

# SHCS 2021

## Surveyor guide

**V2: September 2021**

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# Contents

<b>1 Summary .....</b>	<b>3</b>
<b>2 External+ survey .....</b>	<b>7</b>
<b>3 Health and safety .....</b>	<b>13</b>
<b>4 The External+ Survey Form .....</b>	<b>15</b>
<b>5 Telephone calls with the occupant .....</b>	<b>26</b>
<b>6 EPC and other data sources .....</b>	<b>30</b>
<b>Appendix 1: Appointment letter from CADS.....</b>	<b>36</b>
<b>Appendix 2: Telephone introduction script .....</b>	<b>38</b>
<b>Appendix 3: Surveyor telephone discussion guide .....</b>	<b>40</b>
<b>Appendix 4: EPC data dictionary.....</b>	<b>42</b>

# 1 Summary

The Scottish House Condition Survey (SHCS) has been running for 30 years and is the largest single housing research project in Scotland. It is the only national survey to look at the physical condition of Scotland's homes as well as the experiences of householders. The information captured by the survey is used by the Scottish and local Government to help shape policy and laws, as well as by a variety of other users including charities and academics.

The dwelling inspections for the SHCS 2021 will commence in May 2021, following a suspension of fieldwork since mid-March 2020 due to the Coronavirus outbreak. Due to the current circumstances both the social and physical aspects of the survey will be carried out a little differently in 2021, with the health and safety of occupants, our interviewers and surveyors the main priority.

These instructions are intended to provide you with everything you need to know about the survey before you start: the background to the research; the new procedures for conducting the survey and the main changes to the form. Should you have any queries about the survey, please do not hesitate to contact us using the contact details provided.

## Summary of physical survey approach in 2021

- The overall survey targets will remain the same – 10,450 social interviews and 3,000 physical surveys.
- Households will be invited to take part in the Social Survey by letter and are given the option of opting-in by phone or online.
- Social Survey interviews will be carried out remotely by telephone or video.
- At the end of the social survey, some participants will be asked if they are willing for a surveyor to visit to carry out an external inspection of their home.
- Physical survey appointments will continue to be managed by CADS, with details available on the CADS website. In 2021 CADS will send SHCS participants a letter confirming their appointment.
- During COVID-19 restrictions, **the physical survey will comprise an external inspection of the property and a telephone discussion between the surveyor and occupant** to ask some questions about the interior of the house. In addition, other data sources may be available to help surveyors complete the survey form (e.g. EPC data, Google Maps). We are calling this an **External+ survey**. No Full surveys, DDs or ADDs will be carried out until further notice.
- Physical surveys will only take place in local authorities with COVID protection levels 0, 1 or 2, by a surveyor from an area with the same, or lower, COVID protection level.
- Surveyors will call occupants on arrival at their property, before commencing the survey.
- The dwelling inspections will be carried out externally – **at no point during the survey should surveyors enter the dwelling or (if the Covid protection level where the survey is being carried out is 1 or 2) any internal common areas**. Surveyors will wear a face mask at all times while carrying out the inspection.

- The digital pen and an updated version of the SHCS form will be used to collect the data.
- Surveyors will complete as much of the form as they can via an external inspection.
- Additional information will be collected by surveyors via:
  - A telephone call between the occupant and surveyor after the external survey has been carried out (or, in exceptional circumstances in areas with a Covid-19 protection level 0 or 1, a doorstep<sup>1</sup> / outdoor discussion if the occupant has a strong preference or a telephone call is not possible)
  - Other data sources can be used to complete any missing data on the form following the external inspection and telephone call:
    - EPC data (this will be available for some addresses and linked to the CADS website)
    - Online sources (e.g. Google Maps, Rightmove)
    - Note that surveyor's on-site observations and occupants' answers should always take precedence over other sources of data. This data should only be used if surveyors cannot get this information from the external survey and phone call.
- Submitting and validating the surveys will be carried out as normal through the BRE website.

### COVID-19 - health and safety

- Due to the COVID-19 pandemic and the risk of transmission of the virus, when carrying out the External+ survey the health and safety of surveyors and occupants is paramount, and it is **essential that surveyors read and adhere to the health and safety guidelines** that will be sent to surveyors following the briefing.
- **Before you carry out any surveys, you must email your answers to the Fitness to Work screener questions to your team manager.** (These will be email sent to surveyors following the briefing). If all of these questions are answered negatively, then you are authorised to commence working on the survey.
  - If at any time during fieldwork you start to experience any of the symptoms listed in the screener or if you are advised to self-isolate due to close contact or travel then you must let your manager know immediately. In these cases, you will not be authorised to go into the field until the matter has been resolved with your team manager.
- You must also email your manager to confirm that you have read and understood the Health and Safety guidelines.
- No surveyor is expected to work on the survey if they do not feel comfortable doing so. If at any point you decide that you do not wish to carry out the External+ survey you should get in touch with your team manager to let them know.

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<sup>1</sup> A doorstep discussion where the occupant stands in the doorway of their dwelling and the surveyor remains at a 2m social distance throughout, wearing their facemask.

## Surveyor materials

You should have already received 50 copies of the 2021 survey form (please contact CADS if you have not).

You will also receive the following, to be sent to surveyors after the briefings:

- An electronic copy of the SHCS 2021 Health and Safety guidelines and fitness to work form
- A laminated copy of the SHS advance letter
- A copy of the SHS leaflet
- Laminated copies of the telephone introduction script and discussion guide (2 forms)

You should still have your surveyor passes (which you should display at all times while carrying out the survey). If you need a replacement, please get in touch with Colin – [colin.hockaday@ipsos.com](mailto:colin.hockaday@ipsos.com)

## Surveyors equipment

In addition to the regular equipment you use to complete the survey forms (e.g. measuring tape/rod; compass; pair of binoculars), we also ask that you provide the following safety (PPE) equipment to carry out the External+ survey:

- Face mask
- Hand sanitiser
- Antiviral wipes

Please see the health and safety guidance document for more information about the types of PPE equipment you should use.

## Surveyor feedback

Since this is a new approach to the physical survey, we are keen to hear your feedback on how the new approach is working. We know that the changes won't always be ideal – the physical survey was designed to be conducted both internally and externally with the ability to interact with householders if needed – and if you have suggestions for how things can be improved while retaining data comparability and quality, please do let us know.

## Key contacts

### Surveyor Appointments:

You should contact Ipsos-MORI direct with any queries about payments, or any queries regarding the management of the survey:

- Chris Martin, Project Director ([chris.martin@ipsos.com](mailto:chris.martin@ipsos.com))
- Colin Hockaday, Project Manager ([colin.hockaday@ipsos.com](mailto:colin.hockaday@ipsos.com))

You should contact the CADS Helpline with requests for stationary (additional forms, replacement digital pen, etc), any queries about surveyor appointments, any issues regarding your availability or any queries regarding the CADS website:

- Tel: 0131 558 8999
- Email: [shs@cadshs.co.uk](mailto:shs@cadshs.co.uk)

For technical queries or other concerns, you should contact your regional manager.

## 2 External+ survey

Due to the COVID-19 pandemic it has been necessary to adapt the approach to the physical survey in 2021 to mitigate or remove any risks to occupants and surveyors, while allowing us to collect the best data we can under the circumstances (and which will still allow the Scottish Government to generate its fuel poverty and energy efficiency information). We are calling the new approach the **External+ survey**.

At present, the External+ survey is the only type of survey that will be carried out during the 2021 fieldwork period – Full surveys, DDs or ADDs will not be carried out until further notice. In time we hope to return to full physical inspections when restrictions and the Scottish Government guidelines allow.

The key elements of the External+ survey are outlined below.

### Before starting work on the SHCS 2021

- Before commencing any work on the SHCS 2021, you must email your team manager the following:
  - your answers to the **Fitness to Work screener questions**
  - confirmation that you have **read and understood the Health and Safety guidelines**.
- Once received your team manager will confirm if you are authorised to commence work on the survey. CADS will not allocate any appointments to you until this authorisation has been granted.
- If at any time you start to experience any of the symptoms listed in the screener or if you need to self-isolate then you must let your team manager immediately. In these cases, you will not be authorised to go into the field until the matter has been resolved with your manager.
- You should also watch the **training videos** on use of **Google Maps** and **RightMove** before you start. These can be found on the BRE website, under the 'Documentation' tab.

### The appointment system

- The physical survey appointment system is largely unchanged, and the allocation of survey appointments will be managed by CADS.
- At the end of the Social Survey, the interviewer will ask the occupant if they are happy for a surveyor to carry out an External+ survey. At this stage the interviewer will stress to the occupant that at no point during their survey will the surveyor need to enter their home, and that they will not be required to have any face-to-face contact with the surveyor if they do not wish to and that all contact can be carried out by phone.
- The interviewer will confirm a date and time for the physical survey with the occupant and this information will be forwarded to CADS.
- CADS will manage the appointment system so that appointments can only be allocated to a surveyor where a household is in a COVID protection level 0, 1 or 2 council area, and the surveyor is from an area with the same, or lower, COVID protection level.

