

Research Report

Living without mains gas
in Wales: *challenges
faced by consumers
living off mains gas
network*





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Background and objectives

Citizens Advice and Citizens Advice Scotland are the statutory consumer watchdogs for energy consumers in Great Britain. The organisations provide the consumer voice on issues across the energy market, from generation, infrastructure and metering to supply, complaints and performance. One particular area of interest is the experiences of people in households which do not have access to mains gas to heat their homes (ie 'off-gas' consumers); in particular, whether the off-gas market (comprising electricity companies, heating oil, liquid petroleum gas (LPG) and solid fuel suppliers) is working in the best interests of consumers. People not connected to the mains gas grid face a number of possible disadvantages compared with those with access to mains gas, some of which are linked to the fact that non-gas fuels other than electricity (referred to as 'non-metered' fuels) are not regulated by the Office of Gas and Electricity Markets (Ofgem).

Citizens Advice / Citizens Advice Scotland therefore wished to conduct independent research to better understand the experiences of those living in off-gas households, their satisfaction with the way they heat their home and their perceptions of the service received from their fuel supplier. Beaufort was commissioned to carry out a telephone survey among a sample of those living in households without access to mains gas in Wales, England and Scotland, supplemented by a series of follow-up depth interviews to investigate consumer experiences in more depth. Alongside the consumer telephone survey, Beaufort conducted a series of mystery shopping assessments among a cross-section of non-metered fuel suppliers in Wales, England and Scotland to examine payment options on offer to customers as well as suppliers' trade association membership and adherence to voluntary codes of practice. The third component of the study was the analysis of data from questionnaires completed by representatives of local Citizens Advice offices in Wales and England with consumers in their area living in off-gas households.

Method

The project consisted of three distinct audiences: firstly, consumers living in off-gas households in Wales, England and Scotland; secondly, suppliers of non-metered fuels in Wales, England and Scotland; lastly, a sample of enquirers/clients of local Citizens Advice offices in Wales and England. To cover these audiences four separate research approaches were used, combining quantitative and qualitative methods:

1. **Quantitative consumer telephone survey: 1,004 CATI (Computer Assisted Telephone Interviewing) interviews** with a sample of adults living in off-gas households in Wales (502 interviews), England (250 interviews) and Scotland (252 interviews), with data weighted to be representative of off-gas fuel type. Wales and Scotland samples were up-weighted compared with England to allow for reporting at individual nation level
2. **Qualitative consumer depth interviews: 60 follow-on telephone interviews** conducted with people from a range of off-gas households, to explore their experiences in depth; 20 depth interviews were conducted in Wales, England and Scotland respectively with people identified through the main consumer survey
3. **Supplier mystery shopping: 72 telephone assessments** (24 in Wales, England and Scotland respectively) with a range of suppliers of different non-metered fuel types (10 heating oil, 10 solid fuel and 4 LPG in each nation)
4. **Citizens Advice office interviews: analysis of 193 questionnaires** from interviews conducted by representatives from a range of local Citizens Advice offices in Wales and England with a sample of consumers living in off-gas households in their area (104 in Wales and 89 in England)

Fieldwork for all elements was carried out between 5 January and 11 March 2016, with a pilot for the consumer telephone survey conducted in late December 2015.

This report focuses on findings for Wales – separate reports are available for England and Scotland, together with a report providing an overview of results across three nations.

Key findings

- **The demographic profile of off-gas consumers differs markedly by fuel type:** electricity-only users have the youngest age profile, are most likely to be in the DE¹ socioeconomic groups, to live in smaller rented flats and apartments and to be concentrated in urban South Wales; in contrast, heating oil consumers have the oldest age profile, are most likely to be in the AB socioeconomic groups and to live in large detached homes in Mid and West Wales; LPG and solid fuel consumers are most likely to be skilled manual workers (C2s), to live in North Wales and to have older homes.

¹ Socio-economic classification is determined by establishing an individual's job title and position and social grades are defined as follows:

AB: Higher and intermediate managerial, administrative and professional occupations

C1: Supervisory, clerical and junior managerial, administrative and professional occupations

C2: Skilled manual workers

DE: Semi-skilled and unskilled manual workers, state pensioners, casual and lowest grade workers, unemployed with state benefits only

- **Non-metered fuels are most commonly bought infrequently but in large quantities:** nearly half of non-metered fuel consumers buy fuel only once or twice each year, compared with around one in ten who do so every month. Most commonly, fuel is purchased in October to January, with these four months accounting for three quarters of fuel purchases. Almost six in ten non-metered fuel customers buy their fuel in bulk, double the proportion that purchases as much fuel as they need at a time.
- **The most common method of paying for non-metered fuel in Wales is payment in full in advance:** nearly six in ten of those interviewed pay for their fuel up-front while fewer than a third either pay by instalments or in arrears, that is after they have used their fuel.
- **Despite the fact that most non-metered fuel consumers pay in advance for their fuel, there is little dissatisfaction with payment options in the market:** over nine in ten consumers are satisfied overall, although solid fuel users are less satisfied than heating oil and LPG consumers, primarily because of the lack of payment choices offered by their supplier.
- **Heating costs for off-gas consumers in Wales vary quite considerably by fuel type and by property type:** estimated average monthly expenditure on fuel ranged from just over £90 per month (for heating oil consumers) to over £102 per month (for solid fuel users).
- **Relatively wide variations were evident in the prices quoted by fuel suppliers to mystery callers:** prices quoted for heating oil differed by as much as 30-40%.
- **Over eight in ten off-gas consumers regard their current method of heating their home to be affordable, but 15 per cent do not (rising to almost three in ten electricity-only consumers):** significant minorities of those living in non-mains gas households agree that 'it's very expensive to heat my home', 'I sometimes get stressed when thinking about my fuel costs' and 'I've gone without heating because I can't always afford to pay for fuel'. At the same time, almost six in ten of those interviewed (particularly heating oil customers and more affluent, AB consumers) agree that 'fuel costs aren't really an issue for me'.
- **Satisfaction with delivery options available when ordering from non-metered fuel suppliers is very high:** only 2 per cent of non-metered fuel consumers are dissatisfied and only 6 per cent have ever experienced any problems or issues in getting their fuel delivered (primarily heating oil and LPG customers).
- **Satisfaction with their heating system is also generally high among those not connected to mains gas in Wales:** almost nine in ten are satisfied and just over half are very satisfied. Satisfaction levels are highest among heating oil consumers and LPG users but lowest among electricity-only consumers.

The principal reasons for being dissatisfied are that the house is cold or the system is inefficient and that it is expensive or uneconomical to run.

- **Most off-gas consumers in Wales agree they find it easy to keep their home warm, but a significant minority (one in four) do not:** this rises to over a third of electricity and solid fuel users. Moreover more than one in ten of those interviewed agree they have had problems with their health because their house is cold.
- **The great majority of off-gas consumers consider their heating system to be easy to use:** solid fuel and electricity consumers are less likely than heating oil and LPG consumers to consider their systems very easy to use, however, and are more likely to say they are not easy, either because it's difficult to control or adjust the temperature or because it's physically demanding to carry the fuel or cut logs.
- **Off-gas consumers are also satisfied on the whole with the quality of service provided by fuel suppliers - over nine in ten are satisfied and only 7 per cent dissatisfied:** heating oil customers have the highest satisfaction levels and electricity-only consumers the lowest. Reasons for satisfaction centre primarily round delivery and customer service. In contrast, the cost of fuel tops the list of reasons given by those dissatisfied with their current fuel supplier (most of whom are electricity-only consumers).
- **Fewer than one in ten off-gas consumers in Wales has ever complained about their fuel supplier's service, but the proportion of electricity-only users who have done so is more than double that of other fuel users:** around two-thirds of complainants found it very or fairly easy to complain but over a third said it was difficult. Only one of the twenty four suppliers contacted in the mystery shopping element mentioned a formal complaints procedure.
- **Switching levels are low although the great majority of off-gas consumers believe it to be easy to change fuel supplier:** fewer than half of off-gas consumers have switched supplier during the period they have lived in their current home, with heating oil customers most likely to have done so and LPG users (most likely to be tied into a contract) and electricity-only consumers least likely.
- **Awareness of supplier trade association membership or accreditation is low in the unmetered fuels market:** only around a quarter of consumers using unmetered fuels know their fuel supplier is a member of a trade association (with very few able to name the organisation) and over four in ten have no idea whether they are or not.
- **During the mystery shopping, just over half of the non-metered fuel suppliers in Wales contacted said they have some kind of accreditation or are members of a trade association (that is 13 of the 24 approached):** but only seven companies named the trade association to which they claimed to be accredited.

- **When asked what, if any, special provisions they have in place for elderly customers, no specific reference was made in the mystery shopping by any of the fuel suppliers contacted to a vulnerable persons' protocol or to any formal provision in place for vulnerable customers:** many suppliers contacted offered some informal help or service provision which took the customer's age and circumstances into account, however.
- **Nearly half of heating oil users are aware of oil clubs and one in four of those belongs to one (equating to 11 per cent of all heating oil consumers):** among members, satisfaction with the savings that membership brings is high, but non-members' reaction to the idea of joining an oil club is mixed.
- **Over eight in ten off-gas consumers claim to know something about the use of renewable (green) technologies for heating homes:** most of these would consider using such methods to heat their home.
- **Knowledge of any grants or financial help available for people who don't have mains gas to heat their home is very low:** nearly nine in ten off-gas consumers were not able to think of any grants or financial help that might be available spontaneously and, even after prompting with a list, over four in ten had not heard of any of the grants or schemes providing financial assistance to people in their situation.
- **Around one in five off-gas consumers (21 per cent) has ever applied to a scheme to help improve the energy efficiency of their home:** while around two-thirds of those who had applied for help had been successful and had received some assistance.

Conclusions

- Most off-gas consumers are satisfied with the payment methods offered by suppliers despite the lack of choice available in some sectors (particularly for solid fuel and when purchasing from smaller businesses). The requirement to pay in full on order or delivery could pose problems for less affluent consumers using coal or wood to heat their home, especially if they are unable to set money aside to buy fuel regularly (in fact the survey findings show only around one in ten non-metered fuel consumers are buying fuel monthly).
- Prices in the non-metered fuel market nearly always include delivery (provided the order is above the supplier's minimum order level) so there seems to be little likelihood of hidden additional charges unless customers are buying small quantities of fuel. This might be a problem for those on low incomes, however, who buy fuel as and when they need it, rather than buying in bulk, and who therefore don't benefit from better pricing, free delivery or any other economies of scale available on larger orders.

- As prices in the non-metered fuel market can vary widely by supplier (by as much as 30-40% in the case of heating oil in the mystery shopping assessments) it is clearly worth customers shopping around for the best deal. In reality, not many off-gas consumers are shopping around or switching suppliers, however – fewer than half those interviewed in the telephone survey had switched supplier since moving into their current home. At the same time most feel it is easy to change, so the low levels of switching may be attributable to the relatively high levels of supplier satisfaction in the market, as well as low awareness of the price variations that exist.
- Most non-metered fuel suppliers are relatively flexible with deliveries and nearly all offer some kind of emergency provision to help prevent customers running out of fuel and having to go without heating. As a result, satisfaction with delivery is high in the market and only around 6 per cent of off-gas consumers have experienced any problems or issues with fuel delivery.
- Hardly any of the suppliers contacted during the mystery shopping assessments made reference to any formal complaints procedure in operation. Although the level of complaints was low in the telephone survey (8 per cent had ever complained about their fuel supplier), around a third of those who had complained said they had found it difficult to do so. The absence of (or lack of promotion of) formal complaints procedures might be contributing to this.
- Trade associations seem to have a low profile in the non-metered fuel market – membership or accreditation is not mentioned spontaneously by suppliers and, even when asked, fairly low proportions say their company is a member of a trade association. This suggests that accreditation has a low perceived value among suppliers and is not perhaps felt to be important to customers. Moreover, only a small proportion of off-gas consumers were able to say whether their current fuel supplier is a member of a trade association, reinforcing the impression that suppliers are not promoting membership (where they do indeed belong).
- Likewise hardly any of the suppliers who said they were accredited were able to explain what the consumer benefits of accreditation were. Nor were there any mentions of relevant codes of practice or vulnerable persons protocols in the mystery shopping, suggesting a lack of structure to help vulnerable customers. Despite not having any formal protocols for vulnerable people, however, many suppliers were sympathetic to their needs and willing to make special provision over and beyond the normal service.
- More publicity and promotion of oil clubs would be useful to boost take-up and help other heating oil users benefit from the cost savings they can bring. Perhaps more education about oil clubs and their benefits would help too, in

overcoming the reservations held by non-members that might be acting as barriers to joining one. Also, heating oil suppliers could be encouraged to work with oil clubs more, to increase the options available to consumers.

- Knowledge of any grants or financial assistance available for people who don't have mains gas to heat their home is very low at the moment – fewer than one in twelve off-gas consumers could name a scheme or grant available and, even after prompting, over four in ten had not heard of any of the schemes. Raising awareness of the schemes and their eligibility criteria would therefore be helpful in encouraging those in need of assistance to apply.
- That said, the people who seem to be struggling most to keep their homes warm are not necessarily the ones whom the government's energy efficiency schemes are targeting for help – those in most need of assistance are younger people on low incomes, often parents of young children and often living in electricity-only households.

1. Background

Citizens Advice and Citizens Advice Scotland are the statutory consumer watchdogs for energy consumers in Great Britain. The organisations provide the consumer voice on issues across the energy market, from generation, infrastructure and metering to supply, complaints and performance.

One particular area of interest for Citizens Advice and Citizens Advice Scotland is the experiences of people in households which do not have access to mains gas to heat their homes (hereafter referred to as ‘off-gas’ consumers). In particular, they want to find out whether the off-gas market (comprising electricity companies, heating oil, liquid petroleum gas (LPG) and solid fuel suppliers) is working in the best interests of consumers.

People not connected to the mains gas grid face a number of possible disadvantages compared with those with access to mains gas, some of which are linked to the fact that non-gas fuels other than electricity (referred as ‘non-metered’ fuels in the report) are not regulated by the Office of Gas and Electricity Markets (Ofgem). These include:

- Less consumer protection for those using ‘non-metered’ fuels (heating oil, LPG, solid fuel) compared with consumers with gas and electric heating, eg no ombudsman service or sector-specific statutory consumer representation service
- Higher costs of space and water heating for those using LPG, solid fuel and electricity (the cost of heating oil is currently similar to mains gas, although it has been much higher in the past)
- More volatile price fluctuations for those using LPG and heating oil, compared with mains gas and electricity
- A lack of security of supply or delivery
- A reliance on voluntary codes of practice, the interpretation of which can vary considerably between suppliers in the case of vulnerable customers (LPG, heating oil and solid fuel suppliers are not required to maintain Priority Services Registers;² however, some maintain a voluntary list of vulnerable consumers)
- A strong association with other risk factors for high fuel costs, e.g. homes reliant on non-metered fuels are more likely to be older, built with solid walls and detached or semi-detached; households living in homes heated by electricity or LPG are more likely to live on low incomes. They also tend to have fewer, less flexible payment options

² More information on the Priority Service Register can be found here: <https://www.citizensadvice.org.uk/consumer/energy/energy-supply/get-help-paying-your-bills/priority-services-register-for-older-and-disabled-people/>

In Wales there are 268,000 households (21 per cent) that are not connected to mains gas and which use other fuel sources for heating, while in England there are 2,942,000 households (13 per cent). In Scotland, 507,000 households are not connected to the mains gas network, representing 21 per cent of all households.

In Great Britain the approximate breakdown of the off-gas market by fuel type is as follows:

Table 1: Breakdown of off-gas market	
Fuel type	% of off-gas market
Kerosene heating oil	54
Electricity	27 ³
Solid fuel (wood chips, pellets or logs; coal; coke)	10
Liquid Petroleum Gas (LPG) supplied in bulk and in cylinders	9 ⁴

The majority of electricity-only households will be found in urban areas (electric heating systems are most prevalent in flats) while the reverse is true for households using non-metered fuels, which are often located in geographically remote areas.

Consumers who do not have access to mains gas face particular challenges as a result of their lack of a grid connection:

- Those relying on mains electricity for their heating will primarily be at a disadvantage due to higher heating costs, and often find themselves contributing to government schemes (such as the Energy Company Obligation – ECO) through their bills, but are not as likely to be able to benefit from the schemes⁵
- Customers who rely on unmetered fuels (which are not regulated by Ofgem) face further detriment in that they lack the consumer protections provided to those with access to gas and electricity. Costs can be higher than paying for mains gas and there is no guarantee of supply on specific dates (which can be a particular problem in times of cold weather when roads can be impassable). There is no guarantee of supply for vulnerable customers. The heating oil, LPG and solid fuels markets rely on self-regulation through

³ UKLPG: *Review of Current Regulatory Framework for LPG in Great Britain* (June 2014), p.1

⁴ Data taken from Off-Grid Energy Market Study (Office for Fair Trading, October 2011)
http://webarchive.nationalarchives.gov.uk/20140402142426/http://www.offt.gov.uk/shared_offt/market-studies/off-grid/OFT1380.pdf

⁵ ECO is a scheme run by the UK government, which places an obligation on larger energy suppliers to install energy efficiency measures in domestic properties. Consumers who are in fuel poverty are prioritised for such measures.

voluntary codes of practice put forward by the relevant trade associations, with no firm evidence of the extent to which these are policed by the trade associations or, indeed, adhered to by individual suppliers.

Against this backdrop, Citizens Advice wished to conduct independent research to better understand the experiences of those living in off-gas households and their satisfaction with the way they heat their home and the service received from their fuel supplier. Beaufort was therefore commissioned to carry out a telephone survey among a robust sample of those living in households without access to mains gas in Wales, England and Scotland, supplemented by a series of follow-up depth interviews to investigate off-gas consumer experiences in more depth (see section 3 below for further details).

Alongside the consumer telephone survey, Beaufort conducted a series of mystery shopping assessments among a cross-section of non-metered fuel suppliers in Wales, England and Scotland to examine payment options on offer to customers as well as suppliers' trade association membership and adherence to voluntary codes of practice.

Lastly, the third component of the study was the analysis of data from interviews conducted by representatives of local Citizens Advice offices in Wales and England with consumers in their area living in off-gas households. This exercise was intended to complement the independent survey.

This report focuses on the results for Wales – separate reports detail results for England and Scotland. In addition, an overview report compares results across all three GB countries.

2. Objectives

Specific objectives of the project were as follows for each of the three parts:

2.1 Consumer telephone survey and depth interviews

Overall, to understand the experiences of consumers living in off-gas households with regard to heating their home and to compare the experiences of those using different types of heating fuels; specifically to assess:

- Expenditure on fuel, payment methods and purchasing patterns
- Any payment issues experienced and views on the affordability of their current method of heating their home
- Delivery options available and any problems or issues experienced with fuel delivery
- Satisfaction with their heating system and their supplier
- Awareness of suppliers' membership of relevant trade associations and any voluntary codes of practice
- Awareness of any grants and schemes to help off-grid customers and to determine how many off-gas consumers have applied to a scheme to help improve the energy efficiency of their home (e.g. ECO, Nest⁶, Arbed⁷, HEEPs), as well as whether they were successful

2.2 Supplier mystery shopping

To establish:

- The extent to which suppliers are members of trade associations
- The extent to which suppliers adhere to the relevant trade associations' codes of practice and 'vulnerable persons' protocol'
- Whether suppliers will proactively offer to send consumers copies of relevant documents, e.g. FPS consumer charter

⁶ Nest is a Welsh Government funded scheme – people need to be living in owned or privately rented accommodation with an F or G EPC (Energy Performance Certificate) rating, and in receipt of a means tested benefit, to qualify for assistance

⁷ Arbed is a Welsh Government and ERDF (European Regional Development Fund) funded scheme, currently operating in four areas of Wales – Nantlle, Colwyn Bay, Rhyl and Holywell. Occupants of houses in specifically identified streets can apply for help with making their home more energy efficient. While Arbed is not a means tested scheme, most of the areas included within its remit are in areas of multiple deprivation

- The extent to which suppliers offer flexible payment options to customers, such as direct debits

2.3 Citizens Advice office interviews

To analyse the data from questionnaires completed by representatives of local Citizens Advice offices with consumers in their area who live in off-gas households, covering the following areas:

- How they heat their home and what issues, if any, they have experienced in heating their home
- Whether they have ever made a complaint to their fuel supplier and, if so, what the outcome was
- Whether they have ever switched supplier
- Experience of seeking advice and help with heating and the outcome of any applications for help (where relevant)
- Profile information on the individual and his/her home

3. Methodology overview

3.1 Overview of approach

The project consisted of three distinct audiences: firstly, consumers living in off-gas households in Wales, England and Scotland; secondly, suppliers of non-metered fuels in Wales, England and Scotland; lastly, a sample of enquirers/clients of local Citizens Advice offices in Wales and England. To cover these audiences four separate research approaches were used, combining quantitative and qualitative methods:

1. **Quantitative consumer telephone survey: 1,004 CATI (Computer Assisted Telephone Interviewing) interviews** with a sample of adults living in off-gas households in Wales (502 interviews), England (250 interviews) and Scotland (252 interviews), with data weighted to be representative of off-gas fuel type. Wales and Scotland samples were up-weighted compared with England to allow for reporting at individual nation level
2. **Qualitative consumer depth interviews: 60 follow-on telephone interviews** conducted with people from a range of off-gas households, to explore their experiences in depth; 20 depth interviews were conducted in Wales, England and Scotland respectively with people identified through the main consumer survey
3. **Supplier mystery shopping: 72 telephone assessments** (24 in Wales, England and Scotland respectively) with a range of suppliers of different non-metered fuel types (10 heating oil, 10 solid fuel and 4 LPG in each nation)
4. **Citizens Advice office interviews: analysis of 193 questionnaires** from interviews conducted by representatives from a range of local Citizens Advice offices in Wales and England with a sample of consumers living in off-gas households in their area (104 in Wales and 89 in England)

A summary of the methodology used for each element follows, with particular focus on Wales. More detail on each part is provided in Appendix I.

3.2 Consumer telephone survey of off-gas households

For the consumer survey a total of 502 adults living in off-gas households in Wales were interviewed by telephone. All lived in areas of Wales with a high penetration of off-gas households (65% or above) and all were solely or jointly responsible for paying fuel and energy bills in their household.

Off-gas consumers were identified via an initial stage of desk research pinpointing regions in Wales with a high penetration of off-gas consumers. The geographic area used for sampling was Lower Layer Super Output Area (LSOA)⁸, with sample (Random Digit Dialling or RDD telephone numbers) purchased at LSOA area. To increase the inclusivity of the sample telephone numbers were also purchased for mobile-only households.

A disproportionate sampling approach was adopted by fuel type, to ensure reasonable coverage of each non-gas fuel within the sample and allow results for each to be reported on separately. Final data was weighted to reflect the true proportions of each fuel type within the off-gas population (see Appendix II).

Interviews lasted for around 13 minutes on average and were based on a structured questionnaire (see Appendix III). Survey fieldwork in Wales ran from 5 January to 16 February 2016, with an initial pilot phase to test questionnaire length and participant comprehension in late December 2015.

3.3 Follow on depth interviews

Following the completion of the quantitative survey, a number of in-depth, qualitative interviews were conducted with selected people identified through the survey. The aim was to explore their experiences of living without mains gas in more depth and develop case studies to illustrate key issues relating to specific consumer types.

All had taken part in the telephone survey and all had said they were willing to be re-contacted for further research. The sample of 20 depth interviews in Wales covered users of different fuel types (electricity, heating oil, solid fuel and LPG) across a range of regions and ages, with a particular focus on vulnerable people.

Interviews were conducted by telephone and lasted between 15 minutes to 30 minutes. Fieldwork for Wales took place between 16 February and 29 February 2016.

Extracts from case studies are used in the report to illustrate key themes emerging from the quantitative findings and are provided in full in Appendix V. All names have been changed in the case studies.

⁸ Lower Layer Super Output Areas (LSOAs) are a geographic hierarchy designed to improve the reporting of small area statistics in England and Wales. They are generated to be as consistent in population size as possible and typically contain from four to six Output Areas. The minimum population is 1,000 and the mean is 1,500. There is an LSOA for each postcode in England and Wales, with a pseudo code available for Scotland, Northern Ireland, Channel Islands and the Isle of Man.

3.4 Supplier mystery shopping

A series of mystery calls were made by telephone to a sample of 24 non-metered fuel suppliers in Wales, with callers used the scenario that they were phoning on behalf of their elderly mother who was thinking of changing supplier and was looking for a quote for a specific quantity of fuel (see Appendix VI).

The 24 assessments in Wales were broken down by fuel type as follows:

- 10 with heating oil suppliers
- 10 with solid fuel suppliers (half coal and half wood)
- 4 with LPG suppliers

A list of suppliers in Wales was provided by Citizens Advice for sampling. Within each fuel type, a range of supplier size was obtained (as much as was possible), to ensure that smaller and larger companies were included in the sample and that suppliers in all regions were contacted.

Fieldwork was carried out between 25 January and 1 February 2016 after a pilot on 13 January. The duration of calls varied between 4 minutes to 20 minutes.

3.5 Citizens Advice office interviews

The last element of the project was a stand-alone survey of a sample of consumers without access to mains gas interviewed by representatives from Citizens Advice offices in Wales and England. Interviews were administered face-to-face by Citizens Advice staff and were based on a structured questionnaire (see Appendix VIII). A total of 104 questionnaires were completed and analysed for Wales.

The methods used for the recruitment of consumers for the survey in Wales varied across local offices: some contacted existing clients who were known to be off the gas network, and others contacted people in their local areas whom they suspected would be off the gas network, but had not been clients of the local office previously. Because the recruitment often involved prior contact with a local Citizens Advice office this sample cannot be described as representative of all off-gas consumers.

Questionnaires for Wales were completed between late December 2015 and late January 2016.

4. Research findings

4.1 Profile of off-gas consumers

Consumers living in households without access to mains gas and using different types of fuel to heat their home have quite distinct characteristics (see Table 3 below):

- Electricity-only users have the youngest profile in terms of age, with 16 to 34 year olds making up almost half of electricity users in the sample. They are most likely to live alone and are more likely than other fuel users to be in the DE⁹ socioeconomic grades. They also have a higher concentration in South Wales¹⁰ than other fuel types
- Heating oil consumers, in contrast, have the oldest age profile, with more than half aged 55 and over. They are more likely to be in the upper AB socioeconomic groups than other off-gas consumers and to live in households containing two or three people. Geographically, they are most likely to live in Mid and West Wales
- LPG and solid fuel consumers are more likely to be in the C2 socioeconomic group (that is, skilled manual workers) than other off-gas fuel users and to live in North Wales
- Moreover, LPG users tend to have the largest households – over a third of those interviewed in this group live in households containing at least four people

The profile information captured is based on questions asked in the survey questionnaire (see Appendix III), which included household tenure (discussed below).

⁹ Socio-economic classification is determined by establishing an individual's job title and position and social grades are defined as follows:

AB: Higher and intermediate managerial, administrative and professional occupations

C1: Supervisory, clerical and junior managerial, administrative and professional occupations

C2: Skilled manual workers

DE: Semi-skilled and unskilled manual workers, state pensioners, casual and lowest grade workers, unemployed with state benefits only

¹⁰ Regions were comprised of certain LSOAs within the following unitary authorities (LSOAs were selected on the basis of having at least 65% of households which were off-gas):

North: Conwy, Denbighshire, Flintshire, Gwynedd, Isle of Anglesey, Wrexham

Mid and West: Carmarthenshire, Ceredigion, Pembrokeshire, Powys

South: Cardiff, Monmouthshire, Neath Port Talbot, Newport

Table 3: Demographic profile of off-gas consumers by fuel type

%	TOTAL (502)	Electricity (136)	Heating oil (271)	LPG (45)	Solid fuel (50)
Region					
North Wales	41	39	40	49	47
Mid and West Wales	42	37	47	34	36
South Wales	17	24	13	16	17
Age					
16-34	24	45	13	27	24
35-54	31	19	35	30	40
55 and over	46	36	52	43	36
Social grade					
AB	20	14	24	18	13
C1	35	37	35	32	33
C2	21	18	19	31	32
DE	19	24	18	17	19
Refused	5	6	4	3	4
Someone with disability in household					
Yes	26	24	29	19	26
No	75	76	74	80	75
Gender					
Male	50	49	51	45	52
Female	50	51	49	55	48
Household size					
One person	20	35	14	15	18
Two people	40	38	43	31	40
Three people	16	9	19	19	18
Four people	16	14	16	24	16
Five or more people	6	3	6	10	8

Turning to the properties in which they live:

- Electricity-only users are most likely to live in flats or apartments, with almost half living in relatively new properties (built in 2002 or later) and the same proportion renting their home (with most doing so from a social housing landlord). Moreover, nearly half of this group live in smaller, one or two-bedroom homes (a reflection of the fact they are most likely to live alone)
- Heating oil consumers are more likely than other fuel users to live in large, detached houses (nearly four in ten have homes with four or more bedrooms) and are most likely to own their home outright
- The profile of solid fuel users is biased towards detached and semi-detached houses and particularly older properties (almost six in ten live in homes built

before 1919). They are most likely (along with LPG consumers) to own their home with a mortgage

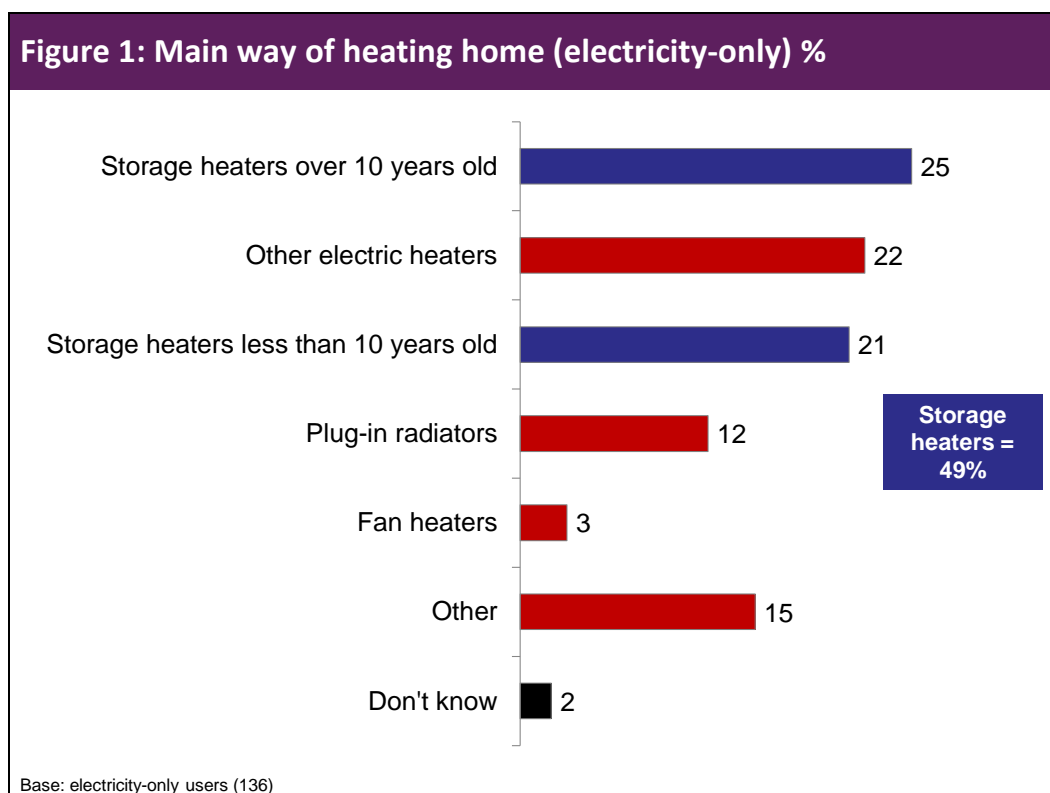
- LPG users also live in older, larger properties, with the great majority having three or more bedrooms and almost half having been constructed pre-1944

Table 4: Property profile of off-gas consumers by fuel type

%	TOTAL (502)	Electricity (136)	Heating oil (271)	LPG (45)	Solid fuel (50)
Type of house					
Detached house	42	20	53	36	50
Semi-detached house	21	19	20	30	27
Bungalow	19	23	19	17	11
Terrace / end of terrace	8	11	6	11	10
Flat / apartment / maisonette	7	24	-	1	-
Other	2	3	-	6	-
Date when property was built (age of property)					
After 2002	14	23	12	8	1
1983 – 2002	17	26	16	12	5
1965 – 1982	16	20	16	5	14
1945 – 1964	10	9	10	17	9
1919 – 1944	5	2	7	5	3
Before 1919	32	15	33	41	59
Don't know	6	5	6	12	9
Size of property (number of bedrooms)					
1	4	12	-	2	4
2	22	35	16	19	24
3	43	41	44	45	42
4 or more	30	12	39	35	30
Household tenure					
Owned outright (no mortgage)	46	28	55	48	46
Owned with a mortgage	25	15	27	32	32
Rented from social landlord (housing association/ council) or shared ownership	15	31	8	7	11
Rented from a private landlord	12	25	7	14	9
Other / don't know	1	1	2	-	2

4.2 Tariffs, contracts and fuel purchasing patterns

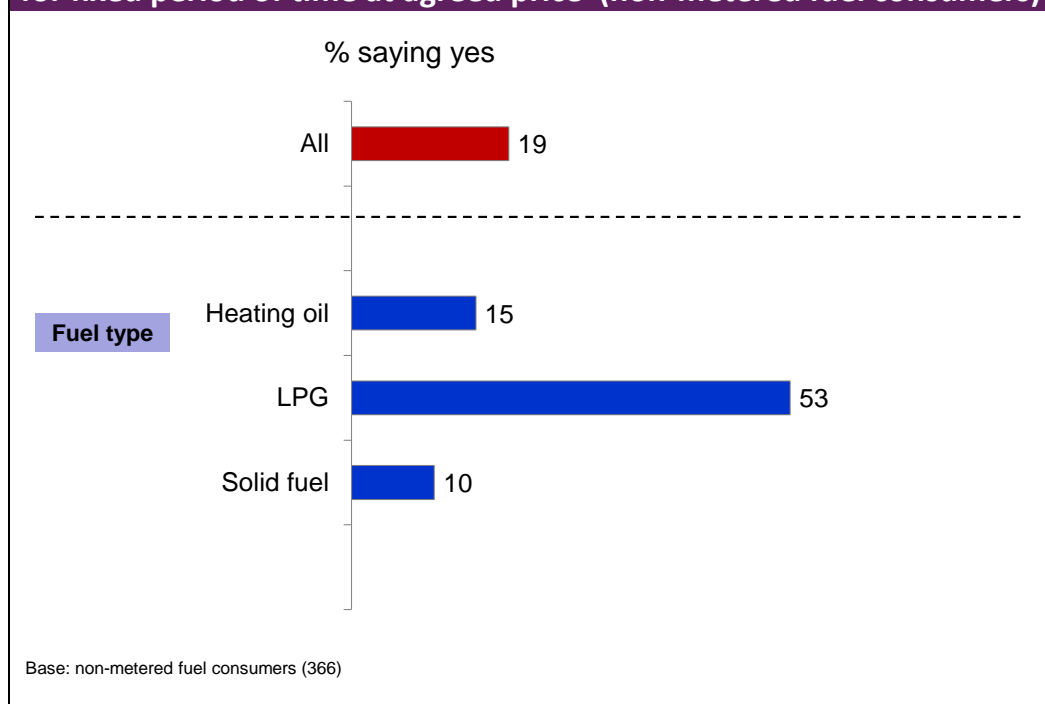
In the telephone survey electricity-only consumers were asked which devices or methods they use to heat their home. Almost half of them (46 per cent) say the main way they heat their home is through storage heaters, with most of these (25 per cent) using storage heaters that are over 10 years old (see figure 1 below):



Seven in ten of those who heat their home with electricity and use storage heaters are on a Time of Use or night-time tariff such as Economy 7. Just over one in five (21 per cent) are using a standard daytime tariff for their storage heaters, however, and this proportion is particularly high among younger electricity-only users, rising to over four in ten (44 per cent) of storage heater users aged 16 to 34.

