

RISE

Retrofit information,
support & expertise

Property and Household Identification Data Sources

Quick guide

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Introduction

This guide aims to assist local authority (LA) officers, registered provider (RP) staff members, delivery partners and other eligible parties with the delivery of retrofit projects. It describes approaches to collate data and identify potential properties that are suitable for funding. Understanding the types of different data sources will help you to identify eligible properties.

Using this guide in the initial stages of project development will support the targeting of properties and help you understand the importance of data in developing a business case.

Disclaimer

This quick guide has been prepared to support organisations developing retrofit schemes across multiple houses. Section 1 signposts users to information sources that will be useful to those working in a social housing context, section 2 will be useful to those developing schemes that make owner-occupied or private rented housing homes more energy efficient. The two different scheme types are presented separately to reflect the funding eligibility of the Warm Homes Social and Local grant schemes.

Publicly available data sourced from several different websites is listed throughout this document. The methodology of how these datasets are formulated is beyond our control and it is possible that changes are made to the boundaries, lower layer super output area (LSOA) inclusion, or calculation methods.

We have based this guidance on the requirements of the government funding at the time of issue. Amendments to policy can be instigated by the funder throughout the lifecycle of the programme. It is the prospective applicant's (PA) responsibility to check the data from these sources still meet the guidance issued by the funder if changes are instigated during project delivery.

Definitions

Owner occupied housing is a form of housing tenure in which a person, called the owner-occupier, owns the home in which they live

Private housing is a form of housing tenure in which a person or organisation owns a property that is not social or affordable housing and is not the owner's main residence. When rented, it is sometimes referred to as private rented housing.

Social housing is a form of housing tenure in which a property is provided by local authorities or registered providers of social housing for people on low incomes or with particular needs.

Energy Performance Certificate (EPC) is a certificate that outlines how energy efficient a property is. They are mainly created when selling a property, renting out a property or building a new property.

An EPC contains:

- Information about a property's energy use and typical energy costs
- Steps to improve a property's energy efficiency and save money

An EPC gives a property an energy efficiency rating from A (best) to G (worst) and is valid for 10 years.

Index of Multiple Deprivation (IMD) is a comprehensive measure used to assess relative deprivation in small areas. It combines data from seven different domains of deprivation: Income, employment, education, skills, and training, health and disability, crime, barriers to housing and services, and living environment. These domains are weighted and combined to produce an overall deprivation score for each area, allowing for comparisons between different areas.

Index of Multiple Deprivation Income Deciles (IMD:ID) focus' specifically on the income domain of the IMD. Areas are ranked based on their income deprivation scores and then divided into ten equal groups, or deciles. Each decile represents 10% of the population, with Decile 1 being the most income-deprived and Decile 10 being the least income-deprived.

IMD and IMD income deciles are not the same.

Data sources for those delivering retrofit on social housing

Criteria	Highest Confidence Data Source(s)
<p>The applicant applying to deliver government funding</p> <p>Depending on the funding scheme, applications are accepted from LAs, combined authorities, net zero hubs, and RPs of social housing. No applicants are permitted for properties outside England.</p>	<ul style="list-style-type: none"> A local authority is defined under Section 33 of the Local Government Act A list of registered providers of social housing can be found here: <u>Registered providers of social housing – updated monthly</u> (GOV.UK)
	Other Data Source(s)
Criteria	Highest Confidence Data Source(s)
<p>Energy Performance prior to retrofit</p> <p>Warm homes schemes aim to improve energy performance through retrofit measures and target EPC D-G properties to improve their performance to EPC C.</p>	<ul style="list-style-type: none"> EPC data up to and including 31st October 2024 is available for individual households here: Energy Performance of Buildings Data England and Wales - <u>Energy Performance of Buildings Data England and Wales</u> (epc.opendatacommunities.org) EPC data is a strong starting place but can contain outdated data and duplications and 40% of domestic properties have never had an EPC <p>A bulk download is possible if you register with the Open EPC Communities webpage. The data is downloaded into a .csv file which can then be filtered, checking for below EPC C and for homes where the main heating system is not gas. License notes are included in the download to ensure the data processors are compliant with the General Data Protection Regulations – these will need to be checked by each user.</p>