- CADS will contact the occupant by letter to confirm the day and time of the external survey. The letter will ask the occupant, where possible, to collect information on the make and model of their central heating boiler and the average depth of any loft insulation in advance of the surveyor visit (Appendix 1).
- CADS will notify surveyors of appointments electronically, through the Surveyor Appointment System and by email.
- Details of the appointment on the CADS website will now include the occupant's telephone number.
- For some addresses, the CADS website will also include Energy Performance Certificate (EPC) data that can be used to assist surveyors in the completion of some parts of the form.

## The survey form

- The External+ survey paper form is similar in appearance to the 2020 form. However, since surveyors will not carry out internal inspections of the dwelling during an External+ survey, it will not be possible to complete every field on the form.
- In the External+ survey, **surveyors should only complete those sections of the form that have been outlined in red.**
- The survey form is outlined in more detail in Chapter 4.

## Before visiting the property

- Prior to visiting an address to carry out the survey, surveyors can review the dwelling using Google Maps and Rightmove (see Chapter 5 for more information). These data sources can be used to familiarise surveyors with some of the different features of the property before the visit, or to complete some sections of the form after they have carried out the external inspection and phone call. Please note that this data should only be used if surveyors are confident that it is sufficiently up to date and reliable.
- EPC data will also be available for some properties and can be accessed through the CADS Surveyor Appointment System. If this is available, before conducting the survey, surveyors may find it useful to circle in pencil any fields on the form that are contained in the EPC data.
  - PLEASE NOTE: The EPC data is intended to be a guide only, and surveyor's observations while personally conducting the survey must always take precedence. EPC data should only be used to complete a field on the form if the surveyor cannot get this information from an external inspection or the telephone call with the occupant, and they are confident based on other data they have observed that the EPC data is sufficiently up to date and reliable.

## Conducting the survey

### Arriving at the property

- On arrival at the property and at the time of the appointment, surveyors must phone the occupant (ideally from their car) to confirm they have arrived and ask permission to commence the external inspection.



- If no contact can be made by telephone, surveyors may knock on the door of the dwelling to speak to the occupant and ask permission to commence the inspection. Surveyors should ensure they are wearing a face mask and adhere to 2 metre social distancing if taking this approach.
- If no contact is made with the occupant following a telephone call and door knock, the surveyor should phone CADS and ask for them to reschedule the appointment.
- During the initial discussion with the occupant the surveyor should:
  - Confirm that the survey will involve an external inspection of the property and a discussion with the occupant by phone (or, in exceptional circumstances in covid protection levels 0 or 1, on the doorstep<sup>2</sup> / outside at an appropriate 2m distance) and at no point will surveyors need to inspect the inside of the dwelling.
  - Ask the occupant if they, or anyone else in their household, has been diagnosed with COVID-19 in the last 10 days, is experiencing any symptoms of COVID-19 - high temperature, new/continuous cough, shortness of breath, loss or change to their sense of smell or taste, or is self-isolating.
    - If the occupant answers 'yes' to any of the above, then the surveyor should advise the occupant that someone will contact them to rearrange the survey for another time, then terminate the survey and phone CADS to advise them of the situation.
  - Advise the occupant that they are not required to have any face-to-face contact with the surveyor if they do not wish to.
  - IF PROPERTY IS IN AN AREA WITH COVID PROTECTION LEVEL 1 OR 2: (If applicable) Confirm that they will not enter any internal communal parts of the property or common block.
  - IF PROPERTY IS IN AN AREA WITH COVID PROTECTION LEVEL 0: (If applicable) Confirm that they will only enter internal communal parts of the property or common block if it is necessary to view the rear of the property.
  - (If applicable) Ask the occupant to open any gates, doors or anything else that will allow the surveyor to safely view the front and back of their property, before the surveyor commences the survey.
  - Advise the occupant that after they have finished the external inspection, they will contact them again by phone, to ask some questions about the inside of their home. This will take about 20 minutes.
    - IF PROPERTY IS IN AN AREA WITH COVID PROTECTION LEVEL 0 OR 1: If it is not possible to carry this part of the survey by phone, or if the occupant strongly prefers, this discussion can take place on the doorstep / outside the property.

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<sup>2</sup> A doorstep discussion where the occupant stands in the doorway of their dwelling and the surveyor remains at a 2m social distance throughout, wearing their facemask.

Surveyors should ensure they are wearing a face mask and adhere to 2 metre social distancing if the discussion takes place on the doorstep / outside.

- IF PROPERTY IS IN AN AREA WITH COVID PROTECTION LEVEL 2: This part of the survey should take place by phone only.
- If the occupant says they will not be available for this discussion, the surveyor should arrange a suitable time to call back to conduct this part of the survey
- If required, surveyors can use the laminated introduction script to help them carry out this part of the survey.

### Social distancing

In exceptional instances where you are conducting the discussion with the occupant on their doorstep or somewhere else outside their property it is essential to adhere to 2m social distancing at all times and be careful not to get closer to the occupant during the discussion.

If you are not already, it may be handy to familiarise yourself with a 2m distance to ensure you can maintain this during the discussion. Knowing this is important since close contact within 2 metres of someone for more than 15 minutes (either as a one-off contact or added up together over one day) could lead to the transmission of COVID-19 and/or NHS' Protect Scotland (track and trace) app instructing you to self-isolate.

### The external survey

- Surveyors should complete as much of the form as they can during the external inspection.
- Surveyors should aim to conduct the inspection in the following order – outside front, outside rear, sides, outbuildings, garages. Due to the health and safety guidelines (see below) it may not be possible for surveyors to access some parts of the property – in those cases surveyors should inspect as much of the exterior of the property as is safe for them to do so, and try to find other vantage points if possible.
- In line with the full survey, surveyors should take four photos of the property, if possible – e.g. two photographs of the dwelling, one to the front and one to the rear, and two photographs of the area immediately surrounding the dwelling. (Note: It may be possible to use Google Maps to take screenshots of any aspects of the property that are inaccessible during the physical inspection).
- Surveyors will have been provided with a laminated copy of the SHS letter to occupants that they can display, along with their badge, to anyone who asks why they are carrying out the survey. Please note – surveyors should display this letter from a distance and not hand it to anyone, to reduce any risk of virus transmission.
- If at any time a surveyor feels unsafe when carrying out the external survey, they should leave the property immediately, terminate the survey and phone CADS.
- **Surveyors should adhere to the following health and safety guidelines** when carrying out the external inspection:
  - Surveyors should **wash their hands or apply hand sanitiser** both before and after conducting the external survey.

- When carrying out the external survey, surveyors should **wear a face mask and display their ID badge** at all times.
- **At no point should surveyors enter the dwelling.**
- COVID PROTECTION LEVEL 1 OR 2: Surveyors should not enter any internal communal parts of the property or common block
- COVID PROTECTION LEVEL 0: Surveyors may enter any internal communal parts of the property or common block if this is the only way they can view external aspects of the property, but must not spend any longer in these areas than is necessary.
- Surveyors should always adhere to **2m social distancing guidelines** with anyone who is outside of the property.
- Occupants should have opened all side gates and doors to allow access around the property before the surveyor accesses the site, and surveyors should only touch any hard surfaces on the property if absolutely necessary. Surveyors should then **wipe any surfaces they touch with antiviral wipes.**

### Conducting the telephone survey with occupants

- Immediately after the external inspection, the surveyor should phone the occupant from their car to ask questions about the interior of the dwelling in order to complete the form.
  - COVID PROTECTION LEVEL 0 OR 1: While conducting the survey by phone is the expectation, this discussion may also take place on the doorstep or outside if the occupant strongly prefers. Surveyors should ensure they are wearing a face mask and adhere to 2 metre social distancing if the discussion takes place on the doorstep / outside.
- Details of the questions surveyors must ask are outlined in Chapter 4, and a laminated check list has been provided to help with this part of the survey.
- In the appointment letter sent by CADS the occupant is asked if, where possible, they could have the details of the make and model of their central heating boiler and the average depth of any loft insulation ready in advance for the telephone call with the surveyor.
- In the event that no contact is made with the occupant at this stage, either by phone or by knocking on their door, surveyors should make at least four further attempts to contact the occupants by phone to complete the survey. These calls should be made at different times of the day, with at least one in the evening and one during a weekend.

### Form completion and validation

- Once the external survey and the telephone call with the occupant is complete, if necessary surveyors can use EPC data or information from Google Maps or Rightmove to complete any sections of the form they had otherwise been unable to complete (see Chapter 5).
- Once the form has been completed, surveyors should upload the data using the validation system on the BRE website as usual.

## Surveyor feedback

Since the External+ approach is new and relatively untested, surveyor feedback is important, and we will be asking for feedback on a regular basis to ensure that the survey collects the best data possible while wherever possible minimising burden on surveyors and occupants.

## 3 Health and safety

The External+ survey is being carried out during the ongoing COVID-19 pandemic and, as a consequence, the health and safety guidelines for surveyors have been updated.

All surveyors will be sent a Health and Safety document relating to COVID-19 and this sets out the hazards relating to the virus and the associated risks. We have set out the steps required to control these risks and it falls to all involved in the survey to understand what is involved in the controls and take ownership of their actions.

