

Encouraging heat pump adoption in heat pump ready oil-heated homes

Report 1 - Insights from structured interviews with heat pump installers



SEAI Behavioural Economics Unit
Behavioural insights for policy: primary research



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Sustainable Energy Authority of Ireland

SEAI is Ireland's national energy authority investing in, and delivering, appropriate, effective and sustainable solutions to help Ireland's transition to a clean energy future. We work with the public, businesses, communities and the Government to achieve this, through expertise, funding, educational programmes, policy advice, research and the development of new technologies.

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Contents

Background	3
Main Findings	3
Conclusion	3
1.1. Background.....	4
1.2. Aims of this research.....	4
1.3. Sample Selection	5
1.4. Data collection & analysis	5
2.1. Perceptions of drivers and barriers to heat pump adoption	6
2.2. Perceptions of candidate interventions to increase heat pump uptake.....	9
2.3. Supply side issues	10
3.1. Financial factors remain central to heat pump adoption	11
3.2. SEAI grant application processes may deter homeowners.....	11
3.3. There is room for improvement on knowledge surrounding heat pumps.....	11
3.4. Primary motivations may vary across different homeowners	12
3.5. There is some disagreement over the likely effectiveness of interventions.....	12
3.6. Conclusion	12
A1 – Sample characteristics	13
A2 – Participant information sheet	14
A3 - Questionnaire.....	16

Executive summary

Background

In an effort to accelerate heat decarbonisation through heat pump adoption, SEAI's Behavioural Economics Unit are conducting research to better understand how to drive heat pump uptake in oil-heated homes that are considered 'heat-pump ready'. As part of this, structured online and phone interviews were carried out with 12 SEAI-registered heat pump installers in spring 2022 to gather their views on barriers and drivers of heat pump adoption in heat pump ready oil-heated homes, and on potential interventions to encourage further uptake.

Main Findings

The primary drivers of heat pump adoption mentioned by multiple installers were:

1. Heating costs (particularly rising oil prices)
2. SEAI grants
3. Comfort
4. Environmental concerns
5. Need to replace existing boiler

The primary barriers to heat pump installation mentioned by multiple installers were:

1. The upfront cost of installation
2. Complex grant paperwork (particularly in the case of emergency boiler replacement)
3. The hassle of installation
4. Low knowledge about heat pumps
5. The upfront cost of the technical assessment required by SEAI prior to installation

Installers were broadly supportive of a number of suggested interventions to further encourage uptake in target homes, of which a grant for replacing radiators, providing running cost comparisons and an oil boiler scrappage bonus were the most popular. However, concerns were raised about the potential for some interventions to backfire.

Conclusion

This report adds to the existing evidence base around behavioural factors affecting heat pump uptake and provides some insights specific to oil-heated heat pump ready homes. Recommendations for policy and further work are highlighted in the box below.

Recommendations

- Consider offering further grant support (e.g. oil boiler scrappage bonus; radiator replacement grant).
- Implement measures to keep heat pump operation costs competitive compared with oil.
- Improve availability and awareness of green loans.
- Simplify the SEAI heat pump grant process and consider offering a "fast track" grant route for homeowners who urgently need to replace their boiler.
- Target interventions at homeowners with older boilers.
- Conduct further research to profile subsets of homeowners and target messaging accordingly.
- Provide guidance and support for homeowners on how best to operate their heat pump.
- Pilot interventions before rolling out more widely, where possible.

1. Introduction and methodology

1.1. Background

A central component of Ireland's Climate Action Plan is the decarbonisation of the residential heating sector through heat pump deployment, with 400,000 heat pumps to be installed in existing dwellings by 2030. SEAI's National Heat Study¹ found that heat pump deployment is critical for rapid decarbonisation. Policy measures are already in place to encourage heat pump adoption – most notably a grant for heat pump installation that was increased to €6,500 in 2022. However, a lot more progress is needed, and a step change will be required in the annual number of heat pump installations to meet Ireland's carbon emissions reduction obligations and technology deployment targets.

