

Staying FiT

Learning from consumer experience of solar PV systems to inform the development of low-carbon policies

The logo for Citizens Advice, featuring the text "citizens advice" in white lowercase letters inside a dark blue speech bubble shape.

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advice**

Staying FiT

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About this report

In 2011, Consumer Focus, predecessor to Citizens Advice as statutory watchdog for energy consumers, published *Keeping FiT*.¹ That report looked at the consumer experience of installing microgeneration technologies using the Feed-in Tariff (FiT) that had been launched in 2010. In late 2014, Citizens Advice commissioned Future Climate and Purple Market Research to undertake follow-up research examining the consumer experience of solar PV systems, almost five years on from the introduction of the FiT. The full report can be downloaded here: [A review of consumer experience of solar PV systems](#).

The research considered the experience of purchasing, installing and operating solar PV for a larger, and more diverse, group of consumers than was evident in 2011.

This paper highlights the findings from the research and discussions during stakeholder workshops with installers, advice providers, FiT scheme administrators and social housing providers, and uses these to develop recommendations, not only for the future of solar PV but for microgeneration technologies more generally. It also draws on evidence in a recently published independent review of energy advice and redress, commissioned by Citizens Advice, to help put these findings in their wider context.

Overall, the consumer experience is demonstrated as a positive one. However, the research does identify some emerging trends that it would be advisable to try and reverse before they become too much of an issue. As important are the lessons for the development of concurrent low-carbon policies, such as the renewable heat incentive, which is evolving to include new finance mechanisms to broaden its reach so that a greater number of consumers can have access to these new heat technologies.

¹ Consumer Focus (2011), *Keeping FiT*, <http://bit.ly/1Gaq7ce>

Recommendations

Need: Remove upfront costs

Recommendation 1: Government should define provision of third-party finance for subsidised renewable heat and power systems, with clear advice on rights and responsibilities that meets the needs of consumers, mortgage providers and other interested parties.

Need: Accurate and up-to-date information and advice

Recommendation 2: Government, industry, Ofgem and advice providers should consider sharing an independently verified library of advice or agree signposts to reliable advice, with clear responsibilities for content updates, and for incorporating issues arising from complaints to industry and advice providers. This will ensure information provision is up-to-date, and enable and encourage investment in advice delivery through a range of channels rather than in content.

Need: Paying a fair price

Recommendation 3: Consumer awareness could be raised through mystery shopping and the publication of the range of quotes offered.

Recommendation 4: The Microgeneration Certification Scheme (MCS) and Renewable Energy Consumer Code (RECC) should consider how they can develop their products and services to be more responsive to consumers' needs in a way that will encompass all consumer groups. This should include an assessment of the way in which the services available to consumers are communicated.

Need: Informed about, and protected during, the installation process

Recommendation 5: Government, Citizens Advice, RECC and MCS should undertake a combined review of complaints to identify the main issues with the installation process, and more specifically the handover process, to develop advice to consumers on their rights and responsibilities, and to identify and address gaps in consumer protections. Particular consideration should be given to issues reported by consumers using third-party finance, where this is evident, as they are noticeably less satisfied than other solar PV users.

Need: Assistance to pay less, waste less and, where appropriate, use less

Recommendation 6: Advice and incentives in the installation of solar PV and of smart meters should be joined up to encourage uptake of energy efficient behaviour and fabric measures.

Need: maintain system efficiency

Recommendation 7: Industry and advice providers should, using a variety of communication channels, provide simple tips to consumers on how to check their system is working correctly. This should be enabled by the introduction of smart meters and data monitoring services.

Need: Social housing residents to benefit from onsite generation

Recommendation 8: Registered Social Landlords (RSLs) should engage tenants much earlier in a project to install microgeneration (including heat) in homes. They should seek to do this in a variety of ways, including meeting individual tenants separately and in groups to explain more about the systems, process of installation and how they can benefit, depending on the type of installation. Regular reminders as part of contact with residents around housing, energy and financial management could also help residents benefit from the installations.

Introduction

In 2011, Consumer Focus (now Citizens Advice) published *Keeping FiT*,² examining the early consumer experience of the microgeneration market. Then, as now, solar PV was by far the most common technology and in 2014, Citizens Advice commissioned Future Climate and Purple Market Research to undertake follow-up research, this time focusing solely on the consumer experience of solar PV.