### Health and Safety plan

Three additional hazards in the updated Health & Safety Plan all relate to COVID-19 and these are:

- Potential for surveyors with COVID-19 related symptoms to be working
- Transmission and spread of COVID-19

The risk controls are fully set out in the document which will be sent to you following the surveyor briefings. **You are required to read the documentation and to confirm with you manager that you have done so.**

### Fitness to work

Before you carry out your first survey, you are required to answer a series of fitness to work screener questions. These questions all relate to COVID-19 symptoms, close contact and travel which we believe should be familiar to all. **Please email your manager your answers to these questions.** Your manager will then confirm if you are authorised to commence work on the survey. CADS will not allocate any appointments to you until this authorisation has been granted.

During the course of fieldwork, **it is your responsibility to report to your manager if at any time you start to experience any of these symptoms, or are advised to self isolate due to close contact with someone who had symptoms or travel<sup>3</sup>**. In these cases, you will not be authorised to carry out any more surveys until you have remained symptom free for a least 10 days.

### Conducting the survey

When carrying out the external inspection, surveyors should adhere to Health & Safety guidelines at all times. In particular they should:

- Wash their hands or apply hand sanitiser both before and after conducting the external survey
- Wear a face mask and display their ID badge at all time
- Not enter the dwelling
- If dwelling is in a local authority area with a COVID protection level 1 or 2, not enter any internal communal parts of the property or common block

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<sup>3</sup> <https://www.gov.scot/publications/coronavirus-covid-19-international-travel-quarantine/pages/red-amber-and-green-list-countries/>

- Always adhere to 2 metre social distancing guidelines with anyone who is outside of the property, including the occupant
- Ask the occupant to open all side gates and doors to allow access to the property. Surveyors should not open these gates or doors themselves. The surveyor should only touch any hard surfaces on the property only if absolutely necessary. The surveyor should then wipe any hard surfaces they touch with antiviral wipes.
- If the occupant or anyone else in their household has been diagnosed with COVID-19 in the last 10 days or is experiencing any symptoms of COVID-19 the surveyor should terminate the survey and advise the occupant that someone will contact them to rearrange the survey for another time. The surveyor should then phone CADS to advise them of the situation.

If at any point during the survey the surveyor is approached by the occupant or a member of the public, they should stress that they are carrying out work for the Scottish Government and are required to adhere to 2 metre social distancing guidelines at all times. If necessary, surveyors can display the laminated SHS advance letter. However, please note that you should only display these from a distance and not hand them to anyone, to reduce any risk of virus transmission.

For surveyors undertaking island visits, there is a special protocol which is set out in Chapter 6. Where such island visits are planned, full discussions will take place between CADS and the appointed surveyor.

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As in all Health & Safety guidance, there is no substitute for common sense. If that is applied properly then all surveyors will be able to work safely and without hindrance.

And please remember that **no surveyor is expected to work on the survey if they do not feel comfortable doing so**. If at any point you decide that do not wish to carry out the External+ survey, you should get in touch with your team manager to let them know.

# 4 The External+ Survey Form

The External+ survey paper form is similar in appearance to the 2020 form. However, since surveyors will not carry out internal inspections of the dwelling during an External+ survey, it will not be possible to complete every field on the form.

In the External+ survey, surveyors should only complete those sections of the form that have been outlined in red (see below). For example, Sections A to F should be completed as normal, Sections G to I should not be completed, only questions 5 and 23 should be completed in Section K etc.

**F. ROOM BY ROOM RECORD**

	Hall/Landing	Kitchen	R1	R2	R3	R4	R5	Bathroom
1. Room level	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Room type		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**G. ROOM REPAIRS ('00' no repairs; '55', '01'-'10' disrepair; '88' n/a; '99' unobtainable)**

	Hall/Landing	Kitchen	R1	R2	R3	R4	R5	Bathroom
1. Floor structure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Floor finish	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Skirtings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Wall finish	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Ceiling finish	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Cornices	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Doors and frames	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Fireplaces and flues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Room Level Legend:**  
 0 entry level  
 1 first level  
 2 second level  
 3 third or more  
 7 below entry level  
 8 no room  
 9 unob

**Room Type Legend:**  
 1 kitchen only  
 2 living  
 3 other public  
 4 bed  
 5 bath and WC  
 6 bath only  
 7 WC only

**Repair Status Legend:**  
 1 satisfactory  
 2 through another

Surveyors should complete as much of form as possible during the external inspection. The remaining fields, asking about aspects of the interior of the property, should be completed during the telephone call with the occupant after the external survey. Following this call, surveyors may then be able to use data sources, such as EPC data or property websites (see Chapter 5), to complete any fields outlined in red that they have otherwise been unable to complete.

Table 1 below sets out each question with guidance on how it may be answered. The table also indicates where occupant input is required and where EPC data, if available, may be helpful.

It is important that all efforts are made to answer each question on the form outlined in red and we believe that, even with the restrictions we are under, the vast majority of the form can be completed. Ultimately, much of the completion of the form will rely upon the judgement and expertise of the surveyor.

Hopefully this guidance should provide surveyors sufficient information to complete the form, but both your manager and the physical survey director are available to provide assistance if required.

## Access to properties and photographs

Due to the restrictions on carrying out the survey, it may not always be possible for surveyors to view the entire exterior of a dwelling. However, where possible surveyors should look for alternative viewpoints that may allow them to collect data, ensuring that they do not enter any private or communal parts of the property or common block while doing so. Alternatively, surveyors may be able to use Google Maps (see Chapter 5) to take screenshots of aspects of the dwelling that were inaccessible during the physical inspection.

In line with the full survey, surveyors should take four photos of the property, if possible – e.g. two photographs of the dwelling, one to the front and one to the rear, and two photographs of the area immediately surrounding the dwelling. Again, it may be possible to use Google Maps to take screenshots of the dwelling and surrounding area that were inaccessible during the physical inspection.

## Use of 9s (unobtainable)

We are aware that in the past we have recommended a minimum use of code '9' in the survey form (unobtainable). However, in the External+ survey if, even after using your own judgement, you are unable to answer a question, then as a last resort the use of '9's is justified.

## Permission for recontact

There is one new question asked in the External+ survey. In Section A, the following question is asked to check if occupants give their consent to a full internal survey (in the event that restrictions are eased and there is a return to the Full Survey approach in 2021):

- 'A4: Can recontact for revisit for future internal survey?'

While it is currently unclear if this is likely to take place in 2021, please do your best to get as many occupants to agree to recontact as possible.



**Table 1: Completing the External+ form**

Section	Question	Completed with occupant input	Relevant EPC data available	All comments (including expected difficulties in completion, links with EPC data, additional briefing/protocols required)
A4	Recontact Information	Yes		New question A4 – surveyor to ask occupant if they would be willing for a surveyor to revisit the property to carry out an internal inspection later in the year in the event that COVID restrictions are removed.
B	Type of Survey			Complete as normal
C	Base Data			Complete as normal
D	Dwelling Description	Yes*	Yes	Complete all sections as normal.  *For properties in rural locations D11 may need input from occupant.
E	Characteristics of Common Block	Yes	Yes	<i>Reminder: surveyors should not enter any communal parts of the property or common block.</i>  E5 to E9 – surveyor will require input from occupant, as it may not be clear from the address exactly where in the common block the property is.  Surveyor judgement to be used but if not possible revert to 9s.
F	Room level and room type	Yes	Yes	Combination of external survey (noting number of windows, position and frosted glass coupled) and asking occupant questions.
J	Rooms/Floors – Summary	Yes	Yes	Completed based on F and external survey.
K5	Number of WCs within dwelling?	Yes		Surveyor to ask occupant.

Section	Question	Completed with occupant input	Relevant EPC data available	All comments (including expected difficulties in completion, links with EPC data, additional briefing/protocols required)
K23	Type of cooker?	Yes		Surveyor to ask occupant
L1	What mains services does the dwelling have?	Yes	Yes	Partially ascertained from external survey – gas pipes, external gas meters and identification of boiler flues indicating gas or oil boiler. An absence of oil or LPG tanks means property has a mains gas supply. Confirmed with occupant input.
L2	Is a prepayment meter present?	Yes		Surveyor to ask occupant.
L2a	Is a smart meter present?	Yes		Surveyor to ask occupant.
L3	Type of electric meter	Yes	Yes	Surveyor to ask occupant.
L4	Does the dwelling have a privately generated power supply?			This should be clear, but surveyor judgement is required.
L11	Is there a private water supply to the dwelling?			This should be clear but in rural locations occupant input may be required.
L19	Percentage of fixed lights with LEL	Yes	Yes	Occupants might be able to provide this information but likely to be of variable quality - surveyor judgement required. It is possible that EPC data could be of assistance (but check age of EPC data).
L20	Is there a mechanical ventilation system?	Yes	Yes	Surveyor to complete based on the heating system present. Occupant input may be required. Surveyor must be clear what is meant by mechanical ventilation (see the Surveyor Manual for more information, pp122-123).
L22	Number of large vents (open chimneys)	Yes		Surveyor judgement required with occupant input.
M1	NHER age category			Complete as normal