Nearly one in five non-metered off-gas customers (19 per cent) say they are on a contract for the supply of fuel for a fixed period of time at an agreed price, rising to over half (53 per cent) of the LPG consumers. Contracts with suppliers are much less common among heating oil and solid fuel users, however (at 15 per cent and 10 per cent respectively).

Figure 2: Whether have a contract with fuel supplier for supplying fuel for fixed period of time at agreed price (non-metered fuel consumers)

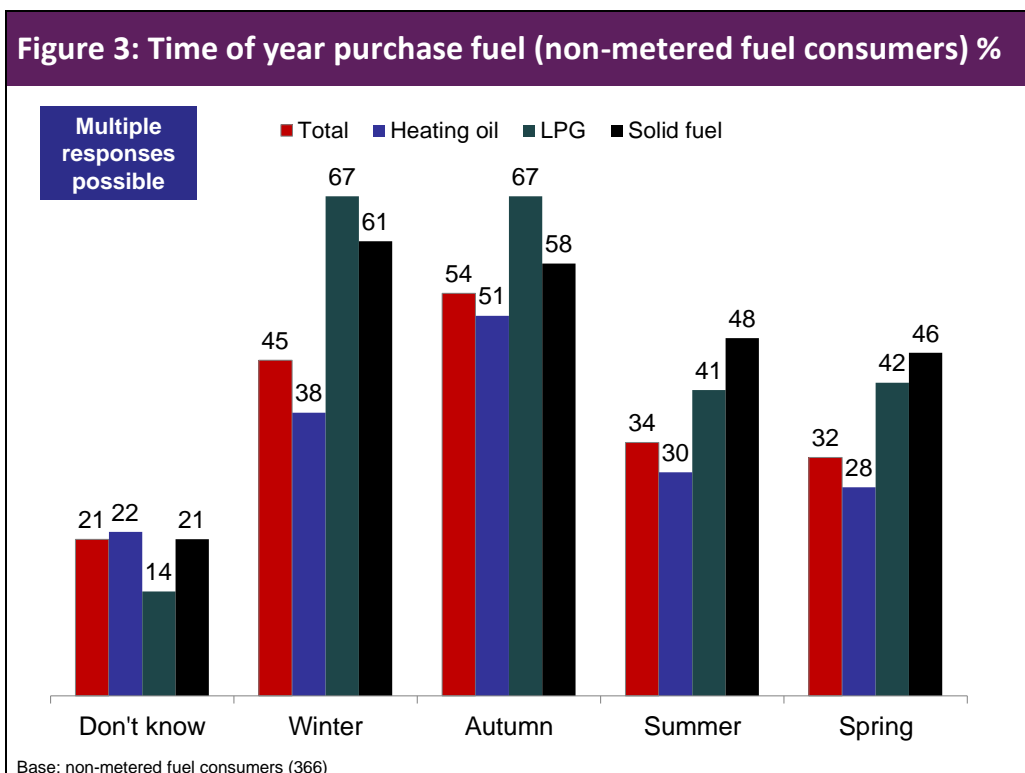


Around half of LPG users (49 per cent) get their gas from a tank which supplies their household only, around a third (32 per cent) from bottles and 17 per cent from a shared tank, which supplies a number of different homes.

Turning now to purchasing patterns for fuel, around one in ten non-metered fuel consumers buy fuel every month (12 per cent); in contrast, nearly half (48 per cent) buy fuel just once or twice each year. LPG and solid fuel users are more likely than heating oil consumers to buy fuel at monthly intervals, with 26 and 29 per cent of each group saying they do so, compared with just 6 per cent of heating oil users.

Most commonly, fuel is purchased in October to January, with these four months accounting for three quarters of fuel purchases.

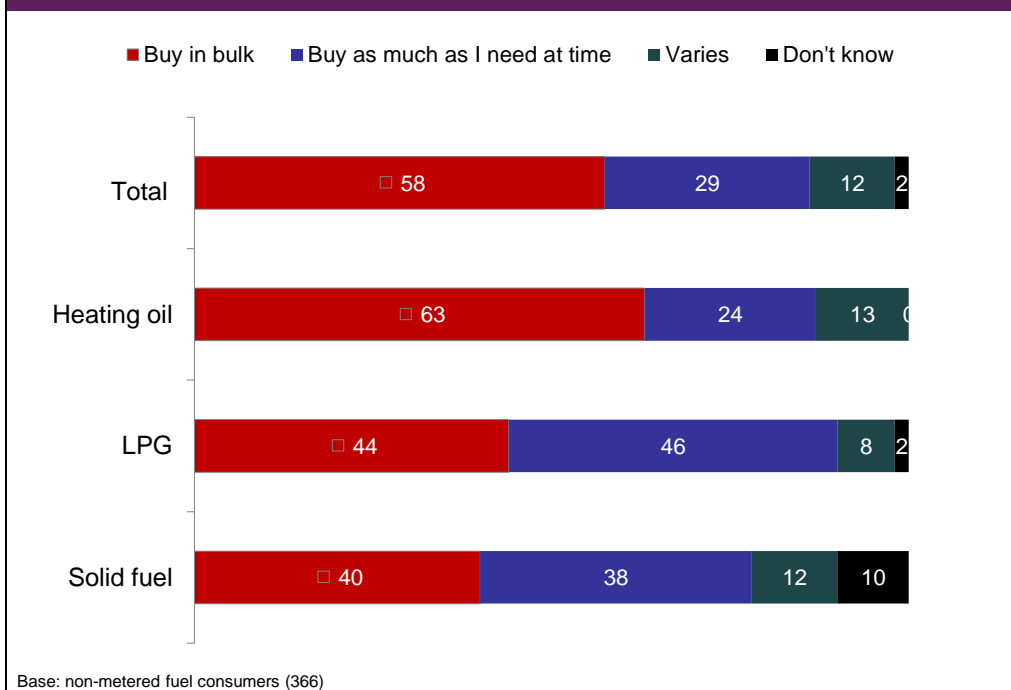
Looking at purchasing by season, the autumn months (September to November) see the highest level of non-metered fuel purchasing overall, followed by winter (December to February), with purchasing in summer (June to August) and spring (March to May) lower and at similar levels (see figure 3 below).



Almost six in ten non-metered fuel customers (58 per cent) buy their fuel in bulk, double the proportion who say they only buy as much as they need at the time.

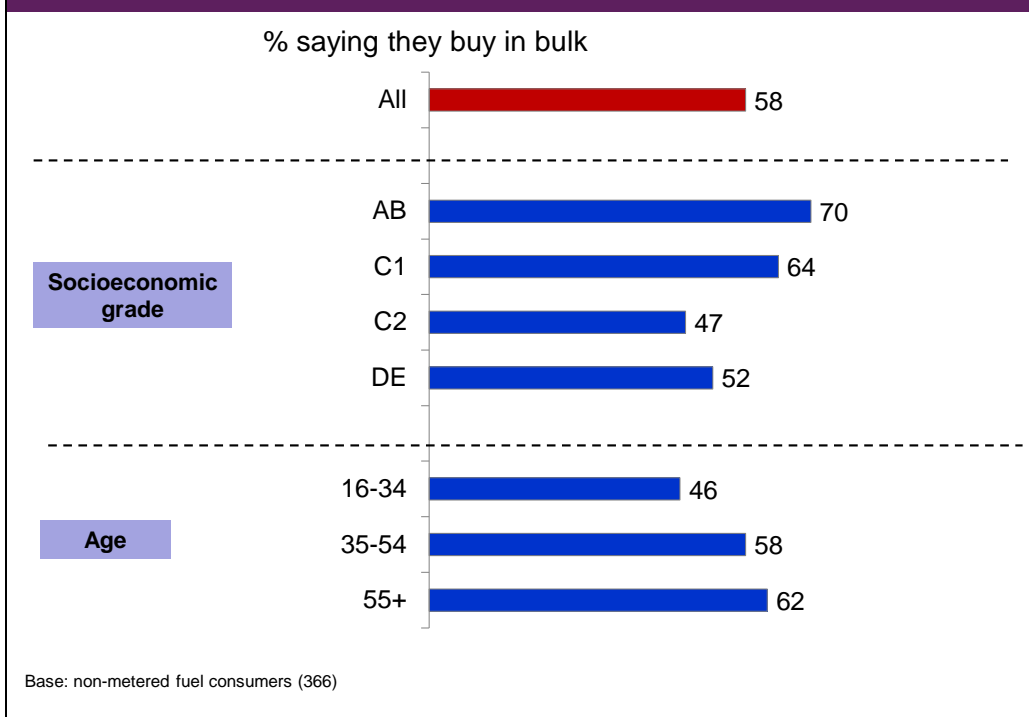
As figure 4 below demonstrates, heating oil consumers (who buy fuel less frequently) are much more likely than LPG or solid fuel users to say they buy in bulk. Among the latter groups, around the same proportions say they buy as much as they need as say they stock up when placing an order for fuel.

Figure 4: Whether buy in bulk or not (non-metered fuel consumers) %



Looking at purchasing habits by demographics, older off-gas consumers (aged 55 and over) and more affluent consumers (ABs) are most likely to buy their fuel in bulk, with younger off-gas consumers (16 -34s) and those from the lower social grades (C2DEs) least likely to do so.

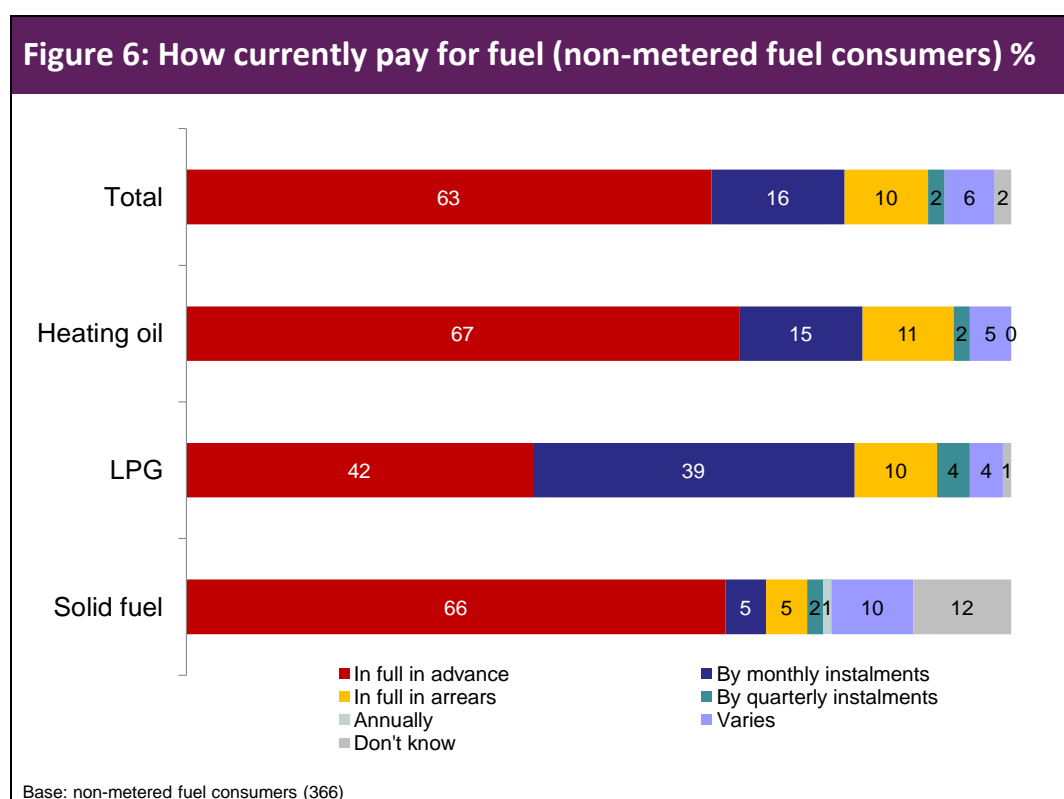
Figure 5: Whether buy in bulk or not, by demographics %



4.3 Payment and payment issues

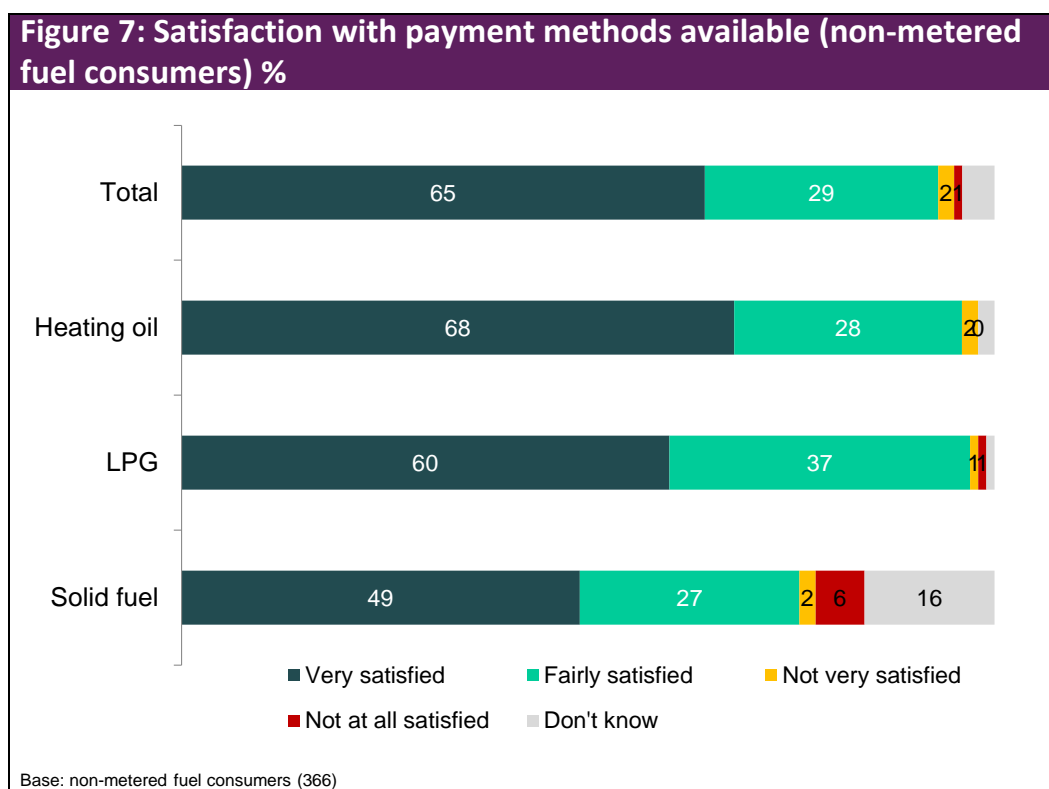
Payment methods used by non-metered off-gas consumers differ markedly by fuel type. When prompted with a list and asked in which way they currently pay for their fuel, payment in full in advance is the most common method (used 63 per cent of off-gas consumers). Just under one in five (18 per cent) pay by instalments, with most of these being monthly payments and just a small proportion quarterly. Another ten per cent say they pay in full in arrears, that is, after they have used their fuel, with heating oil and LPG customers twice as likely to be doing so as solid fuel users.

Heating oil and solid fuel users are most likely to pay for their fuel in advance, with around two-thirds of each group saying they do so, compared with just over four in ten LPG consumers (42 per cent). Around the same proportion of LPG users (43 per cent) pay for their fuel by monthly or quarterly instalments. This is considerably higher than the proportion of heating oil or solid fuel consumers using instalment payments (17 per cent and 7 per cent respectively) and is likely to be linked to the prevalence of supplier contracts in the LPG market.



Despite the fact that most pay in advance for their fuel, the great majority of non-metered fuel consumers are satisfied with the payment methods available to them – 94 per cent are satisfied (with 65 per cent of them being ‘very satisfied’) and only 3 per cent are dissatisfied.

Solid fuel users are less satisfied than heating oil and LPG consumers, however, with fewer than eight in ten satisfied (76 per cent) while nearly one in ten (8 per cent) are dissatisfied with their fuel payment options (see figure 7 below):



When asked why they are dissatisfied with the payment options available, the main reason given is the lack of choice offered by their supplier (mentioned by 5 of the 11 dissatisfied non-metered gas customers, all heating oil consumers) while another 2 mentioned they would rather pay monthly.

Reflecting the generally high satisfaction levels in the market on payment methods, only 2 per cent of non-metered fuel consumers overall said they had ever experienced any problems or issues when paying for their fuel. This rose to 6 per cent among LPG users however, where the 7 individuals concerned mentioned a range of isolated problems, namely:

- Having to pay off a fuel debt
- Not having enough money to pay for their fuel
- Having very large bills.

Very few off-gas consumers interviewed said they ever borrow money to pay for their fuel costs. When prompted with a list of possible methods, 2 per cent said they sometimes borrow money from friends or family to pay for fuel and 1 per cent that they have taken out a bank or building society loan. None of those asked said

they borrow from a credit union. The overwhelming majority (97 per cent) do not use any of these methods to pay fuel costs, however.

Where people do borrow to pay for fuel costs, those most likely to do so are those with young children under six in their household (10 per cent of this group say they get loans from friends or family for this purpose), 16 – 34s (6 per cent), those who are unemployed or long term sick and on benefits (5 per cent) or those not working for other reasons (8 per cent).

Mystery shopping – payment options

During the mystery shopping assessments, the non-metered fuel suppliers contacted were asked whether the customer would have to pay in full when he/she placed the order or if they could spread the cost.

Heating oil suppliers

For first orders, the norm among the sample of suppliers contacted was payment in full when the customer places the order or on delivery. One supplier said they take a debit card authorisation and charge the card on delivery for the exact amount delivered.

For subsequent orders (usually after the first order, but for one supplier after three orders) more flexibility is offered in payment methods, with most suppliers mentioning ways of spreading the cost such as a budget plan with regular payments spread over 12 months, direct debit payments, standing order payments, a 30 day account or paying in full within a week of delivery.

One supplier commented that being tied into a payment plan is not always beneficial for customers as ‘the cost of the oil has dropped dramatically within the last year’.

LPG suppliers

Three of the four LPG suppliers contacted in Wales (who required customers to sign up to a two year contract) said it was possible to spread the cost of the fuel; only one required payment in full on delivery. All three of these companies offered a monthly payment plan to customers involving fixed monthly direct debits to help spread the cost. One of the three (a bigger company) offered a range of other payment options: weekly / monthly standing order payments, variable direct debit (paying in full after delivery), invoice after delivery (to be paid within two weeks) and paying by credit / debit card over the phone.

Solid fuel suppliers

Less flexibility in terms of payment options is offered by solid fuel suppliers in Wales than is available from other types of non-metered fuel suppliers, perhaps because they tend to be smaller, family-run businesses.

Almost all coal and wood suppliers approached required payment in full in advance, either by cash or cheque (or less commonly by bank transfer) on delivery, or by card over the phone when placing the order (some said they preferred the latter). None offered direct debit payments.

Only one volunteered any flexibility in payment, saying he could top up the mystery caller's mother fortnightly with coal but would invoice at the end of each month.

4.4 Expenditure on fuel and affordability

Those taking part in the telephone survey were asked roughly how much it costs them to heat their home. The estimates of average monthly fuel costs given ranged from just over £90 per month (for heating oil consumers) to over £102 per month (for solid fuel users) (see table 5 below):

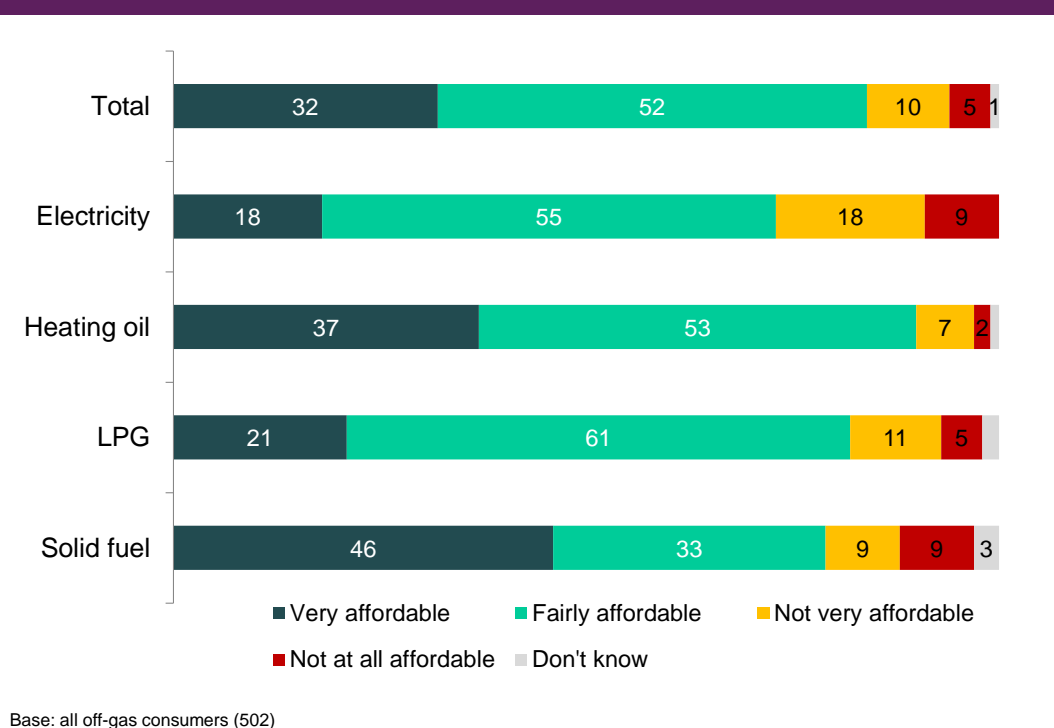
Table 5: Estimates of fuel costs by fuel type		
Mean cost (rounded to nearest £)	Monthly cost £	Annual cost £
Total (base: 502)	95	1,138
Electricity (base:136)	100	1,202
Heating oil (base: 271)	90	1,082
LPG (base: 45)	99	1,190
Solid fuel (base: 50)	102	1,230

Heating costs vary quite considerably by type of property (see table 6 below) with the most expensive homes to heat being older, larger, detached properties. The average heating costs for one-bedroom properties are higher than those for two or three-bedroom properties, however, which may be due to the prevalence of electric heating systems in smaller flats and apartments in the sample (although care needs to be taken here as the base size is very small):

Table 6: Estimates of fuel costs by type of property		
Mean cost (rounded to nearest £)	Monthly cost £	Annual cost £
Total (base: 502)	95	1,138
Type of property		
Terrace (40)*	72	867
Semi-detached (108)	85	1,022
Detached (212)	110	1,318
Bungalow / flat / other (141)	86	1,038
Age of property		
After 2002 (68)	78	933
1965 – 2002 (166)	92	1,102
1919 – 1964 (78)	93	1,120
Before 1919 (158)	105	1,255
Number of bedrooms		
One (19)*	101	1,215
Two (112)	87	1,038
Three (218)	90	1,084
Four or more (152)	107	1,279
* care should be taken as base size is small		

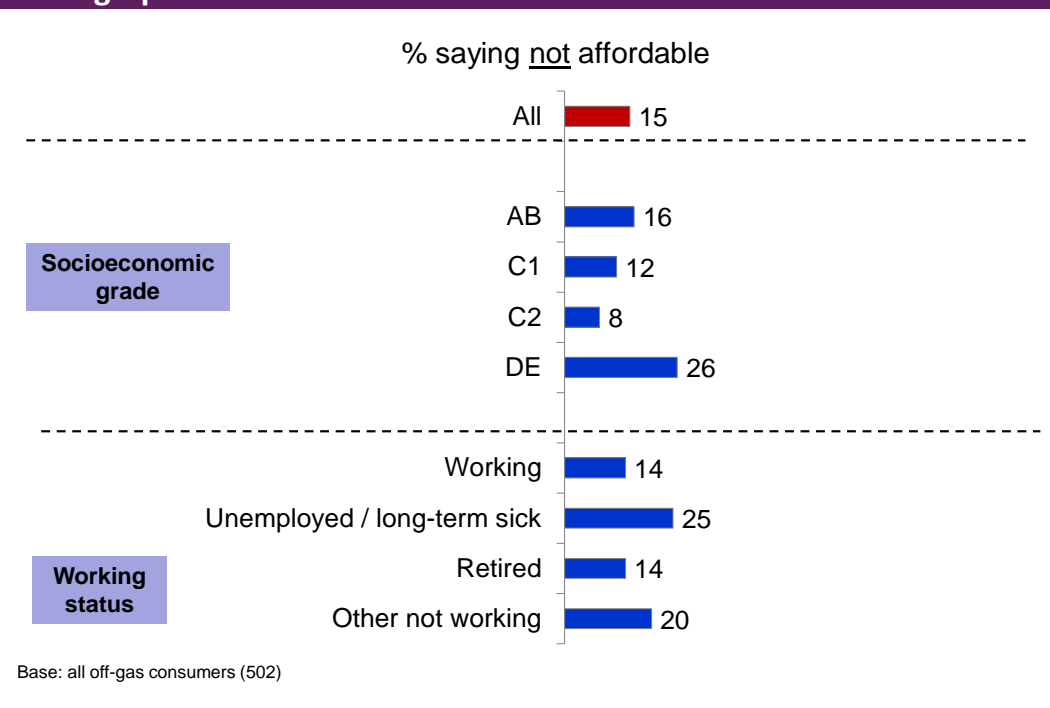
Looking at perceptions of affordability, while just over eight in ten off-gas consumers (84 per cent) regard their current method of heating their home to be affordable (52 per cent saying 'fairly affordable' and 32 per cent 'very affordable'), a sizeable minority (15 per cent) do not. This rises to almost three in ten (27 per cent) of electricity-only consumers (see figure 8 below):

Figure 8: Affordability of current method of heating home %



Those least likely to consider their heating system to be affordable are those on the lowest incomes (DEs) and those who are unemployed, on sickness benefit or not working (see figure 9 below):

Figure 9: Affordability of current method of heating home, by demographics %



Turning to why around one in seven off-gas consumers feel their current heating system is not affordable, over six in ten mentioned the cost of fuel and high bills (see table 7 below). Criticism of the cost of their heating system was highest among electricity-only users and LPG users (figures below have not been broken down by fuel type as base sizes are very small):

Table 7: Reasons for saying current heating system is not affordable	
%	Those saying not very / not at all affordable (75)
Cost of fuel is high / expensive / no deals available	61
Living on state benefits	9
Not connected to mains gas / limited choices for heating	5
House is cold / poor insulation	4
Need a new boiler / heating system	3
Have to buy in bulk	2
Other	19
Don't know	1

When presented with a series of statements in the telephone survey and asked to what extent they agree or disagree with each, more than four in ten off-gas consumers (42 per cent) agreed that 'it's very expensive to heat my home'. Agreement was highest among LPG users and electricity users (at 55 per cent and 53 per cent respectively), as well as among those on the lowest incomes (DEs) and those with a disability or with someone with a disability in their household (at over 50 per cent in both groups).

A quarter of those interviewed agreed that they sometimes get stressed when thinking about their fuel costs. This rose to around 30 per cent of LPG, solid fuel and electricity users. Agreement was particularly high among unemployed people or those on long-term sick (at 43 per cent), those with a disability or with someone with a disability in their household (at 35 per cent) and among DEs (at 30 per cent).

Moreover, 15 per cent of off-gas consumers agree they have gone without heating because they can't always afford to pay for fuel. This rises to 19 per cent of electricity-only consumers and 17 per cent of solid fuel consumers. Agreement was higher among younger consumers than older ones (at 21 per cent of 16-34s compared with 11 per cent of over 55s). It was also especially high among those with a disability (at 23 per cent), those with young children under six at home (23 per cent) and those who are unemployed or long-term sick (at 45 per cent).

June 55+: Running solid fuel system a physical challenge with both wife and husband disabled

June has a physical disability and lives with her husband who has had a number of life-saving operations and is also type 2 diabetic. Neither of them currently works. They live in North East Wales.

They find their solid fuel system quite hard to use because of their disabilities. June used to do everything because of her husband's conditions but as she now has arthritis she, too, has difficulty with lifting and carrying. They therefore rely on family help.

Fortunately my daughter lives nearby so she tends to come and stock us up in the morning.

There are two local coal suppliers and depending on where she is at the time when they need a delivery, she will choose one of the suppliers and pay in person. She's satisfied with the delivery service received and has never had to make a complaint. However, there have been times when they had had to go without fuel owing to financial constraints. As a result, they can't buy in bulk. She isn't aware of any other payment methods but hasn't enquired to find out. June recalls it's approximately £17 for a bag of coal at the moment.

Money usually [is the issue]. It's quite an expensive heating system. . . I tend to buy it when we need it or when we've got the money and then we eke it out.

To ensure they have some fuel, June feels that they do go without, cutting down on spending in the winter in particular. They generally have to be careful with money because she is no longer working.

Amy 30+: uses LPG to heat the home but feels she is charged over the odds and is unable to switch supplier because several local authority houses are tied into communal tank; she goes without heating for several months a year

Amy lives in mid-Wales and is 'five miles from the nearest pint of milk'. She is a single parent with four teenage children living at home. She works full-time. The house is terraced and rented from the local authority. She thinks the property is around 60 years old.

LPG is used to heat the home. Amy thinks the system is 'good', 'simple to use' and 'works well' having had it replaced five years ago. The fuel is delivered by tanker to a communal tank with several houses sharing the tank. There is a monitor on the tank which prompts automatically for deliveries so she doesn't have to order it herself. There haven't been any problems with deliveries she can recall.

Even so, purchasing is a significant issue because Amy doesn't have any say over which supplier provides the fuel.

That's the only thing that's a pain the bum. The company that deliver it owns the tank so we don't have any problems with delivery but we don't have any choice on who we buy it off either. . . . They've got us over a barrel.

Amy pays by monthly direct debit for the LPG and this is her preferred option to help spread the cost. She explains that the only way she can pay for it is to ensure she doesn't turn on the heating at all for around seven months of the year. She has never run out of fuel.

It's so expensive, astronomical compared to mains gas. So I pay £100 a month every month even though come next month till September it will be off. I turn the boiler off but I'm still paying £100 a month to cover the price of fuel when it's on.

Other than cutting back on heating the home, Amy finds that they have to make sacrifices elsewhere to ensure they can cover the fuel bill.

We cut back on most things! Fuel in the car, we've got to be careful where we go; you have to think twice before you go anywhere. And school clothes you have to be very careful. We sit watching the telly with a blanket on.

At the same time, almost six in ten of those interviewed (56 per cent) agree that 'Fuel costs aren't really an issue for me'. Heating oil customers and more affluent consumers (ABs) were most likely to agree (with 63 per cent of each group doing so).

In the Citizens Advice office survey, almost half of those interviewed in Wales (48 per cent) said they have been in a situation where they have been unable to heat their home or have been left without fuel¹¹. The primary reasons for finding themselves in this position are that they couldn't afford to pay their supplier, the fuel supplier was unable to deliver and their heating broke down (all mentioned by around three in ten of this group).

Around half of these people had to rely on secondary heating in these circumstances, another third or so went without fuel and small proportions put on extra clothes or blankets to stay warm or asked family or friends for financial help.

Mystery shopping – pricing and variations in the market

Relatively wide variations were evident in the prices quoted to mystery callers, when phoning and asking fuel suppliers in Wales for a quote. Whilst most suppliers had a minimum order, how this was defined also varied between suppliers.

Heating oil suppliers

Prices quoted by heating oil suppliers across Wales varied more than costs quoted for other types of fuels, with a range from c£230 to £315 including VAT for 1,000 litres of kerosene. All assessments were made within 2-3 weeks of each other¹².

A few asked for any other prices that the caller had been quoted, saying they were willing to match or better them, suggesting that some suppliers are willing to negotiate on price. One or two commented that prices in the market are volatile and change on a daily basis.

All prices quoted included delivery and all had a minimum order quantity. This was most commonly 500 litres (in the case of eight of the ten suppliers contacted) although two smaller suppliers had minimum orders of 100 and 250 litres respectively. Some pointed out that prices for smaller quantities would be higher (eg the price of 26p a litre plus VAT quoted for 1,000 litres would rise to 31p plus VAT for the minimum order of 250 litres, for one supplier). Another commented that their prices were cheaper on orders of 800 litres or above.

¹¹ This sample was sourced mainly via those visiting Citizens Advice offices, therefore it is more likely to contain consumers experiencing issues or problems

¹² Pilot fieldwork was conducted on 13 January 2016, with main fieldwork between 25 January to 1 February 2016

LPG suppliers

Three of the four LPG suppliers contacted specified a two year contract would be required. Two suppliers offered lower prices in year one of the contract followed by a higher price in year two: one quoted 33p per litre plus VAT in year one rising to 36.5p per litre plus VAT in year two; the other offered a fixed price of 31.95p per litre plus VAT in year one then a variable rate in year two capped at 34.95p per litre. The other two suppliers approached offered flat prices (ie 32p per litre plus VAT and 39p per litre including VAT).

In addition, two mentioned annual charges (£40 and £60 per annum) for an above-ground tank on top of the price per litre for the fuel, to cover insurance, maintenance and repairs of the tank. A third supplier mentioned a standing charge of just over £16 a quarter would be payable in addition to the price per litre.

Some were willing to negotiate on price, eg one bigger supplier offered a capped price in year two of the contract when asked about protection against possible big price rises (the initial offer was variable prices in year two, depending on the market). The same supplier also explained they were running a special promotion of £150 of free gas at the beginning of the contract as a 'goodwill gesture for coming over to us'.

All prices quoted by LPG suppliers approached for the scenario amount of 2,000 litres included delivery, but two suppliers said a delivery charge of £50 would be incurred on their minimum order (600 litres) – one said no delivery charge would be imposed for an order of 900 litres or more. A third supplier said their minimum order is half a tank (in this scenario, 1,000 litres). The fourth LPG supplier said there is no ordering service as such as they always deliver on a scheduled run (they monitor the household's usage automatically - see section 4.5 Delivery below).

Solid fuel suppliers

Among the coal suppliers approached in Wales, prices quoted for half a tonne of household coal varied quite considerably, ranging from £150 to £193 including VAT.