In 2011, the early adopters of solar PV were typically from rural areas and in the highest socio-demographic groups. There was also a smaller, parallel group of social tenants whose landlords had taken advantage of the generous return offered by Feed-in Tariffs (FiTs) by installing solar PV.

Since then the domestic solar PV market has grown significantly, bringing down costs and expanding its reach beyond the early adopter households. Therefore, we analysed the consumer experience of solar PV by categorising households based on the way they acquired it:³

- Purchased outright
- Paid for the panels through finance
- Installed as part of a rent-a-roof scheme
- Installed by social housing provider

A balanced sample of households across different regions of England and Wales was used and data analysed by installation date as well as consumer group, to identify any differences and trends in the consumer experience over time.

All aspects of acquiring and living with solar PV were assessed, including overall satisfaction with the technology, information provided and the experience of the installation process, aftercare and the consumer benefits of the technology.

Overall, the consumer experience of solar PV systems is positive. However, the market has grown significantly since the introduction of the FiT, bringing down costs and expanding its reach to a wider range of households. This research brings us more up to date with the issues and points us in the direction of where improvements need to be made in order to ensure adequate and

² Consumer Focus (2011), *Keeping FiT*, <http://bit.ly/1Gaq7ce>

³ There was a small group of consumers that had moved into homes with solar panels already installed, but this was too small a sample size to draw any conclusions from.

ongoing consumer protection, and learn lessons for application to the Renewable Heat Incentive (RHI) and other low-carbon policies for households.

User groups

Citizens Advice wants to ensure that all consumers can access the benefits of new energy technologies and services regardless of their personal circumstances. This latest research shows a wider range of consumers have installed solar PV and demonstrates that certain areas of the solar PV experience are more of an issue for some consumers than others. To better understand why that might be the case, pen portraits were developed for each user group and are noted below:

Purchased system outright: The majority of this group were older people, with 71 per cent over the age of 55. They were likely to live in either a detached or semi-detached home and 50 per cent had installed their system in 2011 or earlier.

Purchased on finance: This group is generally made up of people under the age of 54 (67 per cent), and over half of them still have children living at home. Almost 70 per cent of them are living in urban locations but with an even split across detached, semi-detached and terrace homes. 43 per cent of this group have installed their systems in 2013 or later.

Rent-a-roof schemes: Most people in this group are in the 45 to 64 age range and 25 per cent of them still have children at home. In this group, the homes are mainly detached or semi-detached but with a fairly even split across the years of installation since 2011.

Social housing tenants: The majority of people in this group were older, with 65 per cent over 55 years old, but 30 per cent of the group still had children living at home. A big proportion, 55 per cent, had systems installed in 2013 or later.

Key findings

Some clear themes emerged, in relation to user groups, that will benefit from further work and thought about how to tackle some of the growing issues:

- Overall satisfaction is more lukewarm among those who have not purchased solar PV outright and, using analysis by date of installation, we are also seeing a weakening of satisfaction over time.
- Over a third of consumers purchasing on finance were approached speculatively (34 per cent). This increased from 2013.

- Finance consumers are less likely to be made aware of the cancellation period, the complaints procedure, and the types of guarantees and warranties.
- Those purchasing systems on finance are also generally less satisfied with their experience than other user groups; most notably with the installation and more specifically the handover process within that, and they are much less likely to recommend systems to friends and family.
- A greater proportion of rent-a-roof customers were not made aware of the Renewable Energy Consumer Code (RECC) before signing their contract, and 28 per cent of these consumers also failed to check if their installer was accredited by the Microgeneration Certification Scheme (MCS).

What next?

It is evident that overall consumers buying systems on finance are less satisfied than people in the other user groups.

The cause is unclear but this could be relevant for the RHI. That policy is seeing an increase in the number of installations using third-party finance, and may see more if the government officially expands the RHI policy to include a third-party finance offering.

Recommendation 1: Government should define provision of third-party finance for subsidised renewable heat and power systems, with clear advice on rights and responsibilities that meets the needs of consumers, mortgage providers and other interested parties.

Information and advice

There are a limited number of independent sources of information and advice, and those that do exist are not being used as much as they were in 2011. The most popular sources of information and advice that consumers use are general internet searches/Google, followed by information obtained from installers through a visit or leaflet. Only after these two do we see our first independent source cited - the Energy Saving Trust (EST) website or Energy Saving Advice Service (ESAS) telephone helpline.

Once accessed, the sources considered to be most useful by consumers were the installer visit or leaflet, general internet searches/Google and then the EST website or ESAS telephone advice line.