Section	Question	Completed with occupant input	Relevant EPC data available	All comments (including expected difficulties in completion, links with EPC data, additional briefing/protocols required)
M2	What is the main form of heating in the dwelling?	Yes	Yes	Complete from an external survey and asking occupant questions.
M3	Heat emitters	Yes	Yes	Complete based on main heating type and asking occupants.
M4	Extent of heating system	Yes	Yes	Complete based on main heating type and asking occupants.
M5	Main heating fuel	Yes	Yes	Complete from an external survey and asking occupant questions.
M6	Main heating system age	Yes		Potentially completed from external survey, asking occupant questions, and other information collected (e.g. flue type, as condensing boiler flues are post 1998 and asking occupant if required.)
M7	MHS boiler type	Yes	Yes	Completed from an external survey, asking occupant questions, and other information collected (e.g. open, balanced, fan assisted and condensing) or inferred from main heating type in the case of a back boiler.
M8	MHS boiler flue type	Yes	Yes	Complete from an external survey, asking occupant questions, and other information collected

Section	Question	Completed with occupant input	Relevant EPC data available	All comments (including expected difficulties in completion, links with EPC data, additional briefing/protocols required)
M9	Is MHS boiler in heated space?	Yes		Complete from an external survey and asking occupant questions, (Most boiler flues are horizontal which makes it easy to ascertain whether the boiler is located in a room or an unheated garage. Most boilers are either combi or system boilers and have an external pressure release pipe which can also be used to ascertain the boiler's location.)
M10a/ M10b	MHS Manufacturer / Model Number	Yes	Yes	This information may be collected by the occupant prior to the surveyor's visit. The question is asked in the appointment letter from CADs.
M11	Heat pumps	Yes	Yes	Complete using external survey and asking occupant questions
M12	Warm air system	Yes	Yes	Warm air systems are rare. Surveyor to complete by asking occupant questions on the location of the warm air vents.
M13	Electric boiler system	Yes	Yes	Complete from asking occupant questions (Surveyor to complete based on main heating type and asking pertinent questions about the location/size to determine if it's a wet electric or direct electric system. Occupants may know approximately how old it is and the manufacturer, allowing the surveyor to undertake a web search if necessary.)
M14	Gas room heaters	Yes	Yes	Complete from asking occupant questions (Surveyor to ask occupant if they have a gas fire and basic questions such as is it a coal effect gas fire, age and external flue design to ascertain the type.)
M15	Solid fuel room heaters/ boilers	Yes	Yes	Complete from asking occupant questions. Surveyor to complete based on the main heating system and if necessary, asking questions to determine if it is a closed or open fire.

Section	Question	Completed with occupant input	Relevant EPC data available	All comments (including expected difficulties in completion, links with EPC data, additional briefing/protocols required)
M16	Electric storage system	Yes	Yes	This information will come from the occupant. Surveyor should ask the approximate age, whether it is a foot depth (old style) etc.
M17	Principal hot water heating source	Yes	Yes	Surveyor to complete based on main heating type and if necessary, asking occupant how their water is heated.
M18	What is the water heating fuel	Yes	Yes	Normally mains gas, otherwise the same as the main heating system, but surveyor can ask in cases of doubt.
M21	Heating controls for primary heating	Yes	Yes	Complete from asking occupant questions (Occupants may know if they have a time clock, room thermostat and TRV's).
M21a	Does the dwelling have another heating system installed?	Yes	Yes	It is rare for a house to have more than one main heating system. Surveyor to complete based on asking occupant about the types of heating system they have.
M22	Are any other fixed room heaters present	Yes	Yes	Occupant to be asked if they have any fires (gas, electric or solid fuel) with follow up questions to determine the age and type.
M23	Heating in conservatory	Yes	Yes	If conservatory is accessible, surveyor should be able to see through the windows of the conservatory to see if heating is in place, but occupant can also be asked.
M24	Is there a door separating the dwelling from the conservatory		Yes	Complete as normal

Section	Question	Completed with occupant input	Relevant EPC data available	All comments (including expected difficulties in completion, links with EPC data, additional briefing/protocols required)
M26	Average depth of roof/loft insulation to original dwelling	Yes	Yes	<p>This information may be collected by the occupant prior to the surveyor's visit. The question is asked in the appointment letter from CADS.</p> <p>If the dwelling is socially rented, almost certainly it will have upgraded loft insulation to a depth of 300mm. Also, it is possible that occupants will know the depth of their loft insulation in relation to joist depth, and based on the age of the property a reasonable estimate can be made on the joist size and thereby the insulation depth.</p>
M29	Size of hot water cylinder (litres)	Yes	Yes	Occupants should know if they have a combi boiler or a water tank and a reasonable size estimate can be obtained by asking its approximate height.
M30	Type of insulation to hot water cylinder	Yes	Yes	Occupants should know if their HWSC has a jacket, plastic encapsulated or has yellow or green foam.
M31	Thickness of insulation to hot water cylinder (mm)	Yes	Yes	Normally occupants should have a fair idea of how old the cylinder is, and the insulation thickness can be inferred if it is spray foamed. Encapsulated is 50mm foam equivalent and a jacket covering is up to 80mm fibre glass.
M32	Is there a cylinder thermostat?	Yes	Yes	In all but the oldest systems there is a thermostat.

Section	Question	Completed with occupant input	Relevant EPC data available	All comments (including expected difficulties in completion, links with EPC data, additional briefing/protocols required)
N1 – N7	Dwelling Measurements for Energy Assessment		Yes	<p><i>Reminder: surveyors should not enter any communal parts of the property or common block.</i></p> <p>Surveyor to undertake external measurements only.</p> <p>With houses, the surveyor can enter typical heights based on the property's age.</p> <p>Rooms in roof: With chalet style houses, the area can be calculated from external measurements, for houses where the loft has been converted, the area is usually 2/3 of the main floor area.</p>
O	Characteristics of Common Elements			<p><i>Reminder: surveyors should not enter any communal parts of the property or common block.</i></p> <p>O1 and O2 to be completed as normal. No answers required on O3-O6. O7-9 to be completed as normal, if in doubt 9s can be used.</p>
P	Repairs to Common Elements			<p><i>Reminder: surveyors should not enter any communal parts of the property or common block.</i></p> <p>P2 and P6 are to be completed where possible.</p> <p>If it is not possible to view the rear of a property, surveyors should only collect front view point data for Sections P and R.</p>

Section	Question	Completed with occupant input	Relevant EPC data available	All comments (including expected difficulties in completion, links with EPC data, additional briefing/protocols required)
Q1-32 Q35-41 Q44-48 Q50	External construction / materials	Yes	Yes	<p><i>Reminder: surveyors should not enter any communal parts of the property or common block.</i></p> <ul style="list-style-type: none"> <li>• Q1-7 - complete as normal</li> <li>• Q8-9 - surveyor judgement required plus occupant input</li> <li>• Q10-16 - complete as normal</li> <li>• Q17-18 - surveyor judgement required with occupant input</li> <li>• Q19-30 - complete as normal</li> <li>• Q31-32 - surveyor judgement with occupant input</li> <li>• Q35-39 - complete as normal</li> <li>• Q40-41 - surveyor judgement with occupant input</li> <li>• Q44-48 - complete as normal</li> <li>• Q50 - surveyor judgement required.</li> </ul>
R1 – R23	External Repairs			<p><i>Reminder: surveyors should not enter any communal parts of the property or common block.</i></p> <p>Complete as normal using only the accessible viewpoints.</p> <p>If it is not possible to view the rear of a property, surveyors should only collect front view point data for Sections P and R. However it may be possible to use Google Maps to collect information on the rear of a property.</p>
T1	Is the dwelling structurally stable?			Complete as normal by surveyor using best estimates. Any structural instability will be evident from the external survey.
T4	Has the dwelling an adequate piped supply of wholesome water within the house?	Yes		Completed as normal based on the type of water supply (public/private) and whether any private water supply dries up in the summer. Occupant input required.



Section	Question	Completed with occupant input	Relevant EPC data available	All comments (including expected difficulties in completion, links with EPC data, additional briefing/protocols required)
T5	Has the dwelling a sink provided with satisfactory supply of both hot and cold water within the house?	Yes		It is rare for any dwelling to fail this question. Completed as normal based on whether the property has a kitchen and the type of hot water heating and whether it supplies the sink. Occupant input required.
T6	Has the dwelling a water closet available for the exclusive use of the occupants of the house suitably located within the house?	Yes		Completed as normal. The location of a WC can be ascertained from an external survey and the location of soil vent pipes. Occupant input required.
T7	Has the dwelling a fixed bath/shower and a wash hand basin all with a satisfactory supply of hot and cold water suitably located within the house?	Yes		It is rare for a dwelling not to have these facilities. Most houses, particularly post 1930's were built with bathrooms. Surveyors can make a reasonable subjective judgement if required. Occupant input required.
T8	Has the dwelling an effective system for the drainage and disposal of foul and surface water?	Yes		Complete as normal
T9	Has the dwelling satisfactory facilities for the cooking of food within the dwelling?	Yes		Occupant input required
T10	Is there satisfactory access to all external doors and outbuildings?	Yes		Complete as normal.
T15 – T17	Tolerable standard questions			Complete as normal.

## 5 Telephone calls with the occupant

You will be required to speak to the occupant on two occasions – on arrival at the property and after the external inspection. Details of what you should cover in these calls have been outlined in Chapter 2 but are also covered below and in the laminated scripts you will receive.

### Advance appointment letter from CADS

In advance of the appointment, occupants will receive a letter from CADS confirming the day and time of their appointment and details of what the survey will involve. A copy of this letter can be found at Appendix 1.

The letter will also ask occupants if they could have the details of the make and model of their central heating boiler and the average depth of any loft insulation ready in advance of your visit. Therefore, they may have this information ready for you when you call. (However, it is likely that in some cases occupants may forget or struggle to obtain this information.)

