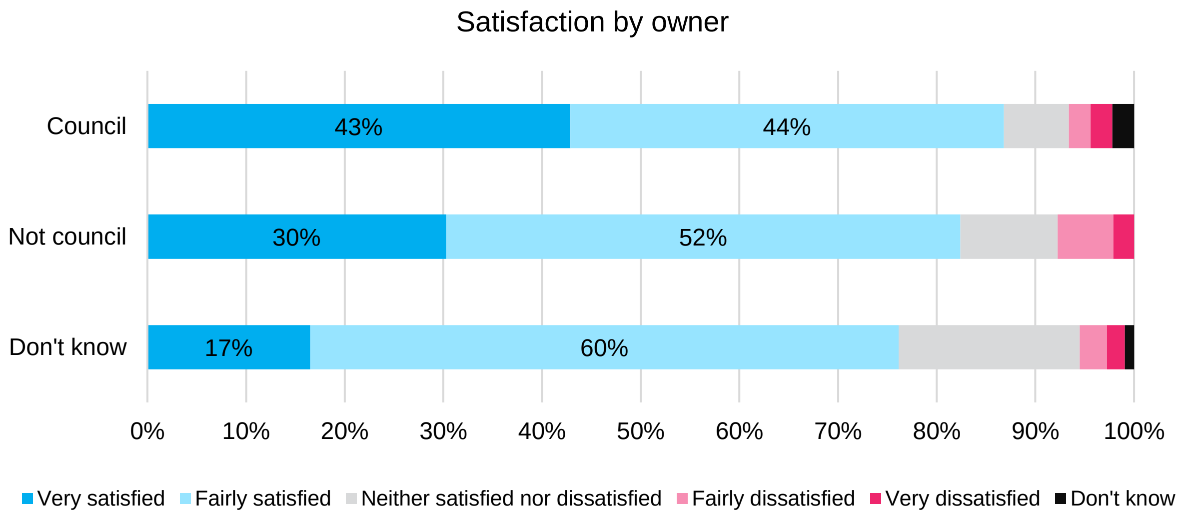
82% of respondents say they are satisfied with the heating and hot water system in their home (32% very satisfied and 50% fairly satisfied). This compares to 6% who are dissatisfied. The remainder either say they don't know, or that they are neither satisfied nor dissatisfied[13].



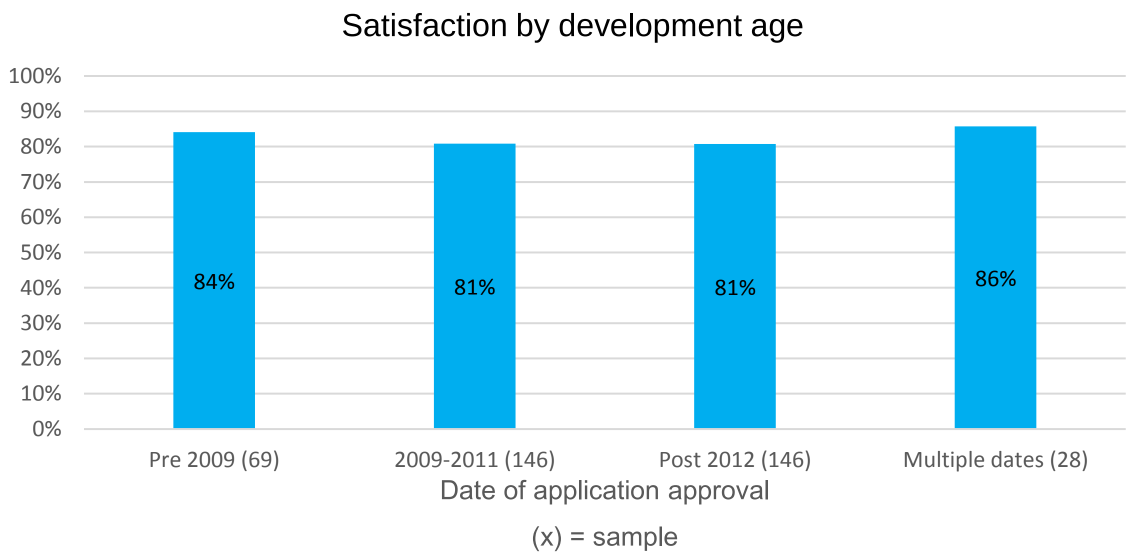
Satisfaction is highest among social renters (89%) and private renters (87%), lower among homeowners (68%). This difference is made up from homeowners being much more likely to be neither satisfied nor dissatisfied, and not from significantly higher dissatisfaction[14].