To accelerate decarbonisation through heat pump adoption, SEAI's Behavioural Economics Unit are conducting research to better understand what interventions might be effective to promote heat pump uptake in oil-heated homes that are considered heat pump ready.² We focus on these homes for two main reasons:

- Switching oil-heated homes to heat pumps would be particularly beneficial in terms of emissions savings, given the carbon intensity of oil.
- Heat pump ready homes should require little additional work prior to heat pump installation, meaning costs and hassle should be lower for the homeowner, compared to homes that require improved building fabric before they are considered heat pumps compatible.

1.2. Aims of this research

A previous literature review identified behavioural barriers and motivators relevant to heat pump adoption, and some potential ways of addressing these.³ It is likely that these barriers and motivators are also relevant to our target subset of homeowners. However, given that some barriers such as the need for additional insulation should be less for these homes, it is less clear which remaining barriers are the most important to address and whether there are any other additional factors to consider.

For this reason, we conducted two pieces of research in 2022:

1. Structured interviews with SEAI-registered heat pump installers in spring 2022, the findings of which are the subject of this report, and
2. A survey of a sample of target homeowners, including a willingness to pay experiment, the results of which are summarised in a separate report.⁴

Heat pump installers have direct contact with homeowners making decisions about heating systems and are uniquely placed to provide insights into the barriers and drivers of heat pump adoption amongst these homeowners. Their own views may also influence the decisions made by their customers.

Findings from these interviews were used to inform the design of the subsequent homeowner survey, and results from both will be used to inform the design of interventions and to form policy recommendations.

¹ <https://www.seai.ie/data-and-insights/national-heat-study/>

² Homes that meet the minimum heat loss indicator criteria for SEAI's heat pump grant eligibility and therefore do not require further insulation or airtightness works.

³ SEAI (2020), Encouraging heat pump installations in Ireland: Strategies to maximise heat pump installation and the savings produced. <https://www.seai.ie/publications/Heat-Pump-Adoption.-Maximising-Savings..pdf>

⁴ SEAI (2023), Encouraging heat pump adoption in heat pump ready oil-heated homes: Insights from a survey and willingness to pay experiment with target homeowners.

1.3. Sample Selection

A sample of 12 interview subjects was drawn from SEAI's database of registered heat pump installers. Only installers that had an active online presence and mentioned heat pumps on their website were selected.

Installers were invited to participate through email.⁵ The final sample was selected to ensure a balance of:

- Geographical region – three installers were included from each of the four provinces;
- Specificity of expertise – a balance was achieved between installers who specialise in heat pumps only and those who also install boilers and/or other renewable systems (e.g. solar PV);
- Technical advisor status⁶ – a balance was achieved between installers who also provide a technical assessment service and those who don't.

A full breakdown of sample characteristics can be found in Appendix A1.

1.4. Data collection and analysis

Structured interviews were conducted online and by phone in March and April 2022 and were recorded for analysis.

The interviews were structured according to a questionnaire (available in Appendix A3) that was created to gather information and insights on the following:

- The installer's perception of potential barriers to and drivers of heat pump adoption, and which are the most relevant to heat pump ready oil-heated homes.
- The installer's perception of potential policies or interventions to encourage heat pump adoption in heat pump ready oil-heated homes.
- Any other information on potential issues being faced by the sector.

A deductive approach was taken to data analysis:

1. Key potential themes (e.g., barriers to heat pump adoption) were identified prior to conducting the interviews, based on previous research.
2. Detailed notes were created from each interview recording.
3. The prevalence of chosen themes was quantified based on the number of installers mentioning them.

This report was prepared using this quantified information, complemented by details from the notes to provide further context and nuance.

⁵ The information sheet sent to prospective participants is available in Appendix A2

⁶ As part of the SEAI grant application process, a technical assessment must be carried out on the dwelling to assess whether it is suitable for a heat pump and meets minimum heat loss criteria. Some heat pump installers are also registered as technical advisors who conduct this process.

2. Results

2.1. Perceptions of drivers and barriers to heat pump adoption

This section summarises the main drivers and barriers to heat pump adoption mentioned by interviewees, as well as some detail regarding how these may differ in heat pump ready oil-heated homes.

2.1.1. Drivers of heat pump installation

The factors mentioned by installers as being the main drivers of heat pump adoption are summarised in Table 1 and described in more detail below.