### Arriving at the property

As discussed in Chapter 2, on arrival at the property and at the time of the appointment, you must phone the occupant (ideally from your car) to confirm you have arrived and ask permission to commence the external inspection.

If no contact is made by telephone, surveyors may knock on the door of the dwelling to speak to the occupant and ask permission to commence the inspection. Surveyors should ensure they are wearing a face mask and adhere to 2 metre social distancing if taking this approach.

If no contact is made with the occupant following a telephone call and door knock, the surveyor should phone CADS and ask for them to reschedule the appointment.

You can use the laminated '**Introduction script**' to help you carry out this part of the survey. This is also attached as Appendix 2. You can adapt this script as you see fit but please make sure to cover the key points below.

During the initial phone call with the occupant, you should cover the following:

- Confirm that the survey will involve an external inspection of the property only and at no point will you be required to inspect the inside of their dwelling.
- Ask the occupant if they, or anyone else in their household, has been diagnosed with COVID-19 in the last 10 days, is self-isolating, or is experiencing any symptoms of COVID-19 - high temperature, new/continuous cough, shortness of breath, loss or change to their sense of smell or taste.
  - If the occupant answers 'yes' to any of the above, then you should advise the occupant that someone will contact them to rearrange the survey for another time, then terminate the survey and phone CADS to advise them of the situation.
- Advise the occupant that they are not required to have any face-to-face contact with you and that you will wear a face mask and adhere to social distancing throughout the external inspection.

- IF PROPERTY IS IN AN AREA WITH COVID PROTECTION LEVEL 1 OR 2: (If applicable) Confirm that they will not enter any internal communal parts of the property or common block.
- IF PROPERTY IS IN AN AREA WITH COVID PROTECTION LEVEL 0: (If applicable) Confirm that they will only enter internal communal parts of the property or common block if it is necessary to view the rear of the property.
- (If applicable) Ask the occupant to open any gates, doors or anything else that will allow you to safely view the front and back of their property, before you commence the survey. (You should not open these gates or doors yourself).
- Advise the occupant that after you have finished the external inspection, you will call them again, to ask some questions about the inside of their home.
  - If the occupant says they will not be available for this phone call, you should arrange a suitable time to call back to conduct this part of the survey
  - If the occupant is completely unwilling to take part in the telephone survey do not carry out an external inspection and let CADS know.
- You may also want to confirm with the occupant if they have the details of the make and model of their central heating boiler and the average depth of any loft insulation ready (as was asked in the appointment letter). If they do not have this information you could ask if they could find this out in advance of your next call. However, if this is difficult/confusing for them, then please tell them not to worry about it.

For this part of the survey you will need to adapt your doorstep approach to the telephone, trying to get as many as possible to take part. Refer to the laminated introduction script and work out what works best for you to encourage participation.

### After the external inspection

As outlined in Chapter 4, to complete some sections of the form input from the occupant will be required. Therefore, following the external inspection, you should return to your car and phone the occupant to complete the remainder of the form.

If the property is in a local authority area with a Covid protection level 0 or 1, and it is not possible to carry out this part of the survey by phone, the discussion can take place on the doorstep / outside the property if the occupant strongly prefers. Surveyors should ensure they are wearing a face mask and adhere to 2 metre social distancing if the discussion takes place on the doorstep / outside.

### Social distancing

In exceptional instances where you are conducting the discussion with the occupant on their doorstep or somewhere else outside their property it is essential to adhere to 2m social distancing at all times and be careful not to get closer to the occupant during the discussion.

If you are not already, it may be handy to familiarise yourself with a 2m distance to ensure you can maintain this during the discussion. Knowing this is important since close contact within 2 metres of someone for more than 15 minutes (either as a one-off contact or added up together over one day) could

lead to the transmission of COVID-19 and/or NHS' Protect Scotland (track and trace) app instructing you to self-isolate.

### Discussion with the occupant

The questions you may need to ask of occupants are highlighted in the table in Chapter 4 and also in the laminated '**Surveyor discussion guide**' you will receive (also see Appendix 3). You can use this to help ensure that you cover all the main sections of the form where you require their input. The questions on this list have been prioritised to ensure you capture the key information at the start of the interview (for example, on heating systems).

Please note that the laminated check list should not necessarily be read out verbatim and you should ask the questions in a way you are comfortable with and that is easy for the occupant to understand. For example, rather than reading out the questions one by one, you could have a general conversation with the occupant about any major changes to the property in the last few years and/or, to help you obtain information for Section M of the form, ask about how they heat their home and their central heating system.

We have estimated that this part of the survey will take around 20 minutes. Of course, this could change depending on the size of the dwelling and the occupant's responses. Please do your best to give an accurate estimation of how long you think this part of the survey will take.

In the event that no contact is made with the occupant at this stage, you should make at least four further attempts to contact the occupant by phone to complete the survey. These calls should be made at different times of the day, with at least one in the evening and one during a weekend. Please make these calls between 10am to 8pm Monday to Friday and 10am to 7pm at the weekends. If no further contact is made get in touch with CADS to let them know.

Some things to keep in mind for this part of the survey:

- When calling please state:
  - Your full name
  - Company name
  - The reason for your call
- You might have to adapt some of the questions where people have difficulty answering or because they struggle to understand the terminology used. Please do your best to explain things carefully and in plain English, and do make a note of where people have the biggest problems giving an accurate answer.
- Try to match the tone and pace of the occupant. For example, if they're elderly or have communication difficulties, speak more slowly & be clearer with your own delivery too.
- Especially in telephone interviews, people may lose interest and pay less attention than they do face-to-face. Do your best to combat this and do record and hints/tips for maintaining the quality of the data collected throughout the interview.

- While we have estimated that this part of the survey will take around 20 minutes, we are a little worried that the interview length might increase overall. Please let your manager know if this part of the survey takes longer than expected. And do try to keep a brisk pace throughout, but do not rush the interview and do explain/repeat questions when necessary.
- If the occupant is becoming impatient with the time it is taking to complete the survey, you should give them an honest explanation of how much is left to go and explain that you will try to get through it as quickly as possible. If they cannot spare the time now, offer to call them back at another time when they might be able to complete the interview and arrange a time to call back.
- If the occupant says they will never have time to do the full length of the survey in one sitting then you can offer to do it in two parts.
- If an occupant is hesitant to take part, state the benefits to them! You might say something like “The survey provides the Scottish Government with vital information about housing quality, how much energy is needed to heat our homes and how much this might cost. This helps the Scottish Government, local councils and various charities to improve the lives of people in your area and across Scotland.”

## 6 EPC and other data sources

For the External+ survey additional sources of data are available to help you to collect information about a dwelling and complete the form. These are:

- Energy Performance Certificate (EPC) data
- Google Maps
- Rightmove / property websites

These sources can be used in advance of your visit to gather information and familiarise you with some of the different features of the property, and then after your visit to fill in any sections of the form you had otherwise been unable to complete following the external inspection and phone call with the occupant.

However, please note that **surveyor's on-site observations and occupants' answers should always take precedence over other sources of data**. These data sources should only be used to complete a field on the form if you cannot get this information from an external inspection or the telephone call with the occupant. It is also important to note that on some occasions the information from these sources may be quite old and so we rely on you to use your professional judgement on the quality of the data before including it on the form. Please add notes to the form if you want to check your use of this data with your team manager.

### EPC data

Energy Performance Certificate data has been obtained by the Scottish Government for around 57% of addresses in the SHS sample. If this data is available for a dwelling you will be able to access it through the CADS website when you receive details of an appointment (see Chapter 6).

The form will contain the data shown in Table 2, which may help you to complete any sections of the form that you have been unable to complete following the external inspection and the telephone call with the occupant. An EPC data dictionary is available at Appendix 4 which outlines the different values which can be found in the form.

**Table 2: Content of EPC form**

Section of SHCS form	EPC data	Notes
	Case number	
	Postcode	
	EPC inspection date	
C	Property type	
D	Conservatory type	
	Solar supply	
	Photovoltaic supply	
E	Flat level	
	Heat loss corridor	
	Unheated corridor length (m)	
J	Number of habitable rooms	<i>The kitchen is usually excluded from habitable room count</i>
L	Mains gas	
	Electricity meter type	
	Mechanical ventilation system	
	Wind turbines count	
	Number of open chimneys	
	%age LEL	
M	Main heating system	
	Heat emitter type	
	Extent of Central Heating	
	Main fuel type	
	Main heating system type	
	Boiler make (brand)	
	Boiler model name	
	Boiler model number (qualifier)	
	Regular/Combi?	
	Condensing?	
	Boiler flue type	
	Fan flue present	
	Hot water heating source	
	Water heating fuel	
	Primary heating controls	
	Other heating system	
	Other fixed room heaters	
	Cylinder size	
	Cylinder insulation type	
	Cylinder insulation thickness (mm)	
	Cylinder thermostat	
N	Dwelling measurements type	<p><i>Confirms if internal or external measurements.</i></p> <p><i>If this field is not present, please note that if wall lengths are taken externally wall thickness also needs to be recorded (in order to convert the floor area to internal measurements) so that may be a good indicator if wall length was taken internally or externally.</i></p>