	<p>Other Data Source(s)</p> <ul style="list-style-type: none"> • Various eligibility criteria exist for private rented properties to exclude elite capture of public funding • Housing stock modelling software can produce lists of eligible properties by EPC band and heating system type
Criteria	Highest Confidence Data Source(s)
<p>Property tenure</p> <p>Social housing</p>	<ul style="list-style-type: none"> • Registered providers/social landlords will be able to provide details of social housing in a local authority area • Registers of Houses of Multiple Occupancy • LA landlord registers
	<p>Other Data Source(s)</p> <p>LSOA-level data (but not at individual household level) is available for the 2011 census here: KS402EW (Tenure) - Nomis - Official Census and Labour Market Statistics (nomisweb.co.uk)</p> <p>Open data communities also provides tenures for properties with EPCs where available:</p> <p>Energy Performance of Buildings Data England and Wales (epc.opendatacommunities.org)</p>
<p>Mains gas supply</p> <p>On and off gas properties</p>	<p>An estimation of the number and percentage of domestic properties not connected to the gas network in 2023, by LSOA, is available here:</p> <p>Subnational estimates of properties not connected to the gas network</p>

Other Data Source(s)

Postcodes with absolutely no gas can be found here:

- **Non-gas map** (nongasmap.org.uk)

N.B., caution should be exercised when using this data source as we have been advised that if even one business or domicile is connected to the gas grid within a postcode, that postcode will be excluded. EPC certificates ordinarily state if the property uses gas central heating and EPC opendata communities includes an off gas flag in their EPC data downloads.

Data sources for those delivering retrofit on private rented and owner-occupied housing

Criteria	Highest Confidence Data Source(s)
<p>The applicant applying to deliver government funding</p> <p>Depending on the funding scheme, applications are accepted from LAs, combined authorities, net zero hubs, and RPs of social housing. No applicants are permitted for properties outside England.</p>	<ul style="list-style-type: none"> • A local authority is defined under Section 33 of the Local Government Act. • A list of registered providers of social housing can be found here: <u>Registered providers of social housing – updated monthly</u>
	<p>Other Data Source(s)</p>
Criteria	Highest Confidence Data Source(s)
<p>Household occupant</p> <p>Low-income households are defined as those in which the annual gross income is <£36k for WH:LG. Such households are more likely to be in fuel poverty than those with higher income.</p> <p>Grant Recipients may include households with</p>	<ul style="list-style-type: none"> • Households residing within IMD income deciles (IMD:ID) 1-2, will be eligible for the Warm Homes: Local Grant without needing an income verification check” <ul style="list-style-type: none"> – IMD data at Lower Layer Super Output Area (LSOA) level is available from File 7 here: <u>English indices of deprivation 2019</u> (GOV.UK). Under the Warm Homes schemes, housing in the most income deprived neighbourhoods will be automatically eligible for upgrades, provided they are properties with an Energy Performance Certificate (EPC) rated D or below. LAs are encouraged to consider these areas in their applications and to achieve economies of scale by upgrading multiple households in concentrated areas of fuel poverty – Data on Council Tax reductions will be available to LAs. Such data often includes income and benefits

total incomes above the £36,000 threshold in certain areas, where higher housing costs mean the resultant household income after housing costs is likely to be below £20,000.

For more information on Alternative Eligibility Methodologies, please refer to the warm homes guidance.

Warm Homes: Local Grant

- Data on free school meals for low-income reasons – LAs have access to data portals hosted by the Department for Education to assess eligibility for free school meals. Eligibility is dependent on receipt of certain benefits.
- Data on means tested benefits (MTB) – LAs may have an existing relationship with the Department for Work and Pensions (DWP) to check benefits received by a household. This data may be used to target eligible households but should be used in conjunction with other ‘eligibility’ data sources (council tax reductions data, free school meals data, etc). Data on housing benefits – LAs should have access to a range of data in relation to benefits. Cross-referencing this with EPC data should provide strong subsets for targeting
- Fuel poverty data at the LSOA level for 2021 (latest data) is here: **[Sub-regional fuel poverty data 2022 \(GOV.UK\)](#)**
- Fuel poverty definition – low income (£36k), low EPC (D-G)
- Note that it may be possible for a household to have income in excess of £36,000 and still be at risk of fuel poverty. A viable way of targeting low-income households likely to be in fuel poverty would be to use the criteria for routes 1 (direct low-income verification) and 2 (low income proxies) set out in the guidance for the Energy Company Obligation flexibility guidance for Local Authorities

Other Data Source(s)

- Annual gross income <£36k. Data available for Middle Layer Super Output Areas here for **[year ending 2020: Income estimates for small areas, England and Wales - Office for National Statistics](#)** (ONS.GOV.UK)
- Data on household income at the household level only known for income by His Majesty's Revenue and Customs
- Data on means-tested benefits (MTB) at household level known by DWP
- Applicants are encouraged to use more than one verification method for income
- There are some subscription services that could identify eligible homes. More innovative approaches such as advanced statistics and machine learning (e.g.,