[13] This represents slightly higher satisfaction than for heat network users across England and Wales, where 74% were satisfied (BEIS, Heat Network Consumer Survey, 2017). There are methodological and sampling differences between these results, making an exact comparison unreliable.
[14] This tenure difference is reflected for heat network users across England and Wales, where home owners have the lowest satisfaction (62%), and social renters (79%) have highest satisfaction (BEIS, Heat Network Consumer Survey, 2017).

Satisfaction is slightly higher for tenants of buildings owned and managed by the council, than for those that are not. Respondents who don't know who owns and manages their building (32% of all respondents) have the lowest satisfaction.

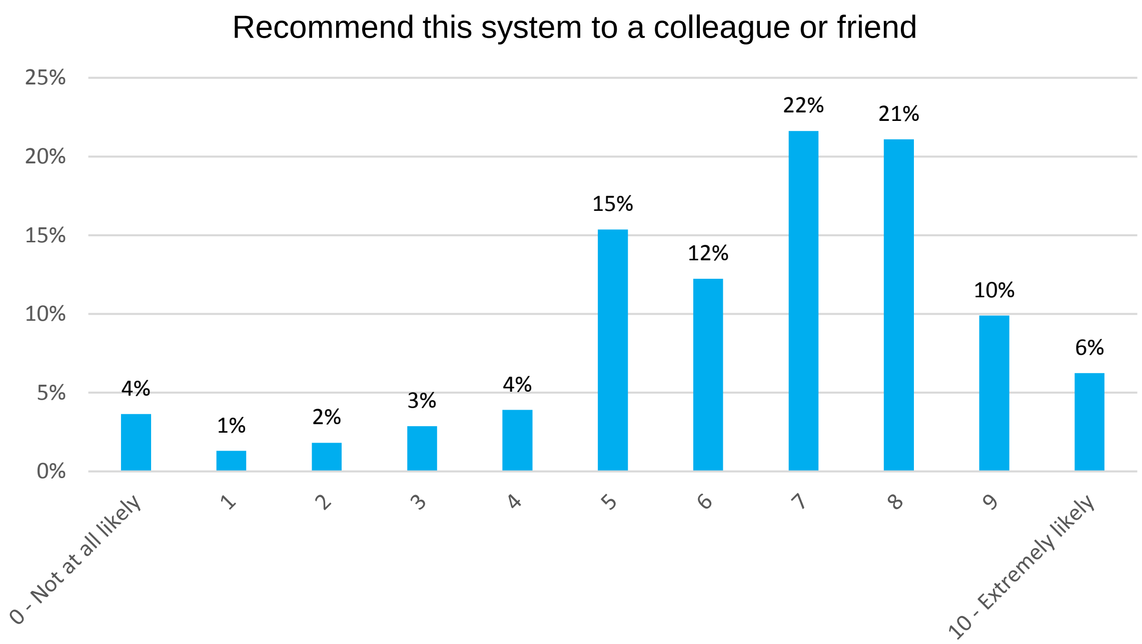


There is little difference by the age of the site[15], with all sites seeing similar levels of satisfaction.



[15] Note: age refers to the date at which stage 2 of the planning application was accepted, not necessarily when the communal heating systems was completed and in use. Multiple dates mean that on a single site multi heating systems have been installed on different dates.

71% said they were likely to recommend this system of heating and hot water to a friend or colleague, whilst 14% said they would not.



Using the communal heating system

Only just over half (53%) say they have full control over the timings and heat of their communal system. 7% of respondents say they have no control over the timings and temperature of heat and 40% can turn the heat on and off, but they have no control over the timings or temperature[16].