Consumers felt that most topics were well covered in the information provided but identified gaps on information relating to carbon emissions reductions, planning issues associated with installation of panels, Energy Performance Certificates (EPCs), how to maintain systems, and finance.

In our stakeholder groups, **many stakeholders saw this lack of access to independent advice as a potential problem**. As the take-up of solar PV and other microgeneration technologies becomes more widespread, with greater numbers of prospective consumers who are less informed or less able to find the time for detailed research, the need for independent advice will become even more important.

Different user groups need different information. Our research found a marked difference between groups in terms of their views of the quality and usefulness of the information and advice available. People who purchased their solar PV outright (50 per cent of whom had done so in 2011 or before) were much more satisfied (48 per cent very satisfied and 42 per cent satisfied) than those who had purchased on finance (23 per cent very satisfied and 57 per cent satisfied) or social housing tenants (22 per cent very satisfied and 35 per cent satisfied). This trend continues throughout the solar PV consumer journey.

The difference in the views of the groups on the quality and usefulness of the information is likely due to the differing demographics of each group.

Key findings

- Customers feel that they need more, and clearer, information on EPCs, planning issues and carbon emissions reductions, as they relate to solar PV.
- Customers who purchase their solar PV outright, who tend to be older people living in larger homes, are much more satisfied with the availability of advice than other consumers.

What next?

There is a need to improve the advice and information available in this sector for consumers who may be less energy literate, have less time or will want to know about different payment options.

With Government policy likely to lead to greater numbers of microgeneration and heat technologies being installed in homes across the nation, advice with consumer needs at the heart should be treated as a priority area for action.

Recommendation 2: Government, industry, Ofgem and advice providers should consider sharing an independently verified library of advice or agree signposts to reliable advice, with clear responsibilities for content updates, and for incorporating issues arising from complaints to industry and advice providers. This will ensure information provision is up-to-date, and enable and encourage investment in advice delivery through a range of channels rather than in content.

The sales process

The key drivers for consumers choosing to install solar PV remain primarily financial but the 2015 research has found that this is changing over time. In 2011, people were generally attracted to installing solar PV panels due to the financial benefit presented by the FiT. With the reduction of the generation tariff, it is perhaps not surprising that motivations have shifted and we found that, while the tariff remains the top driver for installing solar PV, the 2015 research demonstrates that **environmental motivations have become a more significant factor**. In the case of rent-a-roof users, who do not benefit from the export or generation tariff aspects of the FiT but can benefit from on-site savings, rising electricity prices are now the main reason for them choosing to join such a scheme.

Satisfaction with the sales process is declining over time. Among those who identified themselves as very satisfied, there has been a drop from 60 per cent in 2011 to 44 per cent in 2015. Those people who purchased their solar PV on finance tend to be less satisfied overall and more likely to express dissatisfaction with the sales process overall.

The number of consumers being approached speculatively has risen over time. Almost 40 per cent of those buying solar PV systems in 2014 or later were approached in this way, with those buying systems on finance the largest group. It is worth noting that **66 per cent of customers approached speculatively went on to choose that installer for their system**. This is cause for concern to Citizens Advice as it may signify the use of high-pressure doorstep selling.

It is common practice for most organisations to recommend that customers get at least three quotes when making important purchases. Worryingly, our research found that **one in four customers are only obtaining one quote**. Of the different user groups, it is the rent-a-roof users that tend not to seek alternative quotes. This is perhaps understandable as they are less exposed to the costs, but we understand rent-a-roof options are available. Of the other user groups, most are still not shopping around, with an average of 2.4 quotes being sought, which is still worrying. Prices can range from £5,000 to £8,000 for an average 4 kWp system.⁴

While most people seem to be choosing a particular installer for being experienced and knowledgeable (44 per cent), the second biggest reason for

⁴ EST, <http://www.energysavingtrust.org.uk/domestic/content/solar-panels> [accessed 10/06/15]

picking a particular installer is because they are friendly and helpful (42 per cent). This could be particularly problematic when combined with consumers only getting one quote.

Quality assurance is a key part of the FiT scheme, with installers needing to be registered with MCS. We found that most consumers took it on trust that their installer was registered with MCS - 62 per cent of all users either saw the logo on company materials, were advised by the installer of their MCS registration or were given information on MCS from the installer directly. **Only 18 per cent of people checked the MCS website to verify that their installer was registered with the scheme.** More concerning is the fact that 28 per cent of rent-a-roof users did not check at all. This check is important as MCS does take action against rogue traders, and there have been incidences of misleading use of the badge.