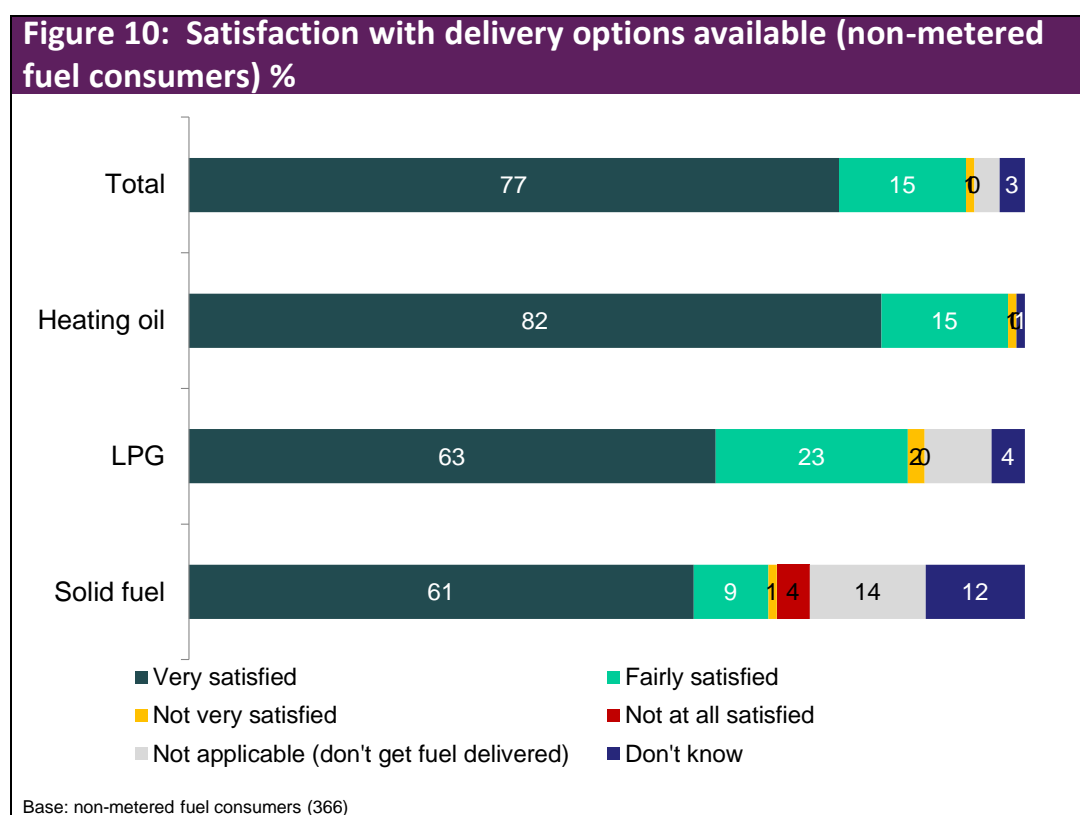
It is difficult to compare pricing for wood suppliers, however, as the quantities included in the price quoted were sometimes different. For example, prices given ranged from c£45 (for a large builder's bag of mixed wood) up to £130 (for a trailer load), but presumably the latter would contain considerably more than 3 cubic metres of wood. Many offered discounts on buying larger quantities (eg offering two bags for £85 or saying they would reduce the price per bag to £40 for an order of five or more bags).

Nearly all the prices quoted by suppliers included delivery. The exception was one smaller wood supplier, where the scenario address was somewhere outside his normal delivery area. He therefore said he would have to charge an extra £10-£15 for delivery.

Half of the suppliers approached said they had a minimum order, which was either expressed in bags (eg five bags of coal) or price (eg £50).

4.5 Delivery and delivery issues

As with the payment methods offered, the great majority of non-metered fuel consumers are satisfied with the delivery options available to them when ordering their fuel. Overall, more than nine in ten are satisfied with the delivery options provided by their supplier (92 per cent) while only 2 per cent are dissatisfied (see figure 10 below):



Some differences in satisfaction levels are evident by fuel type: heating oil customers have the highest levels of satisfaction with delivery options, with over eight in ten very satisfied, compared with just over six in ten LPG and solid fuel consumers saying this. Dissatisfaction with delivery options is highest among solid fuel consumers (at 5 per cent), although still at a very low level.

David, 75: Very satisfied with heating oil system and can't speak highly enough of the supplier

David is a widower who lives with his middle-aged daughter. He is 'on the road to recovery' after being treated for cancer recently. David is a campanologist (bell ringer), so he still rings the bells at the local church but he is retired from work. David and his daughter live in a rural village in North East Wales.

They live in a 2 bedroom cottage which he owns outright. David replaced the electric storage heaters (which were in the cottage when they first moved into the property 15 years ago) with new oil-fired central heating radiators, which he installed himself with his son's help. He is very happy with his heating system.

[The new heating system] been absolutely tremendous... you just press a button and it comes on... it can't be any easier. I can't understand why people go for gas but there we are.

The company deliver the heating oil in big tankers and they fill David's tank up when it needs topping up. He pays for 500 litres at a time because it's easier to pay for that amount rather than 1,000 litres. He thinks the suppliers are 'smashing' because he rings them up and they are there the next day 'in all weathers'. David thinks the company's been going for over a hundred years and he's been with them for years, during which time he has never had to go without fuel:

I pay for it there and then when it turns up and then I haven't got any future bills... I've paid by card and by cheque so it couldn't be any better. You can pay by standing order which Rose next door does. I'd rather do it the other way.

David believes his fuel is very affordable, especially since oil prices have gone down generally.

... more so now because the prices have come down dramatically in comparison. When we first moved here 14 years ago I can't remember exactly how much it was per 1,000 litres but I think it was £500-£600.... Now we are on £150 for 500 litres, so it's practically half.

Of the very small number dissatisfied with delivery options, the main reasons given are the supplier having problems in getting down narrow lanes to deliver (3 people) and it taking too long to deliver on occasion (2 people).

When asked if they have ever experienced any problems or issues with getting their fuel delivered, 6 per cent of non-metered fuel consumers said they have. These were primarily heating oil and LPG customers (at 6 per cent and 7 per cent respectively); only 3 per cent of solid fuel customers said they had experienced any delivery issues.

The issues mentioned by these individuals in order of significance were:

- Problems getting a delivery in poor weather conditions (mentioned by 9 people, nearly all heating oil users)
- Issues with delivery to remote areas (mentioned by 5 people, all heating oil consumers)
- Problems with tankers getting down narrow lanes to deliver (3 people)
- A shortage of supply delaying delivery when the weather turns cold (2 people), and
- It taking too long to deliver on occasion (2 people)

Robert 40+: lack of mobile broadband for tank level monitoring means they have run out of LPG before

Robert lives in South East Wales with his wife and three young children. The house is detached, approximately 400 years old in parts and situated in a rural area. The house is heated by LPG and he describes the system as 'expensive', but he's unsure if it's more expensive than heating oil.

Given the rurality of his home Robert isn't able to make use of the supplier's monitoring system as it relies on mobile broadband. As a result, they have run out of fuel in the last three years on at least one occasion. This left the family 'very cold' and struggling to cook, because the oven runs on the system as well.

We suddenly found we were in quite a difficult position. We had a fan heater and an oil fired heater and a couple of camping stoves.

Robert and his family were without LPG for approximately a week as the supplier also 'messed up' the order which delayed the delivery further. He did complain and the company 'did something minor to apologise but we didn't take it any further than that'. Robert found that he was 'passed a little bit from pillar to post'. One of the administrative staff eventually dealt with it but he made it clear that he wasn't very happy with the situation.

There should be a charter or guidelines . . . I think they do ask if you have children or anything like that but they should make sure that they do it as a priority. . . . I do feel a bit that we got left behind.

Mystery shopping – delivery service

During the mystery telephone calls suppliers contacted were asked for information about how they deliver and what would happen in an emergency, if the caller's mother ran out of fuel.

Heating oil suppliers

Two of the suppliers approached said they deliver every day, while another two mentioned Monday to Friday deliveries with occasional or local deliveries on Saturday mornings. Another two quoted next day delivery or delivery within two days – 'delivery is usually next day, sometimes the same day'.

The remainder were less flexible on delivery and mentioned specific delivery days (between three days to a week away).

If you were to order today [28 Jan] we would be able to deliver next Friday [5 Feb].

When asked about emergency deliveries, if a customer were running out of oil, most offered some provision for such situations:

- One said ‘anyone nearly running out gets priority’ for delivery
- Another that they will do an emergency delivery ‘if needed’
- Another that in an emergency ‘ring before 10am and it will get delivered the same day’
- One said that they have ‘an out of hours number for emergencies’
- Another that they have ‘a local depot with gas on pump – if you’re desperate you can fill a few containers to keep you going’

Some did not mention any emergency delivery service but only one supplier (a larger company) explicitly stated they had no provision for emergencies.

LPG suppliers

Most of the LPG suppliers approached in Wales (three out of four) said they operate on an automatic top-up basis, where the tanks are fitted with gauges which monitor how much gas is being used. When this falls below a certain level (eg 30 per cent) it triggers a delivery. Tanks are therefore topped up regularly, whenever needed, and customers do not need to get in contact with the supplier to place an order or request a delivery. This top-up service is free of charge and was described by one supplier as an ‘extra benefit for customers who may not be able to go and read the tank and a bit of extra peace of mind’, ensuring that customers will not run out of gas.

The fourth supplier said that their delivery response time will depend on when an order is placed but that they offer a two day delivery service for emergencies.

Solid fuel suppliers

Some variation was evident in delivery times and flexibility among coal and wood suppliers. Some of the businesses seemed to have established rounds, calling at certain locations once a week or once a fortnight, so customers would have to fit into these rounds.

*Once a week – on Thursday to Cross Hands. Can’t specify the time as we’ll be doing a number of calls in the area
Every Wednesday fortnightly...I will be up at your Mum’s next Wednesday*

One company said that for emergencies (outside these delivery times) customers could call in to collect enough fuel to tide them over.

Mondays and Tuesdays. Emergencies, you can come and collect it. It's £7.50 a bag and they are 20kg

Others offered more flexibility with delivery, particularly for bigger quantities.

We don't have a set day, whenever you need it

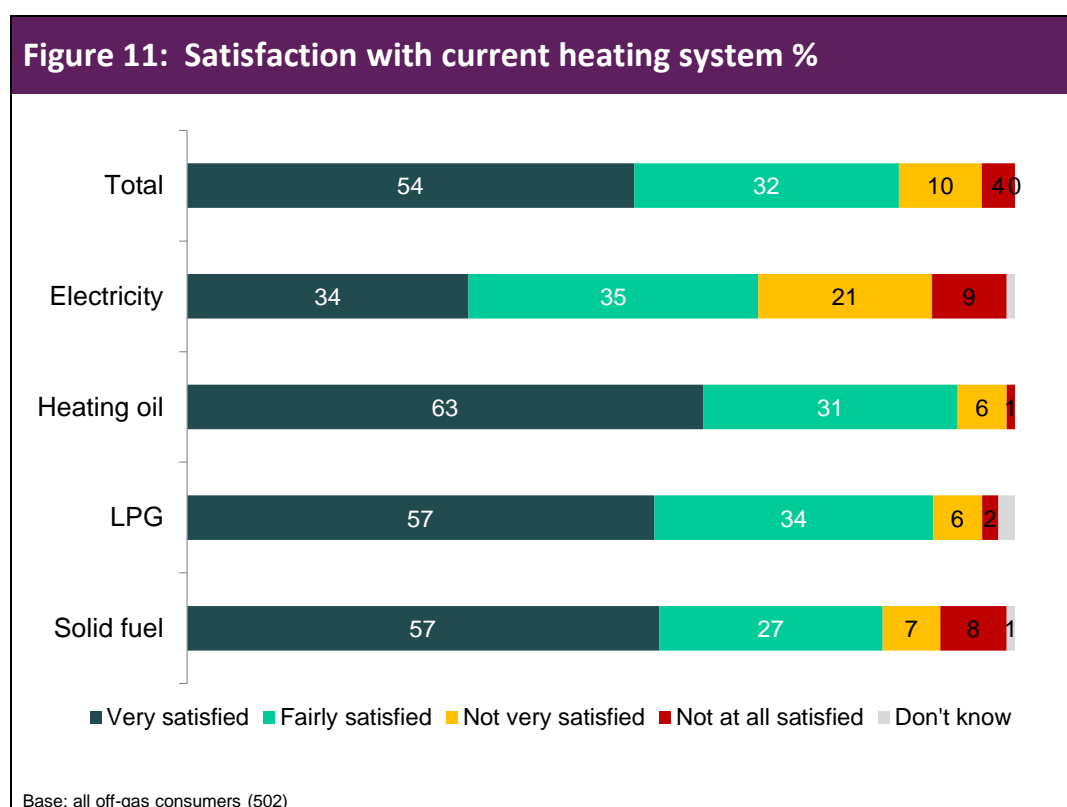
It depends – there are no fixed days or times. I can arrange it to fit in around other calls

We deliver every day. If you order in the next 10 minutes we can deliver to your Mum this afternoon. So any day, if you order a big bag. Small bags only get delivered on a Wednesday

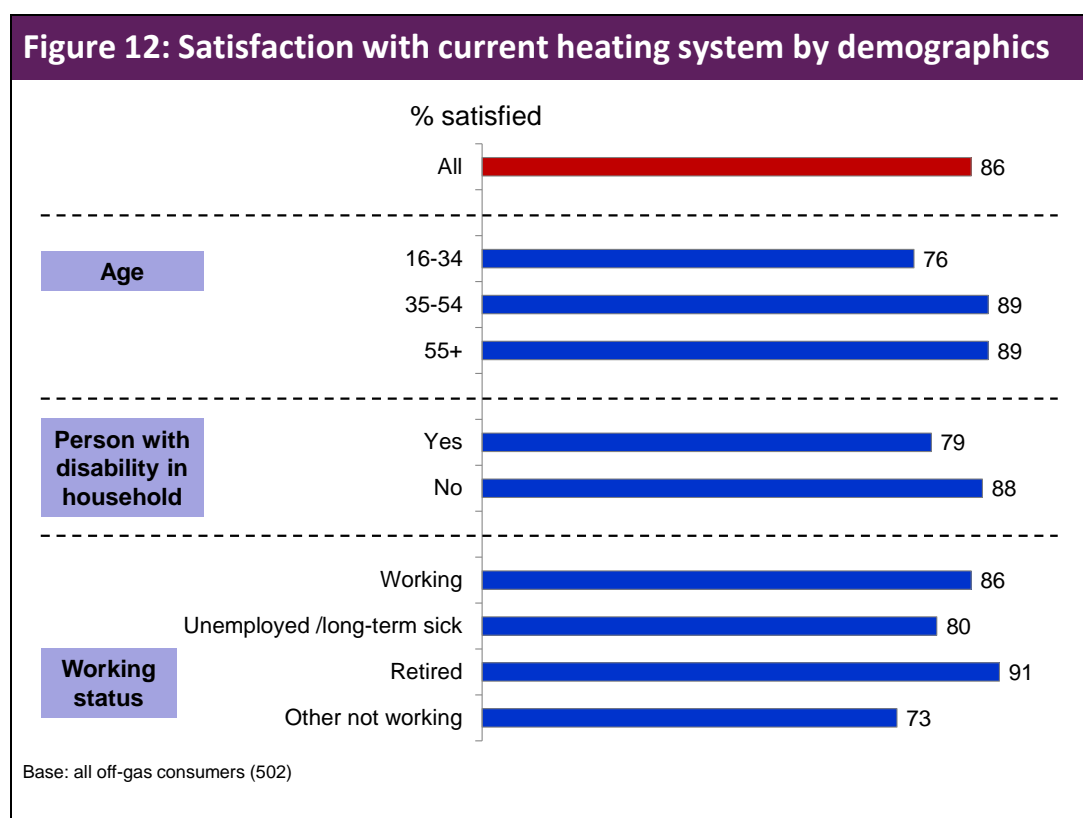
4.6 Satisfaction with heating system and supplier

Just over half the off-gas consumers in Wales interviewed in the telephone survey (54 per cent) are very satisfied with their current heating system, while almost one third (32 per cent) are fairly satisfied. Overall, nearly nine in ten (86 per cent) of those not connected to mains gas are satisfied with the way they heat their home, therefore. Satisfaction is highest among heating oil consumers and LPG users.

In contrast, satisfaction is lowest among electricity-only consumers - as many as three in ten users of this type of heating are dissatisfied with the way they currently heat their home (see figure 11 below):



Linked to the profile of electricity-only consumers, younger off-gas consumers are less likely to be satisfied with their heating system than older consumers. Those who are unemployed, on sickness benefit or not working and those who are either themselves disabled or have someone else in their household with a disability also display lower levels of satisfaction than other groups (see figure 12 below):



The principal reasons given unprompted for being dissatisfied with their current heating system are that the house is cold or the system is inefficient and that it is expensive to run. All reasons given are shown in table 8 below:

Table 8: Reasons for dissatisfaction with current heating system	
%	Those dissatisfied (69)
House is too cold / system is inefficient	35
Expensive to run / uneconomical	26
Difficult to control or adjust temperature / not very responsive	14
Unreliable / problems with maintenance / old	10
Heating system / boiler broken down	9
Not environmentally-friendly / green	7
Don't get instant / constant heat	6
Other	13
Don't know	1

Electricity-only users were most likely to mention cost and the difficulty of controlling the system or adjusting the temperature as reasons for being dissatisfied with their heating system. This is probably linked to the fact only a minority (21 per cent) have storage heaters which are less than 10 years old and the rest are either using older-style storage heaters or other types of electric heaters.

Doreen, 73: Uses Economy 7 storage heaters to heat her home. She has not had any trouble with her supplier but she does think electricity is an expensive way to heat her home

Doreen is a widow who lives on her own with her dog. She has osteoporosis and osteoarthritis so it is important for her to keep warm. She is retired now but she used to be a non-nursing matron at the local college. Doreen lives in a bungalow on a council estate in Carmarthenshire. The bungalows were built in the late 80s.

Doreen currently uses Economy 7 storage heaters to heat her home but the council will be connecting all the houses on the estate to mains gas in the next couple of months. She thinks her current heating system is 'inconvenient' because she has to put it on overnight in order to be able to heat her home the following day.

If you're cold you have to wait a whole 24 hours before you can use it so it's inconvenient.... It is easy, you just flip the switch but it is inconvenient because you either have it on all the time or you have to foretell what the weather is going to be.

She does have to budget to pay for her electricity and she has to watch how much she is spending. She thinks she would have to put £50 on the prepayment meter in order to keep her home at a comfortable temperature. However, she has decided to put £40 a month on it instead because she wants to make sure she has enough money for other things. She tries to keep warm by putting on extra layers of clothing and uses a fleece blanket so she does not have to put the heating on for longer.

You just don't have luxuries, you just live... I just have to be careful... I think it's expensive... to be really comfortable I need to put in £50 a month, well I only put in £40 and I'm really careful. I think if I was warmer, I would be more comfortable and not in as much pain... I walk around like a bit of a mummy with extra layers on all the time and if I'm knitting or anything I'll have a little fleece blanket over my legs.

While just over seven in ten off-gas consumers (72 per cent) agree they find it easy to keep their home warm, a significant minority (25 per cent) do not. This rises to 37 per cent of electricity-only users and 36 per cent of solid fuel users.

Just over one in ten of those interviewed (12 per cent) agree they have had problems with their health because their house is cold. The proportions saying this are highest among LPG and solid fuel consumers (at 19 per cent and 17 per cent of each group), those with a disability or someone with a disability in their household (at 22 per cent) and those who are unemployed or long-term sick (at 37 per cent).

In the Citizens Advice Wales office survey, nearly four in ten of those who took part disagreed that they are able to heat their home to a comfortable temperature. Their main reason for saying that is that their heating costs too much, but other reasons given are that their heating system is poor or inefficient, their insulation is poor and their house is too large.

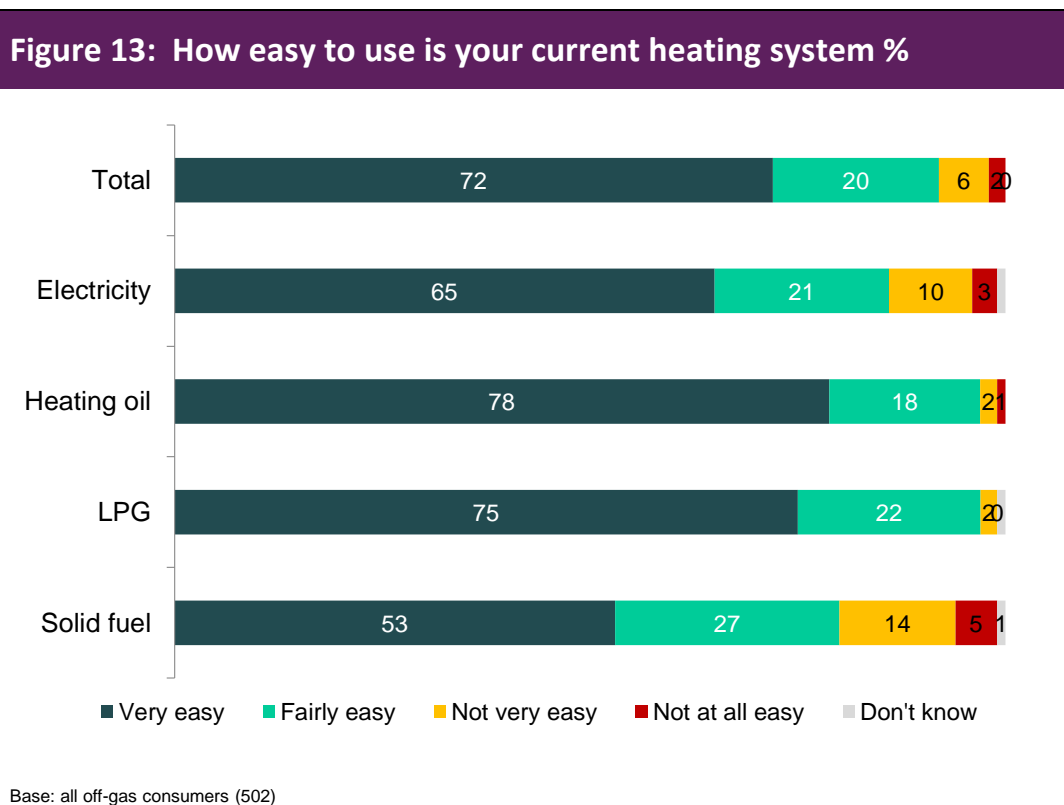
Of the sample of consumers interviewed by Citizens Advice staff, around half or more say they take steps to supplement their heating system to stay warm, namely:

- 63 per cent wear extra clothes / blankets
- 55 per cent use other heaters in addition to their main heating system
- 47 per cent stay in certain heated rooms or only use parts of their home.

Almost half of the off-gas consumers in the Citizens Advice office survey (45 per cent) say they have been caused discomfort, ill health or financial problems as a result of the way they heat their home.

Turning to ease of use, over nine in ten off-gas consumers interviewed by telephone (92 per cent) consider their current system to be very or fairly easy to use and only 6 per cent are of the opposite opinion.

Solid fuel and electricity consumers are less likely than heating oil and LPG consumers to consider their systems very easy to use, however, and are more likely to say they are not easy (see figure 13 below):



The main reasons for saying their current heating system is not easy to use are that it's difficult to control or adjust the temperature (mainly mentioned by electricity-only consumers) and that it's physically demanding (only mentioned by solid fuel users):

Table 9: Reasons for saying current heating system is not easy to use	
%	Those saying it's not easy to use (38)
Difficult to control or adjust temperature / not very responsive	23
Is physically demanding / strenuous (eg chopping wood)	20
Heating system is old	14
Not used to this system / not familiar with it	13
Can't understand the controls	13
Messy / needs regular cleaning	6
Heating system / boiler broken down	3
Other	10
Don't know	1

Sarah, 28: Not satisfied with solid fuel option at all. Heating her home is difficult and expensive

Sarah lives with her husband and her three children who are 8, 5 and 3 years old. She is registered disabled and her husband is her full-time carer. They live in a rural village outside Abergavenny in an end terrace house which they rent from the local housing association. She thought her house was between thirty and forty years old.

[On heating her home with coal] It's inconvenient and it's expensive and it's either hot or it's cold in here.

Sarah uses coal to heat her home and she thinks it is expensive and it's hard to control the temperature in the house. She says it is 'impossible' for her to use it herself because of her condition but it is also 'very difficult' for her husband to do as well because it's quite labour intensive and awkward.

You have to chop kindling to light it; it's too expensive to buy kindling so you need kindling to light it. Then you've got the ash pan to empty whatever the weather. Then you've got to go out to get coal. It's dangerous with the children around.... We just hate it.

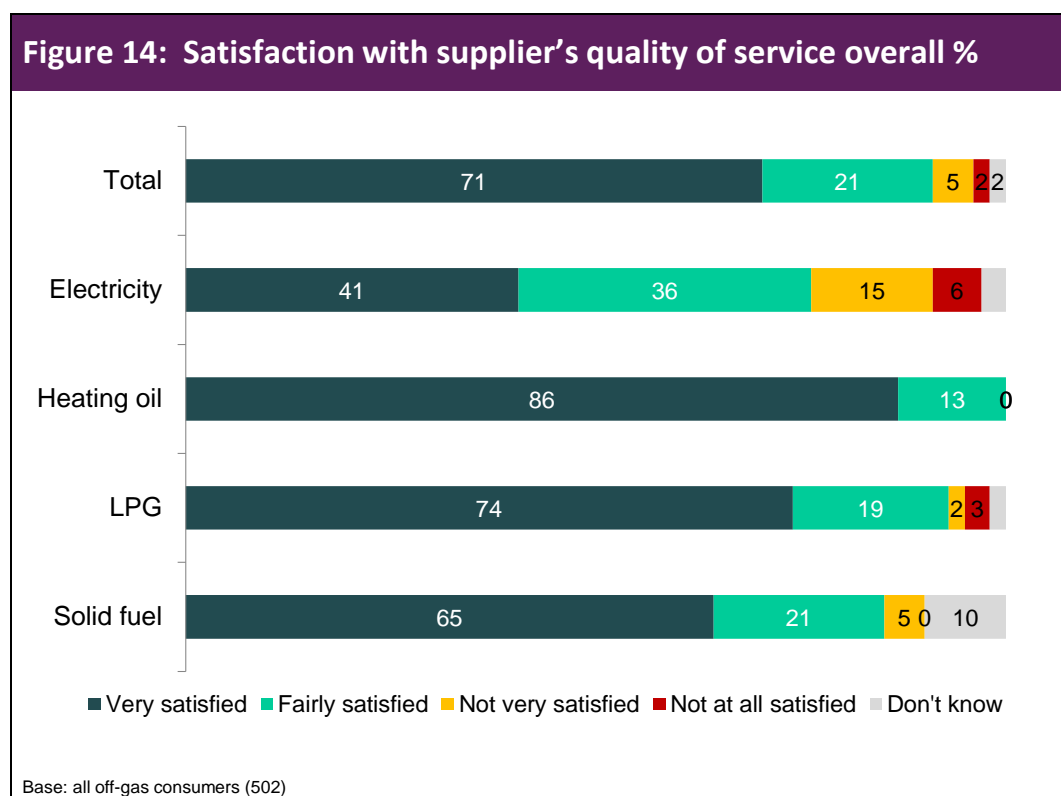
Coal is delivered by coal merchants whenever they run out of fuel. Their current supplier comes from far away so they have to wait a while after ordering before the coal can be delivered. Sarah used to buy coal from a local supplier but they had to switch suppliers because the local one was too expensive. Finding a coal supplier who delivers to her area is difficult in her opinion. Sarah has to pay for her coal when it's delivered and she has to spend a minimum of £100 each time in order to make it worthwhile for the company because they are not based locally. Sarah would ideally like to pay monthly or weekly but the coal merchants will not allow her to do that. Budgeting to pay for coal is difficult for Sarah because she's never sure how much she's going to need.

There is nobody that does monthly payments, whereas you can pay monthly for your electric or your gas, there's no one that does that for coal.... Then you have to have a minimum delivery off him because he's so far away and a minimum delivery is £100.

Satisfaction levels with the quality of service provided by fuel suppliers are generally high among off-gas consumers. Over nine in ten off-gas consumers (92 per cent) are satisfied with the overall quality of service received from their current fuel supplier, and most are very satisfied (71 per cent). Only 7 per cent are dissatisfied (see figure 14 below).

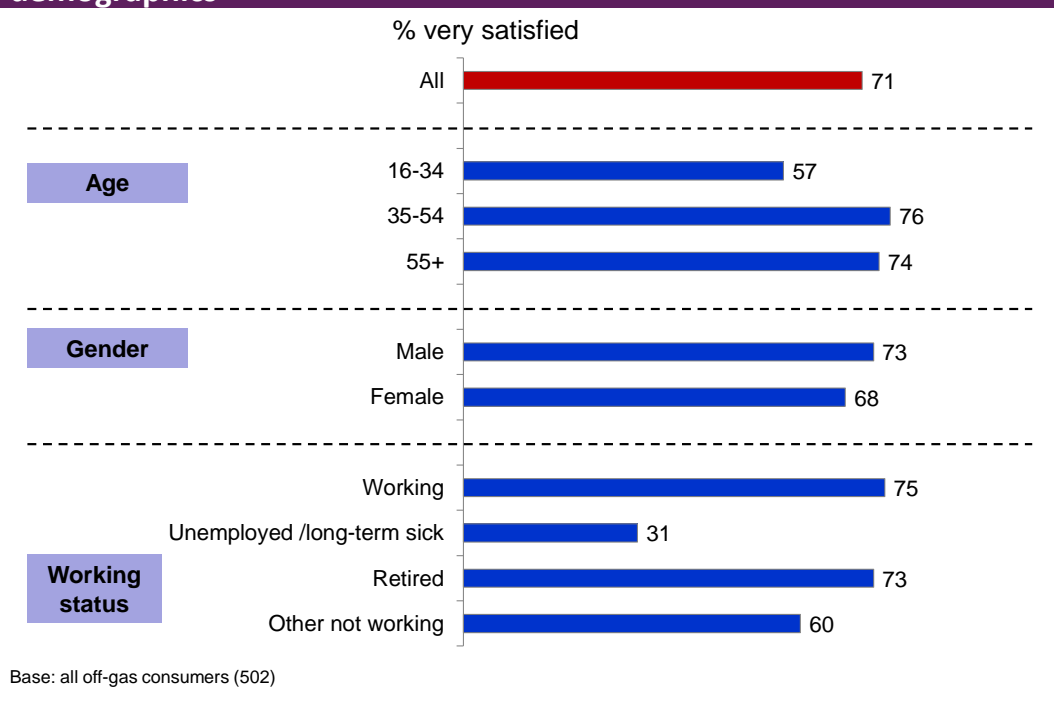
Marked differences are evident between users of different fuel types, however:

- Heating oil customers have the highest satisfaction levels (at 99 per cent satisfied), followed by LPG customers (at 93 per cent)
- In contrast, only just over three-quarters (77 per cent) of electricity customers are satisfied with their supplier (with only 41 per cent very satisfied), while over one in five customers (21 per cent) say they are not satisfied
- Solid fuel customers' satisfaction levels (at 86 per cent) are higher than for electricity customers but below those for heating oil and LPG customers



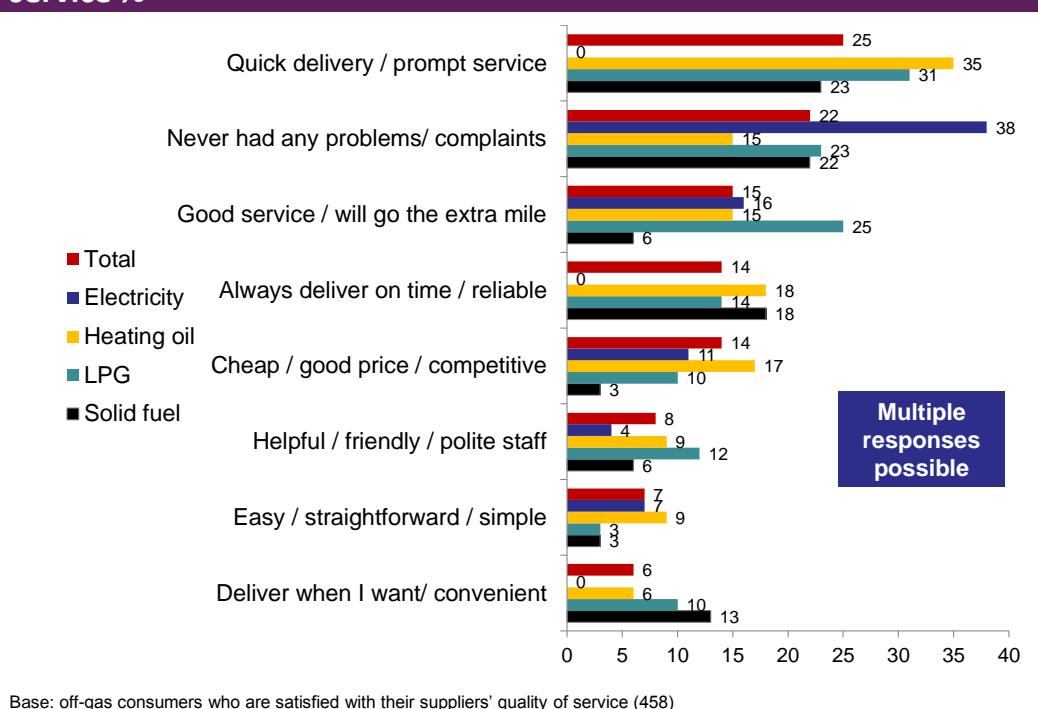
The proportions of those very satisfied with their fuel supplier's quality of service are lowest among younger off-gas consumers (ie those aged 16-34), women and those who are not working or on benefits (see figure 15 below):

Figure 15: Satisfaction with supplier's quality of service by demographics



Reasons for satisfaction centre primarily around delivery (timely, quick delivery and delivery on schedule, at the agreed day/time) and customer service (staff helpfulness, politeness and friendliness and providing good service). Although pricing is mentioned it comes below these elements of service (see figure 16 below).

Figure 16: Main reasons for satisfaction with supplier's quality of service %



Gwen, 58: Uses a combination of heating oil and electricity to heat her home. She thinks it is quite expensive but she can't speak highly enough of her suppliers

Gwen is a retired teacher and she lives with her husband in a small village in North East Wales. They live in a detached house, that they themselves built 30 years ago, and they have recently turned part of the house into a B&B business.

She thinks her current heating system is 'adequate' because it effectively heats their home and it is easy to use. However, the numbers on the dial are quite 'tricky' because they are very small.

She is very satisfied with her electricity and heating oil suppliers. They had their heating oil stolen once but the company replaced the oil on the same day so they did not have to go without. Nevertheless, they have had to go without heating when there have been power cuts in the area. When her son, who has cystic fibrosis and was on nebulisers at the time, was staying with them, the electricity company said they would bring them a generator if their electricity supply cut out. Some years ago, they had a power cut that lasted five days but Gwen's electricity company did bring them a generator. Even though this was a long time ago, the company have still not taken their house off the priority list just in case their son might be there visiting them. For this reason, Gwen thinks her electricity supplier is 'very good'.

One time we had our oil stolen and they came the same day; they are absolutely brilliant. We have been dealing with them for such a long time, I suppose that helps as well. It's a small company.

Conversely, price tops the list of reasons given by those dissatisfied with their current fuel supplier (most of whom are electricity-only consumers). Customer service and payment problems were predominantly mentioned by electricity-only customers (see table 10 below for the overall reasons for dissatisfaction):

Table 10: Reasons for dissatisfaction with current supplier's quality of service	
%	Those dissatisfied (33)
Too expensive / prices have gone up	30
Problems with customer service / difficult to get in contact with them	26
Had problems with payments (direct debit issues/ inaccurate bills)	18
Unable to switch	1
Other	27

Nearly seven in ten off-gas consumers (69 per cent) feel that fuel suppliers should do more to prioritise the needs of older customers. Younger people were more likely to be of this opinion than older people, with 84 per cent of 16-34s agreeing, compared with 58 per cent of over 55s.