For those who have full control, 91% said the heat controls are easy to use, compared to 3% who said they were difficult[17].

[16] Citizens Advice (District Heating Networks, 2016) found out that less than 1% of over a third of respondents had no controls at all, whilst for those with some degree of control, 70% of respondents indicated that thermostatic radiator valves were present in more than half of the homes on their networks, followed by room thermostats (over 60%).
[17] Consistent with Londoners using communal heating, heat network users in England and Wales were also generally satisfied with the *level of control over the temperature of the heating* – 71% were satisfied compared to 14% who were not (BEIS, Heat Network Consumer Survey, 2017).

Residents with no or partial control of their heating systems are more likely to be subject to issues such as over- and under-heating, as well as incur heating bills they are not directly accountable for[18].

Performance of communal heating

Most respondents (61%) said that they have not experienced any of the five issues identified below relating to how their heating and hot water is functioning in the last year. 39% have experienced one of the issued identified once a year, including 5% of respondents who said they experienced at least one of the issues tested at least once a month[19].

Unplanned interruptions to hot water is the most common issue, 30% say they have experienced this.

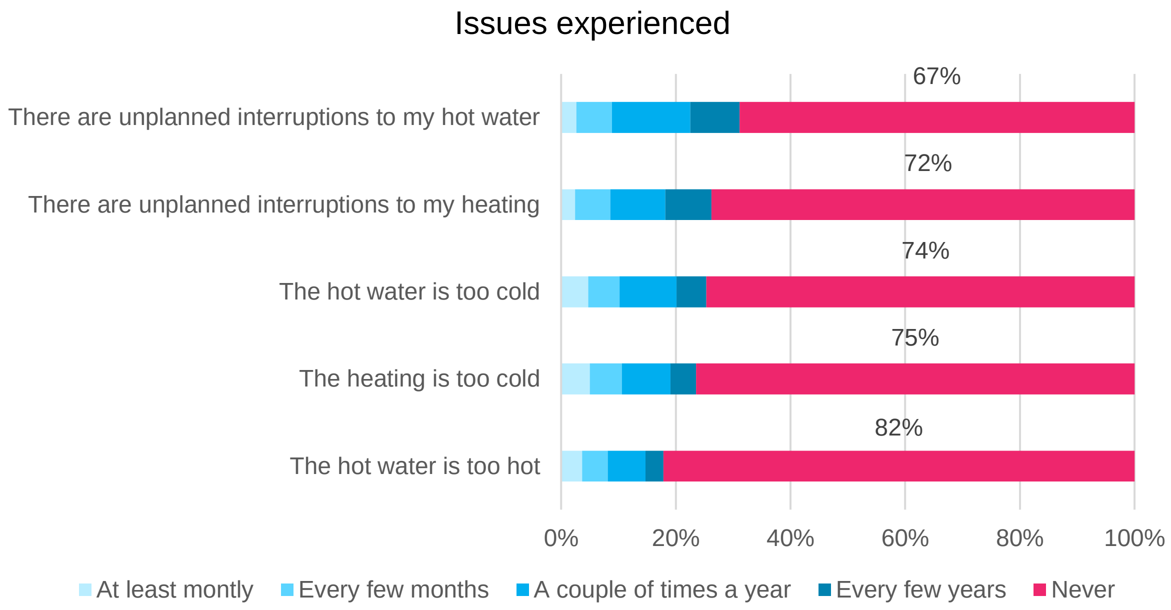
26% said they have experienced unplanned interruptions to heating. This figure is roughly equivalent to non-heat network consumers in England and Wales (24%)[20].

23% of respondents said they have had an issue with the heating being too cold, with 11% saying this issue happened at least once every few months.

[18] The Joseph Rowntree Foundation (Delivering affordable and sustainable energy, 2017) confirmed that overheating was a common concern; residents in three of the six case study schemes expressed that they felt that their dwelling or communal areas were too warm. In few cases this caused discomfort but the impact was largely that residents did not need to use their heating system, leading to bill savings.

[19] Although not directly comparable, this is broadly consistent with existing research on heat network users in England and Wales.