Table 1. Main perceived drivers of heat pump adoption

Driver	No. of installers
Heating costs	10
Grants	4
Comfort	4
Environmental concerns	4
Need to replace boiler	2
Health	1
Neighbourhood effects	1
Other retrofitting work	1
Futureproofing	1

Heating costs

Almost all installers cited energy costs as a main driver of heat pump adoption, with five making explicit reference to rising oil prices. However, one installer mentioned that this is a less of a driver for heat pump ready homes, that have relatively lower heating costs already.

Grants

Four installers mentioned grants explicitly as a driver of heat pump adoption. One installer said that media coverage of grant increases prompts homeowners to consider a heat pump and another emphasised that grants are the overriding factor above all other motivations.

When asked directly about perceptions of SEAI grants, half the installers mentioned that grants offered are generous. One installer said that they highlight the comparative generosity of Irish grants when dealing with customers.

Comfort

Four installers mentioned comfort as a driving factor of heat pump adoption. One installer referred to comfort as the “end product” of heat pump installation, particularly when combined with underfloor heating.

Environmental concerns

Four installers referred to environmental concerns as a driver of heat pump adoption. Two installers divided customers according to whether they were primarily driven by energy costs or environmental concern, with the latter making up a smaller proportion. Another mentioned that environmental considerations were more important for higher income households.

Need to replace boiler

Two installers mentioned the need to replace an old boiler as a main driver of heat pump adoption.

When asked directly about the time point at which homeowners switch to a heat pump, all installers mentioned that this more often occurs when their existing boiler is nearing the end of its life or has broken down. Homeowners who contact them after their boiler has broken down are looking for fast and easy options and heat pump uptake in these cases is constrained by the grant application process and the need, particularly in winter, to install a new system as quickly as possible.

Other drivers

Other primary motivating factors mentioned by installers included health concerns related to the age of the home's occupants, word-of-mouth and neighbourhood effects, carrying out other retrofitting work and a desire to adopt a futureproof heating system.

2.1.2. Barriers to heat pump installation

The factors mentioned by installers as being the main barriers to heat pump adoption are summarised in Table 2 and described in more detail below.

Table 2. Main perceived barriers to heat pump adoption

Barrier	No. of installers
Upfront cost of installation	10
Complex grant paperwork	3
Hassle of installation	3
Low knowledge about heat pumps	2
Upfront cost of technical assessment	2
Missing documentation	1
Inspection process	1
Low awareness of low-cost finance	1

Upfront cost of installation

Almost all installers mentioned the upfront cost of heat pump installation as a barrier to adoption, even after accounting for grants. Six installers specifically mentioned the cost of additional work needed to comply with Heat Loss Indicator requirements to be eligible for SEAI grants. One installer referred to the need for older homes to undergo costly electrical rewiring works.

When asked specifically about oil-heated heat pump ready homes, some installers acknowledged that these homes should face fewer additional costs besides the heat pump itself, but three mentioned homeowners being put off by unanticipated costs associated with upgrading plumbing and replacing radiators.⁷

Long and complex grant process

Three installers mentioned complex paperwork and red tape associated with SEAI grants as a main barrier to adoption, with one mentioning that this also leads some people to install heat pumps outside of grants schemes. This barrier was seen as particularly prominent in cases where the existing boiler has broken down and needs urgent replacing.

⁷ There was mention of particular technical difficulties associated with introducing piping in newer homes.

When asked directly about perceptions of SEAI grants, eight installers indicated that homeowners find the process long, complicated and discouraging. One installer mentioned the requirement of a 'live signature' (not scanned) on paperwork as delaying the process unnecessarily. Two installers said the current process was fine or had improved.

Hassle of installation

Three installers mentioned hassle of heat pump installation and associated works as a main barrier to adoption, including the extra time and hassle involved in additional works to meet SEAI technical grant requirements.

Lack of knowledge

Two installers referred to a lack of knowledge about heat pumps and what is involved in their installation as a main barrier to adoption. Misconceptions may exist in both directions – some homeowners think that installation is as simple as replacing a boiler and are less enthusiastic when they discover additional work is needed, while others may mistakenly believe their home is not suitable for a heat pump. One installer also mentioned that some homeowners find it difficult to operate their heat pump as it is a new technology to them and do not achieve expected energy savings, which in turn leads them to discourage others from installing a heat pump.