4.7 Complaints and barriers to complaining

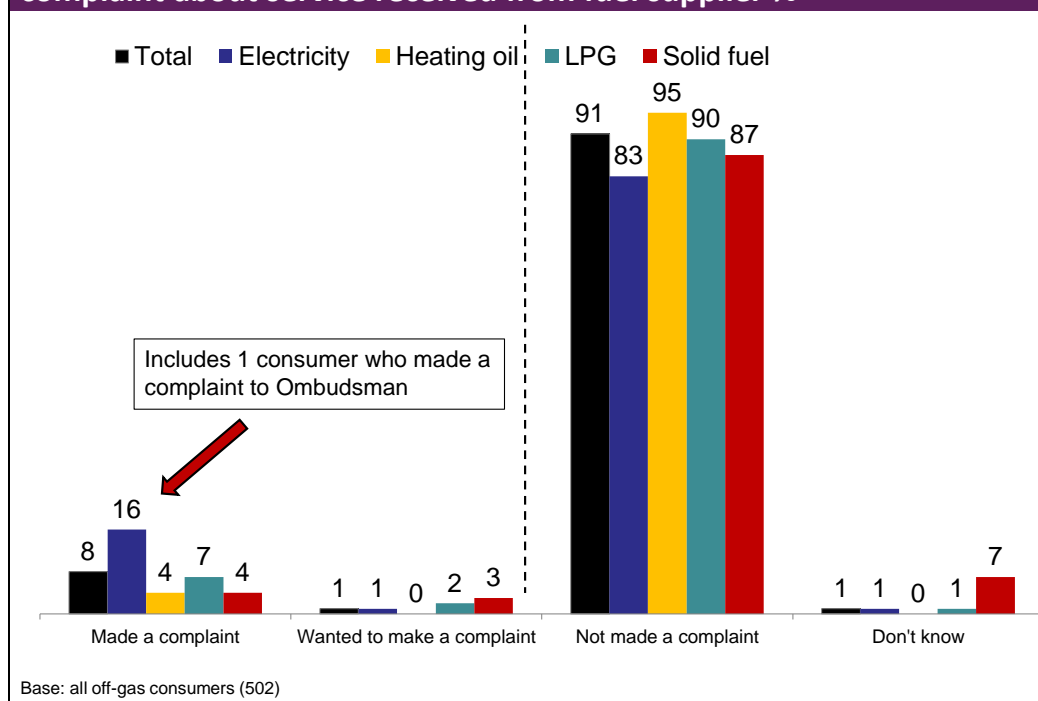
Just under one in ten (8 per cent) of off-gas consumers in Wales say they have made a complaint about their supplier's service at some point, with the proportion of complainants highest amongst those who use electricity to heat their home (at 16 per cent – more than double the level among other fuel type users). The higher incidence of complaints can be linked to the higher levels of dissatisfaction among electricity-only users outlined above. One of the electricity-only users interviewed had also complained to the ombudsman about his/her supplier.

Another 1 per cent of those not on the mains gas network overall (ranging from 1 to 3 per cent by fuel type) have at some point wanted to make a complaint about the service received from their supplier but did not go on to make a complaint.

The great majority of off-gas consumers (91 per cent) have never made a complaint nor have wanted to make a complaint, however. This proportion rises to 95 per cent of heating oil users, who (along with solid fuel users) have the lowest levels of complaints of all fuel types.

The proportion of those who have either made a complaint to their fuel supplier or who wanted to complain but did not found in the Citizens Advice office survey is much higher (at 29 per cent and 8 per cent respectively), reflecting the different way in which these off-gas consumers were sourced.

Figure 17: Whether ever made a complaint or wanted to make a complaint about service received from fuel supplier %

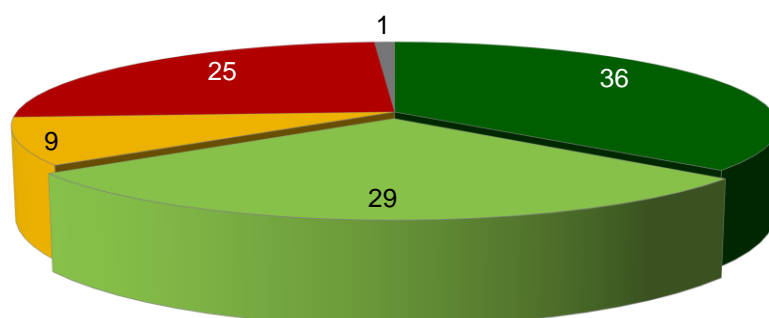


Reflecting the profile of electricity-only users (who make up a high proportion of complainants) those most likely to have complained are younger people and those living in South Wales (at 14 per cent and 12 per cent respectively, compared with 8 per cent overall).

When asked how easy or difficult they found it to make the complaint, around two-thirds said it was very or fairly easy but a significant minority of over a third (34 per cent) said it was not easy to complain. Moreover, over half the electricity-only consumers in the sample who had made a complaint said they found it difficult to complain about their supplier's service.

Figure 18: How easy or difficult it was to make a complaint %

■ Very easy ■ Fairly easy ■ Not very easy ■ Not at all easy ■ Don't know



Base: off-gas consumers who have ever made a complaint about service received from their fuel supplier (38)

Barbara, 50+: Has had to seek help from the Ombudsman to resolve issues with her previous electricity supplier

Barbara lives with her disabled husband who has difficulty walking because he has had two hip replacements. They are both retired and have recently downsized to a bungalow in a rural village in Mid Wales. The bungalow was built in the 1990s.

She mainly uses electric storage heaters to heat her home but also has some LPG bottles in case of power cuts. They pay for their electricity by direct debit and she is very happy with the payment options available to her. She was, however, in dispute with her previous supplier because they could not find the meter installed at the property on their computer system.

[Before switching] we had to pay for what we had used but I refused to pay it until they had got a meter reading and had done it properly because I didn't trust them to give me back my money if I had paid extra.... You have no idea [how difficult it was to sort out].

Barbara had to get the Ombudsman involved in order to help them switch their electricity supplier. It took 9 months for them to agree on a final payment with the previous company before switching, but the Ombudsman 'did the trick'.

...At the third time of screaming at them they came and changed the meter. But they had not registered it on the national database; it was still in a house in Manchester according to that. They changed the meter but it was still registered on another property.

Mystery shopping – suppliers' complaints process

Towards the end of the mystery shopping call, companies were asked what the caller's mother should do if something were to go wrong, to establish what information is provided by non-metered fuel suppliers about how they would handle complaints and to see whether any refer the customer to a formal complaints procedure.

Heating oil suppliers

None of the heating oil companies approached mentioned a specific complaints procedure. If anything were to go wrong, most said the customer should call the office.

Any problems just ring the office, speak to the boss and he will sort it straight away
Ring up and speak to our transport manager if we're running late
Well, we are always open here, we're open all day as it's a family-run business. So you can just call and we can hopefully sort it out, if it's your mother who has run out of oil. We will hopefully get an emergency tanker out...'

Several offered reassurances about being a family business.

It's a family business which has been running for hundreds of years - we look after our customers
We would sort your mother out. As we are a small family-run business we can get to her 24 hours a day. I will never let her run out. Just give me a ring. The phone in the night gets diverted to my home phone

LPG suppliers

The reaction of all LPG suppliers approached was that nothing would go wrong but, if it did, to give them a call in the first instance. One mentioned using their free telephone number to do so.

Only one of the four mentioned a formal complaints procedure.

There's details of our complaints handling procedure on the website, so you can fill in a form online if you want

Solid fuel suppliers

No formal complaints procedure was mentioned by any of the solid fuel suppliers that were contacted in Wales. The most common response (as with other fuel

suppliers) was to give the company a ring in the unlikely event there were any problems.

Some volunteered reassurance about their customer service and reliability and offered to go the extra mile

*Like I said it is my business, nothing will go wrong. I will look after your Mum I won't let anything go wrong. My customers mean the world to me and I'll do anything to make them happy
I can't see that it would [go wrong]. If you tell me what size your Mum's wood stove is, we can even cut them [logs] to size for her*

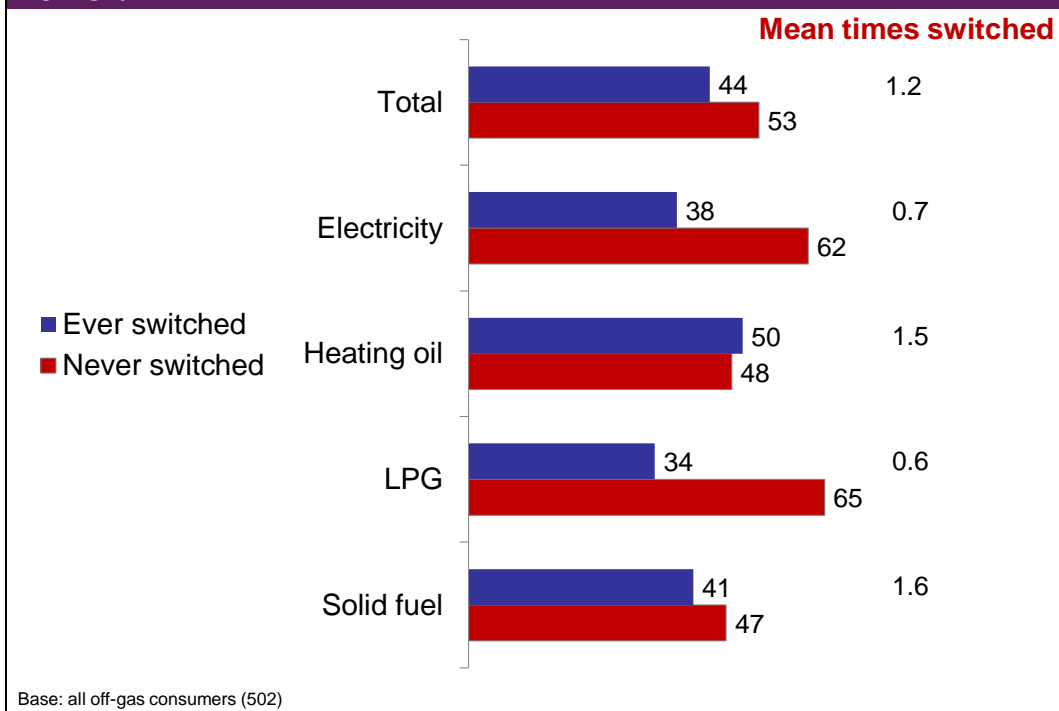
4.8 Switching supplier

Just over four in ten off-gas consumers interviewed in the telephone survey (44 per cent) have switched fuel supplier during the period they have lived in their current home. Over half (53 per cent) have not changed supplier, therefore.

Those most likely to have switched suppliers are heating oil consumers, where the proportions that had and had not switched were almost equal (50 per cent and 48 per cent respectively). In contrast, those least likely to have switched are LPG users (who are most likely to be tied into a contract) and electricity users - over six in ten of each group (65 and 62 per cent in each case) have not changed supplier since moving into their current home.

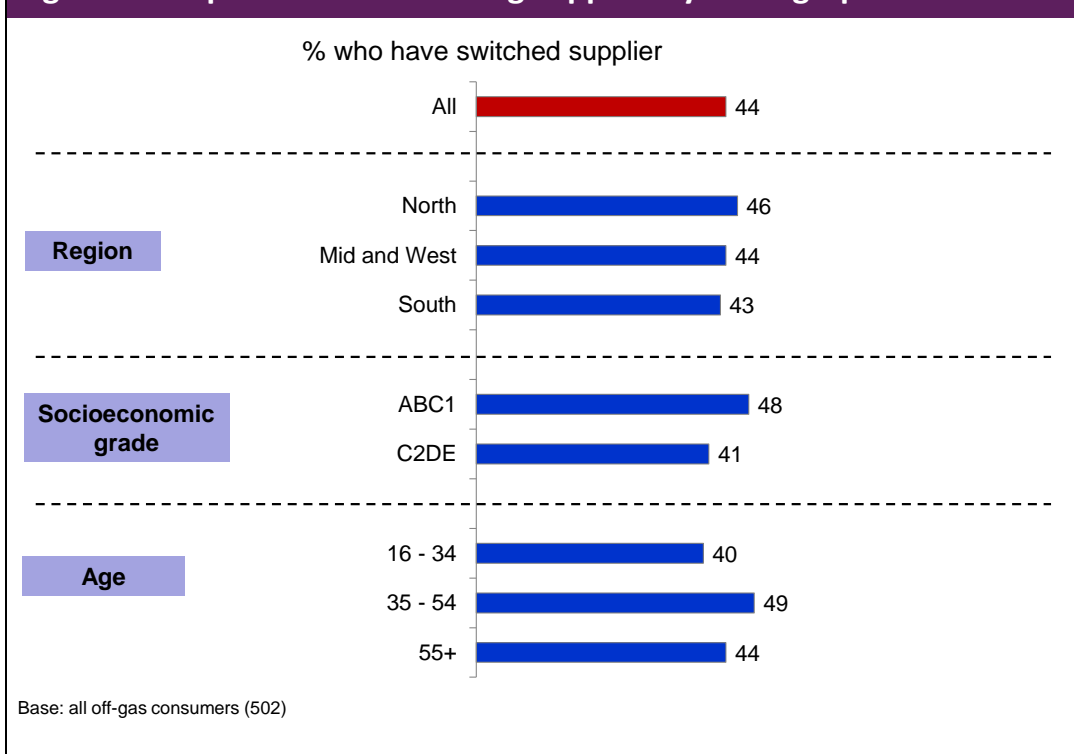
Looking at frequency of switching, solid fuel and heating oil users have each switched on average around 1.5 times since moving into their current home, whilst LPG and electricity-only consumers have switched least often on average (at 0.6 and 0.7 times respectively):

Figure 19: Experience of switching supplier during time in current home %



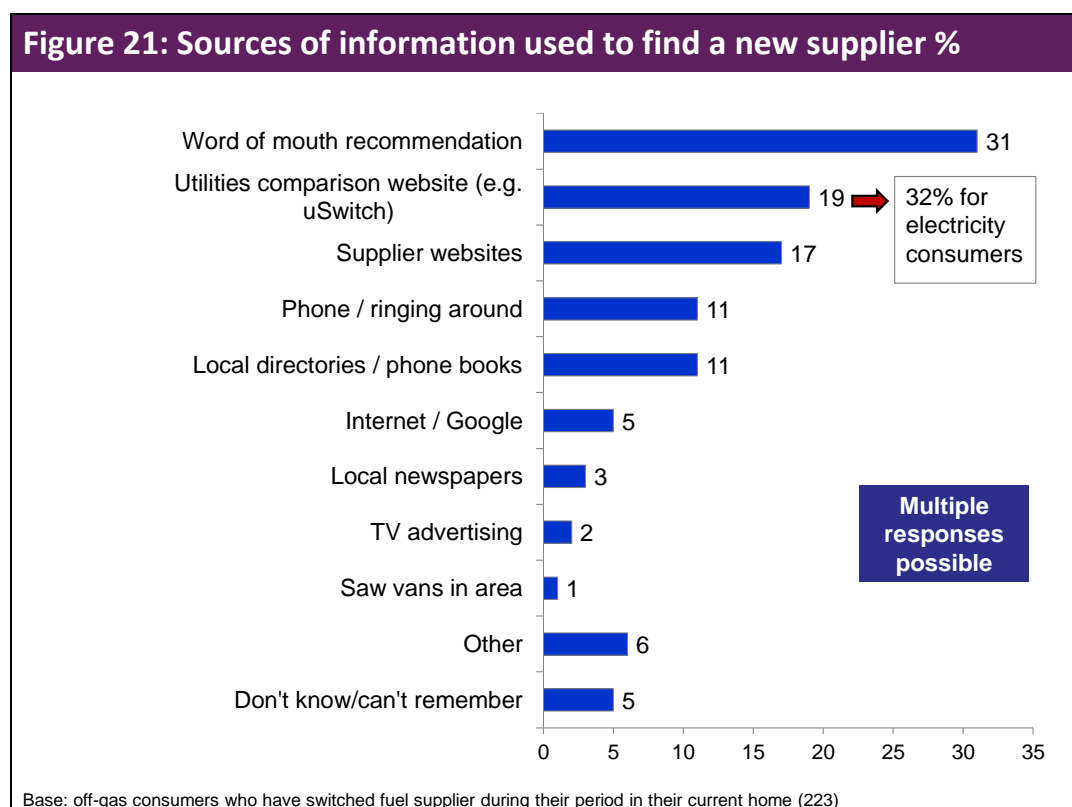
Switching suppliers is higher among the middle classes (ABC1s) and the middle age group (35-54s) than among the working classes (C2DEs) and younger and older people. No particular differences are evident by region (see figure 20 below):

Figure 20: Experience of switching supplier by demographics



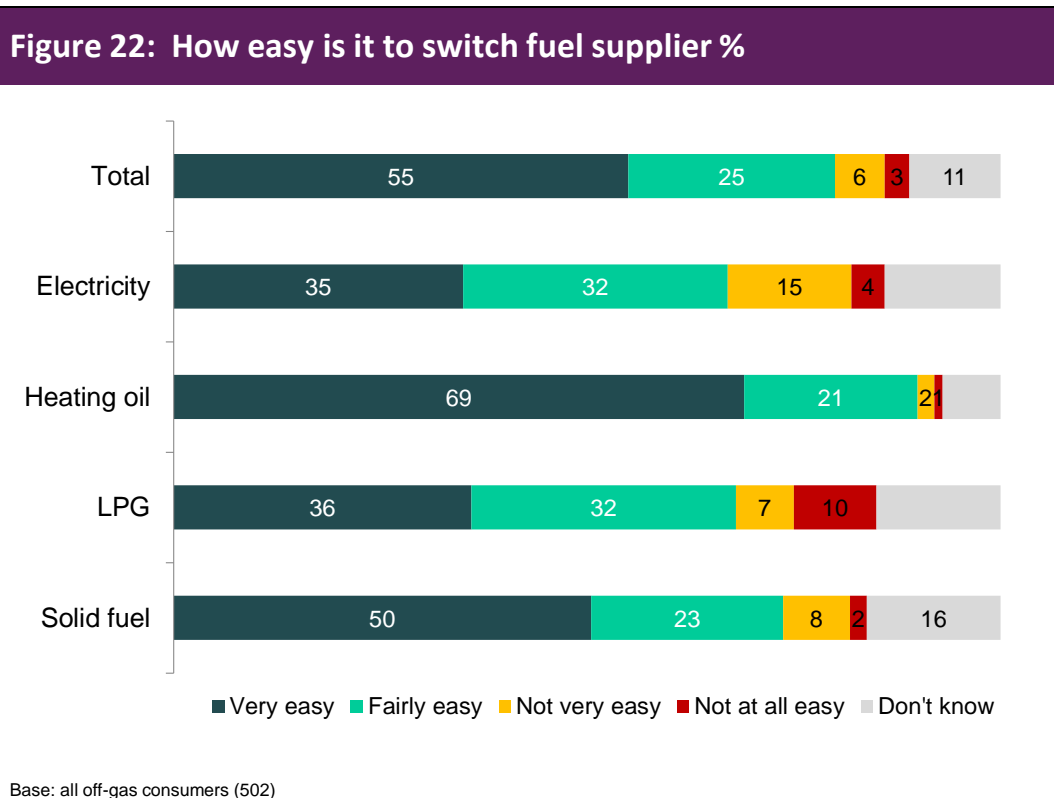
Word of mouth recommendation was used by around three in ten of those who had switched (31 per cent) to find a new supplier, rising to over half of the LPG users who have changed supplier.

Other sources of information mentioned spontaneously by switchers were utilities comparison websites (particularly in the case of electricity-only consumers) and supplier company websites. Both were mentioned by almost one in five of those who have changed suppliers. At a lower level, around one in ten mentioned phoning around and using local telephone directories to help them find a new supplier (see figure 21 below):



Although less than half of the off-gas consumers interviewed in the survey had themselves switched suppliers in their time at their current home, the great majority (eight in ten) perceive it to be easy to change fuel supplier. Fewer than one in ten overall (9 per cent) feel it is difficult to do so (see figure 22 below).

Those who heat their homes using heating oil are most likely to feel it's very easy to switch supplier (with almost seven in ten – 69 per cent saying this) while those using electricity and LPG to heat their homes are least likely to do so (at just over a third in each case). Moreover, significant minorities of almost one in five electricity and LPG consumers perceive it to be difficult to switch fuel supplier (at 19 per cent and 17 per cent of each group respectively).



Younger off-gas consumers in the sample were most likely to feel it's difficult to switch fuel supplier - 16 per cent of 16-34s said this, compared with 7 per cent of 35-54s and 6 per cent of those aged 55 and over.

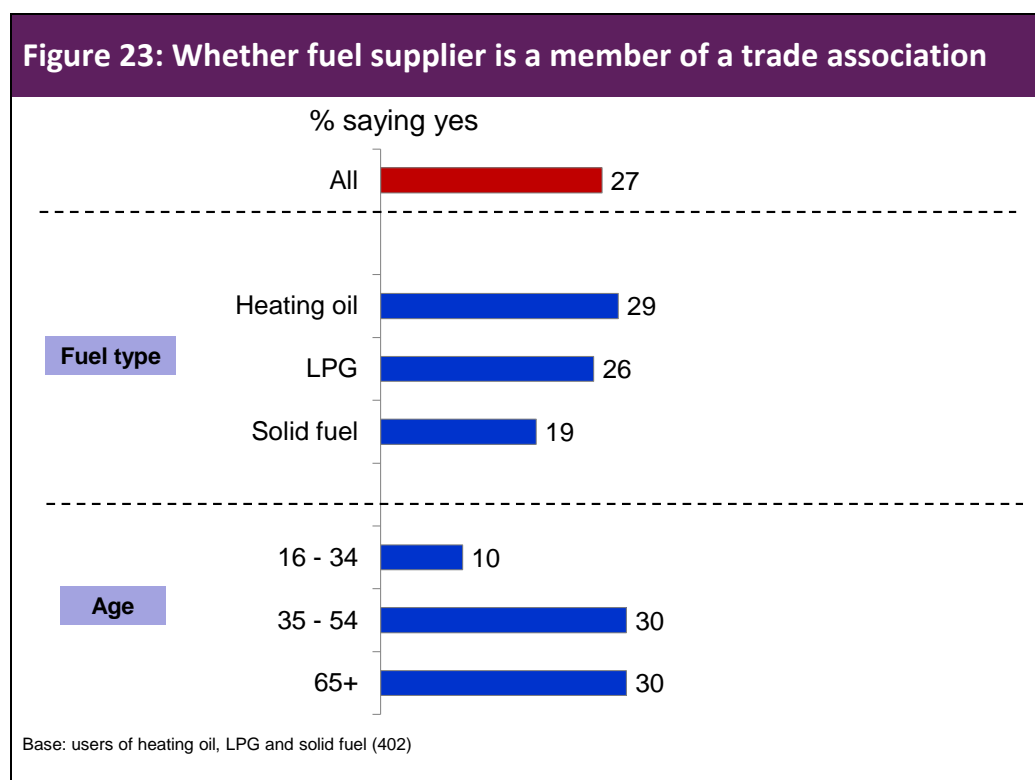
The main reasons given unprompted by those who do not regard it as easy to switch supplier are:

- There is a limited choice of suppliers in their area (13 people – most commonly cited by heating oil users)
- It's too much trouble / hassle (10 people – with 6 of these being younger, electricity-only users)
- Had bad experiences of switching in the past (7 people – with nearly all of these being younger, electricity-only users)

4.9 Trade associations and vulnerable persons protocol

Around one in four off-gas consumers using unmetered fuels (27 per cent) say their fuel supplier is a member of a trade association. About the same proportion (29 per cent) say their supplier is not, while over four in ten consumers (44 per cent) don't know one way or the other (see figure 23 below).

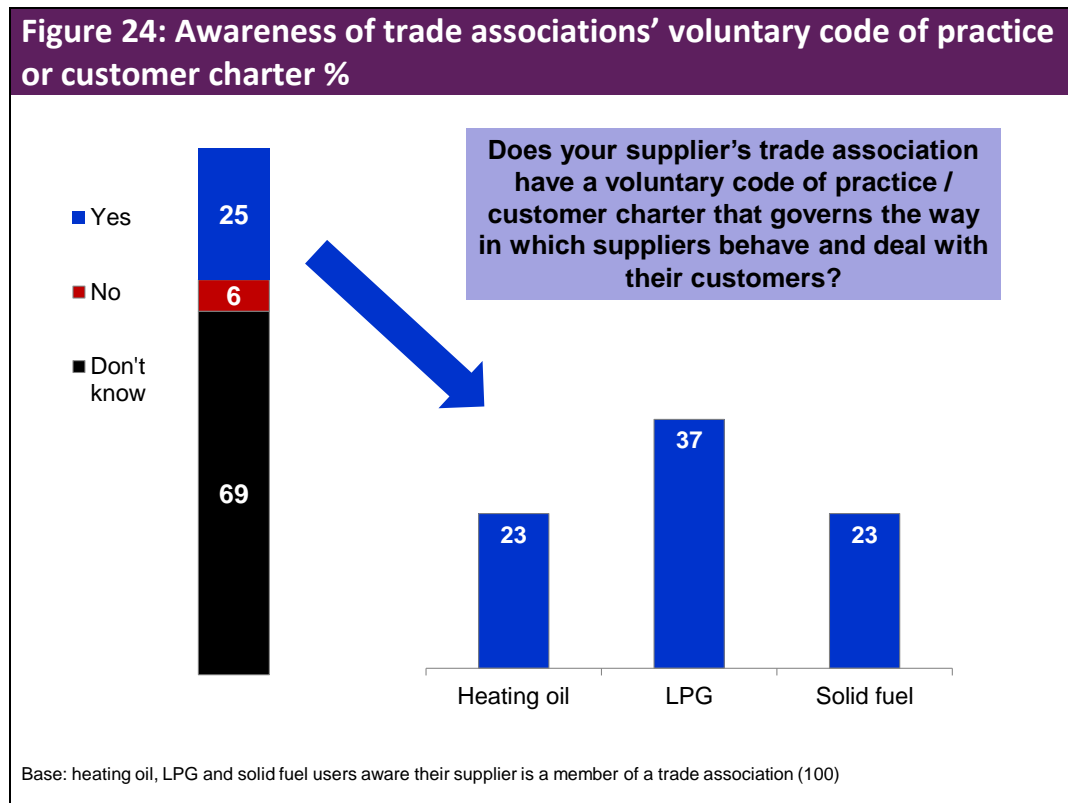
Heating oil and LPG consumers are more likely to say their fuel supplier belongs to a trade association than customers of solid fuel suppliers. Younger people aged under 35 are least likely to know (nearly six in ten of this age group were unable to say).



Hardly any consumers were able to name the trade association to which their supplier belongs when asked, however – nearly nine in ten (88 per cent) said they don't know. Only around 2 per cent of those saying their supplier is a member of a trade association named one of the major trade associations (eg Solid Fuel Association, Federation of Petroleum Suppliers or UKLPG).

Table 11: Trade associations to which suppliers belong	
%	Unmetered fuel customers who know their supplier is a member of a trade association (100)
Solid Fuel Association (SFA)	1
Approved Coal Merchants Scheme	1
Federation of Petroleum Suppliers (FPS)	*
UKLPG	*
Other	10
Don't know	88
* less than 1%	

One in four of those aware their supplier is a member of a trade association say their association has a voluntary code of practice or customer charter that governs the way in which the supplier behaves and deals with their customers. Another 6 per cent say that it does not, but the great majority (69 per cent) were unable to answer the question.



Among the small proportion aware that their supplier has a voluntary code of practice or a customer charter, most had heard about it either through a member of staff (mentioned by 7 out of the 25 individuals concerned) or through a leaflet in with a bill (mentioned by 4 people).

In the Citizens Advice office survey, those who might either classed as vulnerable adults themselves or who had vulnerable people living in their household were asked if their supplier had made them aware of the Priority Services Register (if an electricity-only customer) or their supplier's protocol for vulnerable persons (if a non-metered fuel customer). In both cases, the proportion saying their supplier had done so was low – at three in ten of the electricity customers and lower still, at fewer than one in ten, of the non-metered fuel customers.

Mystery shopping – trade associations, codes of practice and vulnerable persons protocol

Trade association membership and accreditation

During the mystery shopping, just over half of the non-metered fuel suppliers in Wales that were telephoned for a quote said they have some kind of accreditation or are members of a trade association, that is 13 of the 24 approached. Nobody volunteered this information before being asked.

Not all of the 13 who said they are accredited mentioned a specific trade association by name, however. In fact, only seven companies named the trade association to which they claimed to be accredited (accreditation was sometimes interpreted in a less formal way, as reassurance / reputation):

- Among heating oil suppliers in Wales, five of the ten approached said they are accredited, but only two named the Federation of Petroleum Suppliers (FPS). Four said the company is not accredited or a member of a trade association while the last said that 'they didn't have a clue'. Of the three claiming the business was accredited but not mentioning the FPS, one said 'all the trucks are calibrated', another that they are accredited to the DDC Group, while the third talked about the longevity of the business, that it's a family-owned company and the customer could check their credentials online if s/he wished
- Of the four LPG suppliers contacted in Wales, all said their company is accredited but only one named UKLPG. Of the three others, one mentioned they have Calor Gas accreditation, another said in the context of accreditation that they supply the Queen with LPG at her different palaces ('that's how we're recognised') and the third that it is to do with 'the compliance of the tank'
- Of the solid fuel suppliers mystery shopped in Wales, half (five) said they are accredited and nearly all of these (four) mentioned the Approved Coal Merchants scheme (the other one did not give any details).

Those who said their company is accredited or a member of a trade association were asked what this meant for their customers (using the scenario of the caller's elderly mother living alone). Most of the suppliers spoken to struggled to answer this question and responses (where given) were usually very general.

It just means we have to conform and adhere to the rules which have been set out by the Approved Coal Merchants scheme (coal supplier)

The coal is from an Approved Coal Merchant (coal supplier)

It just means the fuel is from a quality supplier and that we are an accredited company (heating oil supplier)

It just safe guards her' (heating oil supplier)
It means we have to adhere to the protocol which is set by the company
(LPG supplier).

Only one supplier in Wales expanded on the benefits to customers of their accreditation.

It is more important for our customers, it gives them peace of mind. We are able to recommend what fuel is best for different appliances, we have liability insurance. All of our members of staff have been on the course. Also our weights get checked twice a year, so the customers get what they're paying for (coal supplier)

Vulnerable persons' protocol

When asked what, if any, special provisions they have in place for elderly customers (using the example that the caller's elderly mother is nervous about letting strangers into the house) no specific reference was made by any of the fuel suppliers contacted to a vulnerable persons protocol or to any formal provision in place for vulnerable customers. Many suppliers contacted offered some informal help or service provision which took the customer's age and circumstances into account, however.

Heating oil suppliers

No specific references to a vulnerable persons' protocol were made during the assessments. Most heating oil suppliers said they would not need to go into the house or bother the caller's mother if the tank were unlocked and payment had been received.

She would not even need to be in. The driver will just go and fill it up and drop the invoice through the door
Not a problem, the driver would not have to go into the house. He would just go straight to the tank

Some suppliers offered to make special provision to accommodate the elderly customer, for example phoning her or a relative beforehand.

If you tell us how to make it easier for her we will try to accommodate it, eg like ringing before delivery and giving her an estimate of what time the driver will be there
We would be able to give you a ring the day before to let you know we are coming. However, the driver would just fill up you Mum's tank and post the invoice through the door

We could ring you the day before we deliver so you or another family member could unlock the tank ready. And if you paid on account there's no need to bother your mother. If we can access the tank we'll make the delivery then leave a slip through the door

Another commented that they only had a small team of drivers and she would be allocated the same driver for each delivery, so would soon get to know him.

A couple of suppliers mentioned a new automatic top up gauge that they could fit to the tank (for an additional charge) which would signal when the tank was running low and therefore alert the customer that a new order was needed. This would make life easier for an older customer who may otherwise struggle to monitor fuel levels.

None of the suppliers who had said they were members of a trade association mentioned a customer code of practice or customer charter.

LPG suppliers

None of the suppliers made any specific reference to the UKLPG Vulnerable Persons' Protocol, although all had said they were members of a trade association (with one naming UKLPG). All offered some suggestions, however:

- That there would be no need to go into the property if the tank is in the garden – the delivery would be done automatically by the driver

The drivers wouldn't have to see your mother and we can do an automatic delivery

- Moreover the tank would be topped up automatically, so the top-up service they offer helps older people who perhaps can't easily read the level in the tank themselves
- That they could call the elderly mother the day before delivery to let her know when to expect the driver. This company also offered reassurance that the driver would be in company uniform and the tanker would be branded with the company name

No, we don't have anything in place, however we could maybe give her a call the day before and let her know to expect him. Also the tanker has sign writing on it and the driver will be in uniform

- That a representative of the business could meet the caller at his/her mother's house in advance of the first delivery to 'check the tank over' (so as not to bother his/her elderly mother)

When a customer code of practice was mentioned by the caller in the context of his/her wanting to make sure his/her elderly mother did not run out of fuel in the winter or when the weather is bad, one of the four LPG suppliers mentioned having their own customer charter. This company did not offer to send a copy out but did refer the caller to their website, saying they could 'check it out there'.

At the same time the supplier commented that there was no danger of this happening as their automatic top-up service meant that customers do not run out of gas. Another said they could deliver smaller tanker loads or individual gas bottles in an emergency like this until they could get a full delivery out.

Solid fuel suppliers

As with other non-metered fuel suppliers, none of the coal or wood suppliers contacted during the mystery shopping mentioned a vulnerable persons protocol or customer charter when the caller said s/he wanted to make sure his/her elderly mother did not run out of fuel in the winter or when the weather is bad. All offered some suggestions, however:

- The main comment made (as with LPG) was that the driver would not need to go into the house or to see the caller's mother if payment had already been made.

The driver would not have to see your Mum, but he is very friendly and I'm sure over time they would be fine

She wouldn't have to see the driver, he could just fill up her bunker and disappear, if it's paid upfront

- Some offered to provide an additional service to assist the caller's elderly mother, eg taking the bags of fuel into the coal shed rather than leaving them on the drive as normal.

Like I said, normally we just drop the logs off. But for your mother I'll drag the bag inside her coal shed for you

Nobody will have to go in her house. Also it will be me who delivers and she will be fine. I will fill up her coal shed for her

- A few companies suggested they could phone before delivery to give some reassurance.

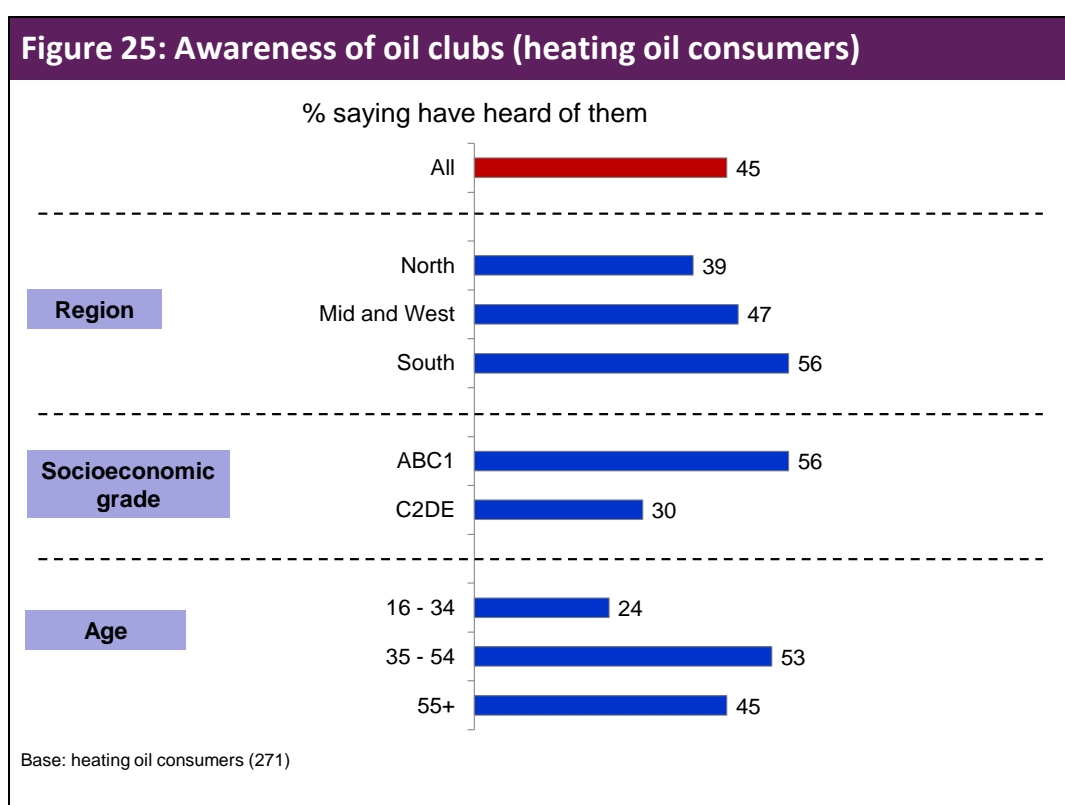
I usually get the logs as close as I can [to the shed]. I can give your mother a call before I come if you would like

- Another offered reassurance about the honesty and integrity of their staff.