[20] This is slightly lower than for heat network users in England and Wales, 37% of whom experienced an interruption/ loss of heating in the last 12 months (BEIS, Heat Network Consumer Survey, 2017).



Billing

22% pay for their heating and hot water through a pre-payment meter, whilst 42% pay in arrears on a meter and 36% pay in arrears on a fixed rate.

21% say they pay less than £500 a year for heating and hot water. 29% pay between £500 and £1,000 and 8% pay £1,000 or more. 40% say they don't know. As would be expected, the cost per year increases with the number of bedrooms in the house. 46% of studios and 50% of one bed houses pay less than £500 a year, compared to 8% of houses with 3+ bedrooms. Less than 1% say they pay £1,500 or more a year for heating and hot water.

28% think they are paying too much for the heating of their home, 58% think they are paying about the right amount. Comparing to non–heat network users in England and Wales, a greater proportion (34%) say the price they pay for heating and hot water is unfair[21].

[21] 27% of heat network users in England and Wales say the price they pay for heating and hot water is unfair – thus similar to the sentiment felt from communal heating users in London (BEIS, Heat Network Consumer Survey, 2017).

9% say their bills are cheaper than with previous heating and hot water systems they've used, whilst 47% say they are about the same. 31% say their bills are more expensive[22,23]. The general rise in energy bills has not been accounted for in the response, and this result has not been verified against actual bills. The reports[22,23] indicate that the cost of heat to heat network customers is similar to gas customers, although the former has a greater range between lowest and highest costs. It is not clear whether the 31% who say their bills are more expensive perceive this to be the case, or whether their bills are actually higher than their previous bills.

The Survey did not target the satisfaction levels with regards to being able to understand the heating bill, which is often considered a cause of concern when a standing charge is applied, in particular amongst customers in metered properties[24] – as highlighted in other similar research reports[25,26,27].

Use of the communal heating system

When asked about specific aspects of the communal heating system, again respondents were generally satisfied.

[22] Which? (Turning up the heat, 2015) determined the unit cost of heat for customers connected to heat networks and compared it with those supplied by individual systems; results showed that in district heating schemes such value ranged from 5.51 to 14.94 p/kWh, whilst gas customers paid for their heat between 9.55 and 11.60 p/kWh and those supplied by electric heating between 21.91 and 22.99 p/kWh. The median cost of heat from the heat networks is 10.23 p/kWh compared with 10.58 p/kWh for gas customers and 22.45 p/kWh for electricity customers. The range of heat costs is larger for heat networks than it is for gas and electricity.

[23] BEIS, Heat Network Consumer Survey, 2017 found evidence of greater variation in pricing in England and Wales in the heat network sector compared to non-heat network consumers. It also found that the median average amount that heat network consumers paid was around £100 less for heating and hot water than for non-heat network consumers.

[24] Citizens Advice (District Heating Networks, 2016) determined that the majority of district heating systems investigated (43%) were completely unmetered, 31% had a mixture of homes that were metered and unmetered and 26% of schemes did have individual heat meters. 45% of customers were billed according to usage in metered properties, while in unmetered properties 43% were billed according to the size of the property (43%) and 17% had a flat rate applied. In 23% of cases a standing charge was applied to all bills.

[25] According to the Heat Trust (Final Report, 2017) between 25th November 2015 and 31st December 2016, 73 customers from 24 heat networks referred a complaint to the Energy Ombudsman. 64% of complaints were related to billing and 10% to back-billing. 54% of the complaints related to billing were related to standing charges.