Section of SHCS form	EPC data	Notes
		<i>Floor heights, rooms in the roof and basements are always internal measurements.</i>
	Total floor area – ground / lowest floor (m2)	
	Total floor area – 1 <sup>st</sup> /next floor (m2)	
	Total floor area – 2 <sup>nd</sup> /next floor (m2)	
	Total floor area – 3 <sup>rd</sup> /next floor and above (m2)	
	Room in roof (m2)	
	Average roof height – ground / lowest floor (m2)	
	Average roof height – 1 <sup>st</sup> /next floor (m2)	
	Average roof height – 2 <sup>nd</sup> /next floor (m2)	
	Average roof height – 3 <sup>rd</sup> /next floor and above (m2)	
	Ground / lowest floor heat loss perimeter (m)	
	1 <sup>st</sup> /next floor heat loss perimeter (m)	
	2 <sup>nd</sup> /next floor heat loss perimeter (m)	
	3 <sup>rd</sup> /next floor and above heat loss perimeter (m)	
	Ground / lowest floor Party Wall Length (m)	
	1 <sup>st</sup> /next floor Party Wall Length (m)	
	2 <sup>nd</sup> /next floor Party Wall Length (m)	
	3 <sup>rd</sup> /next floor and above Party Wall Length (m)	
	Floor type	
	Floor insulation	
Q	Wall construction	
	Wall thickness (mm)	
	Wall insulation type	
	Wall insulation thickness	
	Roof/loft insulation thickness	
	Roof type	
	Roof details (for SAP properties)	<i>Shown for some new builds when no detailed EPC data available for walls and roofs</i>
	Wall details (for SAP properties)	<i>Shown for some new builds when no detailed EPC data available for walls and roofs</i>
Extension data (up to two extensions shown)	Extension 1 Total floor area – ground / lowest floor (m2)	<i>Note: For any properties with 3+ extensions the EPC form will only display the two largest extensions by overall total floor area.</i>
	Extension 1 Total floor area – 1st / next floor (m2)	
	Extension 1 Total floor area – 2nd / next floor (m2)	
	Extension 1 Total floor area – 3rd / next floor and above (m2)	
	Extension 1 - Average roof height – ground / lowest floor (m)	
	Extension 1 - Average roof height – 1st/next floor (m)	
	Extension 1 - Average roof height – 2nd/next floor (m)	
	Extension 1 - Average roof height – 3rd/next floor and above (m)	
	Extension 1 - Ground / lowest floor heat loss perimeter (m)	
	Extension 1 - 1st/next floor heat loss perimeter (m)	
	Extension 1 - 2nd/next floor heat loss perimeter (m)	



Section of SHCS form	EPC data	Notes
	Extension 1 - 3rd/next floor and above heat loss perimeter (m)	
	Extension 1 - Ground / lowest floor Party Wall Length (m)	
	Extension 1 - 1st/next floor Party Wall Length (m)	
	Extension 1 - 2nd/next floor Party Wall Length (m)	
	Extension 1 - 3rd/next floor and above Party Wall Length (m)	
	Extension 1 - Floor type	
	Extension 1 - Floor insulation	
	Extension 1 - wall construction	
	Extension 1 - Wall thickness (mm)	
	Extension 1 - Wall insulation type	
	Extension 1 - Wall insulation thickness	
	Extension 1 – roof insulation thickness	

## Google Maps

Google Maps is available at: [www.google.co.uk/maps](http://www.google.co.uk/maps)

It has some useful functions that you may be able to use to help you complete an External+ survey. For example, you may be able to use Google Maps to view aspects of the dwelling you were unable to see during the physical inspection, or to help you identify information such as the dwelling construction, size of dwelling, and changes to the property over time.

Google Maps can be used to:

- Locate the survey dwelling on a map
- Identify the best route to get there
- Use satellite imagery to view the dwelling
- Use Street View to view the dwelling
- Measure the dimensions of a dwelling
- Take screenshots of the dwelling from vantage points that may otherwise be inaccessible.



A detailed 27 minute video instructing surveyors on how to effectively use Google Maps was created for the English Household Survey and can be found on the BRE website, under the 'Documentation' tab.

Before you conduct any External+ surveys, please watch this video and carry out the tasks at the end. You may already be familiar with some of these functions but it is still important to watch the video to ensure you are making the best use of this resource.

### Rightmove website

The Rightmove website is another useful resource that you may be able to use to help you complete out the survey: <https://www.rightmove.co.uk/house-prices.html>

You can use this site to find out if the property you are surveying has been sold in the past and useful information such as:

- Photos of the outside and inside of the dwelling
- Floor plans and floor area by level
- Dates of listing which can be useful for inferring the age of elements
- Features such as the number of rooms and parking facilities

There is a short training video on the BRE website showing how to find this information using the Rightmove website. Please watch the video before you start work on the External+ survey.

In addition to Rightmove, there may be other property websites you could use to find this kind of information. Please use your discretion and best judgement when using other sources and let your manager know if you are unsure about using this information.

# Appendix 1: Appointment letter from CADS

Dear Sir/Madam,

## The Scottish Household Survey

**Thank you for taking part in the Scottish Household Survey (SHS), carried out by Ipsos MORI on behalf of the Scottish Government.**

At the end of your interview, you kindly agreed to the second part of the survey, which will involve a visit by a professionally qualified housing surveyor, to assess the energy efficiency and outside condition of your home.

The surveyor will carry out the inspection on: **[DATE AND TIME]**

CADS Housing Surveys arrange the appointments and engage the surveyors who conduct the visual, non-intrusive inspection of properties as part of the SHS.

### How does it work?

The surveyor will carry out an external inspection of your home only.

The surveyor will contact you to let you know when they have arrived at your property. After the external inspection has been completed, they will contact you again to ask you some questions about your inside of your home.

### How can I help?

It would be useful if during the phone call you could tell the surveyor about your heating system and insulation. If you can, it will help the surveyor if you have the following details ready:

Central heating boiler  
(make and model number)

Average depth of any loft insulation  
(if you can collect this information safely)

Your participation in the survey really helps improve understanding of the housing situation in Scotland today, so thanks again for playing such an important part.

Yours faithfully,

**Steven Tidy**, CADS SHS Helpline: 0131 558 8999

## FAQS

### Is the survey COVID-19 secure?

Yes. You will not be required to have any face-to-face contact with the surveyor if you do not want to. Any contact you do have with the surveyor can be carried out by phone, both before and after they have carried out the inspection of your home. The surveyor will wear a face covering throughout the inspection of the outside of your home.

### Is the survey important during the pandemic?

The survey has been running for 30 years and has changed and developed as housing quality standards have improved. It continues to provide critical information to help the Scottish Government to better understand changes to housing conditions and affordability across Scotland, and more recently the impact of the COVID-19 pandemic.

### What is the survey about?

During your interview you told us about your housing circumstances, and your views on your home and neighbourhood. To supplement this, we need a professional assessment of your home to help the Scottish Government design specific policies on housing. For instance, which housing types are the most energy efficient and cost less to keep warm.

The surveyor will carry out an external inspection of your home, to assess its age and construction, and then will phone you to ask questions about things like the number of rooms in your house and the types of heating you use in your home. At no point will the surveyor need to inspect the inside of your home.

Please note that the survey cannot be considered a safety inspection and the surveyor will not be able to give you any official advice about the condition of your home or amenities.

### Who is carrying out the survey?

Ipsos MORI carry out the study on behalf of the Scottish Government. Ipsos MORI have appointed CADS Housing Surveys to manage the booking of the housing survey appointments.

All Ipsos MORI housing surveyors are professionally qualified and carry photo IDs.

### Is the survey confidential?

Yes. The information is used by the Scottish Government to help improve housing quality standards across Scotland. The data is all anonymised, meaning nobody will be able to identify you or your household from the information collected by the surveyor. If you'd like any more information, please see [www.gov.scot/publications/scottish-household-survey-privacy-and-data-protection](http://www.gov.scot/publications/scottish-household-survey-privacy-and-data-protection)

### How do I contact you?

If you have any questions about your appointment and the surveyor visit, please contact **CADS** on 0131 558 8999.

If you have any general questions about the survey or how your data is used, **Ipsos MORI** can be contacted for free on 0808 238 5376 or by email at [shs@ipsos.com](mailto:shs@ipsos.com). The team at the **Scottish Government** can be contacted on 0131 244 1685 or by email [shs@gov.scot](mailto:shs@gov.scot).

# Appendix 2: Telephone introduction script

## Arrival phone call with occupant:

Hello, it's [NAME] from Ipsos MORI. Can I speak to [NAMED PARTICIPANT]?

I'm here to carry out the property inspection as part of the Scottish Household Survey. You should have received a letter about this.

[ADVISE HOUSEHOLDER ON CURRENT LOCATION – e.g. PARKED OUTSIDE etc]

The inspection will involve me looking at the outside of your home, to check things like the age, construction and size of your home. It will also involve me taking a few photographs of the outside of your home too. This should take about [X\*] minutes.

*[\*SURVEYOR TO ESTIMATE TIME BASED ON SIZE OF PROPERTY]*

After I've finished the inspection of the outside of your home, I'll return to my car and will contact you to ask some questions about the inside of your home. This should take about 20 minutes.

Are you happy for me to start the inspection now?