We only have honest people working for us

4.10 Awareness and experience of oil clubs

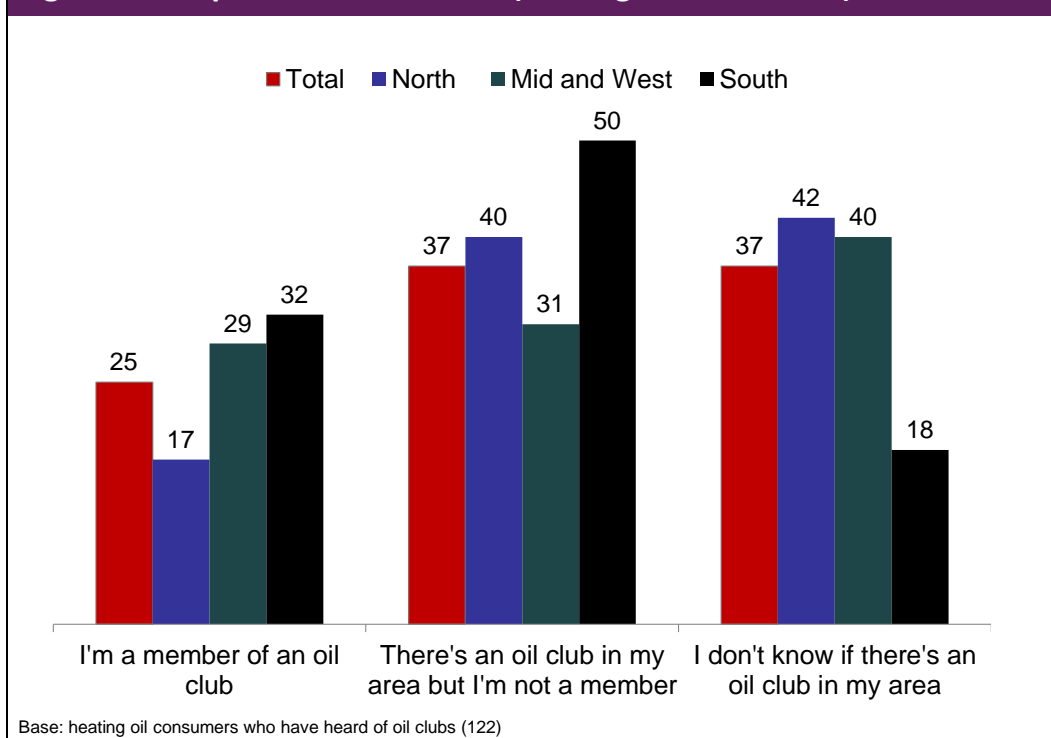
Nearly half of the heating oil users in the telephone survey say they have heard of oil clubs (45 per cent), with awareness highest among those living in South Wales, the middle classes (ABC1s) and those aged 35 to 54 (see figure 25 below):



One in four heating oil consumers aware of oil clubs say they belong to one, which equates to 11 per cent of all heating oil users. The remainder are split evenly between those who know there is an oil club in their area but are not a member and those who don't know if there is a club locally (see figure 26 below).

Membership of oil clubs is highest in South and Mid and West Wales, while familiarity is highest in South Wales. Four in ten of those living in North and Mid and West Wales who have heard of oil clubs do not know if a club exists in their area.

Figure 26: Experience of oil clubs (heating oil consumers) %

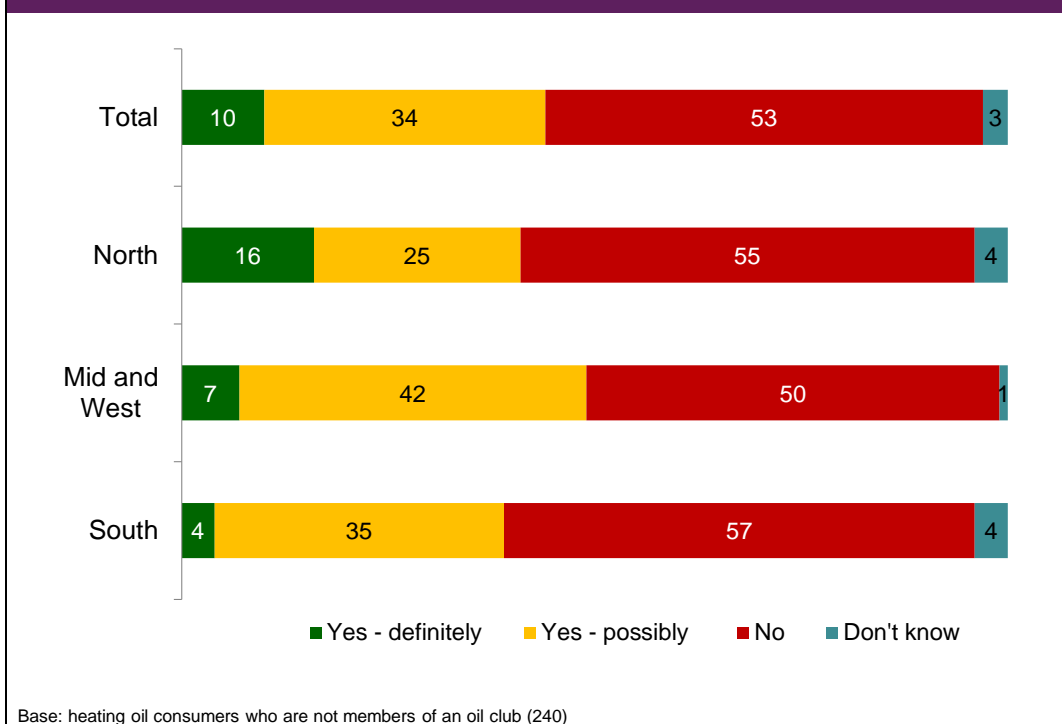


Of the 31 oil club members interviewed, around one in five (21 per cent) said they pay a fee for belonging to the club but the great majority (79 per cent) do not.

Satisfaction with the oil club belonged to is high - only one of the 31 oil club members in the survey said they are not satisfied with the savings they get from being a member. Most of the members interviewed are very satisfied (79 per cent) and another 17 per cent are fairly satisfied.

All heating oil consumers not currently members of an oil club were asked whether they would be interested in joining one if one were available in their area. Reaction was mixed – although between 4 and 16 per cent in each area are very interested in the idea, at least half of the sample in each region is not interested. In fact, in all areas, the proportion not interested outweighs the proportion that is interested.

Figure 27: Interest in joining an oil club if one were available locally %



Mystery shopping – oil clubs

Heating oil suppliers contacted as part of the mystery shopping assessments were asked whether they worked with oil clubs in the area. Around a third of the companies telephoned (three) said they did.

Of these three, one said they did not know of any in the area in which the caller's mother lived but sounded knowledgeable.

Yes, we quote for a few oil clubs but I've not heard of one in Cross Hands....the closest to where your mother lives is Llandovery.

Two of the three who did work with oil clubs mentioned their positive impact on prices paid by customers and one gave names of club organisers in the area.

*Yes, there are there people in the street who do [belong]... The more you buy the cheaper it is
Yes – it would be an organiser within the village. [Name] at [business name] in Mold runs one...They are good – it means the price comes down*

A few heating oil suppliers were less positive about oil clubs, however, querying their value to customers.

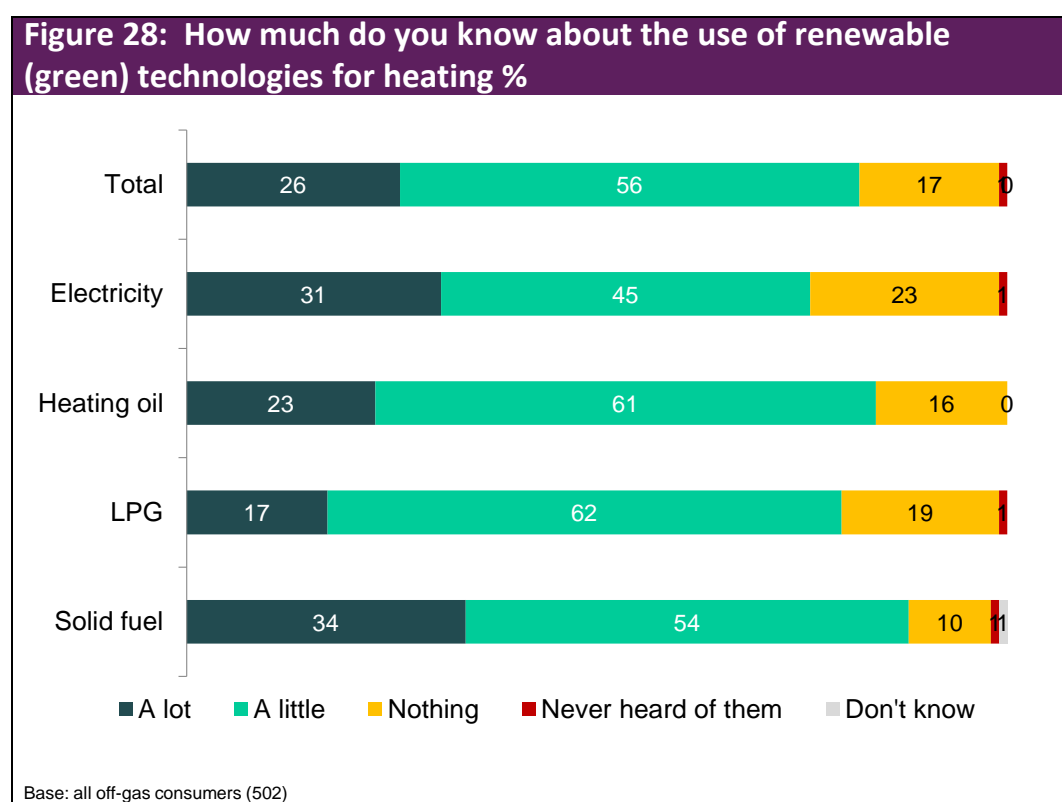
It's better to order direct, as clubs are not cheaper all of the time.... Our customers get priority over clubs

No – oil clubs may only save your mother around £10 anyway

4.11 Knowledge and interest in renewable technologies

Most off-gas consumers claim to know something about the use of renewable (green) technologies, such as solar panels on the roof (for hot water or electricity), biomass heaters / boilers and heat pumps, for heating homes. While over eight in ten (82 per cent) have some knowledge of these technologies, only just over one in four (26 per cent) say they know 'a lot' about them and nearly one in five (18 per cent) either know nothing about them or have never heard of them (see figure 28 below).

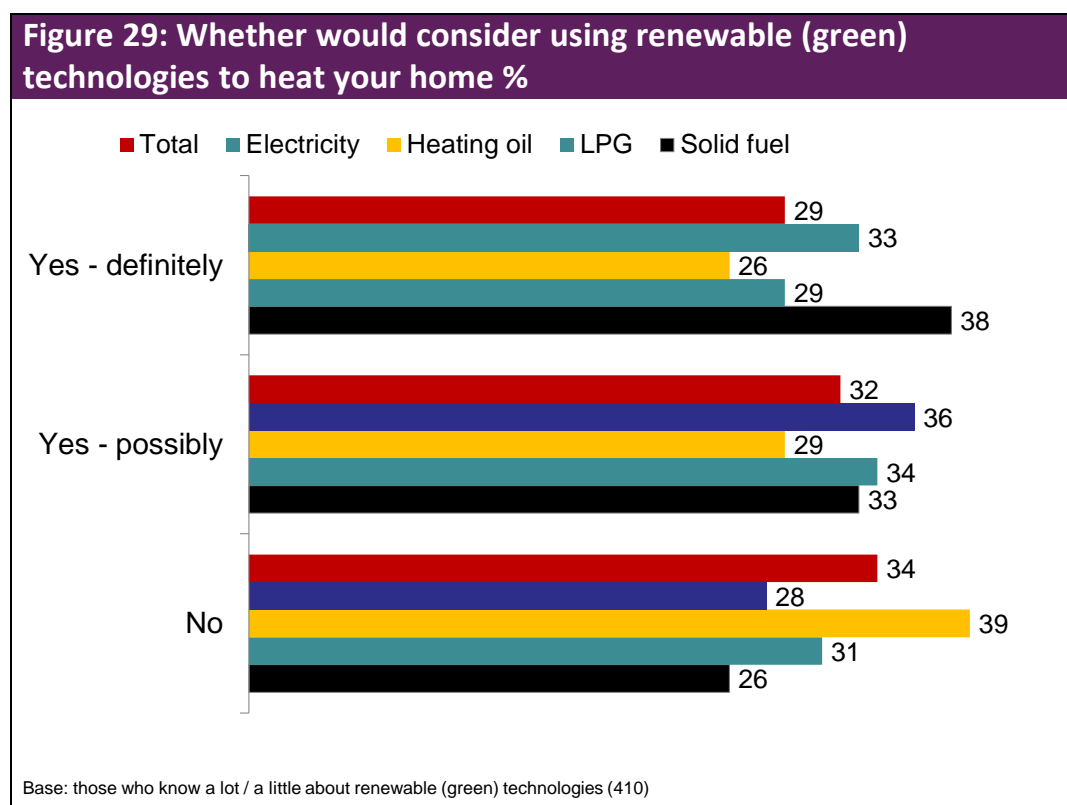
Electricity-only consumers and LPG users are the least likely to be familiar with renewable technologies, with 24 per cent and 21 per cent respectively of each group saying they know nothing about them or have never heard of them. Conversely, solid fuel users and heating oil users are most likely to have some knowledge of renewable technologies.



The upper social grades (ABs), men and those aged 35-54 are most likely to have some knowledge of renewable (green) technologies (at 96 per cent, 90 per cent and 88 per cent of each group respectively, compared with 58 per cent of DEs, 74 per cent of women and 79 per cent of other age groups).

Those who said they had heard a lot or a little about renewable technologies were then asked if they would consider using such methods to heat their home. Most (61 per cent) say they would consider doing so, but just over a third (34 per cent) would not and another 4 per cent say they would need further information before making up their mind.

Solid fuel users and electricity-only consumers are most likely to say they would definitely consider using green technologies for heating their home (with 38 per cent and 33 per cent of each group saying this) while heating oil consumers are least likely to say they would consider doing so.



The profile of those willing to consider using green technologies for heating their home is biased towards the under 55s - 36 per cent of 16-34s and 35 per cent of 35-54s say they would definitely consider doing so, compared with just 20 per cent of those aged 55 and over.

In the Citizens Advice office survey, over half the sample (55 per cent) said they had considered using renewable technologies to heat their home.

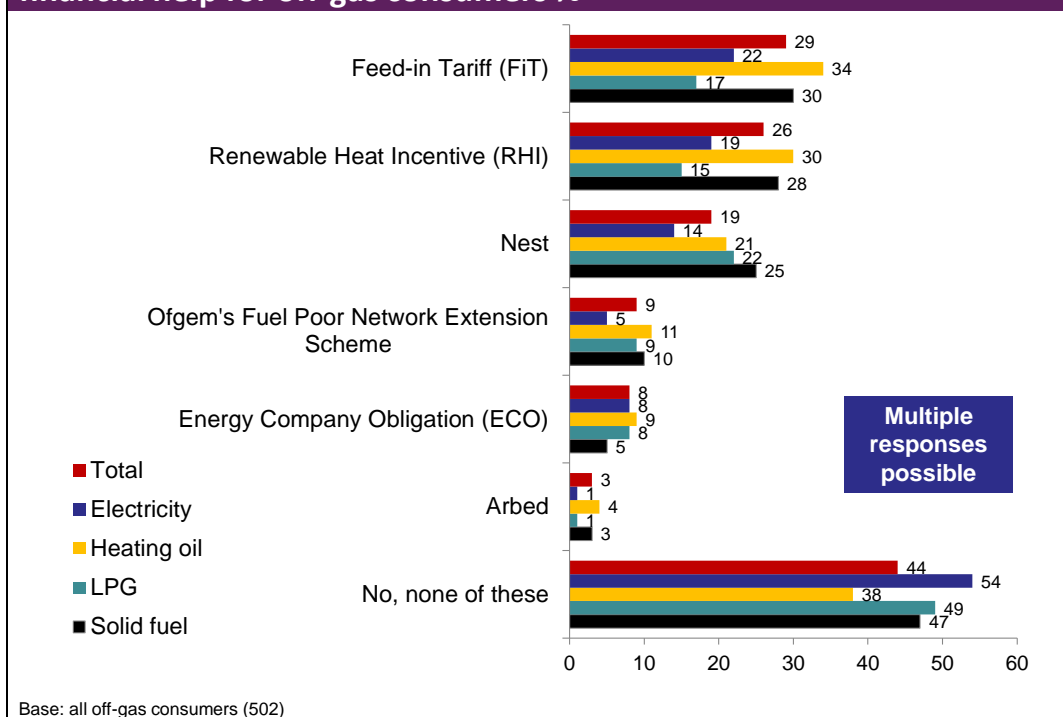
4.12 Grants / financial assistance for off-gas consumers

Knowledge of any grants or financial help available for people who don't have mains gas to heat their home is very low. When participants in the telephone survey were asked if they could think of any grants or financial help that might be available, nearly nine in ten (85 per cent) were unable to name any and another eight per cent were unable to answer. Among the minority who could, Nest was the only scheme mentioned by more than one person (named by 2 per cent overall).

When prompted with a list of grants or schemes providing financial help to people who don't have access to mains gas almost six in ten off-gas consumers had heard of at least one of the schemes. The schemes with the highest recall are the Feed-in Tariff (FiT) and the Renewable Heat Incentive (RHI), both recognised by at least one in four of those interviewed (at 29 per cent and 26 per cent respectively), followed by Nest (recognised by almost one in five – 19 per cent). Heating oil consumers and solid fuel users are more likely to be aware of the Feed-in Tariff and the Renewable Heat Incentive scheme than other fuel type users.

Over four in ten (44 per cent) of those living without mains gas have not heard of any of the grants or schemes providing financial assistance to people in their situation, however. Electricity-only consumers are most likely of all fuel types not to know of any of these schemes.

Figure 30: Prompted awareness of grants or schemes providing financial help for off-gas consumers %



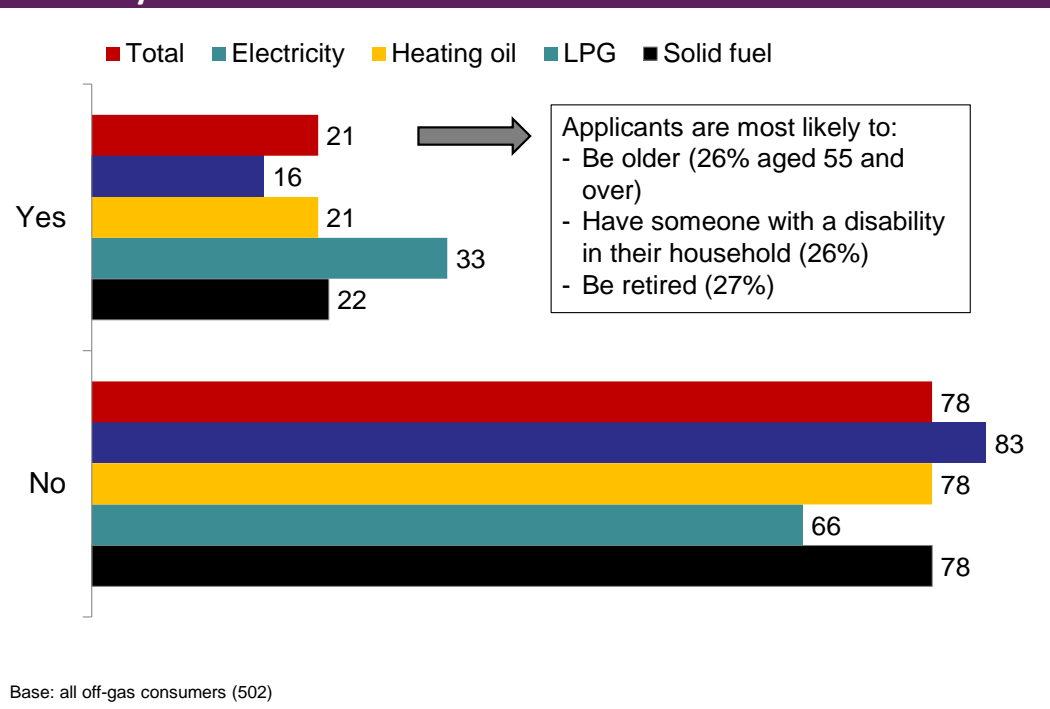
Around one in five off-gas consumers (21 per cent) has ever applied to a scheme to help improve the energy efficiency of their home, for example providing financial assistance with improvements to their home such as a boiler replacement, loft insulation, cavity wall or solid wall insulation.

Experience of energy efficiency schemes is highest amongst LPG consumers, with one in three (33 per cent) of this group having applied, and lowest among electricity-only consumers, where only 16 per cent have ever done so.

Those most likely to have applied for help are older consumers, those who are retired and those who have a disability or a health condition that limits their daily activities or have someone else in their household in this situation.

A higher proportion of those in the Citizens Advice office survey sample had applied for help with improving the energy efficiency of their home (31 per cent compared with 21 per cent in the telephone survey). This reflects the way the sample was recruited (often involving prior contact with a local office).

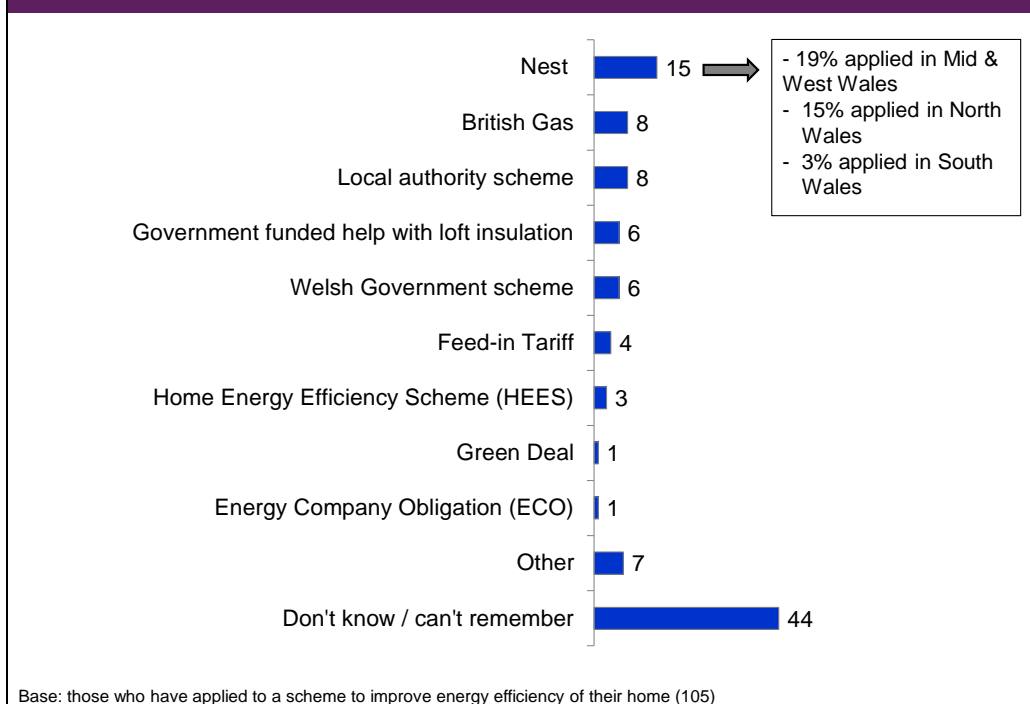
Figure 31: Whether ever applied to scheme to improve energy efficiency of home %



Around one in six applicants (15 per cent) had applied to the Nest scheme for assistance with improving the energy efficiency of their home, with applications to Nest being much higher in Mid and West Wales and North Wales than South Wales (at 19 per cent and 15 per cent respectively, compared with just 3 per cent in the South). Other schemes mentioned unprompted were programmes run by British Gas, local authorities, central government and the Welsh Government. Mentions of specific named schemes such as the Feed-in Tariff and the Home Energy Efficiency Scheme (which is an old scheme, replaced over 10 years ago by Nest) were at a lower level.

Over four in ten (44 per cent) of those who had sought assistance said they could not remember the name of the scheme to which they had applied.

Figure 32: Which energy efficiency scheme applied to %



Around two-thirds (67 per cent) of the off-gas consumers who had made an application for help to improve the energy efficiency of their home had been successful and received some assistance.

5. Conclusions

The great majority of those living in households in Wales without access to mains gas to heat their homes are satisfied with their current heating system (86 per cent) and their supplier's quality of service (92 per cent) and have no issues with delivery or payment.

Satisfaction levels vary quite considerably among users of the different fuel types, however. Electricity-only consumers display much higher levels of dissatisfaction than users of other fuel types (30 per cent are dissatisfied with the way they heat their home), particularly around the cost of heating their home and with their supplier (they tend to be younger, with almost half aged between 16 to 34, and less affluent, with almost a quarter in the DE socioeconomic groups). In contrast, heating oil customers across Wales are most satisfied with the way they heat their home and there is much less criticism of affordability among this group than users of other fuel types – probably influenced by prices in the market coming down recently and by their older, more affluent profile (over half are aged 55 and over and almost a quarter are AB).

Payment in full in advance is the most common method of paying for non-metered fuel, but most off-gas consumers are satisfied with the payment options offered by suppliers. The mystery shopping element of the project indicates there are varying degrees of flexibility in the payment methods on offer from suppliers: heating oil suppliers (after the first delivery, in many cases) and LPG suppliers (where contracts are required by many suppliers) offer the most flexibility in spreading the cost of fuel, whereas solid fuel suppliers (which tend to be smaller businesses) offer the least, usually demanding payment in full on delivery or order. This could pose problems for less affluent consumers using coal or wood to heat their home, especially if they are not able to set money aside to buy fuel regularly (in fact the survey findings show only around one in ten non-metered fuel consumers are buying fuel monthly).

Prices in the non-metered fuel market nearly always include delivery (provided the order is above the supplier's minimum order level) so there seems to be little likelihood of hidden additional charges unless customers are buying small quantities of fuel. This might be a problem for those on low incomes, however, who buy fuel as and when they need it, rather than buying in bulk, and who therefore don't benefit from better pricing, free delivery or any other economies of scale available on larger orders.

The mystery shopping element of the study indicates that prices in the non-metered fuel market can vary widely by supplier – by as much as 30-40% in the

case of heating oil - suggesting that it is worth customers shopping around for the best deal. In reality, not many off-gas consumers are shopping around or switching suppliers, however – fewer than half those interviewed in the telephone survey had switched supplier since moving into their current home. At the same time most feel it is easy to change, so the low levels of switching may be attributable to the relatively high levels of supplier satisfaction in the market, as well as low awareness of the price variations that exist.

Most non-metered fuel suppliers are relatively flexible with deliveries and nearly all offer some kind of emergency provision to help prevent customers running out of fuel and having to go without heating. As a result, satisfaction with delivery is high in the market and only around 6 per cent of off-gas consumers have experienced any problems or issues with fuel delivery.

Hardly any of the suppliers contacted during the mystery shopping assessments made reference to any formal complaints procedure in operation – in the event of something going wrong the customer was told to call the office to resolve the problem. In the telephone survey, although the level of complaints was low (8 per cent had ever complained about their fuel supplier) a significant minority of those who had complained (around a third) said they had found it difficult to make the complaint. The absence of (or lack of promotion of) formal complaints procedures might be contributing to this.

Trade associations seem to have a low profile in the non-metered fuel market – membership or accreditation is not something mentioned spontaneously by suppliers when potential customers get in touch and, even when asked, fairly low proportions of suppliers say their company is a member of a trade association. This suggests that membership or accreditation has a low perceived value among suppliers and is not perhaps felt to be important to customers. Only a small proportion of off-gas consumers were able to say whether their current fuel supplier is a member of a trade association too, reinforcing the impression that suppliers are not promoting membership (where they do indeed belong).

Likewise hardly any of the suppliers who said they were accredited were able to explain what the consumer benefits of accreditation were. When questioned on what accreditation might mean to the customer, responses given were very vague on the whole. Nor were there any mentions of relevant codes of practice or vulnerable persons' protocols in the mystery shopping, suggesting a lack of structure to help vulnerable customers.

Despite not having any formal protocols for vulnerable people, many suppliers contacted in the mystery shopping were sympathetic to the needs of vulnerable people and willing to make special provision over and above the normal service to cater for their needs. So, many suppliers suggested additional services they could

provide for a vulnerable customer (in our mystery shopping scenario a frail, elderly relative living alone), for example phoning in advance to let her know a delivery was on its way, carrying the fuel into the coal shed rather than leaving it on the drive for her to have to move, and so on.

More publicity and promotion of oil clubs would be useful to boost take-up and help other heating oil users benefit from the cost savings they can bring - fewer than half of the heating oil users interviewed had heard of oil clubs but most of those who belonged to one were very satisfied with how much they saved from being a member. Perhaps more education about oil clubs and their benefits would help too – those not currently members had mixed views about the idea of joining one, so there are clearly some reservations that need to be overcome. Also, heating oil suppliers could be encouraged to work with oil clubs – only a minority of the heating oil suppliers contacted in the mystery shopping assessments said they worked with oil clubs in the area.

Knowledge of any grants or financial assistance available for people who don't have mains gas to heat their home is very low at the moment – only 7 per cent of off-gas consumers could name a scheme or grant available unprompted and even when given a list, over four in ten (44 per cent) had not heard of any of the schemes. Raising awareness of the schemes and their eligibility criteria would therefore be helpful in encouraging those in need of assistance to apply.

That said, the people who seem to be struggling most to keep their homes warm are not necessarily the ones whom the government's energy efficiency schemes are targeting for help – those in most need of assistance are younger people on low incomes, often parents of young children and often living in electricity-only households.

Appendix I

Detailed methodology

1.1 Consumer telephone survey of off-gas households

For the consumer survey a total of 502 adults living in off-gas households in Wales were interviewed by telephone. All lived in areas of Wales with a high penetration of off-gas households and all were solely or jointly responsible for paying fuel and energy bills in their household.

Off-gas consumers were identified in the following ways:

- An initial stage of desk research identified regions in Wales with high penetration levels of off-gas consumers, primarily using the www.nongasmap.org.uk¹³ online resource. Detailed information at Lower Layer Super Output Area (LSOA)¹⁴ was obtained which then allowed the purchase of sample (Random Digit Dialling or RDD telephone numbers) at these targeted areas. To increase the inclusivity of the sample telephone numbers were also purchased for mobile-only households. All LSOAs selected for the sample frame had a high concentration of off-gas households (at a level of 65% and above). The sample is therefore representative of areas with a high penetration of households off the mains gas network, but is not representative of Wales as a whole.
- Through screening questions at the start of the interview it was established that participants were:
 - Not connected to the mains gas grid (we went on to determine how they powered and heated their home)
 - Aged 16 and over
 - Sole or joint energy bill-payers in their household

A disproportionate sampling approach was adopted for the telephone survey overall and by fuel type within each country. So, within the overall sample of

¹³ Provided by DECC (Department for Energy & Climate Change)

¹⁴ Lower Layer Super Output Areas (LSOAs) are a geographic hierarchy designed to improve the reporting of small area statistics in England and Wales. They are generated to be as consistent in population size as possible and typically contain from four to six Output Areas. The minimum population is 1,000 and the mean is 1,500. There is an LSOA for each postcode in England and Wales, with a pseudo code available for Scotland, Northern Ireland, Channel Islands and the Isle of Man.

c1,000 interviews, the number of interviews conducted in Wales was boosted to c500. The sample for Scotland was also up-weighted (to 250) while as a result England was down-weighted to 250. The number of interviews for Wales and Scotland was up-weighted to allow for reporting at individual nation level.

Furthermore, to obtain reasonable coverage of each non-gas fuel type within each nation, and to allow results for consumers using each to be analysed separately, a disproportionate strategy was employed for fuel type, as illustrated below:

Table 2: Disproportionate sample design by fuel type							
	Wales		England		Scotland		TOTAL
TOTAL SAMPLE	500		250		250		1,000
	% of sample	No. interviews	% of sample	No. interviews	% of sample	No. interviews	
Electricity only	20	100	20	50	20	50	200
Kerosene	40	200	40	100	40	100	400
LPG	20	100	20	50	20	50	200
Solid fuel	20	100	20	50	20	50	200
TOTAL	100	500	100	250	100	250	1,000

Interlocking quotas were set to ensure that the sample interviewed was representative of people living in the selected LSOAs in Wales in terms of age and gender within region. At analysis stage, the data was weighted to fine-tune any imbalances between the sample profile and that of the population. It was not possible to set demographic quotas for off-gas households or energy bill-payers specifically, however, since no demographic data could be sourced for these groups to provide information on their profile.

At the end of the interview participants' willingness to take part in a further stage of research was established. 61 per cent of those interviewed in Wales were willing for Beaufort to contact them again for research purposes.

All participants were able to take part in the language of their choice (English or Welsh). Of the 83 fluent Welsh speakers interviewed 8 chose to participate in the Welsh language.

Interviews lasted for around 13 minutes on average and were based on the structured questionnaire appended (see Appendix III). An average of 3 calls was made to each participant in an attempt to secure an interview (ranging from 1 to 16 calls).

Survey fieldwork ran from 5 January to 16 February 2016, with an initial pilot phase to test questionnaire length and participant comprehension in late December 2015.

1.2 Follow on depth interviews

Following the completion of the quantitative survey, a number of in-depth, qualitative interviews were conducted with selected people identified through the survey. The aim was to explore their experiences of living without mains gas in more depth and develop case studies to illustrate key issues relating to specific consumer types.

A range of consumers were selected for the depth interviews, with a particular focus on those who were less satisfied with their current heating system or supplier or who had experienced issues with deliveries or payments or something else. In the interests of balance, we also included some consumers who were very satisfied with their current heating system or supplier, to highlight good practice. When selecting interviewees, vulnerable consumers, such as older people, those with disabilities, those on low incomes and those with young children were prioritised. All had taken part in the telephone survey and all had said they were willing to be re-contacted for further research.

The sample of 20 depth interviews in Wales covered users of different fuel types (electricity, heating oil, solid fuel and LPG) across a range of regions and ages. None of the interviews were conducted in Welsh but two of the interviewees were fluent Welsh speakers.

Interviews were conducted by telephone and lasted between around 15 minutes to 30 minutes. The discussions were free-flowing but centred around a topic guide (see Appendix IV). All participants received a gift token to the value of £10 as a thank-you for their time.

Depth interviews were carried out by three highly experienced facilitators from Beaufort's qualitative team (Adam Blunt, John Dickinson and Catrin Davies) and fieldwork took place between 16 February and 29 February 2016.

Extracts from case studies are used in the report to illustrate key themes emerging from the quantitative findings and are provided in full in Appendix V. All names have been changed in the case studies.

1.3 Supplier mystery shopping

A series of mystery calls were made by telephone to a sample of 72 non-metered fuel suppliers across Wales, England and Scotland.

Callers used the scenario that they were phoning on behalf of their elderly mother who was thinking of changing supplier and was looking for a quote for a specific quantity of fuel (see pen portraits in Appendix VI). Information from each call was recorded on an assessment form (see Appendix VII) which was then input into an anonymised spreadsheet containing details of all 72 assessments carried out. This has been provided separately to Citizens Advice.