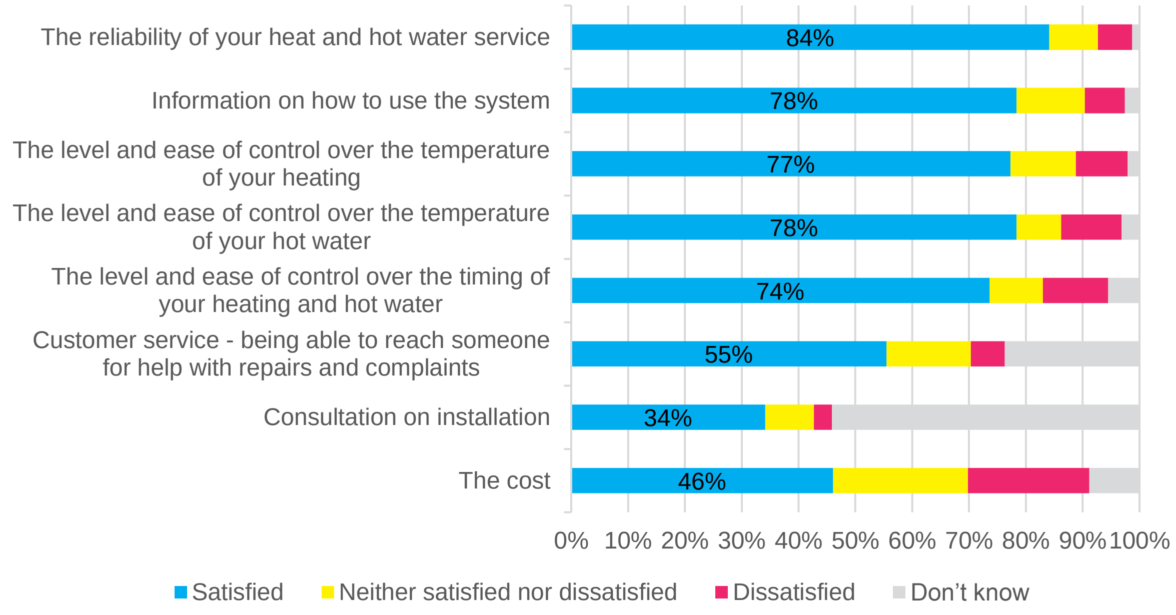
[26] Citizens Advice (District Heating Networks, 2016) found out that 38% of customers responded that suppliers shared with them how their bill was calculated and of those that did apply a standing charge it was clearly stated on their bills. Some metered customers did not receive bills with their consumption noted on them (54% had the date the bill covered on it and just over 30% had previous and current meter readings on it).

[27] CMA (Heat Networks Market Study, 2018) claimed that for many customers, heat networks appear to offer an efficient supply of heat and hot water at prices which are the same or lower than other potential sources of supply and with comparable service standards. However, for some customers – particularly those on certain privately-operated schemes - poorer outcomes in terms of price and service were identified.

84% of respondents say they are satisfied (very satisfied or fairly satisfied) with the reliability of the heating and hot water system.

78% of respondents say they are satisfied with the information they received on how to use the system – 7% are dissatisfied[28]. 77% say they are satisfied with the level and ease of control over the temperature of their heating – 9% are dissatisfied.

Satisfaction with aspects of the system



78% are satisfied with the level and ease of control over the temperature of their hot water; 11% are dissatisfied. 74% are satisfied with the level and ease of control over the timings of their heating and hot water; 12% are dissatisfied.

84% are satisfied with the reliability of the heating and hot water service – 6% are dissatisfied.

[28] Citizens Advice (District Heating Networks, 2016) found out that over half (58%) said that a member of staff attends the property to explain the system to any new customer and 43% provided them with scheme contact details for help and information. The Heat Trust (Final Report, 2017) suggested that information is not provided in a consistent manner when purchasing/renting properties. Which? (Turning up the heat, 2015) highlighted how many consumers felt they were given inadequate or misleading information about district heating before they moved into their property. Finally, the Joseph Rowntree Foundation (Delivering affordable and sustainable energy, 2017) found out that many residents do not have a full understanding of how to effectively and efficiently use their heating, despite usually having been provided with advice.

46% say they are satisfied with the cost, 21% are not.

The majority of respondents say they would not change their current energy supplier - 58%. 9% of respondents say they would definitely change their energy supplier, 21% say they would probably change[29]. As a reference, in 2017 around 18% of customers switched gas or electricity supplier[30].

Repairs and customer service

A minority of respondents (23%) said they have needed to make a complaint or contact their energy supplier. The majority of those who contacted their supplier were satisfied with the service they received[31,32, 33].