Upfront cost of technical assessment

Two installers mentioned the upfront cost of the technical assessment required prior to grant-funded heat pump installation, which is typically in the range of €600 to €700, as a primary barrier. In particular, the fact that the SEAI grant of €200 is conditional on subsequent heat pump installation was seen as off-putting for homeowners.

Other barriers

One installer noted missing documentation as being a prominent barrier to heat pump installation. If homeowners are unable to provide the technical advisor with documentation of previous retrofit works, advisors use default values (based on building age and type) in their assessment. These values tend to be conservative and can result in the property receiving a higher Heat Loss Indicator (HLI) value than expected.

Another installer spoke of the inspection process and the risk of grants being denied or revoked after work is completed. As a result, they discouraged homeowners from using a grant for more complex installations, out of fear of failing the inspection.

Finally, one installer mentioned lack of awareness of low-cost finance options as a potential barrier to heat pump adoption.

2.2. Perceptions of candidate interventions to increase heat pump uptake

In order to inform strategies to accelerate heat pump adoption in target homes, installers were invited to give their views about several candidate interventions, and to suggest any additional interventions they thought might be successful. Their views are summarised in Table 3 and described in further detail below.

Table 3. Installer views on likely effect of candidate interventions to increase heat pump uptake

Intervention	Positive effect	No effect/ Uncertain	Negative effect
Grant for replacing radiators ⁸	7	1	0
Further information about running costs	9	3	0
Oil boiler scrappage bonus	7	5	0
Unconditional grant for technical assessment	7	4	1
Group discount scheme	6	4	2

Grant for replacing radiators

Seven out of eight installers supported the idea of increasing the grant amount based on the number of radiators that need to be replaced. One installer suggested removing the requirement to change radiators for grant compliance altogether and offering a separate grant for replacing radiators. Another installer suggested giving a bonus for installing radiators that run at a lower temperature, maximising the efficiency of the heat pump. One installer argued that changing radiators is not perceived as a significant expense by homeowners and that providing an additional grant for radiators may not have a significant impact.

Further information about running costs

Most installers thought that providing homeowners with information about lifetime running costs and oil security issues would encourage heat pump adoption. One installer mentioned the success of their own information campaign promoting solar panels, which highlighted cost and benefits compared to oil boilers. Other suggestions included conducting webinars, roadshows and providing customised advice on suitability for a heat pump based on occupancy patterns and energy bills.

Three installers, however, did not think additional information would be effective, as other barriers are more significant.

Oil boilers scrappage bonus

Seven installers thought that giving homeowners an additional financial bonus to scrap their oil boiler would encourage further heat pump adoption. On the contrary, five installers thought that the existing grant is attractive enough and any additional bonus would not have a significant effect. One installer emphasised that such a scheme would be effective only if the process to obtain the bonus is simple and straightforward.

Unconditional grant for technical assessment

Seven installers thought that providing the €200 grant for the technical assessment to all homeowners, irrespective of whether they go on to install a heat pump, would boost overall levels of heat pump adoption. There was a perception that the current model is unfair, and that many homeowners are currently sitting on the fence as they are afraid of wasting their money.

However, five installers thought such a scheme would not be effective. One installer in particular argued that given the current shortage of technical assessors, such an intervention would create unsustainable demand that could adversely affect the quality of technical assessments and cause delays for genuinely interested homeowners.

⁸ A question about radiator grants was only included after the first few interviews.

Group discount scheme

Half the installers thought that a scheme whereby a group of neighbours or community members could avail of a discount through bulk purchasing would be effective for driving additional heat pump installations. Two installers were in fact already implementing schemes of this kind. One installer suggested targeting specific estates and towns to improve the chance of success.

Other installers were unsure this approach would work and raised concerns about feasibility and potential adverse effects. One difficulty was seen to be the fact that installation works and costs can vary greatly from home to home. A concern was raised that such schemes would put additional pressure on installers thereby leading to price inflation. Two installers raised a concern that a group discount scheme might create undesirable social pressure among neighbours.

Other interventions

Installers were also asked to put forward any other suggestions of interventions they thought would be effective at increasing heat pump adoption.