The consumer code for small-scale renewable energy has been in place since 2006. Previously called the REAL Assurance Code, it was renamed the Renewable Energy Consumer Code (RECC) in 2013 and sets out best practice for installers and salespeople around the selling and installation of microgeneration (backed by the Trading Standards Institute). Our survey shows that consumer awareness of RECC is not very high, with **nearly a third of consumers unsure if they were made aware of RECC by their installer.** However, 40 per cent said they were made aware but again, awareness levels are much lower amongst rent-a-roof users. This is concerning because in 2013, 15 per cent of complaints to RECC were about installers who were not members of the scheme. In those circumstances RECC are unable to help, and customers are unlikely to be able to claim the FiT on which they have based their decision to invest in solar PV.

RECC (and previously REAL) sets out requirements regarding the provision of warranties, guarantees and insurance-backed guarantees in case an installer goes out of business. Some 81 per cent of consumers were made aware of the guarantees and warranties, however, these levels are lower for those who purchased on finance, with 18 per cent of users explicitly stating they did not receive an explanation and a further 11 per cent saying they were not sure. In addition, 19 per cent of rent-a-roof users seemed unsure of whether they had received this information.

The number of installers taking the time to explain third-party, insurance-backed guarantees is even lower, with a quarter of all users not advised and a further quarter unsure.

RECC requires that consumers be advised prior to a contract being signed about the cooling-off period in which they can cancel their order. Three-quarters

of consumers were advised but of those users who explicitly stated they were not told of the cooling-off period, the highest group were those using third-party finance (16 per cent).

There is a complaints procedure set out by RECC but the research found that less than half of all consumers were advised about it. The figures were again particularly high amongst consumers using third-party finance, with 59 per cent either not advised or unsure.

Key findings

- Financial returns remain the main motivation for investment in solar PV, but environmental motivations are increasingly significant. Rent-a-roof consumers mostly cite rising electricity prices as attracting them to solar PV. For those in this group installing after 2013, it was the most important factor.
- Customers are not checking installer details with the MCS and RECC schemes but instead are taking it on trust with their installer that they are registered.
- Of the main reasons consumers cited for picking an installer, only 39 per cent said it was because they had MCS and RECC accreditation.
- Customers are not getting three quotes for purchasing solar PV systems, and those people on rent-a-roof schemes are most likely to only get one quote.
- A quarter of consumers are not made aware of the cooling-off period before signing a contract, which is an important consumer protection for such high-value goods.

What next?

Recommendation 3: Consumer awareness could be raised through mystery shopping and the publication of the range of quotes offered.

Recommendation 4: MCS and RECC should consider how they can develop their products and services to be more responsive to consumers' needs in a way that will encompass all consumer groups. This should include an assessment of the way in which the services available to consumers are communicated.

Installation

Overall satisfaction with the installation process is high, with **89 per cent of all users very satisfied or satisfied with their solar PV installation**. However, these levels of satisfaction are falling over time and the number of people expressing explicit dissatisfaction has risen slightly. It is concerning that the highest number of people neither satisfied nor dissatisfied occurs among those who installed in 2014 or later.

Social housing tenants and those purchasing on finance are generally less satisfied than other users, with only 25 per cent of those on finance very satisfied in comparison to those people buying outright or on rent-a-roof schemes, which are 58 per cent and 54 per cent respectively in terms of being very satisfied.

The ability for microgeneration installations to encourage other energy saving measures is a clear area of interest to Citizens Advice, not least because energy efficiency can give consumers the ability to better manage their bills. We wanted to understand what actions people had taken to improve the energy efficiency of their homes before and after they had installed solar PV.

Consumers were asked what energy efficiency measures they had taken in the year before and the year after installation. The results for measures installed prior to solar PV being installed are high, and our stakeholder group did not feel they tallied with the energy efficiency installation rates seen through schemes such as the current Energy Company Obligation (ECO) and the previous Carbon Emissions Reduction Target (CERT). However, it is important to note that people claim to have changed their behaviour with regard to energy use since their systems had been installed (44 per cent), and people are also monitoring their actual energy use (37 per cent for monthly and 29 per cent for weekly).

Those living in social housing were less likely to have changed their behaviour when it came to energy use, with only 20 per cent claiming to have consciously done so, set against 47 per cent of users who purchased outright and 47 per cent of rent-a-roof users.