23% say they have needed to have repairs made to the heating system. Unsurprisingly, those who have needed repairs are slightly less satisfied; 67% for those have had repairs compared to 86% for those who haven't.

Of the 23% who have contacted their energy supplier, the majority (74%) say that the supplier was easy to contact[34].

74% also think the supplier was helpful and informative, and 57% think the supplier was quick to solve the problem.

81% were happy that the supplier fixed the problem, whilst 8% were not.

[29] Heat network users in England and Wales are fairly split on whether they want to switch energy provider, whereas communal heating users in London are less likely to want to (BEIS, Heat Network Consumer Survey, 2017). There are methodological and sampling reasons why this might be the case
[30] https://www.gov.uk/government/statistical-data-sets/quarterly-domestic-energy-switching-statistics
[31] Between the 25th November 2015 and 31st December 2016, 73 customers from 24 heat networks referred a complaint to the Energy Ombudsman, and where a decision was made, customers accepted the decision in 74% of cases (Heat Trust Final report, 2017).
[32] These results broadly align with the experiences of communal heating and non-heat network users in England and Wales, 21% and 18% of whom respectively have made a complaint (BEIS, Heat Network Consumer Survey, 2017).
[33] The survey did not ask whether a complaint was upheld.
[34] Citizens Advice (District Heating Networks, 2016) found out that 74% of schemes had a dedicated telephone number for general enquiries compared with 40% for a dedicated complaints telephone number. 68% of responses stated that customers could come in and speak to a member of staff for assistance and 71% had set timescales for dealing with any complaints.

65% agree the repairs were easy and straightforward to arrange, 15% disagree[35,36].

[35] Which? (Turning up the heat, 2015) found out that although some consumers reflected positively on their experience when raising complaints, others felt let down and frustrated by poor customer service and complaints handling procedures.
[36] The Joseph Rowntree Foundation (Delivering affordable and sustainable energy, 2017) concluded that breakdowns were reasonably infrequent, although these and subsequent complaints could sometimes be handled better, with some residents experiencing significant problems.

Discussion

This section discusses the conclusions from published research regarding customer experiences of communal heating and hot water systems. The reports were published by:

1. BEIS[8]
2. Citizens Advice[9]
3. Heat Trust[10]
4. Which?[11]
5. The Joseph Rowntree Foundation[12]
6. CMA[13]

Each report's sample group and research methodology differ, so do not allow a direct comparison of the results. However, the main conclusions and recommendations generally align with the conclusions of this research. Consistent points across all the research studies are:

- The majority of customers connected to district heating networks are generally satisfied with their communal heating systems, and they would not switch to a different system if they could choose to;
- There are some elements of dissatisfaction, the main issues experienced by some consumers being:
  - Lengthy contracts with no right to switch heat supplier
  - Billing, specifically the perceived high cost of heat in new properties and application of standing charges
  - Reliability and customer service not always as high as expected
  - Lack of adequate room-level control which may lead to overheating and wasteful cooling behaviours
  - Absence of consumer protection scheme and effective way to raise complaints
  - Insufficient information prior moving into a property.

The key and common recommendations these studies drew were:

- Billing consumers in a clear and transparent manner, explaining standing charges
- Clearer customer communications. Tenants and buyers should be informed that a heat network is present before moving into a property, and what this means for customers in terms of a single service provider
- The Government should look beyond voluntary consumer protection and work with the Heat Trust to inform heat suppliers of the benefits of joining the Heat Trust Scheme. Ideally all district heating schemes should be accredited and heat suppliers required to publish key information annually, including price data
- Improved customer service, ideally with the organisation responsible for billing to take responsibility for dealing with all consumer problems within each district heating scheme
- All district heating consumers should have recourse to a single ombudsman for the sector.

Since the completion of the Survey, the CMA has carried out a market study into domestic heat networks to ensure consumers get a good deal. An update paper was published[37] that concluded that for many customers, heat networks appear to offer an efficient supply of heat and hot water at prices which are the same or lower than other potential sources of supply (such as gas or electricity) and with comparable service standards.