Two installers emphasised the need to simplify grant procedures, especially for homeowners who urgently need to replace their heating system. Suggestions included developing a “fast track” option for these homeowners, or allowing additional upgrades required for grant compliance to be undertaken *after* the heat pump is installed. Another installer suggested a scaled approach to grants whereby homeowners can claim a certain proportion of the full grant depending on how many requirements they have satisfied.

Other recommendations included improving green loan offerings and increasing awareness of these, as well as running workshops to train homeowners on how to operate their heat pumps. This last intervention would minimise the chance that homeowners have negative experiences that then go on to discourage other would-be adopters.

2.3. Supply side issues

Ten installers were also invited to give their views on supply side issues faced by the industry.

Installers were first asked if they thought there were sufficient training courses and educational supports available for the sector. Most installers indicated that existing courses and supports were sufficient, with courses offered by manufacturers on their latest technology being mentioned as helpful. However, three installers thought further training would be useful. One installer mentioned that the cost and time out of work for installers getting registered was an issue.

Installers were also asked if they had any problem recruiting qualified staff given increasing demand. Four installers said they were encountering some issues while the others did not. On a related note, two installers previously referred to a shortage of SEAI-registered technical advisors qualified to carry out the technical assessment as being one of the main barriers to heat pump adoption.

Finally, installers were invited to give their comments on SEAI’s inspection process. Three installers mentioned that inspection guidelines and products change regularly and that they need to be kept up to date. One installer raised a concern over plumbers being held responsible for mistakes made by electricians. Again, the issue of a shortage of technical advisors was raised.

3. Discussion

In this section we briefly discuss some of the main themes emerging from this research and make some recommendations on avenues to encourage heat pump adoption in oil-heated heat pump ready homes in Ireland based on the findings.

3.1. Financial factors remain central to heat pump adoption

Cost was easily the top factor according to the installers both in terms of driving heat pump installation and as a barrier to adoption. Rising oil costs and a desire to save money on heating bills was the most mentioned driver of heat pump adoption. On the other hand, the relatively high upfront cost of installing a heat pump was the barrier most mentioned by installers.

Given these findings, further **interventions to reduce the upfront cost** associated with installation may be effective for driving further uptake among target homeowners. Options to be considered include **a supplementary grant for scrapping an existing oil boiler, group discount schemes** or an **additional grant for replacing radiators** to cover the unanticipated hidden costs associated with this work. This last suggestion was supported by almost all installers asked. **Improving availability and awareness of green loan options** was also recommended.

It is also crucial that measures are taken to **ensure the long-term running costs of a heat pump remain competitive compared with fossil fuel alternatives**. This issue will have become increasingly pertinent since the research was carried out due to increases in electricity prices.

3.2. SEAI grant application processes may deter homeowners

On the whole, installers perceived SEAI heat pump grants as being a generous and effective incentive but warned that the current application process acts as a barrier to adoption. Uncertainty over receiving the grant for the required technical assessment may prevent homeowners from taking the first step. Complex paperwork may later cause them to abandon their application altogether. This issue is particularly heightened for so-called 'distress purchases' where a homeowner's existing boiler has broken down and needs replacing as soon as possible.

In light of this, **simplifying grant processes, removing uncertainty around grant payments and revisiting technical requirements** may be an effective way of encouraging further heat pump installations. Some installers particularly recommended establishing a **fast track process for homeowners who urgently need to replace their heating system**, to minimise the chance they get locked into another long-term fossil fuel solution. **Targeting homeowners with older boilers at risk of breaking down** may also be beneficial.

Another implication of complexity of grant processes is that there may be a significant number of homeowners installing heat pumps outside of SEAI grant schemes, and data on grant applications may not accurately reflect true rates of heat pump adoption across the country. This requires further research.

3.3. There is room for improvement on knowledge surrounding heat pumps

Some installers indicated that a general lack of knowledge about heat pumps may be causing problems at several points along the customer journey. Misconceptions about the suitability of their home for a heat pump may prevent some homeowners from looking into the technology in the first place and cause others to abandon the process when they face unanticipated additional costs. Poor understanding of how best to operate heat pumps post-installation was also highlighted as an issue, in line with prior research.^{9,10}

⁹ SEAI (2022), Consumers' ability to operate heat pumps and their controls: Insights from a survey and online experiment.