A list of suppliers for sampling was provided by Citizens Advice for Wales, while sample for England and Scotland was sourced by Beaufort from a specialist business information data provider.

A total of 24 assessments were made for each nation, broken down by fuel type as follows:

- 10 with heating oil suppliers
- 10 with solid fuel suppliers (half coal and half wood)
- 4 with LPG suppliers

Within each fuel type, a range of supplier size was obtained (as much as was possible), to ensure that smaller and larger companies were included in the sample. Each country was also split by region so that suppliers within all areas were contacted.

The scenarios and assessment forms were piloted on 13 January 2016. After a comprehensive briefing for the team of assessors, which included input from Citizens Advice, fieldwork was carried out between 25 January and 1 February 2016. The duration of calls varied between 4 minutes to 20 minutes.

1.4 Citizens Advice office interviews

The last element of the project was a stand-alone survey of a sample of consumers without access to mains gas interviewed by representatives from Citizens Advice offices in Wales and England. These were recruited in a variety of ways (see details below) which often involved prior contact with a local Citizens Advice office, so this sample cannot be described as representative of all off-gas consumers.

Interviews were administered face-to-face by Citizens Advice staff and were based on a structured questionnaire (see Appendix VIII). The questionnaire was designed by Citizens Advice with some input into questionnaire development and formatting from Beaufort. A total of 193 questionnaires were returned and analysed by Beaufort (104 from Wales and 89 from England - Citizens Advice Scotland did not take part in this element of the project).

The methods used for the recruitment of consumers for the Citizens Advice office questionnaires in Wales varied across local offices: some contacted existing clients who were known to be off the gas network, and others contacted people in their local areas whom they suspected would be off the gas network, but had not been clients of the local office previously.

Participants for the Citizens Advice office survey in England were generally recruited through the provision of another service (eg from people seeking debt advice) or from consumers visiting a local office with an enquiry (not necessarily related to energy, although some were). In one area participants were recruited from having attended a community talk on the Energy Best Deal project.

Questionnaires were completed between late December and late January (in Wales) and from January to late February (in England) before being returned to Beaufort for editing, coding, data entry and analysis. A set of data tabulations has been produced for Wales and England providing full results from the questionnaires in each nation.

Appendix II

Profile of the consumer telephone survey sample

Profile of the Wales sample

Table 12 below outlines the demographic profile of the sample, showing the actual number of interviews completed with each group against the weighted proportion:

Table 12 Profile of sample by demographics		
Region	No. of interviews	Weighted %
North Wales	227	41
Mid / West Wales	197	42
South Wales	78	17
Age		
16 - 34	44	24
35 – 44	57	10
45 – 54	120	21
55 – 64	100	16
65+	164	26
Gender		
Male	238	50
Female	264	50
Social class		
AB	98	20
C1	171	35
C2	108	21
DE	100	19
Welsh speaker		
Yes – fluent	84	17
Yes – non-fluent	63	13
No	355	71
Children living in household		
Yes	106	26
No	390	72

Base: all survey participants in Wales (502)

Table 12: Profile of sample by demographics – continued		
Fuel type	No. of interviews	Weighted %
Electricity	100	27
Heating oil	201	54
LPG	100	9
Solid fuel	101	10
Number of people living in household		
1	113	20
2	209	40
3	73	16
4	78	16
5+	29	7
Anyone with long term illness, health problem or disability in household		
Yes – participant	81	15
Yes – other member of household	56	11
No	370	75
Employment status		
Working full-time	189	41
Working part-time	66	13
Self-employed	9	3
Unemployed and seeking work	26	5
Retired	176	28
Full-time student	5	3
Looking after home	11	3
Carer	6	2
Long-term sick / disabled	8	1
Other	6	1

Base: all survey participants in Wales (502)

Appendix III

Consumer telephone survey questionnaire

BBQ01542 – Citizens Advice / Citizens Advice Scotland

Off-Gas Households Survey Questionnaire – FINAL (21.12.15)

READ OUT - Hello, I'm Jane/John from Beaufort Research. We're a research company doing a survey for Citizens Advice / Citizens Advice Scotland. It's about how people across Great Britain heat their homes and how satisfied they are with the energy options available to them. Citizens Advice want to make sure that the energy market is meeting consumers' needs.

The study is being conducted under the Market Research Society Code of Conduct. Your answers will be treated in confidence and there will be no follow up sales calls. The survey should last 15 to 20 minutes

REASSURE NO SELLING ETC. SET UP APPOINTMENTS AS NECESSARY.

CODE FROM SAMPLE

Country:

England

Scotland

Wales

ASK WALES SAMPLE

S1 Can I check - do you speak Welsh?

Single code

Yes - fluently

Yes - not fluently

No - does not speak Welsh

IF YES AT S1

S2 We can conduct this interview in English or in Welsh. Which would you prefer? *Single code*

English }

Welsh }

Continue in preferred language

READ OUT – Firstly can I ask a few questions about you, to make sure that we interview a broad range of people?

ASK ALL

S3. Which of these methods do you (mainly) use to heat your home? *Read out – single code*

Mains gas

Thank and close

Electricity	}	Check quotas and continue
Kerosene heating oil	}	
Liquid petroleum gas (LPG)	}	
Solid fuel	}	
(for example, logs, wood pellets, wood chippings, coal and coke)		

S4. Are you the main bill payer, the joint bill payer or is someone else responsible for paying fuel and energy bills in your household? *Single code*

Main energy bill payer }
 Joint energy bill payer }

Continue

Someone else is bill payer }
 Don't know }

Thank and close

S5. INTERVIEWER CODE GENDER
Single code

Male
 Female

ASK ALL

S6a What was your age last birthday?

Record actual age and age band

16 – 24
 25 – 34
 35 – 44
 45 – 54
 55 – 60
 61 – 64
 65 or more

Refused → **S6b**

IF REFUSED AT S6a

S6b Do you mind telling me which of these age groups you fall into?

Single code

16 – 24

25 – 34

35 – 44

45 – 54

55 – 60

61 – 64

65 or more

Refused – **THANK AND CLOSE**

INSTRUCTION: QUOTAS ON AGE AND GENDER WITHIN REGION

SECTION A: PROFILE OF HOME

READ OUT: Now some questions about your home.

ASK ALL

Q1 What type of property do you live in?

Read out as necessary – single code

Terrace / end of terrace

Semi-detached house

Detached house

Bungalow

Flat / apartment / maisonette – converted building / house

Flat / apartment / maisonette – purpose built

Park (mobile) home

Other (please specify) _____

Refused

Q2 Approximately how long ago was your home built?

Read out – single code

After 2002

1983 -2002

1965 -1982

1945 -1964

1919 -1944

Before 1919

Don't know

Q3 How many bedrooms does your property have?

Single code

- 1
- 2
- 3
- 4 or more

Don't know

Q4 Can I just check, is your home....?

Read out – single code

- Owned outright with no mortgage
- Owned with a mortgage
- Rented from the council
- Rented from housing association / housing co-operative
- Rented from a private landlord
- Shared ownership (part rent / part buy)

Other (please specify)

Don't know

Q5 Do you know what the energy efficiency rating of your home is? *Read out as necessary: This is a rating of how energy efficient your home is calculated on a scale from A (most efficient) to G (least efficient) and is included on a property's Energy Performance Certificate (provided when a home is built, sold or rented)* Do not prompt – single code

- A
- B
- C
- D
- E
- F
- G

Don't know

INSTRUCTION: ELECTRICITY CUSTOMERS ANSWER SECTION B; USERS OF OTHER NON-METERED FUELS GO TO SECTION C

SECTION B: METERED OFF-GAS CUSTOMERS (ELECTRICITY) ONLY

Q6 Which of these devices or methods do you use for heating your home? *Read out – can multicode*

Storage heaters that are less than 10 years old

Storage heaters that are more than 10 years old

Plug-in radiators

Fan heaters

Other electric heaters

Any other form of secondary, non-electric heating e.g. coal fires (please specify)

Other (please specify) _____

Don't know

IF MORE THAN ONE CODED ABOVE

Q7 Which one is the main way you heat your home? *Single code*

Storage heaters that are less than 10 years old

Storage heaters that are more than 10 years old

Plug-in radiators

Fan heaters

Other electric heaters

Other (please specify) _____

Don't know

IF USE STORAGE HEATERS ABOVE

Q8 What type of electricity tariff are your storage heaters on? *Read out – single code*

Time of Use or night-time tariff e.g. Economy 7

Standard daytime tariff

Don't know

INSTRUCTION: ELECTRICITY CUSTOMERS NOW SKIP TO SECTION D

SECTION C: NON-METERED OFF-GAS CUSTOMERS (HEATING OIL, LPG & SOLID FUELS) ONLY

ASK ALL NON-METERED OFF-GAS CUSTOMERS

Q9 Do you have a contract with your [Heating oil / LPG / Solid fuel] supplier to supply you with fuel for a fixed period of time at an agreed price?

Yes

No

Don't know

Q10 Do you know if your fuel supplier is a member of a trade association?

Yes

Ask Q11

No

Skip to Q14

Don't know

IF YES ABOVE

Q11 Which trade association/s do they belong to? *Do not prompt – can multicode*

Approved Coal Merchant Scheme

Approved Wood Merchant Scheme

Federation of Petroleum Suppliers (FPS)

Solid Fuels Association (SFA)

UKLPG

Other (please specify) _____

Don't know

Q12 Does your fuel supplier's trade association have a voluntary code of practice or customer charter that governs the way in which suppliers behave and deal with their customers.

Yes

Ask Q13

No

Skip to Q14

Don't know

IF YES

Q13 How did you come to hear about this voluntary code of practice or customer charter? *Do not prompt – single code*

Leaflet in with bill
 Mentioned by a member of staff
 Saw it on their website
 Other (please specify) _____

Don't know / can't remember

ASK ALL NON-METERED OFF-GAS CUSTOMERS

Q14 During which months of the year do you tend to buy your [Heating oil / LPG / Solid fuel]? *Can multicode*

Every month of the year

January
 February
 March
 April
 May
 June
 July
 August
 September
 October
 November
 December
 Don't know

Q15 Do you tend to buy your fuel in bulk or do you only buy as much as you need at the time? *Single code*

Buy in bulk
 Buy as much as I need at the time

Varies
 Don't know

Q16 In which of these ways do you currently pay for your [Heating oil / LPG / Solid fuel]? *Read out – single code*

By monthly instalments

By quarterly instalments

Annually

In full in advance, that is when you purchase the fuel

In full in arrears, that is after you have used your fuel

It varies

Don't know

Q17 How satisfied are you with the payment methods available to you? *Read out – single code*

Very satisfied

Fairly satisfied

Not very satisfied

Not at all satisfied

Don't know

IF NOT VERY / NOT AT ALL SATISFIED

Q18 Why do you say that? *Write in verbatim*

Don't know

ASK ALL NON-METERED OFF-GAS CUSTOMERS

Q19 Have you ever experienced any problems or issues when paying for your [Heating oil / LPG / Solid fuel]?

Yes

No

Not applicable – do not get fuel delivered

Don't know

IF YES

Q20 What issues or problems are those? Probe: **Any others? *Write in verbatim***

Don't know

ASK ALL NON-METERED OFF-GAS CUSTOMERS

Q21 How satisfied are you with the delivery options available to you when ordering your [Heating oil / LPG / Solid fuel]? *Read out – single code*

Very satisfied
Fairly satisfied
Not very satisfied
Not at all satisfied

Not applicable – do not get fuel delivered

Don't know

IF NOT VERY / NOT AT ALL SATISFIED

Q22 Why do you say that? *Write in verbatim*

Don't know

ASK ALL NON-METERED OFF-GAS CUSTOMERS

Q23 Have you ever experienced any problems or issues with getting your [Heating oil / LPG / Solid fuel] delivered?

Yes
No

Don't know

IF YES

Q24 What issues or problems are those? Probe: Any others? *Write in verbatim*

Don't know

ASK LPG USERS ONLY

Q25 Do you get your LPG gas from a tank or in bottles? *Can multicode*

A tank which supplies your household only
A tank which supplies a number of different homes
Bottles

Don't know

ASK HEATING OIL USERS ONLY

Q26 Have you ever heard of oil clubs?

Yes

No

Don't know

Q27a Which of these best sums up your personal experience of oil clubs? *Read out – single code*

I'm a member of an oil club

Ask Q27b and Q28

There's an oil club in my area but I'm not a member }

I don't know if there's an oil club in my area }

Skip to Q29

Don't know

IF OIL CLUB MEMBER

Q27b Do you pay a fee for being a member of your oil club?

Yes

No

Don't know

IF OIL CLUB MEMBER

Q28 How satisfied are you with the oil club to which you belong in terms of helping save you money? *Read out – single code*

Very satisfied

Fairly satisfied

Not very satisfied

Not at all satisfied

Don't know

ASK ALL OTHER HEATING OIL USERS

READ OUT IF NECESSARY: Oil clubs are initiatives where a group of customers living in the same area club together to buy oil at a better rate

Q29 Would you be interested in joining an oil club if one was available in your area?

Yes - definitely

Yes - possibly

No

Don't know

SECTION D: COMMON THEMES – ASKED OF FULL SAMPLE

ASK ALL

Q30a How many times have you switched [Electricity / Heating oil / LPG / solid fuel] supplier, during the period you have lived in your current home? *Single code*

Never switched

Once

Twice

Three times

Four times

Five times or more

Don't know

Not able to switch – no alternative supplier available

ASK IF SWITCHED SUPPLIER

Q30b Which sources of information did you use to find a new supplier? *Do not prompt – code all mentioned*

Utilities comparison website (e.g. uSwitch)

Supplier websites

Local directories (e.g. Thomson)

Word of mouth recommendation

Local newspapers

TV advertising

Radio advertising

Other (please specify)

Don't know / can't remember

ASK ALL

Q31 How easy do you think it is to switch fuel supplier? *Single code*

Very easy
Fairly easy
Not very easy
Not at all easy

Don't know

IF NOT VERY / NOT AT ALL EASY

Q32 Why do you say that? *Write in verbatim*

Don't know

ASK ALL

Q33 Roughly how much does it cost you to heat your home? An estimate will be fine if you can't say exactly how much. *Can give monthly cost or annual cost (whichever is easier to calculate) in rounded £*

£ per month _____ or £ per year _____

Don't know

Q34 How affordable is your current method of heating your home, in your opinion? *Read out – single code*

Very affordable
Fairly affordable
Not very affordable
Not at all affordable

Don't know

IF NOT VERY / NOT AT ALL AFFORDABLE

Q35 Why do you say that? *Write in verbatim*

Don't know

ASK ALL

Q36 How satisfied are you with your current heating system? *Read out – single code*

Very satisfied
Fairly satisfied
Not very satisfied
Not at all satisfied

Don't know

IF NOT VERY / NOT AT ALL SATISFIED

Q37 Why do you say that? *Write in verbatim*

Don't know

ASK ALL

Q38a And how easy to use is your current heating system? *Read out – single code*

Very easy
Fairly easy
Not very easy
Not at all easy

Don't know

IF NOT VERY / NOT AT ALL EASY

Q38b Why do you say that? *Write in verbatim*

Don't know

Q39 Now, thinking of your [Electricity / Heating oil / LPG / solid fuel] supplier - how satisfied overall are you with their quality of service? *Read out – single code*

Very satisfied
Fairly satisfied
Not very satisfied
Not at all satisfied

Don't know

IF VERY / FAIRLY SATISFIED

Q40 Why do you say you're [very / fairly] satisfied with their quality of service?

Write in verbatim

Don't know

IF NOT VERY / NOT AT ALL SATISFIED

Q41 Why do you say you're [not very / not at all] satisfied with their quality of service? *Write in verbatim*

Don't know

ASK ALL

Q42 Have you ever made a complaint or ever wanted to make a complaint about the service received from your [Electricity / Heating oil / LPG / solid fuel] supplier? *Can multicode*

Yes – made a complaint to supplier

Yes – made a complaint to a third party (please specify third party)

Yes – wanted to make a complaint to supplier but didn't

Yes – made a complaint to a third party (please specify third party) but didn't

No – have not made or wanted to make a complaint

Don't know

IF MADE A COMPLAINT

Q43 How easy or difficult was it to make a complaint? *Read out – single code*

Very easy

Fairly easy

Not very easy

Not at all easy

Don't know

ASK ALL

Q44 Can you think of any grants or financial help available for people who don't have access to mains gas to heat their home? Do not prompt – code all mentioned below

Arbed
Energy Company Obligation (ECO)
Feed-in Tariff (FiT)
Ofgem's Fuel Poor Network Extension Scheme
Nest
Renewable Heat Incentive (RHI)

Other (please specify) _____

No - none
Don't know

Q45 Have you heard of the following grants or schemes that provide financial help to people who don't have access to mains gas? Read out – code yes / no / don't know to each

Arbed
Energy Company Obligation (ECO)
Feed-in Tariff (FiT)
Ofgem's Fuel Poor Network Extension Scheme
Nest
Renewable Heat Incentive (RHI)

No - none
Don't know

Q46 Have you ever applied to a scheme to help improve the energy efficiency of your home, for example a scheme that provides financial assistance with improvements to your home such a boiler repair or replacement, loft insulation, cavity wall or solid wall insulation?

Yes
No

Don't know

IF YES

Q47 What was the name of the scheme you applied to? *Do not prompt – can multicode*

Arbed
Carbon Emissions Reduction Target (CERT)
Community Energy Saving Programmes (CESP)
Energy Company Obligation (ECO)
Energy Efficiency Commitment (EEC I & II)
Green Deal
Home Energy Efficiency Scheme (HEES)
Nest/Warm Front Scheme

Other (please specify) _____

Don't know / can't remember

FOR EACH MENTIONED ABOVE ASK

Q48 Was your application successful, that is did you receive any assistance with improving the energy efficiency of your home (for example, a boiler repair or replacement, loft insulation, cavity wall or solid wall insulation)?

Yes
No

Don't know

Q49 How much would you say you know about the use of renewable (green) technologies such as solar panels on the roof (for hot water or electricity), biomass heaters / boilers, heat pumps for heating?

A lot
A little
Nothing

Never heard of microgeneration technologies

Don't know

IF HEARD A LOT / A LITTLE

Q50 Would you consider using renewable (green) technologies to heat your home?

Yes - definitely
Yes - possibly
No

Would need more information

Don't know

ASK ALL

Q51 Do you ever use any of the following methods for paying for fuel costs? *Read out – can multicode*

Loan from credit union
 Loan from local council
 Loan from bank or building society
 Loan from friends or family

No – none of these

Refused

Q52 Now I'm going to read out some statements that people have made about heating their home and their fuel supplier. Please tell me whether you agree strongly, agree, disagree or disagree strongly with each. *Read out – randomise order of statements*

- I find it easy to keep my home warm
- It's very expensive to heat my home
- Fuel suppliers should do more to prioritise the needs of older customers
- Fuel costs aren't really an issue for me
- I've had problems with my health because my house is cold
- I sometimes get stressed when thinking about my fuel costs
- I have gone without heating because I can't always afford to pay for fuel

SECTION E: CLASSIFICATION

READ OUT – Finally, some questions about yourself and your household. Please remember all the information you give will be kept completely confidential, and will only be used for our analysis of survey data.

Q53 How many people live in your household?

Number of children aged 0 – 6 years _____
 Number of children aged 7 – 11 years _____
 Number of children aged 12 – 15 years _____
 Number of adults aged 16+ years _____

TOTAL NUMBER OF PEOPLE IN HOUSEHOLD _____

Q54 Can I just check, including yourself there are [INSERT NO.] people living in your household?

Yes

No → **GO BACK AND CHECK RESPONSES**

Q55 Do you, or does someone else in your household, have any long term illness, health problem or disability that limits your / their daily activities or the work that you / they do? *Can multicode*

Yes – respondent

Yes – other member/s of household

No

Q56 What is your working situation? *Read out as necessary – single code*

Working full time (over 30 hours per week)

Working part time (30 hrs or less per week)

Unemployed \ seeking work

Full time student

Wholly retired \ other permanently not working

Looking after the home

Carer

Other (please specify)

Q57 Can you please tell me the occupation of the chief income earner in your household? The Chief Income Earner is the member of the household with the largest income, whether from employment, pensions, state benefits, investments or any other source. This person can be of either sex. *Single code*

Actual job: _____

Position: _____

AB

C1

C2

DE

Refused

Q58 What is your postcode please? We only need this for analysis purposes. *Write in*

ASK ALL

Q59 Would you be willing to be re-contacted by Beaufort as part of a second stage of research on behalf of Citizens Advice and Citizens Advice Scotland? This will be carried out over the next few weeks via telephone and can be done at a time that is convenient to you.

Again, all information provided will be completely confidential, and by saying yes now, you will not be committing yourself to a further interview when we contact you again.

Yes - willing to be re-contacted - **RECORD NAME AND TELEPHONE NUMBER**
No

Thank you for your time and cooperation. Just to confirm that my name is [interviewer name] calling from Beaufort Research and that this survey has been conducted in accordance with the Market Research Society Code of Conduct. If you'd like to check our credentials, you can telephone the MRS via the Freephone number 0500 39 69 99.

Appendix IV

Qualitative depth interviews topic guide

**Citizens Advice / Citizens Advice Scotland
Follow up Consumer Depths
Topic Guide FINAL**

Overall objectives:

- *Vulnerabilities*
- *Whether people have had any experience of no supply of their main heating fuel (and reasons why, e.g. impassable roads, supply has run out) and what they have done instead, e.g. electric, paraffin heaters, gone cold*
- *Affordability*
- *Appeal of alternative payment options/delivery loads*
- *What strategies people adopt to budget for bulk purchase of fuel supplies (tank of oil or LPG, bags of wood, coal etc). Have they bought little and often instead?*
- *What people do to combat not being able to keep warm, and paying fuel bills*
- *Complaints*
- *How easy people find it to get quotes from different suppliers*
- *What help/assistance consumers would find most useful*

A. Introduction (5 mins)

1. *Thank participant for taking part. Introduce self and Beaufort Research.*
2. *Explain aims of study: Beaufort has been commissioned by Citizens Advice / Citizens Advice Scotland to conduct research into the experiences of off mains gas consumers. The purpose of this interview is to explore in more depth the topics discussed when you were first interviewed a few weeks ago*
3. *Explain MRS Code of Conduct: reassure about confidentiality and anonymity. Obtain permission to record – purpose of digital recorder is to aid analysis.*

4. *Brief introduction:*

- *Family situation, number of people in household, children (if so, age/s)*
- *Does anyone in the household have a health condition or disability?*
- *Working situation*
- *Where they live*
- *Describe area (i.e. rural / urban, near a main road / town etc.)*
- *Type of property (rented – private landlord/ social housing; owned – wholly, mortgage);*
- *Type of house (detached / semi-detached / terrace / etc.)*
- *Approximate age of home*

Moderator note: have survey responses to hand throughout interview

B. Context and Affordability

Note: ask ALL

1. You told us before that you use [insert fuel type] to heat your home. Is this correct?
2. What words would you use to describe your heating system?
Probe words given: Why is that?
3. How easy to use is your current heating system?
Probe: Why is that?

Note: Do not ask those who use electricity

4. How is the [heating oil / LPG / solid fuel] delivered?
 - How satisfied are you with delivery?
Probe: Why / why not?
5. What would be your preferred delivery option?
Probe: Why / why not?
6. Have you ever experienced any problems with getting your fuel delivered?

If yes, ask:
What were those problems?
7. Do you buy in bulk or small amounts as and when you need it?
Probe: Why?

Note: Ask ALL

8. Have you ever been in a position where you ran out of fuel?
Probe: payment issues and / or issues with delivery?

If yes, ask:
9. What did you do?
10. What impact did this have on you and your family?

11. And how do you pay for the [insert fuel type]?

Prompt: monthly direct debit, quarterly, in advance, as and when you need it etc.?

- Are you happy with your current method of paying for fuel?
- What would be your preferred payment method?
- What other payment options are available to you?

12. Do you budget to pay for your fuel?

Probe: How?

Why / Why not?

13. How affordable do you think it is to heat your home using your current heating system?

Probe if not affordable, ask:

14. Have you ever had to go without heating or not been able to heat your home adequately because you couldn't afford it?

15. Have you had to take any action or cut back on anything to help pay for your [insert fuel type] over the last 12 months or so?

If yes, ask:

16. What have you done / cut back on?

Prompt: cut back on food / groceries; cut back on other essentials such as other bills / clothes; cut back on non-essentials such as holidays, books, music; cut back on going out / leisure and social activities; cut back on using the car; anything else

17. How has this affected your daily life? What implications have there been for you and your family?

C. Complaints and Switching Suppliers

1. Have you ever made a complaint or ever wanted to make a complaint about the service received from your [insert fuel type] supplier?

If yes, ask:

- What was the complaint about?
- Who did you speak to?
- What happened?
- Was it resolved?
- How easy was it to make a complaint?

If wanted to make a complaint but did not, ask:

2. What stopped you from making a complaint?

Note: Ask ALL

3. Have you ever switched fuel supplier?

Probe: Why / Why not?

If yes, ask:

4. What prompted you to switch supplier?
5. How easy was it to switch suppliers?

Probe: Why / Why not?

If no, ask:

6. Have you ever shopped around for quotes from other suppliers?

If yes to shopping around, ask:

7. What prompted you to start looking?
8. How easy was it to get quotes from other suppliers?

Probe: Why / Why not?

If no to both, ask:

9. What, if anything, makes it difficult to switch supplier / shop around for other quotes?

D. Oil Clubs

Note: Only ask those who use heating oil

1. Have you heard of oil clubs?

If yes, ask:

2. How much do you know about oil clubs?
3. Can I just check, are you a member of an oil club?

If yes, ask:

4. How satisfied are you with the oil club?
Probe: Why do you say that?

If no, ask:

5. Have you ever considered joining one?
Probe: Why / Why not?

E. Other Assistance

Note: Ask ALL

6. What could the Government / Local Government do to help you keep your home warm at an affordable price?

Probe: Why do you say that?

7. If there were grants available to help you heat your home, would you be interested in applying for them?

Probe: Why / Why not?

8. Do you think fuel suppliers could offer customers more help / assistance generally?

If yes, ask:

9. What type of help or assistance would be useful?
Probe: Why / Why not?

If no, ask:

10. Why do you say that?

11. What, if any, other help or assistance would you like to receive in order to help you keep your home warm at an affordable price?

Probe: How would this help?

Probe: Anything else?

F. Summing up

Note: ask all

1. Overall how satisfied are you with the options available for heating your home?

Probe: Why do you say that?

2. Is there anything else you would like to add?

3. Before finishing, Citizens Advice / Citizens Advice Scotland may wish to re-contact some individuals taking part in the research in order to discuss their experiences or for media purposes. We will be sending you a form to sign confirming whether you are or are not willing for Beaufort Research to pass your contact details on to Citizens Advice. A free post envelope will be provided.

When we have received the form back, we will send you the £10 gift voucher as a thank you for your time.

You will still have the option of opting out if Citizens Advice / Citizens Advice Scotland does contact you.

Thank and close

**ASK FOR RESPONDENT ADDRESS FOR SENDING OUT
FORM BEFORE CLOSING**

Appendix V

Qualitative case studies

Doreen, 73: Uses Economy 7 storage heaters to heat her home. She has not had any trouble with the supplier but she does think electricity is an expensive way to heat her home.

Doreen is a widow who lives on her own with her dog. She has osteoporosis and osteoarthritis so it is important for her to keep warm. She is retired now but she used to be a non-nursing matron at the local college. Doreen lives in a bungalow on a council estate in Carmarthenshire. The bungalows were built in the late 80s.

Doreen currently uses Economy 7 storage heaters to heat her home but the council will be connecting all the houses on the estate to mains gas in the next couple of months. She thinks her current heating system is 'inconvenient' because she has to put it on overnight in order to be able to heat her home the following day.

If you're cold you have to wait a whole 24 hours before you can use it so it's inconvenient.... It is easy, you just flip the switch but it is inconvenient because you either have it on all the time or you have to foretell what the weather is going to be.

Doreen had a prepayment meter installed after her husband died because he used to pay the bills and so she was worried about being unable to pay these bills. She does regret installing the prepayment meter to some extent because she has been told by friends that it is a more expensive way of heating her home. However, Doreen does like the fact that she never has any 'shocks' with her fuel bills.

I had the meter changed; I wish I hadn't because everyone tells me it's dearer doing it this way but at least I know where I am. I don't have any shocks every quarter or anything like that.

Doreen does have to budget to pay for her electricity and she has to watch how much she is spending. She thinks she would have to put £50 on the prepayment meter in order to keep her home at a comfortable temperature. However, she has decided to put £40 a month on it instead because she wants to make sure she has enough money for other things. She tries to keep warm by putting on extra layers of clothing and uses a fleece blanket so she does not have to put the heating on for longer.

You just don't have luxuries, you just live... I just have to be careful... I think it's expensive... to be really comfortable I need to put in £50 a month, well I only put in £40 and I'm really careful. I think if I was warmer, I would be more comfortable and not in as much pain... I walk around like a bit of a mummy with extra layers on all the time and if I'm knitting or anything I'll have a little fleece blanket over my legs.

She has never wanted to make a complaint to her fuel supplier but Doreen and her neighbours have complained to the council about how expensive it is to heat their homes. As a result, the council have decided to connect the estate to a mains gas supply. Doreen will not have to pay to be connected to the mains herself as it will all be done by the council. She thinks they are only doing it now because people on the estate have been complaining. She's never switched electricity supplier but she thinks it would be easy to do it if she wanted to switch.

Doreen receives the Winter Fuel Allowance but says it 'doesn't really last long'. She would be interested in applying for grants to help her keep her home warm, but only if she did not have to pay them back as she does not think she could afford to apply otherwise. She also thinks suppliers could help by putting people on a cheaper tariff.

... They make a lot of profit don't they [fuel suppliers] so I suppose they could help us... [They] should charge less per unit of electricity.

Gwen, 58: Uses a combination of heating oil and electricity to heat her home. She thinks it is quite expensive but she can't speak highly enough of her suppliers

Gwen is a retired teacher and she lives with her husband in a small village in North East Wales. They live in a detached house, that they themselves built 30 years ago, and they have recently turned part of the house into a B&B business.

Gwen uses both electricity and oil to heat her home. She thinks her current heating system is 'adequate' because it effectively heats their home and it is easy to use. However, the numbers on the dial are quite 'tricky' because they are very small. Their property is quite well insulated because they completed everything to a high specification when they built their house.

It heats the rooms very well and the house is so well insulated... so we don't use a lot of heating oil because the house stays warm.... I think we are very lucky because we built our house ourselves so we built it to the highest specification with the insulation.

Gwen is very satisfied with the delivery of the heating oil and thinks they are 'very good'. They had their heating oil stolen once but the company replaced the oil on the same day so they did not have to go without. Nevertheless, they have had to go without heating when there have been power cuts in the area. When her son, who has cystic fibrosis and was on nebulisers at the time, was staying with them, the electricity company said they would bring them a generator if their electricity supply cut out. Some years ago, they had a power cut that lasted five days but Gwen's electricity company did bring them a generator. Even though this was a long time ago, the company have still not taken their house off the priority list just in case their son might be there visiting them. For this reason, Gwen thinks her electricity supplier is 'very good'.

One time we had our oil stolen and they came the same day; they are absolutely brilliant. We have been dealing with them for such a long time, I suppose that helps as well. It's a small company.

Gwen pays for the electricity by direct debit and pays for the oil by cheque or by card over the phone when they order. The heating oil company offered them the option of paying monthly but her husband gets his pension every three months so they buy in bulk when Gwen's husband gets his pension.

I think it is expensive but the electric has gone down and the price of the oil has gone down so it is much better now than it was 12 months ago. So it's easier now than it was 12 months ago, but it is very expensive still. We probably spend more on the heating than we do on food all together. We have

to go without other things to make sure we can pay [for the heating] ...because it is a direct debit you've got to make sure you've got the money in to pay that and of course we know that the pension is going to pay for the heating oil. I think [we have to cut back] on clothes and things. We try not to cut back on food because we like our food, but we would probably buy more clothes and things for the house otherwise.

She has never wanted to make a complaint and she thinks they have been 'quite lucky' with their suppliers. When her contract with her electricity supplier was coming up for renewal, Gwen was contacted by several electricity companies offering her a deal if she switched supplier. However, she told her current electricity supplier about this so they matched the cheapest deal on offer. Therefore, Gwen decided to stay with them rather than switch.

... I didn't have to change when I told them who had had given me a better deal. They matched it. I find if you do that... I do that with my mobile phone and if you tell them they usually drop their prices because they want to keep you.

Gwen would be interested in joining an oil club because most people in their area are on oil.

She also thinks the government should encourage people to have more insulation in their homes and they could offer to do it for older people. She does not think they could do much for her and her husband personally. Gwen does not think that the fuel industry should have been privatised in the first place because she thinks 'everybody should be paying the same rate... and it shouldn't be for profit'. She would be interested in applying for grants to help her heat her home.

Probably not us but a lot of people have older houses and they have draughts and stuff, someone should go in and advise on what they need because people think their lofts are well insulated, and it might have been 30 years ago but there are so many new products out now that are better. I think the Government should do a survey on older houses, especially for older people, and they should advise them on what they would need doing.

Gwen also believes that suppliers should let customers know if they have been paying too much each month if they have a direct debit set up with the fuel supplier. She was once owed £1,000 and she only found out about because she rang the company. She also feels companies should automatically reduce their prices when the cost of fuel generally drops.

You should automatically get the drop [in fuel prices]; it should be automatically passed on to you. You shouldn't have to ask for it. They

automatically raise it when they want more money off you, but they won't automatically drop it and that's just insane really... well it's not moral at all.

Gwen has been asked before if she wanted to be connected to the mains gas network and although she would like to do so she had to refuse, because it would be too expensive (around £5,000).

Barbara, 50+: Has had to seek help from the Ombudsman to resolve issues with her previous electricity supplier.

Barbara lives with her disabled husband who has difficulty walking because he has had two hip replacements. They are both retired and have recently downsized to a bungalow in a rural village in Mid Wales. The bungalow was built in the 1990s.

When we first moved in it was all electric, with quite elderly storage heaters which we replaced with up-to-date storage heaters but we have also put in a couple of red gas bottles and a gas fire in case there is no electricity in a storm... I never was happy with the electric heaters but I am learning to live with them.

She mainly uses electric storage heaters to heat her home but also has some LPG bottles in case of power cuts. Barbara is having difficulties reading the controls because they are very complicated and difficult to see as they are small.

I'm having some trouble with the control unit but that's probably because I can't read them properly... It's easy if it does what I tell it to, but it doesn't always.

She and her husband have never been in a position when they have run out of fuel because they have gas bottles as back up. As it happens, there have been fewer power cuts in the area in the last five years anyway.

She currently pays for the electricity by direct debit with her new supplier and is very happy with the payment options available to her. She was, however, in dispute with her previous supplier because they could not find the meter they had installed at the property on their computer system.

[Before switching] we had to pay for what we had used but I refused to pay it until they had got a meter reading and had done it properly because I didn't trust them to give me back my money if I had paid extra.... You have no idea [how difficult it was to sort out].

They had been with their current electricity supplier before so they could easily set up a direct debit again. They do budget to pay for their fuel but their payments go out of their account as soon as they get their pension so they know they have enough to cover their fuel costs.

It's a bit expensive but really we haven't been on this new tariff for long enough to really give an educated answer on that. [When they were with the previous company] they were charging us standard rate and wouldn't put us on a tariff because they couldn't find the meter.

Barbara had to get the Ombudsman involved in order to help them switch their electricity supplier. It took 9 months for them to agree on a final payment with the previous company before switching, but the Ombudsman 'did the trick'. It took their previous electricity supplier a long time to agree to visit the property in order to read the meter and give Barbara an accurate meter reading. The meter was still registered at another property.