[IF NO, ARRANGE ANOTHER TIME FOR INSPECTION / CONTACT CADS IF REFUSAL]

Before I begin can I ask, have you, or has anyone else in your household, been diagnosed with COVID-19 in the last 10 days, self-isolating, or experiencing any of the following symptoms: a high temperature, a new or continuous cough, shortness of breath, or a loss or change to their sense of smell or taste?

[IF ANSWER YES TO ANY OF THESE, ADVISE OCCUPANT THAT, FOR HEALTH AND SAFETY REASONS, WE WILL NEED TO REARRANGE THE SURVEY AND SOMEONE WILL CONTACT SOON TO DO SO. THEN END CALL AND CONTACT CADS TO ADVISE THEM OF THE SITUATION.]

Just so you know, I will wear a face mask throughout the external inspection of the outside of your home. Also, I am not required to have any direct face-to-face contact with you, and if you or anyone else is outside your home during the external inspection I will adhere to the 2 metre social distancing guidelines at all time. And just to confirm, at no point will I require access to the inside of your home. [IF COVID LEVEL 0:

### ADD IF APPLICABLE:

COVID PROTECTION LEVEL 1 OR 2: Also, for health and safety reasons I will not enter any communal or common areas of the property.

COVID PROTECTION LEVEL 0: I may need to pass through the communal or common areas of the property to allow me to carry out an inspection of the rear of the property.

After I've finished the inspection of the outside of your home, I will give you another call to ask some questions about the inside of your home. I will be asking questions about things like the number of rooms in your home and the different types of heating you use.

In advance of this call, if you can, it would be useful if you could have the following information to hand, which will make it quicker and easier for us to complete this part of the survey:

- The make and model of your central heating boiler
- The average depth of any loft insulation you may have

*[PTO]*

[IF HOUSEHOLDER NOT AVAILABLE FOR SECOND PHONE CALL, ARRANGE SUITABLE TIME TO CALL TO CARRY OUT PHONE SURVEY]

[IF THE OCCUPANT IS UNWILLING TO TAKE PART IN THE TELEPHONE SURVEY DO NOT CARRY OUT AN EXTERNAL INSPECTION AND INFORM CADS]

ADD IF APPLICABLE: I will start the inspection of the outside of your home shortly, but before I approach your property and begin it would be useful if, where possible, you could open any gates, outside doors or anything else that will allow me to safely view the front, back and sides of your property.

- IF THIS IS NOT REQUIRED, COMMENCE EXTERNAL SURVEY.
- IF REQUIRED – ASK HOW LONG THEY'LL NEED TO DO THIS AND THEN COMMENCE EXTERNAL SURVEY ONCE DONE

Great, thanks. I'll start carrying out the inspection of the outside of your property now.



# Appendix 3: Surveyor telephone discussion guide

	Form section
<p><b>Heating and hot water systems</b></p> <p>1. What kind of heating do you have?</p> <ul style="list-style-type: none"> <li>• If boiler, is it mains gas?</li> <li>• Do you know the manufacturer and model of your boiler? <i>[Look for a boiler flue as you survey externally, external meter cupboards, is a condensate pipe visible?]</i></li> <li>• How old is it?</li> <li>• Is the boiler inside the house?</li> <li>• If not a mains gas boiler, what? What fuel do they use?</li> </ul> <p>2. Radiators? In all main rooms?</p> <p>3. Do you have any other fixed heaters in any room? <i>[e.g. screwed to the wall / hard wired, not portable]</i></p> <p>4. What controls do you have? PROBE: Time clock? Room thermostat in hall? Dials on radiators?</p> <p>5. How do you heat your hot water? <i>If not a combi, usually going to be a cylinder so ask if its small medium or large?</i></p> <p>IF CYLINDER: Is it insulated? <i>Red or white jacket or yellow or blue or green foam on it? Both?</i></p> <p><b>Meters</b></p> <p>6. Do you have a gas and electricity meter?</p> <p>7. Are any of these prepay meters?</p> <p>8. Are any of these smart meters?</p> <p>9. If electric heating, do you know what tariff you are on?</p> <p>PROBE: Is there a time clock beside the meter / black box [teleswitch], / multiple meters / multiple displays on a meter?</p> <p><b>Insulation</b></p> <p>10. Do you know if any insulation has been added to your house?</p> <p><i>NOTE: If the dwelling is socially rented, almost certainly it will have upgraded loft insulation to a depth of 300mm.</i></p> <p><i>It is possible that occupants will know the depth of their loft insulation in relation to joist depth, and based on the age of the property a reasonable estimate can be made on the joist size and thereby the insulation depth.</i></p>	<p>M2/ M5/ M9/ M6/ M10/10a</p> <p>M3 / M4</p> <p>M9 / M21</p> <p>M21a / M22</p> <p>M21 M17/ M29/ M30/ M31</p> <p>L1</p> <p>L2</p> <p>L2a</p> <p>L4</p> <p>M26 Q8/Q17/Q31/ Q40</p>



<b>FLATS</b>	E4
11. What floor is your flat on?	E7
12. How many outside walls are there to your flat?	E8
13. Are there any walls to the close?	
<b>GENERAL</b>	F1/F2-J1
14. How many rooms do you have? What type are they? And what floor are they on?	
15. Do you have a basement or any rooms in your roof space?	J3, J4
16. Do you have a business run from home? <i>e.g. probe for any non-residential use</i>	J5
17. How many WCs do you have in the property?	K5
18. What type of cooker do you have?	K23
19. Do you use low energy light bulbs IF YES: a few / some / half /lots / all?	L19
20. Do you have a mechanical ventilation system?	L20
21. How many open chimneys do you have?	L22
22. Do you have a septic tank/cesspool?	D11
23. Do you have a private water supply?	L11
24. Do you have a private power supply?	L4
25. If the coronavirus restrictions ease and things start to return to normal, would you be willing for a surveyor to come to your house to carry out an inspection of the inside of your home?	A4

## Appendix 4: EPC data dictionary

Field name	Description
<b>MORI ID</b>	SHS identifier
<b>Postcode</b>	Postcode as per SHS sample
<b>EPC Date</b>	Year of 'Date of Certificate' unless 'Date of Certificate' was earlier than 'Date of Assessment' in which case 'Date of Assessment'.
<b>Dwelling type</b>	Possible values: Basement flat; Basement maisonette; Basement-floor flat; Detached bungalow; Detached house; Enclosed Mid-Terrace bungalow; Enclosed end-terrace house; Enclosed mid-terrace bungalow; Enclosed mid-terrace house; Enclosed-end-terrace bungalow; Enclosed-mid-terrace house; End-Terrace house; End-terrace bungalow; End-terrace flat; End-terrace house; Ground floor flat; Ground-floor flat; Ground-floor maisonette; Mid-Terrace house; Mid-floor flat; Mid-floor maisonette; Mid-terrace bungalow; Mid-terrace house; Park home; Semi-Detached bungalow; Semi-detached bungalow; Semi-detached flat; Semi-detached house; Top floor maisonette; Top-floor flat; Top-floor maisonette; end-terrace bungalow; end-terrace house
<b>Conservatory Type</b>	Description of conservatory type for dwelling. Categories include: <ul style="list-style-type: none"> <li>- no conservatory</li> <li>- not separated</li> <li>- separated heated conservatory</li> <li>- separated unheated conservatory.</li> </ul>
<b>Has Solar Panel</b>	Whether solar panel for water heating. 0 - No, 1 - Yes.
<b>Photovoltaic supply</b>	Yes/No, and if yes then either: <ul style="list-style-type: none"> <li>a) % of external roof area with PVs, or</li> <li>b) details of the PV: <ul style="list-style-type: none"> <li>- kWp</li> <li>- pitch: one of horizontal, 30°, 45°, 60°, vertical</li> <li>- orientation (if not horizontal): one of S, SE, E, NE, N, NW, W, SW</li> <li>- overshadowing: very little, modest, significant or heavy</li> </ul> </li> </ul> <p>In either case, whether the PVs are connected to the dwelling's electricity meter (yes/no, separately for each PV if more than one).</p>
<b>Flat Level</b>	For flats and maisonettes only, this is the lowest floor level of the property if it has more than one storey (0 for ground level, unless there is a basement in which case 0 is basement).
<b>Heat Loss Corridor</b>	For flats and maisonettes only, whether there is a heat loss corridor. Categories include: <ul style="list-style-type: none"> <li>- no corridor</li> </ul>