<https://www.seai.ie/publications/Consumers-ability-to-operate-heat-pump-control.pdf>

¹⁰ Roy, R & Caird, S (2013), Diffusion, user experiences and performance of UK domestic heat pumps. *Energy Science and Technology*, 6(2). <http://dx.doi.org/10.3968/g5278>

Evidently there is a **need for further education of homeowners at all stages of the customer journey, whether through general information campaigns or targeted interventions**. Previous SEAI research trialling targeted letters to homeowners in heat pump ready homes failed to drive measurable increases in uptake. However, there was an effect of behaviourally-informed messages on enquiries, suggesting that perhaps a targeted information approach could be beneficial if combined with other measures.

3.4. Primary motivations may vary across different homeowners

Most installers highlighted energy costs as the primary driver of heat pump enquiries. However, there was an acknowledgment that different subgroups may be driven by different motivations, with a smaller proportion of higher-income homeowners being primarily driven by environmental concern. One installer also pointed out that for our target sample of heat pump ready homes, energy bills are likely to be less of a concern.

This points to a need to further **profile target homes in terms of likely motivators, in order to deliver tailored interventions and messaging**. A subsequent survey of homeowners conducted by SEAI's Behavioural Economics Unit in September 2022 partly addresses this goal.

3.5. There is some disagreement over the likely effectiveness of interventions

Installers were generally positive about proposed interventions to promote heat pump uptake in oil-heated heat pump ready homes, but support was not unanimous, and concerns were raised about potential backfire effects in the case of group discounts and an unconditional grant for the technical assessment.

This highlights the need to **conduct further research to inform intervention design, and to pilot interventions and policies where possible before they are fully implemented**.

3.6. Conclusion

This research adds to the existing evidence base regarding heat pump uptake, with particular insights for oil-heated heat pump ready homes, which are the target of current SEAI research. Support was found for existing hypotheses regarding drivers and barriers of heat pump uptake, and additional issues identified, such as the unanticipated cost of changing radiators.

The generalisability of findings is limited by

- the relatively small sample size;
- the fact that the sample was restricted to SEAI-registered contractors only; and
- the fact that the interviews were carried out by a member of SEAI staff. Installers may have focused less on SEAI-related issues if they were carried out by a third party.

Nonetheless, the results provide a useful starting point for further research.

Appendix

A1 – Sample characteristics

Contractor ID	Area of work*	County	Province	Technical advisor
1.	3	Galway	Connacht	No
2.	1	Sligo	Connacht	Yes
3.	1	Galway	Connacht	No
4.	3	Cork	Munster	Yes
5.	3	Cork	Munster	No
6.	3	Cork	Munster	Yes
7.	3	Monaghan	Ulster	No
8.	2	Monaghan	Ulster	No
9.	1	Donegal	Ulster	No
10.	3	Wexford	Leinster	No
11.	2	Dublin	Leinster	Yes
12.	3	Louth	Leinster	No

*Heat pump specialist = 1; Heat pumps and boilers =2; Heat pumps, boilers and Solar PV= 3.

Characteristic	No.	
Position	Managing Director	11 installers
	Technical Manager	1 installer
Years of experience	Mean years of experience	18 years
	Minimum	10 years
	Maximum	40 years
Type of heat pumps	Air to water	12 installers
	Air to air	3 installers
	Geothermal/Ground source	9 installers

A2 – Participant information sheet



Promoting Heat Pump Uptake in Oil-Heated Irish Homes - Installer Interviews

You are being invited to take part in a research project conducted by the SEAI's Behavioural Economics Unit. Before deciding to take part, it is important you understand why the research is being done and what will be asked of you. Please take time to read the following information carefully and get in touch if anything is unclear or if you would like more information.

What is this study about?