These meters don't use Economy 7 they just come on as and when you need them and at the third time of screaming at them they came and changed the meter. But they had not registered it on the national database; it was still in a house in Manchester according to that. They changed the meter but it was still registered on another property.

Barbara was advised by her current supplier to contact the Ombudsman in order to resolve the issue with the previous supplier. They did not shop around for another electricity supplier as they went with the company they had used previously, because they 'had never had a scrap of bother with them'.

Barbara knows that the Government give out grants in order to help people improve the insulation in their properties but she does not want any cavity wall insulation. However, she would be interested in loft insulation but she would go on the internet if she wanted more information about it. She does not think she or her husband would be eligible for any financial assistance.

I do not think we would be eligible because we both have small private pensions... the fuel suppliers could let us know when there is a cheaper tariff but I have a feeling that they used to [when they were with them the first time round].

Barbara thinks her heating system is ok – 'not dissatisfied but not leaping over the moon with joy'.

I'd love to be on mains gas but I don't think it's ever going to happen down here. We are in a tiny village miles from anywhere.

Jenny, 25: fairly satisfied with her electric heating system but she does think it is quite expensive since she has to keep the house warm because of her young child

Jenny is a single mother who lives with her two year old son. She is currently unemployed and is renting a semi-detached house from a local housing association in a village outside Wrexham in North Wales. The house was built in 1990s.

It's ok...I would prefer a combi boiler rather than having to heat my water up.

Jenny has a prepayment meter installed so she tops it up every time she needs electricity to heat the home. The prepayment meter is her preferred method of paying as she pays in advance for the fuel she uses. She has been left without heating for short periods of time in the past when there has been a power cut but otherwise she is fine.

Only when there is a power cut... it happens about three times a year and it's usually because of the bad weather. It gets sorted out pretty quick.

Jenny says she has to spend more on heating now because her son is young but she is managing at the moment because the supplier she switched to when she moved in gave her a deal.

It's fairly affordable at the moment...maybe they could give something back over winter. Give money back or something.

She thinks the government could help people in a similar position to her in the winter when it's colder. She would definitely be interested in applying for grants if there were any available to help her heat her home and she thinks suppliers should price match.

The [suppliers] could match deals if there are any better deals out there.

Richard, 75+: finds electricity affordable but surprised how much he was able to save by switching recently - with help from his son

Richard and his wife are in a rural location in West Wales. They live in a detached house in a street with a number of other houses – a small but growing village, a few miles from the nearest town. They are both retired and own the property outright. The house is around 40 years old.

He uses electricity to heat the home. They have switched recently to a cheaper tariff with a different supplier. Richard's neighbour had switched and he therefore followed suit, changing to a supplier offering to reduce their monthly bill by approximately £40. As neither he or his wife is very comfortable going online, his son explored the options online and carried out the process for them.

It's quite a big saving, £445 per year. I haven't been one to go on the internet to compare prices before but my son looked at it and we did it through Which? and it's a major saving.

If his son had not been able to help, Richard doesn't think that he would have had the confidence to switch online but as it turned out the process all went smoothly.

They find the monthly amount they pay for electricity affordable. The conditions for the new supplier include signing up to a two year contract. Richard isn't sure whether he's able to get out of the contract or not but doubts he would be penalised if he withdrew.

In terms of the heating system itself, Richard is broadly happy with it. The only niggle is not being able to instantly adjust the temperature; but it isn't a great issue for them. Otherwise he thinks other forms of heating are likely to be just as expensive as electricity. They pay by direct debit which suits them for its convenience.

Richard hasn't wanted to make any complaints in the past about his electricity supplier. He is slightly annoyed that the supplier he has just left only decided to offer him a cheaper tariff once he informed them that he was switching.

If [another] company can provide it for so much less, it means they're overcharging. That's my way of looking at it.

Thinking about government support or grants, Richard can't envisage applying for them. They are able to cover their costs of living with their pensions and he doesn't think it would be fair if they took advantage of financial support.

I wouldn't be happy. Those who have been lucky to have a job should pay their own way, me included.

On reflection, the previous supplier could have offered a more attractive package to keep him as a customer, when the supplier found out that he intended to switch, particularly as they had been a long-time customer for over 30 years.

Simone, 60+: severe financial hardship can mean selling possessions to pay for heating oil and relying on building rapport with suppliers to allow for occasional late payment

Simone lives at home with her eldest (adult) daughter in North Wales. Her daughter is Simone's carer and Simone herself is unemployed. The area they live in is rural and the house is detached, owned outright and approximately 150 years old. Before she became ill, Simone was employed with a good job but now they face significant financial hardship.

They use heating oil in the home and the system was paid for by a government scheme called Warm Front – installation took place over five years ago. Simone thinks the scheme itself is good but the boiler they received has broken down every year since it was installed, including just before Christmas which was a 'nightmare'.

If someone told me when we changed that they would take the immersion heater out because they couldn't run a combi boiler and an old fashioned heater, I would have asked for a different boiler, because as soon as it breaks down we have no hot water, it's not just the heating. It's extremely inconvenient.

She is unhappy that she didn't fully understand how the insurance cover worked the first time the boiler broke down. It included 24 hour cover but Simone didn't realise that this referred to the requirement for her to contact the insurance company within 24 hours to be covered. As she was ill at the time she was unable to do so and the lack of cover meant a significant financial outlay which she had to fund through selling possessions. The insurers were 'apologetic' as she was ill but it made no difference.

I was told it wasn't covered because it was more than 24 hours since it had broken down. That stressed me out and cost £400 to put it right. I had to sell some personal effects.

The remaining times it broke down Simone remembered and was able to call them within 24 hours. However, recently engineers have advised that she should have the radiators flushed to ensure the insurance remains valid but she is unable to pay for this work.

Deliveries are by tanker and made two to three times a year but it can depend on what she is able to afford at the time. Simone recalls that they have had to go without heating several times because she couldn't afford the oil, which requires a minimum 500 litre purchase ('we'd have to wash by the kettle'). She doesn't have much left she can sell to cover the fuel bills when she is short of money.

Sometimes Simone has run out of oil because she has been ill and unable to check the fuel level. They have two suppliers and one is normally able to respond quite quickly when needed. She points out, however, that it's important to have 'history' and 'rapport' with them so that she can now pay a month in arrears. This wouldn't be possible with a new supplier, she thinks.

By the time it comes to pay the money I've scraped it together.

One previous supplier refused to let her pay the following week on deliveries when she became short of money and was very ill. The supplier 'lost trust' in her after four years and she left the supplier.

Simone found that suppliers were willing to price match if asked but there was a condition that they delivered when it was convenient to them rather than within a couple of days as they would do normally. At that point she could afford to pay and therefore wait. If she has the money available up front to pay for a delivery, Simone wouldn't have a problem with switching supplier. There are several suppliers in the area to choose from.

Changing supplier, you've got to have the money in hand. They won't deliver unless you pay.

She prefers to pay on delivery because she can get the money together rather than risk not having enough money available on a monthly basis. Simone and her daughter change the way they shop to help manage the money they have, for example buying food about to go past its sell-by date. She also doesn't dress the way she used to dress to try and save money which 'makes you feel inhibited walking round like a dog's dinner'. When making a trip in the car, Simone tries to fit in as many tasks as possible (disability permitting) to save on petrol.

She can't think of any recent complaints she may have wanted to make about her supplier. There was one occasion in the past when the amount delivered was several inches short of the level on the tank but the supplier replied that it was impossible for the driver not to deliver the correct amount because of the technology used.

Heating the home is a real struggle and not at all affordable for her. Simone acknowledges that the price has come down quite a bit in recent years but she still thinks the government should help with subsidies for people in her position. She would definitely be interested in any grants available.

There should be some help if you haven't got that kind of money. The suppliers say it's all the tax that goes to the government. If the government are helping me to survive why are they taxing me on my heating oil?

The idea of an oil club appeals to Simone but she doubts she would be able to take advantage of it because she may not always be able to lay her hands on the money needed. Also, she would be wary of potentially revealing her financial situation to other people in the area.

In terms of the fuel suppliers helping, Simone doubts there's much they would do as they are private businesses. However, she thinks they could be a 'little more understanding' over the timing of payment given that she is not normally a 'bad payer'.

They said 'you don't go into Tesco's to get your shopping and then say you'll pay the next week'. That really upset me.

David, 75: Very satisfied with heating oil system and can't speak highly enough of the supplier

David is a widower who lives with his middle-aged daughter. He is 'on the road to recovery' after being treated for cancer recently. David is a campanologist (bell ringer), so he still rings the bells at the local church but he is retired from work. David and his daughter live in a rural village in North East Wales.

They live in a 2 bedroom cottage which he owns outright. The cottage was built in 1918 and it is a timber building so 'things creak and groan'. David replaced the electric storage heaters (which were in the cottage when they first moved into the property 15 years ago) with new oil-fired central heating radiators, which he installed himself with his son's help. He is very happy with his heating system.

[The new heating system] been absolutely tremendous... you just press a button and it comes on... it can't be any easier. I can't understand why people go for gas but there we are.

David thinks his heating system is very easy to use as he only has to press a button to turn it on. He can also put the system on a timer but he feels he doesn't need to bother with that at the moment. The company deliver the heating oil in big tankers and they fill David's tank up when it needs topping up. He pays for 500 litres at a time because it's easier to pay for that amount rather than 1,000 litres. He thinks the suppliers are 'smashing' because he rings them up and they are there the next day 'in all weathers'. David thinks the company's been going for over a hundred years and he's been with them for years, during which time he has never had to go without fuel:

I pay for it there and then when it turns up and then I haven't got any future bills... I've paid by card and by cheque so it couldn't be any better. You can pay by standing order which Rose next door does. I'd rather do it the other way.

David is happy with the payment options available to him and says he does not have to budget because he's quite a 'frugal' person anyway. David believes his fuel is very affordable, especially since oil prices have gone down generally.

... more so now because the prices have come down dramatically in comparison. When we first moved here 14 years ago I can't remember exactly how much it was per 1,000 litres but I think it was £500-£600.... Now we are on £150 for 500 litres, so it's practically half.

David has never felt the need to make a complaint about anything to the supplier and he gets 'fed up' when there are adverts on the television encouraging people to switch suppliers.

Change your electric, change your gas, change this, change that – you can save this, you can save that...it's the same with the banks, but at the end of the day there's no point because they are all the same... you're just chasing your tail basically.

He had never heard of oil clubs but he would not consider joining anyway. He said he only gets a delivery once every six months so he did not see the point.

He has insulated the walls and loft of his home so he could not think of anything more the government could do to help. He would not be interested in any home improvements that could improve the energy efficiency of his home because he feels he is 'too long in the tooth' and does not want any work to be done on the property. He said he would not be interested in applying for any financial grants either.

Very good...I'm quite pleased , no problem at all. 10 out of 10.

Mary 70+: satisfied with an economical and easy-to-run heating system with good customer service

Mary lives with her partner. Her adult son (who works) lives with them and has a disability which affects his mobility and her partner is waiting for an operation but is still working. Mary is now retired. Their home is in central Mid Wales in a 'very rural' location a couple of miles from the nearest small town. The house is rented and a 150 year old semi-detached building.

The heating system is based on oil and Mary is happy with it. The home is cosy and the system is 'dead simple' to use. They also have a wood burner to help heat the living room. Deliveries are prompt, arriving a couple of days after ordering, and she has had no problems with getting the fuel.

In terms of cost, Mary thinks her oil heating system is 'quite economical' to run. She pays upfront by cheque for the fuel to the delivery driver and this payment option suits her best. They don't find themselves having to budget to cover the heating fuel costs. She keeps an eye on the price before ordering and 'usually the price is right'. Currently they are enjoying the benefit of a lower oil price. Mary buys 500 litres each time and has never run out of fuel since having the system.

At the moment it's good, because of the oil prices. We're down to something like 27p a litre this last delivery but we have paid up in the 60ps, 70p [in the past].

It's been a mild winter so we haven't used that much. We ordered I think in October and we've just had another delivery in January.

She is happy with the supplier, having never switched or had cause to make a complaint. She has developed a rapport with the delivery driver and appreciates how he is patient on arrival, allowing her to get the dogs in: 'I've got no need to change'.

It's not obvious to Mary how the government could help her keep her home warm. She feels that it's 'up to the individual how they can cut back'. If it became a problem she wouldn't heat the entire house, describing herself as always having been quite thrifty. However, if grants did exist for helping people to heat their homes she would be very interested in applying for them.

Why not? I've worked since I was 15 and didn't retire until last year [in her 70s] and I don't claim anything apart from the state pension. If there is anything out there to be had then why not have it? . . . If I was entitled I would go for it because I just think I've earned it over the years.

Mary can't envisage the suppliers being able to do much and recognises that they do reduce their prices when the wholesale price of oil drops: 'It's not as though we're being robbed'.

Andrew 30+: satisfied with heating oil complemented by log burner and the ease of switching supplier if needed

Andrew lives with his wife and two children (aged 6 and 3). He is self-employed in the construction industry in hills above a small town in North East Wales. The house is detached, mortgaged and approximately 80 years old. It was originally a commercial building.

They use heating oil and a log burner to heat the home. The oil heats the hot water and the building is well insulated. When it becomes very cold, they light the log burner 'just to take the edge off' because the underfloor heating requires some time to take effect. Andrew thinks they probably use more solid fuel with the logs over the winter than heating oil. He describes the heating system as 'more than sufficient' and 'controllable'. The underfloor heating needs some understanding because it's on thermostats in every room.

It's never been less than between 18 and 21 degrees in the house all winter.

The oil is delivered by tanker, usually every three months or so. Andrew is very satisfied with the delivery process. He tends to stick to one company from whom he also buys fuel for his business. As a result he gets quite a good deal on the prices for both. He hasn't experienced any issues with fuel deliveries recently but he has run out of fuel in the past, acknowledging that it was his own fault.

It was basically not managing the tank we've got, like a watchman which sends a signal from the tank to the house and notifies you on how full it is and we just unplugged it for the iron or something and the next thing there was no oil!

The supplier delivers mid-week and applies a better rate for the price because Andrew is fitting in with their routine deliveries in that area which fall on the same day.

Usually they come [mid-week] and you get a better deal. What happens is instead of sending one truck to tramp over hundreds of miles a day you get a better rate if you order for the day they allocate for that area.

Payment is made by card, with the supplier taking Andrew's card details but not taking payment until the oil is in the tank. This method suits him: 'it's just another bill to pay'. They don't have to cut back on anything to pay for their fuel. Given current prices, he thinks heating the home is very affordable.

At the moment, very affordable because it's down maybe two thirds what it was two years ago. At the minute it's just a bit too good to be true.

A previous supplier did damage some property a long time ago which led to a 'fall out'. It was a delivery late in the evening. They discovered next morning the driver had reversed into a building and damaged it but the supplier denied all liability. Unfortunately they could not prove it so they just stopped using them.

He switches supplier from time to time, keeping an eye on rates. He switched from one supplier because they were 'quite willing to take my money' but it proved a struggle to obtain a receipt from them for the business, with the company saying that they did not give receipts for credit card payments. He's been with his current supplier for four years.

Andrew also used to be a member of an 'oil group' but found that, after paying an annual subscription to the group (which was also linked to finding work leads for his construction business), it wasn't much cheaper than shopping around and going direct. If the financial benefits were clear he would consider joining an oil club.

Sometimes you can play one [supplier] off against the other so they can drop a few pence which is a lot of money when you're buying a lot. . . . With the internet it's easy-peasy [to switch].

The government, he feels, could continue to provide residents with free insulation and exterior cladding which he has seen being installed in the local town. Andrew would be interested in any grants available, for example if they applied to using renewable energy heating which he associates with his log burner. He doubts suppliers could or would do anything to help customers: 'they'd be shooting themselves in the foot'.

Andrew is largely happy with the options available for heating his home although he imagines that mains gas would be attractive, because of the ability to have more or less instant heat. He sums up by saying that he remains satisfied with his current system.

Cathy, 50+: feels that regardless of fuel type her very old house would be difficult to heat effectively but wonders if the government could do more to help out financially where fuel options are limited

Cathy is retired and lives in Mid Wales on her own in a 'very rural' area. She owns the detached house with no mortgage. The house is over 200 years old and listed. Heating oil is the main source of heating. She describes herself as being 'moderately satisfied' with the heating options available for her home but fuel costs account for a significant portion of her income.

If you do the sums I'm technically in fuel poverty, it's just that I don't qualify in other terms but if you look at my income and expenditure on fuel then I'm poor. I'm always disadvantaged in that respect.

According to Cathy, choosing this heating method is a 'bit of Hobson's choice'. She acknowledges that there are a few alternatives but 'green energy' is not an option for her. She thinks it would pose problems in carrying fuel into the house for the boiler, having to carry it up steps because of her physical condition. She also considered bottled gas but believes that there is no price benefit in that heating method.

I'd have to carry [the green fuel] up steps. I'm not disabled but I have arthritis. . . . Price-wise [for bottled gas] you'd need a tank and there was very little difference in it. Last time I looked gas was more expensive.

Her current system is very easy to use as she has just converted to an outside boiler from an indoor 'stove' which was inefficient. Even so, she's not sure yet whether it will turn out to be a cheaper option with the new boiler. Cathy looked into different heating options before making this choice to replace her problematic internal boiler. To try and keep the house warm she had to run the old system at a 'high level'.

I'm hopeful this new system is cheaper and there was no timer [on the old one] so it was on constantly.

The oil is delivered by tanker and Cathy says that delivery works well, with a number of firms that can meet her needs. She chose a supplier who was able to let her know on what day they would deliver whereas others would deliver 'as and when'.

A tank may last her six to eight weeks in cold weather. She has a smaller tank as larger tanks are too costly to buy and would be difficult to install. They need renewing every 15 to 20 years.

Cathy has had two bad experiences with previous suppliers. In the first example, she was left without a fuel delivery to cover Christmas a few years ago. She found out that a new manager at the supplier had mixed up all the delivery orders, so even

though Cathy's neighbours received a delivery (having ordered after her), she did not. The issue was further compounded by heavy snow which meant that the supplier could not immediately rectify the situation. She imagined this would be a potential problem with other types of fuel delivered.

My neighbours fetched me two big containers of oil, although it was more expensive. I was obviously cold! There's only so many pairs of socks you can wear!

She complained to the manager who was quite dismissive and did not acknowledge that there had been a mix-up (Cathy found this out from the delivery driver). The manager claimed that it was purely down to the weather conditions and was 'very unhelpful and didn't acknowledge any responsibility'. She switched firm immediately. This was easy to do, just a phone call to three other suppliers as well as talking to other people in the area and hearing their recommendations. There are no contracts or agreements. The new supplier has a smaller tanker (needed for her property) which could deliver more quickly. She feels the market is quite competitive.

On a second occasion, a delivery had not been made and Cathy was left without fuel. It was unfortunate particularly because her mother lived with her at that time and was very elderly.

We had to close off rooms and I just put the heating on in her bedroom.

Broadly speaking, Cathy may have delivery issues every two or three years, normally because of adverse weather conditions, lasting a day or so. She is fairly sanguine about the situation.

It is frustrating but I chose to live here. You have to take the rough with the smooth.

From time to time Cathy is involved with an informal 'collective buying' group with two or three other households in the area. They 'do it as an informal arrangement whenever we can' (two or three times a year).

It works quite well really . . . but an oil club needs someone to coordinate it and that becomes a task for somebody and I'm not sure it's that formal.

She pays by card having received an invoice. She prefers this method so she knows exactly what she's spending and can keep track. Cathy is slightly unhappy that her bank account offers rebates on utility bills but excludes heating oil.

There are disadvantages like that. . . . It frustrates me because it's a major expenditure for me and if I could save 1% or whatever it might be it's

something I'm missing out on. . . . I'm very conscious about how much I'm spending.

It's not, she feels, an affordable way of heating the home compared with a new home. The fact that the house is listed means she cannot take steps such as installing double glazing. She recognises that the heating affordability issue is partly a combination of the age of the house and, up until oil prices decreased recently, the price of oil. She can't say how much she spends a month on average on heating the home. Cathy also points out that the price of heating oil can fluctuate from one day to the next.

However, she hasn't had to cut back in other areas based on the price of the fuel although she is very careful about how much fuel she uses, for example ensuring the heating is off in rooms she isn't using.

Cathy wonders if the government could somehow recognise financially the limitations she faces with heating choices. She likes the concept of collective buying but can't see how this could be developed given how few people live in the area and how remote her location is. Cathy concludes by thinking more widely and suggests there could be greater flexibility for insulating listed buildings like hers.

I think the acknowledgement that if you are limited in fuel choices . . . and whether that couldn't be financially acknowledged in some way, that would be quite helpful and if there were deals on utilities then something like oil should be included, but that's not a government issue is it?

There could be bigger advantages for collective buying . . . I'm not sure how really that might work. Maybe the incentives to do that could be greater. . . . It has to be cheaper for the company.

Adam, 50+: Fairly satisfied with the LPG heating system but he does think that his electric storage heaters are too expensive.

Adam lives with his partner of 12 years and three children, one of whom is his step-child. The children are 17, 10 and 6 years old. Adam looks after the home while his partner works as a kitchen assistant. They all live in North West Wales in a village outside Caernarfon. Adam and his partner have a mortgage on an end terrace house that used to be owned by the council. The house is about 60 years old.

Adam uses bottled gas to heat his house and he says it is very easy to use. A bottle of gas will last Adam a month and he always keeps a spare bottle in case he runs out. The LPG company delivers the gas 'as necessary' so Adam will order his LPG and the company will deliver the bottles on the set days for his area. However, if it is an emergency, they will deliver as soon as they can.

If you say it's an emergency, ie you've run out or you are about to, they will endeavour to get a bottle to you as soon as they can... they are very helpful if you're in trouble. I should also mention there is always the option of going to the local depot and picking up a bottle yourself but the only problem with that is they are incredibly heavy the bottles, the delivery guys are used to it. And your car smells of gas afterwards.

Adam pays for his bottles either by cash over the counter or by debit card over the phone. He was given the option of paying monthly by direct debit but he chose not to. They do have to budget to pay for the fuel 'to some extent'. Adam is always in arrears of one bottle and they will pay for that bottle on payday and order a new one. Adam believes it is 'relatively expensive at the moment' because they have two forms of heating. They only use the gas for the living room and they also use two Economy 7 storage heaters for the rest of the property. It is particularly cold in his area currently so Adam feels he is using 'quite a bit of electricity' but in summer he will hardly use them at all.

It's just part of general day to day budgeting; by and large we try and rely on cash; it's easier for us because, as you can appreciate, banks can be less than helpful. As it stands at the moment, we spend £5 on electric a day but come summer we will be using, I imagine, £15 a week; it's less than half. Hopefully, by this time next month I will be able to switch one of the storage heaters off. I always try and budget with everything. Because I'm a house husband, I've got time to do these things and check if I'm with the cheapest suppliers etc. To be honest, families where both parents work I honestly don't know how they manage to get everything done.

Adam has never wanted to make a complaint to a supplier. Adam has never switched LPG supplier but he regularly shops around for a better deal with his electricity supplier.

Adam thinks the government or local council could help him keep his home warm at an affordable price by offering grants to help people pay for double glazing. They have already received their storage heaters from a government funded energy efficiency scheme called Nest.

The one thing we haven't got and we desperately need is double glazing. We have had various quotes but the cheapest quote we have had is £2,500, and to be honest they might as well have said £2.5 million because £2,500 is a lot more than we've got.... As it stands Gwynedd Council, they don't do grants any more but they will do home improvement loans, but they have got to be of a minimum of £5,000. We don't actually need that much. Yes we could make it up to £5,000, but that's putting us into more debt than we need to be, so that's the main thing. I'm sure if we had double glazing that would make a huge difference.

Adam would be interested in applying for grants to help him heat their home if they were available. He also thinks electricity suppliers should do more to help customers pay for their electricity by offering them cheaper tariffs.

I think electricity is far too expensive and I think the fact that it is supplied by private companies with shareholders is wrong... When I first rented houses some thirty odd years ago, I don't seem to recall thinking bloody hell this electricity business is expensive, whereas now it's a constant day-to-day thing.

Adam has noticed that the price of his LPG gas has come down recently but he is not sure if it 'has come down as much as it should have'. Adam is, however, fairly satisfied with the options available to him for heating his home.

Gareth, 47: Not satisfied with his heating system because it is expensive and he cannot switch suppliers without getting everyone on his whole housing estate to agree to switch as well.

Gareth, who is registered disabled, lives with his wife and his sixteen year old daughter. Gareth's wife has mental health problems so she is currently on long term sick leave and Gareth himself can no longer work because of his disability. They live five miles outside Ammanford in Carmarthenshire. They have a mortgage on a three bedroomed semi-detached house that was built in the early 1990s.

Gareth uses LPG to heat his home. He thinks his current heating system heats his home well, but he is concerned about how expensive it is. He is frustrated because he does not have his own LPG tank so he cannot change supplier unless everyone else on his estate agrees to switch as well. He says the system is really easy to use and there have not been any problems with deliveries. However, there have been 'one or two incidents' when the gas was cut off, but that was because a neighbour had been digging in the garden and had hit the pipe by mistake. They did not have to wait too long before they were reconnected again.

It's very expensive to use LPG in comparison with mains gas and it's not fairly regulated, because as gas prices come down my bills never do, and I chase the supplier ... I think if you had your own personal gas tank you could regulate it better and you could be in charge of who you get your gas from but on my estate it's based on bulk storage tanks at the corner of the estate, which has 30-40 houses built on it. Whoever supplies the gas supplies the gas... [We've been with the same company from the start] because as you can imagine getting everyone together to decide how we are going to get cheaper gas is virtually impossible, so in effect we are held to ransom really.

Gareth pays for his gas by direct debit and that is his preferred payment method because he can spread the cost evenly throughout the year. However, he does think it's 'very expensive'.

My wife set it all up by direct debit so it just comes out every month, we know exactly when it's coming out and how much. The only argument we have had with the company is we actually want to pay more. Where the company says we should be paying £80 a month, we pay £125 a month to make sure that when our consumption goes up during the winter we are not hit with a big bill... it's not an argument, it's more a hassle really, because every year they send a bill saying this is going to be your new monthly figure and we have to phone up and say 'no we want to pay more' and explain why rather than just keeping it the same every year.

They have had to cut back in order to pay for their heating in the past and there was a time, when he became disabled and had to stop working, when Gareth and his family owed the company £3,000. This was because the LPG company was not billing them on a regular basis so their bill had been mounting up over time. They agreed on a payment plan with the company but they had to cut back on food and other necessities in order to make sure they could pay the company.

The billing structure was wrong, really wrong. What happened was they wanted to bill us in a certain way, but they would not be regular so before we knew it we owed them £2,000-£3,000. They would bill us every quarter, but sometimes they would not bill us for a year, so we were only paying them as the bills came in and so we owed them £3,000... that was a few years ago now We had to sort out a payment plan and pay it back that way. That's why we wanted to pay by direct debit... we did complain about how the billing system was done but it was resolved over a period of time. To pay for the gas we had used [when in debt to the supplier] we had to cut back on food or other things really. At the moment... from an income point of view, our income is very tight; it's very hard to make ends meet every month.

Gareth has phoned the company in the past to complain to the area manager that his gas bill had not decreased even though gas prices had, but they offered him a 'token gesture of 3% less'. However, because everyone on the estate was on the same tank it was difficult to negotiate a better price with the company.

Gareth has already tried to get help through government funded energy efficiency schemes but they could not help him with the improvements that he wanted done. He has also tried contacting the local council but he feels that was a waste of time because the criteria for getting assistance is 'so ridiculous' that Gareth cannot see how anyone would be eligible for help.

I am disabled, I'm no longer working and I am classed as a vulnerable person... there are these schemes like Nest and so on but whenever I've contacted them, what they're offering is just no good like. They offer cavity wall insulation which causes damp, my mother and my mother-in-law have both had cavity wall insulation and they've both complained about damp so she had to have it removed and everything else. That's no good to me, my attic is already insulated so that's no good, but the one thing I have pointed out that I could do with is I've got a draughty kitchen window and a draughty patio door and I said 'Is there any chance you could help with that?' They don't have to pay for it in full just help towards paying for it, they said 'No we don't do that, we only do cavity wall insulation, attic insulation'.... Whenever I phone the council they just don't want to know. The criteria that they [local government] put in place is so ridiculous, nobody got it you know.

Gareth would be interested in applying for grants that were available. He had to pay to get a new boiler himself because even though he's disabled he was not eligible for a free boiler, which he feels is 'ridiculous'. Gareth also said that some energy providers offer extra assistance and cheaper tariffs to customers who are disabled or classed as vulnerable but his LPG supplier 'is not part of any schemes to do that'.

Gareth said he was not satisfied at all with the options available for heating his home, because he feels he does not have any choice apart from his current LPG supplier.

Amy 30+: uses LPG to heat the home but feels she is charged over the odds and is unable to switch supplier because several local authority houses are tied into communal tank; she goes without heating for several months a year

Amy lives in mid-Wales and is 'five miles from the nearest pint of milk'. She is a single parent with four teenage children living at home. She works full-time. The house is terraced and rented from the local authority. She thinks the property is around 60 years old.

LPG is used to heat the home. Amy thinks the system is 'good', 'simple to use' and 'works well' having had it replaced five years ago. The fuel is delivered by tanker to a communal tank with several houses sharing the tank. There is a monitor on the tank which prompts automatically for deliveries so she doesn't have to order it herself. There haven't been any problems with deliveries she can recall.

Even so, purchasing is a significant issue because Amy doesn't have any say over which supplier provides the fuel.

That's the only thing that's a pain the bum. The company that deliver it owns the tank so we don't have any problems with delivery but we don't have any choice on who we buy it off either. . . . They've got us over a barrel.

Amy pays by monthly direct debit for the LPG and this is her preferred option to help spread the cost. She explains that the only way she can pay for it is to ensure she doesn't turn on the heating at all for around seven months of the year. She has never run out of fuel.

It's so expensive, astronomical compared to mains gas. So I pay £100 a month every month even though come next month till September it will be off. I turn the boiler off but I'm still paying £100 a month to cover the price of fuel when it's on.

Other than cutting back on heating the home, Amy finds that they have to make sacrifices elsewhere to ensure they can cover the fuel bill.

We cut back on most things! Fuel in the car, we've got to be careful where we go; you have to think twice before you go anywhere. And school clothes you have to be very careful. We sit watching the telly with a blanket on.

Exploring changing supplier has become an insurmountable challenge as the other homes using the communal tank are pensioners who, Amy, says, aren't keen on change.

I have tried it a few times but you have to get a signature off everyone who uses the supply and I've got to get them all to agree and they won't, bless them. They don't understand and it's upsetting for them.

Amy would like the government or local government to help her in some way so she could switch supplier as an individual and look for better deals.

We've got no leverage at all because they know I'm not going to get the others to agree. I've managed to get it down to about 65p but it's still 20p more than the national average. It's so annoying and there's nothing I can do about it.

She would be interested in grants available for heating. Amy describes how the local authority has provided her with some external insulation but it is only on the front and back of the house. The sides – within the terrace – are therefore not insulated. None of the other houses in the terrace has the external insulation. She has also had the loft insulated.

The way our house is facing is the best you can get for solar panels. We could do with a bit more of that sort of thing.

Amy strongly believes that fuel suppliers could provide more help, for example bringing the price down more in line with the national average or prices she has had quoted from other local suppliers. She thinks that one of her elderly neighbours had to disconnect from the LPG because he could not afford the costs, moving to electric heaters instead.

When I ring them I give them a poke with a stick to try and get the price down. But's a joke really, even the lady on the phone says there's nothing she can do about it. I've tried [speaking to someone more senior] but they just fob you off. . . . I've had quotes off other companies, local ones, and they're so much cheaper. . . . Why can't we change like normal people can do? They've got a monopoly.

Peter, 73+: unhappy with the price of LPG and being fobbed off when contacting supplier to raise the issue

Peter lives with his wife and has occasional visits from their adult children with the grandchildren. He describes himself and his wife as pretty healthy.

Peter is now retired but used to be a civil servant and before that in the military. Their detached house (owned outright) is situated in a rural location on the edge of a village in North Wales. Parts of the house date back more than 250 years old.

The home is heated using LPG which is delivered by lorry. They also have a wood burner and sometimes use electric heaters. The LPG is used primarily for central heating and Peter is very conscious of how much it costs to use. He and his wife therefore do whatever they can to avoid using the central heating, for example basing themselves mainly in two rooms in the house downstairs and relying on alternative heating methods.

It's efficient but it's very expensive. It works when I want it to but I try and keep it off as much as possible, we try not to use parts of the house. We use the kitchen and sitting room which are heated by the Aga and the wood burning stove. We try to keep the central heating down to a minimum because of the very high cost of LPG gas.

The LPG is delivered on demand and Peter tries to minimise it to two deliveries a year but they sometimes need three. They have a tank buried underground. He can't recall any issues with having the fuel delivered and has never had to go without it. He has used the same supplier for many years.

They do respond within seven working days of your request.

He would like to buy in bulk if he could but the tank only holds 2,000 litres. Peter pays for the LPG by monthly direct debit. He could have paid 'on the nose' but direct debit helps to spread the cost across the year. Peter monitors the cost of electricity and gas and monitors his other outgoings to ensure they have enough money to pay by direct debit each month. Although he doesn't think that they have ever cut back on anything specifically in order to cover fuel bills, Peter points out that it still requires careful planning.

With the household budget you just try and keep a tight hold on everything really. It would be wrong to single that out but one thing you do cut back on because of the cost of all these things is holidays.

Peter is also unhappy that he has to pay a daily charge of 25 pence for renting the tank which he feels he must have paid for several times over by now: 'They're doing quite well out of me'.

Comparing fuel types, Peter explains that doesn't have to pay for wood as it's supplied by friends and family. He finds it too difficult to draw cost comparisons with electricity but he thinks it might be more expensive to heat the home by electricity than by LPG, but he isn't sure.

Peter recalls a recent instance where he had cause to raise an issue with his supplier. He called to place an order and said that he was disappointed that despite the 'huge' drop in the price of oil the decrease had not been reflected in the price of gas. A manager did call him back and stated that he would see a reduction in the cost. Peter is currently waiting to see if this occurs. He felt that this would not have happened if he hadn't raised the issue. He was 'amazed' to get a reduction at all as he often mentions the price issue when we contacts the supplier but is 'ignored'.

The problem is I can never speak to a manager to discuss this with them. I'm always fobbed off. A week later I had a call from a manager. I said I was very disappointed that you keep recommending ways of me cutting down my gas costs, I follow that up and then all you do is put the cost up.

He went onto explain that he is tied in to two year contracts, with the first year on a reduced rate. However, the small print says that after 12 months the supplier has the right to raise the price per litre by 3.5 pence every three months for the remaining 12 months. On the current contract the supplier has not taken this step, probably, Peter thinks, because of competition with the price of oil dropping and the potential of losing him to oil for fuel instead.

Some time ago, Peter explored (along with the local MP) what it would take for the village to be connected to mains gas because he envisaged it would reduce their bills, but it proved to be prohibitively expensive for those wishing to sign up.

In the past, Peter has looked at switching to a smaller company which was slightly cheaper than the large supplier. However, he would also have been tied into a similar contract and found the smaller supplier wasn't very responsive or easy to get hold of.

Turning to possible help with heating his home, Peter isn't very positive about his local authority. He has improved the insulation in parts of the house but without any financial help. He thinks unless you're on housing benefit help with insulation is not available (he has an occupational and state pension). Peter mentions that in the past he was regularly 'pestered' by people selling solar panels but that he received emphatic advice from an architect not to install panels.

He has looked into double glazing but it was too expensive to consider. Peter is wary of any offers or incentives related to double glazing and treats any such offer as too good to be true.

The main help suppliers can be is to be more reasonable in their pricing but I think there's very little chance of that. But there has been a slight move on that recently because of my going on at them. I'm going to keep a record of my telephone calls. . . . They dismiss you as if you're not important.