	<p>Experian or CACI Paycheck), where LAs can demonstrate these will target low-income households, are encouraged</p> <ul style="list-style-type: none"> • LAs will also be asked what additional steps they will take to target potentially eligible households. Such steps include, but are not limited to, use of health-based referrals, charity-based referrals, deprivation statistics, EPC data and local knowledge to target specific areas within their LA boundary. For example, according to ECO Flex Route 2, referrals can include: <ul style="list-style-type: none"> – Referrals from energy companies or Citizens Advice Bureau – Proof of specific health conditions that make the person vulnerable to the cold (cardiovascular, immunosuppression etc) – A householder supported by a LA run scheme, that has been named and described by the LA in their Statement of Intent as supporting low income and vulnerable households for the purposes of National Institute for Health and Care Excellence Guideline – Proof of energy supplier debt (within last 3 months) <p>Some housing stock assessment software services may include access to income data (e.g. Experian) alongside energy performance data, and could therefore be a viable route to target suitable homes. IMD income deciles 3-5 are areas where the postcodes are not automatically eligible like IMD income decile 1-2, but they still include areas below the English median level of income deprivation. Use of this proxy could be a good way of initial targeting to identify areas of interest. You will need to combine IMD income decile 3-5 data with other household income and fuel poverty data to provide assurance that the households are in fuel poverty.</p>
Criteria	Highest Confidence Data Source(s)
Energy Performance prior to retrofit	<ul style="list-style-type: none"> • EPC data up to and including 31st October 2024 is available for individual households here: Energy Performance of Buildings Data England and Wales - Energy Performance of Buildings Data England and Wales (epc.opendatacommunities.org)

<p>Warm homes schemes aim to improve energy performance through retrofit measures and target EPC D-G properties to improve their performance to EPC C.</p>	<ul style="list-style-type: none"> EPC data is a strong starting place but can contain outdated data and duplications and 40% of domestic properties have never had an EPC <p>A bulk download is possible if you register with the Open EPC Communities webpage. The data is downloaded into a csv file which can then be filtered, checking for below EPC C and for homes where the main heating system is not gas. License notes are included in the download to ensure the data processors are compliant with the General Data Protection Regulations – these will need to be checked by each user.</p> <p>Other Data Source(s)</p> <ul style="list-style-type: none"> Various eligibility criteria exist for private rented properties to exclude elite capture of public funding Housing stock modelling software can produce lists of eligible properties by EPC band and heating system type
<p>Criteria</p>	<p>Highest Confidence Data Source(s)</p>
<p>Property tenure</p> <p>Owner occupied and private tenure housing</p>	<p>Other Data Source(s)</p> <p>LSOA-level data (but not at individual household level) is available for the 2011 census here: KS402EW (Tenure) - Nomis - Official Census and Labour Market Statistics (nomisweb.co.uk)</p> <p>Open data communities does also provide tenures for properties with EPCs where available - Energy Performance of Buildings Data England and Wales (epc.opendatacommunities.org)</p>

Criteria	Highest Confidence Data Source(s)
<p>Mains gas supply</p> <p>On and off gas properties</p>	<p>An estimation of the number and percentage of domestic properties not connected to the gas network in 2023, by LSOA, is available here: <u>Subnational estimates of properties not connected to the gas network</u></p> <p>Other Data Source(s)</p> <p>Postcodes with absolutely no gas can be found here: <u>Non-gas map (nongasmap.org.uk)</u></p> <p>N.B., caution should be exercised when using this data source as we have been advised that if even one business or domicile is connected to the gas grid within a postcode, that postcode will be excluded. EPC certificates ordinarily state if the property uses gas central heating and EPC open data communities includes an off-gas flag in their EPC data downloads.</p>
Criteria	Highest Confidence Data Source(s)
<p>Fuel Type</p>	<p>Estimated proportion of dwellings with an Energy Performance Certificate by main method of heating in central heating, available here for financial year 2018-2019 (by local authority and LSOA, respectively) <u>LSOA estimates of properties not connected to the gas network</u></p> <p>Other Data Source(s)</p> <p>Estimated proportion of dwellings with an Energy Performance Certificate by main fuel type or method of heating used in central heating. <u>Estimated proportion of dwellings with an Energy Performance Certificate by main fuel type or method of heating used in central heating</u></p>

Data sources to support wider project objectives

Eligibility Criteria	Highest Confidence Data Source(s)	Other Data Source(s)
Occupier character demographics		<ul style="list-style-type: none"> • LSOA-level data (but not at individual household level) is available for census here: <u>Historic census data - Office for National Statistics</u> • Labour market profile of an area. Includes datasets on population, employment, unemployment, qualifications, earnings, benefit claimants and businesses. (<u>Nomis - Official Census and Labour Market Statistics</u>)