	<ul style="list-style-type: none"> <li>- heated corridor</li> <li>- unheated corridor</li> </ul>
<b>Unheated corridor length</b>	For flats and maisonettes only, if unheated corridor, length of sheltered wall between flat and corridor. If a flat or maisonette is sheltered on more than one storey this is the total of the sheltered lengths on each storey.
<b>Habitable Room Count</b>	Number of habitable rooms in main building and any extensions. Habitable rooms include any living room, sitting room, dining room, bedroom, study and similar; and also a non-separated conservatory. A kitchen/diner having a discrete seating area also counts as a habitable room. A non-separated conservatory adds to the habitable room count if it has an internal quality door between it and the dwelling. Excluded from the room count are any room used solely as a kitchen, utility room, bathroom, cloakroom, en-suite accommodation and similar; any hallway, stairs or landing; and also any room not having a window. For open plan dwellings counts all spaces thermally connected to the main living area (e.g. a living/dining room) as one room. For a kitchen to be a kitchen/diner it must have space for a table and 4 chairs. A lounge/dining room where the door was temporarily removed (i.e. architrave and hinges still there) is two habitable rooms. A lounge/dining room with the door permanently removed (hinge holes filled etc) is one habitable room. Care needed with large values.
<b>Mains Gas</b>	Whether mains gas available - Yes / No. Present for all records. Indicates that there is a gas meter or a gas-burning appliance (e.g. cooker) in the dwelling. A closed-off gas pipe does not count.
<b>Meter Type</b>	Electricity tariff. Categories include: <ul style="list-style-type: none"> <li>- dual</li> <li>- single</li> <li>- off-peak 18 hour</li> <li>- dual (24 hour)</li> <li>- unknown</li> </ul>
<b>Mechanical ventilation</b>	Type of mechanical ventilation present. Applies to whole house ventilation system only. Otherwise natural ventilation is assumed. Intermittent extract fans (kitchen and bathrooms) are not a mechanical ventilation system for SAP calculations, but continuously running extract fans in wet rooms are treated as mechanical extract ventilation. Categories include: <ul style="list-style-type: none"> <li>- natural</li> <li>- mechanical, extract only</li> <li>- mechanical, supply and extract</li> </ul>
<b>Wind turbines count</b>	Count of wind turbines at dwelling.
<b>Open fireplaces count</b>	Number of open fireplaces in dwelling.
<b>Low Energy Lighting %</b>	Low energy fixed lighting outlets as a % of total fixed lighting outlets in dwelling. 0 to 100.

<b>Main Heating 1 (or 2) Category</b>	<p>Categories include:</p> <ul style="list-style-type: none"> <li>- boiler with radiators or underfloor heating</li> <li>- community heating system</li> <li>- electric storage heaters</li> <li>- electric underfloor heating</li> <li>- heat pump with radiators or underfloor heating</li> <li>- heat pump with warm air distribution</li> <li>- none</li> <li>- other system</li> <li>- room heaters</li> <li>- warm air system (not heat pump)</li> </ul>
<b>Main Heating 1 Emitter Type</b>	<p>Description of emitters for main heating system where this is a gas or oil boiler, heat pump to water and for electric CPSUs. Categories include:</p> <ul style="list-style-type: none"> <li>- both radiators and underfloor heating</li> <li>- radiators</li> <li>- underfloor</li> </ul>
<b>Main Heating 1 Boiler Flue Type</b>	<p>Description of boiler flue. Categories include:</p> <ul style="list-style-type: none"> <li>- balanced flue</li> <li>- chimney</li> <li>- open flue</li> <li>- unknown (there is a flue, but its type could not be determined).</li> </ul>
<b>Water heating code</b>	<p>Code for water heating system. See table 4a of <a href="https://www.bre.co.uk/filelibrary/SAP/2012/SAP-2012_9-92.pdf">https://www.bre.co.uk/filelibrary/SAP/2012/SAP-2012_9-92.pdf</a>.</p>
<b>Water heating fuel code</b>	<p>Code for water heating fuel. See table 12 of <a href="https://www.bre.co.uk/filelibrary/SAP/2012/SAP-2012_9-92.pdf">https://www.bre.co.uk/filelibrary/SAP/2012/SAP-2012_9-92.pdf</a>.</p>
<b>Main Heating 1 Control</b>	<p>Code for control associated with main heating system. See table 4e of <a href="https://www.bre.co.uk/filelibrary/SAP/2012/SAP-2012_9-92.pdf">https://www.bre.co.uk/filelibrary/SAP/2012/SAP-2012_9-92.pdf</a>.</p>
<b>Secondary Heating Type</b>	<p>Code secondary heating. See table 4a of <a href="https://www.bre.co.uk/filelibrary/SAP/2012/SAP-2012_9-92.pdf">https://www.bre.co.uk/filelibrary/SAP/2012/SAP-2012_9-92.pdf</a>.</p>
<b>Cylinder size</b>	<p>Categories include:</p> <ul style="list-style-type: none"> <li>- No Access</li> <li>- No Cylinder</li> <li>- Normal - up to 130 litres</li> <li>- Medium - between 131 and 170 litres</li> <li>- Large - greater than 170 litres</li> <li>- actual size included in Solar Water Heating Details</li> </ul>
<b>Cylinder insulation thickness</b>	<p>Values include 0, 12, 25, 38, 50, 80, 120, 160 mm.</p>
<b>Cylinder insulation type</b>	<p>Type of cylinder insulation. Categories include: foam, jacket, none.</p>
<b>Cylinder thermostat</b>	<p>Y/N (though also a handful with TRUE / FALSE).</p>

<p><b>Dwelling measurements type</b></p>	<p>Confirms if internal or external measurements.</p> <p>If this field is not present, please note that if wall lengths are taken externally wall thickness also needs to be recorded (in order to convert the floor area to internal measurements) so that may be a good indicator if wall length was taken internally or externally.</p> <p>Floor heights, rooms in the roof and basements are always internal measurements.</p>
<p><b>Floor Area (Parts 1 to 5, Floors 0 to 4 for part 1, 0 to 3 for part 2 and 0 to 1 for parts 3 to 5. No instances of higher floors for parts 2 to 5 in sample).</b></p> <p><b>Rooms in roof.</b></p>	<p>Floor area for given part and floor of dwelling. Care required with small values.</p> <p>Rooms in the roof and basements are always internal measurements.</p>
<p><b>Floor Height (Parts 1 to 5, Floors 0 to 4 for part 1, 0 to 3 for part 2 and 0 to 1 for parts 3 to 5. No instances of higher floors for parts 2 to 5 in sample).</b></p>	<p>Average height for given part and floor of dwelling. Care required with particularly large values which are likely to be errors.</p> <p>These measurements are always internal measurements.</p>
<p><b>Heat Loss Area/Pe (Parts 1 to 5, Floors 0 to 4 for part 1, 0 to 3 for part 2 and 0 to 1 for parts 3 to 5. No instances in sample of higher floors for parts 2 to 5).</b></p>	<p>Exposed perimeter for given part and floor of dwelling.</p>
<p><b>Party Wall Length (Parts 1 to 5, Floors 0 to 3 for part 1, 0 to 1 for part 2 and 3 and 0 for parts 4 to 5. No instances of higher floors in sample).</b></p>	<p>Party wall length for given part and floor of dwelling. Care required with particularly large values which are likely to be errors.</p>
<p><b>Floor Type (Parts 1 to 5, Floor 0).</b></p>	<p>Description of floor construction. For lowest floor of the building. Not if another dwelling or premises below. Categories include:</p> <ul style="list-style-type: none"> <li>- ground floor</li> <li>- solid</li> <li>- suspended (not timber)</li> <li>- suspended timber</li> <li>- unknown</li> <li>- upper floor (if heat loss area &gt;0, this is an exposed floor)</li> </ul>
<p><b>Insulation (Parts 1 to 5, Floor 0)</b></p>	<p>Description of floor insulation. Not if another dwelling or premises below. Categories include:</p> <ul style="list-style-type: none"> <li>- as built</li> <li>- retro-fitted</li> <li>- unknown</li> </ul>

<b>Wall Construction (Parts 1 to 5)</b>	Description of wall construction for given part of dwelling. Categories include: <ul style="list-style-type: none"> <li>- cavity</li> <li>- granite or whinstone</li> <li>- park home wall</li> <li>- sandstone or limestone</li> <li>- solid brick</li> <li>- system built</li> <li>- timber frame</li> </ul>
<b>Wall Thickness (Parts 1 to 5)</b>	Description of wall thickness for given part of dwelling in mm where measured rather than SAP defaults.
<b>Wall Insulation Thickness (Parts 1 to 5)</b>	Description of wall insulation thickness for given part of dwelling. Only if wall insulation is internal, external or cavity (filled or unfilled) plus internal or external. Categories include: <ul style="list-style-type: none"> <li>- 50mm</li> <li>- 100mm</li> <li>- 150mm</li> <li>- 200mm</li> <li>- NI (referring to no insulation).</li> </ul>
<b>Roof Insulation Thickness (Parts 1 to 5)</b>	Description of roof insulation thickness for given part of dwelling. Categories include: 0, 12mm, 25mm, 50mm, 75mm, 100mm, 150mm, 200mm, 250mm, 270mm, 300mm, 300mm+, 350mm, 400mm+, ND (not defined), NI (no insulation). Only for roof insulation at joist level and where can be accessed.
<b>Roof Construction (Part 1)</b>	Description of roof construction for main part of dwelling. Categories include: <ul style="list-style-type: none"> <li>- Another dwelling above</li> <li>- Flat</li> <li>- Pitched (slates or tiles), access to loft</li> <li>- Pitched (slates or tiles), no access to loft</li> <li>- Pitched (thatch)</li> <li>- Pitched roof with sloping ceiling</li> <li>- Same dwelling above</li> </ul>

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### **About Ipsos MORI Scotland**

Ipsos MORI Scotland provides research focused on the distinct needs of policymakers and businesses in Scotland. We offer the full range of qualitative and quantitative research methodologies and have a detailed understanding of specific sectors in Scotland, their policy challenges and their research needs. The variety of research we conduct gives us a unique insight into many aspects of life in Scotland.