The lowest levels of satisfaction in the installation process came out against the handover process, although it was not significantly lower than the other aspects. But when you look at this **over time, levels of satisfaction with the handover process are dropping and levels of dissatisfaction are rising - from 3 per cent in 2011 to 9 per cent in 2015**. Here again, we see the lowest levels

of satisfaction being recorded among those purchasing on finance and social housing tenants. Even more concerning is that these groups are expressing greater levels of dissatisfaction than other groups.

Key findings

- The data shows that the handover process is the one aspect of the installation process where satisfaction is declining over time. Here, we also see that explicitly stated dissatisfaction has increased.
- This is an area in which those buying their systems on finance are clearly less satisfied, especially with the handover process.
- While the results concerning energy efficiency and behaviour change are encouraging, there are some questions around the validity of the consumer responses.

What next?

Clearly improvements can be made to the way in which installations are handed over to customers. Those consumers purchasing on finance are the least satisfied with this process and further work should be undertaken to find out precisely what the issues might be, and how they could best be rectified.

The feedback from consumers on energy efficiency, while slightly conflicting with stakeholder experience, is useful nonetheless and we should be considering what action could be taken to further encourage energy efficiency, energy demand reduction and better matching of demand to generation of solar PV systems.

Recommendation 5: Government, Citizens Advice, RECC and MCS should undertake a combined review of complaints to identify the main issues with the installation process, and more specifically the handover process, to develop advice to consumers on their rights and responsibilities, and to identify and address gaps in consumer protections. Particular consideration should be given to issues reported by consumers using third-party finance, where this is evident, as they are noticeably less satisfied than other solar PV users.

Recommendation 6: Advice and incentives in the installation of solar PV and of smart meters should be joined up to encourage uptake of energy efficient behaviour and fabric measures.

System performance and maintenance

General satisfaction with the performance and maintenance of systems has fallen over time, from 94 per cent in 2011 to 89 per cent in 2015. While this might not seem particularly marked, if we look at the reduction in consumers being very satisfied then the drop is greater - from 64 per cent in 2011 down to 49 per cent in 2015.

When this is split down further, we can see that the lukewarm reception given to solar PV systems is much more significant among those users who did not purchase their systems outright. **Those on finance and social housing tenants report the lowest levels of satisfaction with their systems, while rent-a-roof users and social housing tenants also express greater levels of explicit dissatisfaction.**

Looking at specific aspects of system performance, the main issues identified are the quality of information and advice on using and maintaining their system, and the aftercare provided by installers. Aftercare is a bigger issue for those with systems installed in 2012 or earlier, indicating that people with older systems may have had more cause to require aftercare and so had more experience of it. However, satisfaction from 2014 onwards is only 65 per cent, leaving over a third of people with new systems unhappy with aftercare, which is concerning.

Social housing tenants are the least satisfied with the different elements of performance and support for their system. Exploring the data further does seem to suggest that a lack of engagement throughout the process has resulted in lower levels of satisfaction overall.

Despite the perception that solar PV is a technology you just plug in and leave, checking solar PV systems as part of an effective maintenance regime is important. It is positive that 52 per cent of users report that they check their generation meter and 49 per cent check their electricity bills (multiple answers allowed). However, 10 per cent have left it to their installer to check, inviting them back to do so, and another 10 per cent haven't checked at all.

Recommendations from family and friends are an important advertisement for solar PV. However, since our 2011 report, **the number of people likely to recommend solar PV to someone they know has dropped from 91 per cent to 79 per cent**. There has also been a corresponding increase in consumers that are unlikely, very unlikely or unsure about recommending solar PV - from 9 per cent in 2011 up to 21 per cent in 2015. This is concerning as our research found that **friends and family are a trusted source of information and recommendation, with 46 per cent of those installing solar PV having done so based on recommendations** - in more than one home in some cases. Recommendations from friends and family clearly have an effect.

Key findings

- Little information is provided to consumers on warranties and insurance-backed guarantees. These are important protections and could have benefits to installer reputation so greater transparency of their use should be encouraged.
- It seems that consumers are unaware of the simple checks they can make themselves to make sure their system is working correctly, and of how they might be able to change their behaviour to maximise their own use of the electricity generated by it.
- The decline in the number of people likely to recommend solar PV is very concerning when set against the number of those who have been positively influenced by such recommendations.

What next?

