

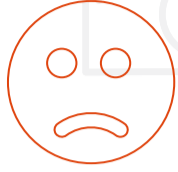
How citizens decide to heat and cool their homes

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Current Systems

Most use **gas or electricity**



People are most unhappy about the **price of fuel**. Users of **oil and electricity** are the unhappiest



People like **comfort levels** most, followed by **ease of use**, and **reliability**

Information Sources

Information comes from professionals (49%), the internet (29%), and relatives & colleagues (25%)



Spanish people, Rural people, and those aged 41-59 are the most likely to go to professionals



Those most likely to use the internet are British, Polish, young, and have an above average income

Purchasing Criteria

When making a decision, people care most about

1
comfort level

2
Total economic savings

3
initial investment

Awareness



68% of this sector is aware of **Renewables for Heating and Cooling**

Men are more aware than women



Perceived attributes

- 1** eco-friendly
- 2** require high investment
- 3** imply high savings

Perceived adequacy

The least likely to change are **Women**, people living in **urban centres**, and those in **multi-family dwellings**

Most aware people would consider renewables

Renewables for heating and cooling

Willingness to pay

50% would pay more

The most likely to pay more are Young Men with a university education



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