CMA published its final findings on 23rd July 2018 highlighting that one of the key problems driving poor outcomes for heat customers was the absence of a regulator for this part of the energy sector. The CMA recommended that Ofgem is given the role and that once established, the regulator should:

- Introduce consumer protection for all heat network customers so they get the same level of protection as customers in the gas and electricity sectors

[37] https://assets.publishing.service.gov.uk/media/5af31b9640f0b622d18b2d3f/Update_paper_heat_networks.pdf

- Address the low levels of transparency so customers know they are on a heat network and there are clear agreements or contracts between customers and heat network operators

- Make sure customers are aware of what they are paying as this is often unclear

- Protect customers from poorly designed, built and operated heat networks by preventing developers from using cheaper options to meet planning regulations that end up being paid for by the customer over the longer-term.

Conclusions

The Survey findings show an overall satisfaction from residents in developments where communal heating systems with CHP are installed. This conclusion concurs with those of other published research reports on the topic.

A total of 384 responses were gained from 44 sites across London, although the number of respondents cannot be considered representative of the projected satisfaction levels for any one site. However, this number provides a good understanding of the general satisfaction levels that heat consumers have towards their communal heating systems with CHP as well as highlights issues and areas of concern.

A total of 384 responses were gained from 44 sites across London. The key findings of the Survey were:

- Respondents are generally satisfied with their communal heating systems. 82% said they were satisfied, compared to 6% who were dissatisfied
- Satisfaction is highest among social renters (89%) and private renters (87%), lower among homeowners (68%)
- There is little difference in satisfaction levels by the age of the site (84% pre-2009, 81% post-2009)
- Most respondents did not raise any issues with the running and control of their community heating systems, or with their supply of heating. The most common issue was unplanned interruptions to domestic hot water – experienced by 21% of respondents a few times a year or more regularly
- A minority of respondents (21%) say they are dissatisfied with the cost of their heating and hot water system, and most state that their bills were about the same as or cheaper than the bills for their previous heating and hot water systems

(57%)[38]. 31% say their bills are more expensive than from their previous supplier and 28% think they pay too much for the cost of heating their home
- 71% said they were likely to recommend this system of heating and hot water to a friend or colleague, whilst 14% said they would not.

The key issues identified by the Survey and other reports centred on:

- Heat pricing
- Lack of understanding of heat customers' heating arrangements
- Absence of consumer protection
- The need for minimum technical standards.

In light of the findings of this Survey and other reports, it is concluded that benefit for heat network customers could be achieved from further regulation of district heating, and the wider heat market in the areas of heat pricing, consumer protection, transparency and minimum technical standards.

[38] The average UK household dual fuel bill has decreased by £109 between 2012 and 2016. The Clean Growth Strategy, BEIS, 2017.

Appendix A - Sample

A total of 384 responses were gained from 44 sites across London.

Housing tenure	Percent
Owned outright	8%
Owned with a mortgage	23%
Private rented	33%
Social rented	36%
Total	100%

Number of rooms	Percent
Studio	6%
1 bedroom	16%
2 bedrooms	29%
3 or more bedrooms	49%
Total	100%

Installation of communal heating system	Percent
It was installed while I was living in my home	6%
It was installed before I moved in	92%
Don't know	2%
Total	100%

Appendix B - Questionnaire

1. Does your household own or rent this accommodation?

a) Owned outright

b) Owned with a mortgage

c) Private rented

d) Social rented

2. How many bedrooms does your home have?

a) Studio

b) 1

c) 2

d) 3+

3. Which of the following best describes when the communal heating system was installed in your home?

a) It was installed while I was living in my home

b) It was installed before I moved in

c) Don't know

#If installed while living there

4. To what extent were you consulted on the installation decision?

a) Fully, all my concerns or questions were answered

b) Partially, some concerns or questions were answered, but some were left unanswered

c) Not at all, I was not given an opportunity to raise concerns or answer questions

d) Not sure

5. How would you rate information provided to you in the following circumstances before the new housing system was installed?

a) The installation of the new heating system and when things were happening
b) The benefits of the new heating system
c) When repairs would take place on the new heating system
d) How to operate and use the new heating system

- Very good
- Fairly good
- Fairly poor
- Very poor
- Don’t know
- I was not provided any information about this