Recommendation 7: Industry and advice providers should, using a variety of communication channels, provide simple tips to consumers on how to check their system is working correctly. This should be enabled by the introduction of smart meters and data monitoring services.

Social housing

It was important to Citizens Advice to get a good cross-section of data on the consumer experience of solar PV, so we undertook additional research with social housing tenants using telephone interviews. The data has been incorporated into the main dataset but there are some themes that are clearly different with this user group, so we felt these worth exploring further.

Social housing tenants did not generally access information or advice on solar PV before it was installed, and further discussions with stakeholders suggested that, in many cases, tenants were not consulted or engaged with the process and so were not necessarily provided with information on solar PV.

Therefore, we asked tenants what type of information they would have liked prior to installation. The majority of people were most interested in the electricity bill savings (34 per cent), effective use of the system (26 per cent) and technical details (21 per cent). Despite this, there was still a large group that said they didn't need or want any more information (47 per cent).

With regards to the installation process, the general satisfaction among social housing tenants is high, although lower than among users in general. Looking at the different aspects of the installation process, satisfaction is also lower than for all users.

As mentioned earlier, we found that social housing tenants were less likely to have changed their behaviour with regard to energy use once their system was installed. While 20 per cent said they had consciously changed their behaviour, this is low when compared with consumers who bought systems outright - 47 per cent of whom claimed to have changed their behaviour.

An interesting point is that 58 per cent of tenants said they were consulted during the installation of their solar PV system but only 29 per cent of tenants considered themselves informed about solar PV once it was installed. This points to serious shortcomings with the handover process and the information provided to tenants, who would be expected to make the best use of these systems.

It is disappointing to note that only half of social housing tenants feel confident in using their solar PV systems. It is likely that this is a consequence of a lack of information given to them throughout the process of installation and handover, as well as a general lack of engagement with it. The stakeholders

consulted as part of this research felt strongly that tenants did need to be much more engaged by social housing providers from the beginning. They also felt that ongoing information and advice on using solar PV and maximising the benefits should be provided by social housing staff that interact with tenants on a regular or periodic basis; this advice provision should be embedded throughout social housing providers.

Given the lack of engagement tenants have with their solar PV systems, it is not surprising that almost a third have not checked that their system is working. Social landlords will generally have remote monitoring, but that does not ensure that tenants are engaged with the system or making the best use of it.

A positive result is that 66 per cent of tenants reported noticing that their bills had lowered. This is despite 20 per cent of them stating they do not check their bills and a large amount having not consciously changed their behaviour concerning energy use.

Key findings

- Social housing tenants expressed the greatest levels of dissatisfaction with the quality and usefulness of information available on solar PV. This suggests that little thought has been given to the type, and delivery of, information provided to tenants.
- Social housing tenants are not engaged with the process of solar PV installation prior to the decisions being made to install systems in their homes.
- Nor are they engaged on how to use their systems effectively, or how their actions can affect overall energy consumption in the home.
- Electricity bill savings, effective use of their system and more technical details are at the top of the list of information tenants would like more of.
- There is a lack of ongoing engagement with social housing tenants regarding their solar PV systems or when new tenants move into homes with solar PV already installed.

What next?

Recommendation 8: Registered Social Landlords (RSLs) should engage tenants much earlier in a project to install microgeneration (including heat) in homes. They should seek to do this in a variety of ways, including meeting individual tenants separately and in groups to explain more about the systems, process of installation and how they can benefit, depending on the type of installation.

Regular reminders as part of contact with residents around housing, energy and financial management could also help residents benefit from the installations.

Conclusions

Overall, this latest survey into the consumer experience of solar PV systems shows that consumers have a very positive experience of installing and living with this technology. However, we are seeing that as it becomes more mainstream, and as people live with it for longer periods of time, some concerns are emerging.

While none of the issues identified are, as yet, of a significant size, the direction of travel does show that they have the potential to grow further still, if left unchecked, and have the ability to cause significant consumer detriment to certain groups of consumers. Therefore, it is important to reverse these trends to minimise the negative impact on consumers as well as the reputation of good installers and systems.

The findings of this report also have important lessons for the renewable heat industry as it begins to grow. Arguably, allowing the same issues to develop with renewable heat could have more catastrophic impacts for consumers, given the importance of providing affordable and reliable heat in homes, particularly for more vulnerable consumers.

We believe that the recommendations in this report, if acted upon, will help to reverse the negative trends we are beginning to see and build upon the positive experiences that many consumers are clearly having.