To achieve targets for existing buildings set out in the Climate Action Plan, 400,000 heat pumps must be installed by 2030. Given the urgent need to meet the target, it is important to identify the barriers and drivers that may reduce or boost adoption. Oil-heated homes are currently responsible for most residential heating-related emissions and switching these homes to heat pumps could generate greater reductions. Thus, SEAI's Behavioural Economics Unit are conducting research to identify potential interventions that might promote heat pump uptake in "heat pump ready" oil-heated homes. As part of this research, we are talking to heat pump installers to get their perspective on the barriers and motivators homeowners face and what potential interventions might accelerate heat pump adoption in this type of home.

Why have I been invited to take part?

Having direct contact with homeowners and their customer journey experience, you have first-hand insights into the potential barriers and motivators different types of homeowner face when installing a heat pump. Your contribution to this research will be extremely valuable in helping us to find new ways to increase rates of heat pump adoption.

What will taking part involve?

The research involves a one-to-one interview, to be conducted either by phone or online with a member of SEAI's Behavioural Economics Unit. You will be asked some simple questions about your perspective of what works and what doesn't in encouraging homeowners to install a heat pump. The interview should last approximately 30 min, but the exact length will depend on how much you have to say about the topic.

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SEAI is funded by the Government of Ireland. Tá an SEAI maoinithe ag Rialtas na hÉireann.



The interview will be recorded and approved for use by SEAI. Any information you provide during the interview will be kept anonymous and will be used solely for research purposes to help us improve SEAI's programmes and provide insights for policy to boost heat pump adoption.

How can I find out more?

Please contact shalin.sajan@seai.ie with any further queries.

NOTES ON DATA PROTECTION

The legal basis for using the data you provide is that it is necessary for the performance of a task carried out in the public interest i.e., the delivery of research undertaken by a national authority.

The data controller for this research is SEAI. For any data protection enquiries, please contact the SEAI's Data Protection Officer by email: dataprotection@seai.ie

All identifying information will be removed from the transcript of your conversation. This includes, for example, any mentions of your name, age and place of residence. The data will not be sent outside the EU.

The following are your rights in respect of this data processing:

- The right to access your personal data
- The right to rectification if the personal data we hold about you is incorrect
- The right to restrict processing of your personal data
- The right to request erasure (deletion) of your personal data
- The right to data portability

You also have the right to lodge a complaint with the Information Commissioner's Office about our handling of your data.

March 2021

A3 - Questionnaire

Level of experience with heat pump installation

1. What is your position in the company?
2. How long have you been installing domestic heat pumps?
3. What kinds of heat pump do you install?
4. How much of your business is made up of domestic heat pump installations? Does your service include other heating systems such as boilers?

For those who install multiple heating systems

5. Do homeowners generally ask you for advice about what type of heating system to install?

Perspective on potential barriers to and drivers of heat pump adoption in heat pump ready oil-heated homes

6. In general, what would you say are the main reasons people install a heat pump? Have you found any approaches that work for encouraging them to install one?
7. In general, what would you say are the main barriers to people installing a heat pump?
8. For this project, we're particularly interested in people living in so-called heat pump ready homes that currently use oil to heat their homes, many of which are in rural areas. Would you say the barriers and motivators for heat pump adoption are the same for this type of homes, or are there any differences?
9. In your experience, do people install heat pumps when their existing boiler has reached the end of its lifespan, or some time before? How long do you think people spend making the decision to install a heat pump?
10. How do you think people perceive SEAI, the grants we offer and the grant process?

Perspective on potential policies or interventions to encourage heat pump adoption in heat pump ready oil-heated homes.

11. Do you think giving these homeowners a financial bonus to scrap their oil boiler would help encourage heat pump adoption?
12. Do you think a group discount scheme, where a group of neighbours/community members can come together and avail of lower prices, would help encourage heat pump adoption? Do you think such a scheme would be feasible – would you as an installer consider offering group discounts in this way?
13. Do you think an unconditional grant for the initial technical assessment would encourage heat pump adoption in these homes? (i.e., they get the grant even if they don't go on to install the heat pump)
14. Do you think providing people with more information about issues such as lifetime running costs and oil security issues would encourage adoption?
15. Is there anything else you think would be effective at encouraging uptake of heat pumps?

Issues faced by the sector

16. Do you think there are sufficient training courses/supports available for the sector? (i.e., for the contractors)
17. Is your organisation experiencing difficulties in recruiting staff?
18. Do you have any comments about SEAI's inspection process?



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