6. Which of the following best describes how your heating and hot water is controlled:

a) I cannot control the timing and temperature of heat to my home; this is controlled by a third party
b) I am able to turn the heat on and off manually, but I cannot programme the timings of when this happens
c) I am able to turn the heat on and off and I can programme the timings of when this happens

#If programmable heating

7. How easy or difficult would you say it is to use the heat controls in your house?

a) Very easy
b) Quite easy
c) Neither easy nor difficult
d) Quite difficult
e) Very difficult
f) Don’t know

8. How often, if at all, would you say you encounter the following problems in your home due to your heating and hot water system?

a) The heating is too hot
b) The heating is too cold
c) There are unplanned interruptions to my heating
a) The hot water is too hot
b) The hot water is too cold
c) There are unplanned interruptions to my hot water

- Weekly
- Every couple of weeks
- monthly
- Every few months
- A couple of times a year
- Every few years
- Never
- Don’t know

9. Have you ever had to do any of the following?

a) Make a complaint or contact your hot water and heating customer service for any other reason?
b) Have any repairs made to your hot water and heating system?

- Yes
- No
- don’t know

#If yes to a) or b)

10. To what extent would you agree or disagree that the customer service was…

a) Easy to contact – I knew where to find contact information about them
b) Helpful and informative – they knew how to help me
a) Quick to solve the problem
1) Strongly agree
2) agree
3) Neither agree nor disagree
4) Disagree

5) Strongly disagree

6) Don’t know

#If yes to b)

11. To what extent would you agree or disagree that the repairs…

a) Took place quickly

b) Fixed the problem

c) Were easy and straightforward to arrange

1. Strongly agree
2. agree
3. Neither agree nor disagree
4. Disagree
5. Strongly disagree
6. Don’t know

12. Which of the following best describes how your heating and hot water bill works?

- I pay on a pre-payment meter and top up when I need to
- I pay a utility bill for only the amount of heat I use
- I pay on a utility bill a fixed charge along with a usage charge

13. Give your best estimate for how much you pay a year to heat your home and your water?

NOTE: Cold water supply (e.g. Thames Water bill) to your home NOT included in the amount below

a) £0-500

b) £500-1000

c) £1000-1500

d) More than £1500

e) Don’t know

f) Exact amount if known________

14. Which of the following best describes how you feel about the cost of heating your home?

a) I pay too much

b) I pay about the right amount

c) I pay too little

d) Don’t know

15. Thinking about your bills over the course of the year, would you say your bills are now more or less than with previous heating and hot water systems you’ve used, or about the same?

a) Much more

b) A little bit more

c) About the same

d) A little bit less

e) Much less

f) Don’t know

16. How satisfied or dissatisfied are you with the following aspects of your heating and hot water system?

a) Consultation on installation

b) Information on how to use the system

c) The level and ease of control over the temperature of your heating

d) The level and ease of control over the temperature of your hot water

e) The level and ease of control over the timing of your heating and hot water

a) The reliability of your heat and hot water service

b) Customer service – being able to reach someone for help with repairs and complaints

c) The cost

- Very satisfied
- fairly satisfied
- neither satisfied nor dissatisfied
- fairly dissatisfied

- very dissatisfied
- don’t know

17. If you had the choice, would you or would you not change your energy supplier?

a) Yes, definitely
b) yes, probably
c) no, probably not
d) no, definitely not
e) don’t know

18. Overall, how satisfied or dissatisfied are you with the heating and hot water system in your home?

- very satisfied
- fairly satisfied
- neither satisfied nor dissatisfied
- fairly dissatisfied
- very dissatisfied
- don’t know

19. How likely is it that you would recommend this system of heating and hot water to a friend or colleague?

Where 0 equals not at all likely and 10 equals extremely likely

Enter number here__________

20. Who is your heat supplier?

____

[If don't know, please type DK]

21. Who owns and manages your development?

____

[If don't know, please type DK]

22. Is there a Tenant/Resident Association at your development?

- Yes
- No
- Don’t know

23. What are the contact details of the tenant/resident association?

____

[If don't know, please type DK]

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