Robert 40+: unhappy with options available to heat home and lack of mobile broadband for tank level monitoring means they have run out of LPG before

Robert lives in South East Wales with his wife and three young children. The house is detached, approximately 400 years old in parts and situated in a rural area. They have a mortgage on the home.

The house is heated by LPG and he describes the system as 'expensive', but he's unsure if it's more expensive than heating oil. He has in the past considered solar panels and heat pumps but eventually decided against them, partly because of 'significant upfront costs'.

He has no problems using the system, summing it up as 'relatively straightforward'. However, given the rurality of the home Robert isn't able to make use of the supplier's monitoring system as it relies on mobile broadband. As a result, they have run out of fuel in the last three years on at least one occasion.

It's a bit of a fiddle because we're not in a very good mobile reception area; we can't have monitoring of the level of the gas and we have run out of LPG at least once before.

This left the family 'very cold' and struggling to cook because the oven runs on the system as well.

We suddenly found we were in quite a difficult position. We had a fan heater and an oil fired heater and a couple of camping stoves.

Robert and his family were without LPG for approximately a week as the supplier also 'messed up' the order which delayed the delivery further. He did complain and the company 'did something minor to apologise but we didn't take it any further than that'. Robert found that he was 'passed a little bit from pillar to post'. One of the administrative staff eventually dealt with it but he made it clear that he wasn't very happy with the situation.

There should be a charter or guidelines . . . I think they do ask if you have children or anything like that but they should make sure that they do it as a priority. . . . I do feel a bit that we got left behind.

Robert therefore has to phone the supplier each time they need more fuel. There is an email option but he prefers to speak with someone to ensure that the order gets through. He pays by direct debit (but isn't sure how they're tied in as his wife set it up). The family don't need to budget specifically to pay for the fuel but it is 'one of the major outgoings on the house'. They keep a close eye on it and only put it on when they need to as they're mindful that it's an 'expensive resource'.

Robert has moved between two suppliers in the past because of different pricing and offers. He explains that it has been quite straightforward to move from one to another. However, he does find it frustrating that suppliers don't seem to look after existing clients, forcing them to have to check how much the different suppliers are charging. Recently with the price dropping they have paid less attention to price. They have a contact who is an independent heating engineer who sometimes advises on where the best deal is: 'when it's going up we do ring around'.

Robert thinks more could be done to help people reduce heat loss from the house or perhaps financial help. He points out that they are five minutes from a town, 'ten minutes' from a large city and yet aren't on mains gas.

In quite rural areas we have no options but LPG. It might be nice if there was mains gas or other alternatives. Or some sort of voucher for those houses where there's no mains gas. . . . There are additional costs for living in rural areas.

He would also like to be able to visit an independent website which gives, for example, the current market price of LPG or the prices / deals being offered by suppliers in one place. In addition, Robert would like to know where to go for independent, authoritative advice on solar panels. He is therefore not very satisfied with the heating options available for his home.

If it says 'gov.uk' I look for it or something associated with the local authority I would trust it. I'm always a little wary of private companies as I don't know if they're acting in my best interest.

There is bottled gas but I don't know how practical that would be. . . . Heating oil is another option but I'm sure we'd have to change our boiler and that would be quite a large expense.

Catrin, 50+: Very satisfied with solid fuel option compared with previous heating system and can't speak highly enough of the supplier

Catrin is a full-time carer for her partner, who suffers from a range of conditions. They live 'in the wilds' several miles from Caernarfon with their two sons, one at secondary school and one in his twenties.

You grin and bear things don't you? You get on with life. Life is a holiday and you make the most of it!

Their social housing home is semi-detached and is approximately 60 to 70 years old. Around ten or so years ago, the local authority put in new windows and insulated the walls and roof. More recently, the council gave Catrin and her partner a choice of options for upgrading their heating system from Economy 7, which in her mind had been 'useless'. They went for a multi-fuel burner and Catrin has been very happy with the result ('brilliant'). She is able to heat the house and generate hot water for most of the day on half a bucket of coal. They sometimes add another half bucket at night. They find it very easy to use. Her son also tops up their fuel store with wood he cuts locally. Prior to receiving the upgrade they had always had an open coal fire.

It's absolutely brilliant. It's the best heating system we've ever had. Before all we had was an open fire. We had Economy 7 storage heaters which were useless. We've [now] got radiators in every room in the house.

Catrin pays £30 cash a week for the coal whatever the weather. The money is set aside at the start of the week from the money they receive in benefits. She feels that it's very affordable and when it's warmer they are able to stockpile coal for when they may need more. Catrin also thinks it's good value as she is aware that other coal suppliers in the area charge more than her supplier.

We're crafty, during the summer you carry on taking two bags every week and then you've stored up for the winter.

It heats the hot water, it heats the house. You don't have to put extra money in the electric to heat the storage heaters like we used to.

I know there are other suppliers around here and they are more expensive.

She is loyal to the supplier who is someone she knows and delivers whatever the weather. The only reason she has had to switch supplier was when the previous supplier died. The new supplier bought the existing business. There has never been any cause for complaint with the service.

He's spot on and never misses [a delivery]. . . . They're very polite, they're brilliant.

There aren't any improvements she can think of to her heating system and does not envisage needing any further help given how satisfied she is with the results and service provided by the supplier.

June 55+: Running solid fuel system a physical challenge with both wife and husband disabled

June has a physical disability and lives with her husband who has had a number of life-saving operations and is also type 2 diabetic. Neither of them currently works. They live in North East Wales.

Their home is in a small village which doesn't have many facilities. It's a semi-detached rented local authority property. The heating system is run on smokeless coal. June explains that the system was installed in the last couple of years and replaced a less efficient open fire.

It's a glass fronted sealed unit and we have radiators running off it throughout the house so it's much more efficient than the old system. You can use wood on it as well.

They find the system quite hard to use because of their disabilities. June used to do everything because of her husband's conditions but as she now has arthritis she, too, has difficulty with lifting and carrying. They therefore rely on family help.

Fortunately my daughter lives nearby so she tends to come and stock us up in the morning.

There are two local coal suppliers and depending on where she is at the time when they need a delivery, she will choose one of the suppliers and pay in person. She's satisfied with the delivery service received and has never had to make a complaint. However, there have been times when they had had to go without fuel owing to financial constraints. As a result, they can't buy in bulk. She isn't aware of any other payment methods but hasn't enquired to find out. June recalls it's approximately £17 for a bag of coal at the moment.

Money usually [is the issue]. It's quite an expensive heating system. . . . I tend to buy it when we need it or when we've got the money and then we eke it out.

To ensure they have some fuel, June feels that they do go without, cutting down on spending in the winter in particular. They generally have to be careful with money because she is no longer working. So June always looks out for reduced items when shopping. Even so, she appreciates how the new system heats the house more effectively than the open coal fire they used to have, which is important for her husband's health.

It's more efficient at heating, therefore we're using less [coal]. . . . Part of my husband's condition means that I have to keep the house warm.

June hasn't investigated to see if there are other suppliers with alternative offers who could provide her with coal because of the proximity of the two current suppliers and her inability to buy in bulk.

You couldn't afford to go anywhere else really because I couldn't afford to go out and make a bulk purchase.

Thinking about possible government support with heating, June isn't sure how the government could help. She comments how they're not entitled to the Winter Fuel Payment yet but thinks there should be some consideration for those who are unable to use mains gas. June would therefore be interested in any grants available but doubts the suppliers can offer much help because 'they're pretty stuck on the price they have to pay for coal'.

There ought to be some sort of allowance for people who can't get traditional [mains gas heating]. . . If we had gas or electric heating there's a scheme where if you're disabled you can get money back from the companies, I'm told, every year. The electricity company we use isn't one of the big six because we've gone with the cheapest quote therefore they don't do the money back scheme. And it's not extended to people who have solid fuel heating.

They do enjoy having a coal fire but June feels being connected to mains gas would be more convenient because of their disabilities and also as a more efficient means of keeping the home warm.

Because of the difficulty of getting stuff in for the fire and cleaning it out it would be nice to come in and switch [the gas on] and have the place kept at a constant temperature.

Sarah, 28: Not satisfied with solid fuel option at all. Heating her home is difficult and expensive.

Sarah lives with her husband and her three children who are 8, 5 and 3 years old. She is registered disabled and her husband is her full-time carer. They live in a rural village outside Abergavenny in an end terrace house which they rent from the local housing association. She thought her house was between thirty and forty years old.

[On heating her home with coal] It's inconvenient and it's expensive and it's either hot or it's cold in here.

Sarah uses coal to heat her home and she thinks it is expensive and it's hard to control the temperature in the house. She says it is 'impossible' for her to use it herself because of her condition but it is also 'very difficult' for her husband to do as well because it's quite labour intensive and awkward.

You have to chop kindling to light it; it's too expensive to buy kindling so you need kindling to light it. Then you've got the ash pan to empty whatever the weather. Then you've got to go out to get coal. It's dangerous with the children around.... We just hate it.

Coal is delivered by coal merchants whenever they run out of fuel. Their current supplier comes from far away so they have to wait a while after ordering before the coal can be delivered. Sarah used to buy coal from a local supplier but they had to switch suppliers because the local one was too expensive. Finding a coal supplier who delivers to her area is difficult in her opinion. Sarah has to pay for her coal when it's delivered and she has to spend a minimum of £100 each time in order to make it worthwhile for the company because they are not based locally. Sarah would ideally like to pay monthly or weekly but the coal merchants will not allow her to do that. Budgeting to pay for coal is difficult for Sarah because she's never sure how much she's going to need.

There is nobody that does monthly payments, whereas you can pay monthly for your electric or your gas, there's no one that does that for coal.... Then you have to have a minimum delivery off him because he's so far away and a minimum delivery is £100.

We try to [budget] but obviously you don't know how much you are going to use if it gets extra cold, sometimes it burns more if the wind's going the wrong way. It's really hard to budget for it... For example, this load went quicker than the last load and the weather hadn't really been any different.

Sarah and her family ran out of coal and therefore had to wait a few days in order to get a delivery. Sarah has to keep the house warm because of her condition but she finds it difficult to keep the house at a temperature that suits the whole family.

[We get the coal] whenever he can deliver it. For example last week, we didn't realise how low we were and we ran out on the Monday and he [coal merchant] couldn't come till Thursday, so we had to go without heating... we were freezing cold and then obviously because of the pain I'm in I've got to keep warm all the time. It's a bit of a nightmare....[because] there's no thermostat in the house.

Sarah does not think her heating system is affordable at all and sometimes has to choose whether she does the weekly food shopping or buys coal to keep the house warm.

[Had to go without] Food. Obviously, I make sure the kids are fed but I'm not worried about me. Last week we needed coal so I didn't do a food shop in order to get the coal. We are on a tight budget anyway because I'm not working and nor is my husband, so clothes are a luxury anyway... It's a massive pull down on us really. It would be a lot easier if it was a lot more affordable but I don't see any other way really because out here there's no gas. The only other option really is to have oil put in and that's not an option because that's even more expensive. It's just a way of life that we have got to get used to.

Sarah has spoken to her housing association about the cost of heating her home but she was told that her best option was to switch to heating her home with heating oil like the other houses on her street. However, Sarah thinks heating oil is more expensive and she would have to buy her fuel in more bulk and they are already struggling.

She did not think the Government could do anything to help them as they were already getting £140 for the Winter Fuel Allowance. However, she would 'definitely' be interested in applying for any grants that were available. They had tried to get solar panels from their housing association but their request had been denied because of the position of the house. Sarah does not believe that coal merchants will do more to help their customers.

Jane, 53: Very satisfied with combination of solid fuel and heating oil option and is very happy with the service provided by her supplier

Jane is a farmer and she lives with her husband who is an accountant. Their daughter is currently at university but she's back most weekends. She lives in a Welsh long house that's over 200 years old in Monmouthshire. She rents the property from a private landlord.

She uses oil central heating and wood to heat her home. She uses the heating oil over the winter but she uses wood all year round. They are thinking of installing more wood burners around the house but currently they mainly use the solid fuel Rayburn, which is in the centre of the house in the kitchen, to heat their water and the house.

You get a mess because it's dusty, but it's good at heating the house. We've got the Rayburn in the centre of the house. It's on the agenda to put a couple more wood burners in to save using the oil more because obviously we have trees that fall down on the farm. We use all our own wood.

Jane does not need to buy logs or kindling from anyone as they have enough wood around the farm. They buy a lot of tractor diesel so they get their heating oil from the same company. They get the oil delivered once or twice a year and it is delivered on the same truck as the tractor diesel. Jane has run out of fuel a couple of times because they forgot to look at the tank but the oil company delivered the oil the same day or the next day.

No problems at all [with delivery] they're absolutely fantastic. They are fantastic, they are friends as well, even if the weather's bad and they can't get the lorry up here they'll say bring the tractor and they'll fill it up where they are. They are very, very good.

They have an account with the heating oil company because they also buy tractor diesel from them on a regular basis. The company send them invoices and they pay every month. Jane thinks the heating system has been very affordable this year because the 'oil prices have been down'. She thinks wood is actually quite an expensive way of heating her home because the tools to chop the wood, for example chainsaws, are expensive. Her friends sell solid fuel and she said 'they do quite well out of it'.

They have not switched suppliers in a long time because Jane and her husband are pleased with the service and are friends with the company owners.

We know them well because they keep vintage tractors, as does my father... we have friends who do [shop around for new suppliers]... I don't think it

would make a difference because he always tries to give us the best price anyway and you know he looks after you.

Jane said her elderly parents had been offered a government run scheme after representatives had visited the property to check how well insulated it was. Apart from these types of energy efficiency schemes, Jane could not think what else the government or local councils could do. However, she does think it would be a good idea if the government could offer grants to help them improve the insulation they have currently.

John 50+: lets out rooms to help cover solid fuel costs - disappointed it isn't as green as he hoped and physically hard to bring fuel into house

John lives with his wife and describes themselves as 'empty nesters'. His wife has multiple sclerosis. He is employed as an office administrator while his wife is self-employed. They live in the northern part of mid Wales in an 'extremely rural area a mile up a track from the main road'.

The property is detached and owned outright. It's over 400 years old. They use a biomass wood pellet boiler for their heating. John says that he is 'not happy' with the system they have which was installed around 10 years ago. He explains that it's meant to be a green source of energy but that he doubts its credentials. His preference would be for a small wind turbine.

All the pellets seem to come from Northern Ireland or Scandinavia and come in 16 kilo big plastic bags that arrive on pallets all wrapped in plastic.

The system itself is not especially easy for John to use as he describes how he has to 'lug in eight tons of pellets in 15 kilo bags from the barn' which is 100 yards from the house throughout the winter and which therefore 'isn't much fun'. The fuel is delivered by a 'courier company' on a large truck. John has had issues with deliveries in the past, for example large amounts of pellets being dropped off the back of the truck and late deliveries. They haven't had to go without fuel but it was inconvenient having to wait in for the late delivery to be made.

John did make a complaint about the spilled fuel and the supplier paid to repair the damage to his property and also gave him a discount on the delivery. He found this process of making a complaint straightforward.

They didn't quibble, it was straightforward. We sent them photos of what they'd done.

They pay for the pellets 'up front' usually on a debit card. John's preferred payment method would be to pay monthly and spread the cost of the fuel more evenly. He wasn't offered this option and isn't aware that there are alternative ways of paying. He places orders online.

Thinking about the cost of the biomass system, John doesn't think it's very affordable. To pay for it, they use the money they make from letting out part of the house to tourists. It's been 'close' on a couple of occasions to get the money together to pay for the fuel but so far they haven't had to go without anything in order to pay for it. The recent letting activity now helps in this respect. He thinks that they probably do cut back on 'non-essential things like going out'.

Sometimes he'll make a larger purchase, for example in the summer, because he has shopped around and spotted a supplier offering a deal on pellets. Over the years John has swapped supplier three times. It hasn't posed any problems although on occasion a supplier may decline to deliver because of access concerns to the property which is 'up a mountain'.

There's no contracts or anything it's just like going shopping. It's pretty straightforward until they look at the map and realise where we live!

John has no idea whether the government could do more help him keep his home warm at an affordable price. He isn't sure how else the house could be kept warmer given its age, lack of a loft or cavities for insulating. They do have double glazing. Even so, he would definitely be interested in applying for grants if anything appropriate became available because of 'the uncertainty of employment and my wife's health condition'. John is aware of neighbours receiving financial help with similar systems.

Some of our neighbours have biomass boilers and they get grants for running them and we don't. Probably because we got our boiler installed too long ago.

Fuel suppliers, John thinks, could probably do more to help customers, for example by being more open to delivering to less accessible properties.

Being more realistic with their logistics and yes you can take eight tons of pellets up a mountain, even if the drivers don't usually like it. The good ones do.

Appendix VI

Mystery shopping pen portraits

BBQ01542 Citizens Advice / Citizens Advice Scotland

Off-Gas Households Research

Mystery Shopping Pen Portraits FINAL

Category:	LPG
Type of Fuel:	LPG (Propane)
Device:	Above ground tank – 2,000 litre capacity – located in garden Don't own the tank but know your mother is free to switch supplier (would have to find out name of current supplier / tank owner)
Type / Quantity of Fuel Required:	Price for 2,000 litres to fill tank
Usage:	For heating home and cooking
Delivery vehicle:	Standard tanker fine – no access issues
Background	
You're calling on behalf of your elderly mother, who's in her 80s, lives alone and is quite frail.	
You're looking for a new LPG supplier for her – she can switch suppliers as she's out of a contract.	
You don't know off the top of your head who her current supplier is but you know she's out of contract and is free to switch supplier	
She's not had an account with you before	

Category:	Heating Oil
Type of Fuel:	Heating Oil (Kerosene)
Device:	Above ground steel tank – 2,000 litre capacity – located in garden
Type / Quantity of Fuel Required:	1,000 litres
Usage:	For heating home and cooking
Delivery vehicle:	Standard tanker fine – no access issues

Background

You're calling on behalf of your elderly mother, who's in her 80s, lives alone and is quite frail.

You're looking for a new heating oil supplier for her – she wasn't happy with the service from the last one.

She's not had an account with you before.

Category: Solid Fuel - Coal

Type of Fuel: Household coal

Device: Multi fuel stove

Type / Quantity of Fuel Required: Half a tonne or 10 bags

Background

You're calling on behalf of your elderly mother, who's in her 80s, lives alone and is quite frail.

You're looking to buy some household coal

The coal is stored in a coal shed attached to the house

Category: Solid Fuel - Wood

Type of Fuel: Hardwood (or mixed) logs

Device: Wood burning stove

Type / Quantity of Fuel Required: A large bag (3 cubic metres or 2 cubic metres)

Background

You're calling on behalf of your elderly mother, who's in her 80s, lives alone and is quite frail.

You're looking to buy some hardwood logs

The wood is stored in a wood shed attached to the house

Appendix VII

Mystery shopping assessment form

Off-Gas Households Research

Mystery Shopping Scenario – FINAL

Country	_____	Time Started	_____
Assessment No.	_____	Time Ended	_____
Supplier Name	_____	Date	_____

Introduction:

Hello, I'm calling on behalf of my elderly mother to find out about buying some heating oil.

I want to find a new supplier for my mother and want to check a few things first because she's quite frail.

Have town / postcode ready in case asked – do not give house number or your mother's name however if asked to confirm exact address / details

ASSESSMENT FORM

A - PRICING

Q1. Firstly can you give me some information on your prices. What would the cost including VAT be for 1,000 litres?

Please write in details of pricing – be as specific and detailed as possible

Q2. Does this include delivery?

Yes ☐ No ☐

IF DOES NOT INCLUDE DELIVERY

Q3. What do you charge for delivery (including VAT)?

Please write in further details on delivery charges including any additional charges for out of hours / weekends /emergency deliveries – ensure these charges are quoted inclusive of VAT

Q4. Is there a minimum quantity we can order?

Yes ☐ No ☐

Please write in further details on what is said

B – DELIVERY

Q5. Can you please tell me about how you deliver (what days of the week / times and so on)?

Please write in further details on delivery options including days of week / times of day / out of hours / weekend / emergency delivery options

C - PAYMENT

Q6. Do we have to pay in full when we place the order or can we spread the cost?

Pay in full when place order only ☐ Spread the cost ☐

IF CAN SPREAD THE COST, LIST PAYMENT OPTIONS MENTIONED BELOW

Monthly payment plan (monthly direct debit) ☐

Quarterly direct debit ☐

Pay by credit card ☐

Other (please write in) ☐

Please write in full details on payment options and if they vary if first order/ repeat order

Q7. Do you work with any oil clubs in the area?

Yes ☐

No ☐

Please write in full details on what is said

D – VULNERABLE PERSONS PROTOCOL / SERVICE

Q8. My mother is nervous about letting strangers into the house so do you do anything that might help with this or have any special provisions in place for elderly customers generally?

Please write in what is said about provision for vulnerable customers – specifically if a password system for elderly people is mentioned

E – ACCREDITATION / TRADE ASSOCIATION MEMBERSHIP

NOT TO BE ASKED

Is the company a member of a trade association / accredited? (BASED ON REVIEW OF THEIR WEBSITE BEFORE THE CALL)

Yes ☐ No ☐ Not clear/don't know ☐ No website ☐

Q9. Do you have any kind of accreditation or are you a member of any trade body?

Yes ☐ No ☐

IF YES – TICK ACCREDITATION / TRADE ASSOCIATION/S MENTIONED

Approved Coal Merchants Scheme ☐

Approved Wood Merchants Scheme ☐

Federation of Petroleum Suppliers (FPS) ☐

The Solid Fuel Association ☐

UK Liquid Petroleum Gas (UKLPG) ☐

Other (please write in) ☐

Q10. What does this accreditation mean in practice for my mother?

Please write in what is said in full

Q11. Somebody told me the trade association has a customer code of practice or something like that? The reason I'm asking is that my mother is elderly and I wouldn't want her to be in a position where she runs out of [heating oil / LPG / coal or wood] in the winter or when the weather is bad.

Please write in what is said about the code of practice / customer charter / etc.

NOT TO BE ASKED

Did the company volunteer to send you a copy of the code of practice / customer charter or tell you where to find it (e.g. a website)?

Yes ☐ No ☐

Please write in further details on what is said

IF NO ACCREDITATION AT Q8

Q12. Some of the other suppliers I've spoken to say they've got accreditation or are members of a trade association. If you're not, will that cause any problems for my mother?

Please write in what is said in full

ASK ALL – WHETHER ACCREDITED / TRADE ASSOCIATION OR NOT

Q13. What should my mother do if something goes wrong? Is there a complaints procedure or anything?

Please write in what is said in full

CLOSE:

That's been really useful. Thanks very much for your time. I'll speak to my mother and we'll get back to you.

IF ASKED FOR YOUR / YOUR MOTHER'S DETAILS SAY:

I'd rather not give them at the moment as we're just shopping around for now to get any idea of what's available. We'll think about it and get back to you if we have any further questions or want to place an order.

Context / notes on call as a whole

Appendix VIII

Citizens Advice office questionnaire

Citizens Advice: Off-Gas Customer Survey

Case No.	Country	(1)
	England	1
	Wales	2



Citizens Advice are conducting a survey about how people across Great Britain heat their homes and how satisfied they are with the energy options available to them.

Part of this research is being conducted by an independent market research agency, Beaufort Research. Beaufort will be speaking to people across Great Britain living in homes that are not connected to the mains gas grid, who heat their homes using electricity only, kerosene heating oil, liquid petroleum gas (LPG) or solid fuel.

Part of the research will also be conducted by Citizens Advice Bureau Advisors: this questionnaire has been designed to be used with members of the public who attend Citizens Advice Bureaux in person, or call Bureaux asking for advice on issues related to living in off-gas homes.

HOW TO COMPLETE THE QUESTIONNAIRE

- Before completing the interview, it should be established that customers are living in homes that are **not connected to the mains gas network**, and heat their homes using electricity only, kerosene heating oil, liquid petroleum gas (LPG) or solid fuel.
- It should only be administered by staff that have been briefed and trained on the project, and should take around 15 - 20 minutes to complete.
- Please read the instructions for each question carefully – in some cases you will only have to mark one box for each question; in other cases you can tick more than one box if applicable, or write in more detailed comments.
- Please store the completed questionnaires in safe and secure place, and send these by Special Delivery to Delyth Jewell at Citizens Advice in Cardiff ('Trafalgar House', 5 Fitzalan Place, Cardiff CF24 0ED) by 5pm on 29th January 2016.
- Should you have any queries, please contact either Delyth Jewell at Citizens Advice Cymru (03000 231249) or Zoe Guijarro at Citizens Advice (England) (03000 231626) or Sarah McDonough at Beaufort Research can be contacted on 029 2037 6742.

Please use a black or blue pen.

Clearly mark the appropriate box with an ☒ rather than a ☐

If you make a mistake, shade in the box ☒ and then insert a cross in the correct box

Thank you.

SECTION A: ABOUT YOUR HOME

Firstly, some questions about your home.

Q1 What type of property do you live in?

Read out as necessary - please cross one box only

(2)

Terrace / end of terrace	<input type="checkbox"/> 1	Flat / apartment / maisonette – purpose built	<input type="checkbox"/> 6
Semi-detached house	<input type="checkbox"/> 2	Park (mobile) home	<input type="checkbox"/> 7
Detached house	<input type="checkbox"/> 3	Other (please write in below)	
Bungalow	<input type="checkbox"/> 4		
Flat / apartment / maisonette – converted building / house	<input type="checkbox"/> 5	Not answered	<input type="checkbox"/> N

Q2 Approximately how long ago was your home built?

Read out as necessary - please cross one box only

(3)

After 2002	<input type="checkbox"/> 1	1919 – 1944	<input type="checkbox"/> 5
1983 - 2002	<input type="checkbox"/> 2	Before 1919	<input type="checkbox"/> 6
1965 - 1982	<input type="checkbox"/> 3	Don't know	<input type="checkbox"/> 7
1945 – 1964	<input type="checkbox"/> 4	Not answered	<input type="checkbox"/> 8

Q3 Is your home...?

Read out options - please cross one box only

(4)

Owned outright with no mortgage	<input type="checkbox"/> 1	Shared ownership (part rent / part buy)	<input type="checkbox"/> 6
Owned with a mortgage	<input type="checkbox"/> 2	Other (please write in below)	
Rented from the Council	<input type="checkbox"/> 3		
Rented from a housing association / housing co-operative	<input type="checkbox"/> 4	Don't know	<input type="checkbox"/> M
Rented from a private landlord	<input type="checkbox"/> 5	Not answered	<input type="checkbox"/> N

SECTION B: HEATING YOUR HOME

Now some questions about heating your home.

Q4 Which of these methods do you mainly use to heat your home?

Read out options - please tick one box only

(5)

Electricity → GO TO Q5	<input type="checkbox"/> 1	Solid fuel (e.g. logs, wood pellets, wood chippings, coal and coke)	<input type="checkbox"/> 4
Kerosene heating oil	<input type="checkbox"/> 2	IF USE KEROSENE, LPG OR SOLID FUEL, GO TO SECTION C	
Liquid petroleum gas (LPG)	<input type="checkbox"/> 3		

ASK IF CUSTOMER HEATS THEIR HOME MAINLY USING ELECTRICITY AT Q4

Q5

How do you pay for your electricity?

Read out options – please cross one box only

(6)

Monthly direct debit	<input type="checkbox"/> 1	Pay directly to local authority / housing association	<input type="checkbox"/> 5
Quarterly bill that you pay when it arrives	<input type="checkbox"/> 2	Other (please write in below)	
Pre-payment meter	<input type="checkbox"/> 3	_____	
Smart Card / Pre-payment card (using Post Office / Paypoint)	<input type="checkbox"/> 4	Don't know	<input type="checkbox"/> M
		Not answered	<input type="checkbox"/> N

⇒ **NOW SKIP TO SECTION D**

SECTION C: HEATING YOUR HOME WITH OIL, LPG OR SOLID FUEL

Q6

How do you pay for your heating fuel?

Read out options – please cross one box only

(7)

By instalment at monthly intervals	<input type="checkbox"/> 1	Other (please write in below)	
By instalment at other intervals	<input type="checkbox"/> 2	_____	
In-full and in advance (when you purchase your fuel)	<input type="checkbox"/> 3	Don't know	<input type="checkbox"/> M
In full and in arrears (after you have purchased your fuel)	<input type="checkbox"/> 4	Not answered	<input type="checkbox"/> N

ONLY ASK IF KEROSENE OIL USED TO HEAT HOME AT Q4

Q7

Are you a member of an oil buying club or syndicate?

Please cross one box only

(8)

Yes	→ GO TO Q8	<input type="checkbox"/> 1
No		<input type="checkbox"/> 2
Don't know	→ GO TO SECTION D	<input type="checkbox"/> 3
Prefer not to say		<input type="checkbox"/> 4

ONLY ASK IF A MEMBER OF AN OIL CLUB / SYNDICATE AT Q7

Q8

Are there any advantages or disadvantages of being a member of an oil club / syndicate?

Please write in comments in the box below

(9-12m)

SECTION D: ISSUES WITH HEATING YOUR HOME

Turning to issues with heating your home.

Q9 Generally speaking, to what extent do you agree or disagree that you are able to heat your home to a comfortable temperature?

Read out options – please cross one box only

(15)

Agree strongly	→ GO TO Q11	<input type="checkbox"/> 1
Agree		<input type="checkbox"/> 2
Disagree	→ GO TO Q10	<input type="checkbox"/> 3
Disagree strongly		<input type="checkbox"/> 4
Don't know	→ GO TO Q11	<input type="checkbox"/> 5
Not answered		<input type="checkbox"/> 6

ONLY ASK IF DISAGREE AT Q9

Q10 Why are you unable to heat your home to a comfortable temperature?

Do not read out options – please cross as many boxes as apply

(16-19m)

Heating costs too much	<input type="checkbox"/> 1	Other (please write in below)	
Poor insulation	<input type="checkbox"/> 2		
House is large / many rooms to heat	<input type="checkbox"/> 3	Don't know	<input type="checkbox"/> M
Poor / inefficient heating system	<input type="checkbox"/> 4	Not answered	<input type="checkbox"/> N

ASK ALL

Q11 Have you ever been in a situation where you were unable to heat your home or left without heating fuel?

Please cross one box only

(20)

Yes	→ GO TO Q12	<input type="checkbox"/> 1
No		<input type="checkbox"/> 2
Don't know	→ GO TO Q14	<input type="checkbox"/> 3

ONLY ASK IF YES AT Q11

Q12 Why were you unable to heat your home or left without fuel?

Do not read out options – please cross as many boxes as apply

(21-24m)

Couldn't afford to pay supplier	<input type="checkbox"/> 1	Heating broke down	<input type="checkbox"/> 6
Couldn't get money onto pre-payment card / key	<input type="checkbox"/> 2	Other (please write in below)	
Lost pre-payment card / key	<input type="checkbox"/> 3		
Paying off fuel debt	<input type="checkbox"/> 4	Don't know	<input type="checkbox"/> M
Fuel supplier was unable to deliver	<input type="checkbox"/> 5	Not answered	<input type="checkbox"/> N

ONLY ASK IF YES AT Q11

Q13 What, if anything, did you do when you were unable to heat your home or left without fuel?

Do not read out options – please cross as many boxes as apply

(30-33m)

Applied for a loan	<input type="checkbox"/> 1	Other (please write in below)	
Asked friends / family for financial help	<input type="checkbox"/> 2		
Went without fuel	<input type="checkbox"/> 3	Don't know	<input type="checkbox"/> M
Relied on secondary heating	<input type="checkbox"/> 4	Not answered	<input type="checkbox"/> N

ASK ALL

Q14 Do you ever do any of the following to supplement your heating system to stay warm?

Read out options – please cross as many boxes as apply

(34-37m)

Wear extra clothes / blankets	<input type="checkbox"/> 1	Other (please write in below)	
Stay in certain heated rooms / parts of the home	<input type="checkbox"/> 2		
Use other heaters in addition to main heating system	<input type="checkbox"/> 3	Don't know	<input type="checkbox"/> M
		Not answered	<input type="checkbox"/> N

Q15 To what extent do you agree or disagree that you have been caused discomfort, ill health or financial problems as a result of the way in which you heat your home?

Read out options – please cross one box only

(38)

Agree strongly	<input type="checkbox"/> 1
Agree	<input type="checkbox"/> 2
Disagree	<input type="checkbox"/> 3
Disagree strongly	<input type="checkbox"/> 4
Don't know	<input type="checkbox"/> 5
Not answered	<input type="checkbox"/> 6

SECTION E: SWITCHING SUPPLIERS

Turning quickly to switching energy suppliers and tariffs.

ASK IF CUSTOMER HEATS THEIR HOME MAINLY USING ELECTRICITY AT Q4

Q16 How many times have you ever switched your heating energy supplier, during the period you have lived in your current home, if at all?

Read out as necessary – please cross one box only

(39)

Never	<input type="checkbox"/> 1	Four times	<input type="checkbox"/> 5
Once	<input type="checkbox"/> 2	Five times or more	<input type="checkbox"/> 6
Twice	<input type="checkbox"/> 3	Don't know	<input type="checkbox"/> 7
Three times	<input type="checkbox"/> 4	Not answered	<input type="checkbox"/> 8

ASK IF CUSTOMER HEATS THEIR HOME MAINLY USING KEROSENE, LPG OR SOLID FUEL AT Q4

Q17 How many times have you ever switched your heating energy tariff, during the period you have lived in your current home, if at all?

Read out as necessary – please cross one box only

(45)

Never	<input type="checkbox"/> 1	Four times	<input type="checkbox"/> 5
Once	<input type="checkbox"/> 2	Five times or more	<input type="checkbox"/> 6
Twice	<input type="checkbox"/> 3	Don't know	<input type="checkbox"/> 7
Three times	<input type="checkbox"/> 4	Not answered	<input type="checkbox"/> 8

SECTION F: SERVICE FROM YOUR ELECTRICITY / FUEL SUPPLIER

Now some questions about the service you receive from your electricity / fuel supplier.

Q18 Have you ever made a complaint or ever wanted to make a complaint about the service received from your electricity / fuel supplier?

Please cross one box only

(46)

Yes – made a complaint	→ GO TO Q19	<input type="checkbox"/> 1
Yes – wanted to make a complaint but didn't	→ GO TO Q20	<input type="checkbox"/> 2
No		<input type="checkbox"/> 3
Don't know	→ GO TO Q21	<input type="checkbox"/> 4

ONLY ASK IF MADE A COMPLAINT AT Q18

Q19 What was the outcome of your complaint?

Please write in comments in the box below

(47-50m)

ONLY ASK IF NOT MADE A COMPLAINT AT Q18

Q20 If you have not made a complaint to your electricity / fuel supplier, why was this?

Do not read out options - please cross as many boxes as apply

(51-54m)

No need to	<input type="checkbox"/> 1
Did not know I could complain	<input type="checkbox"/> 2
Did not know how to complain	<input type="checkbox"/> 3
Did not think it would be worth it	<input type="checkbox"/> 4

Other reason – please write in below

Don't know / can't remember	<input type="checkbox"/> M
Not answered	<input type="checkbox"/> N

ASK ALL

Q21 Is anyone in your household.....?

Read out options – please cross as many boxes as apply

(60-61m)

Under 5 years old	<input type="checkbox"/> 1	Living with an illness that is affected by warmth	<input type="checkbox"/> 6
Of pensionable age (65 and older)	<input type="checkbox"/> 2	Pregnant	<input type="checkbox"/> 7
Disabled or chronically sick	<input type="checkbox"/> 3	IF ANY BOXES 1-7 TICKED, GO TO Q22 or Q23	
Living with a visual or hearing impairment	<input type="checkbox"/> 4	No – none of these	<input type="checkbox"/> 8
	<input type="checkbox"/> 5	Not answered	<input type="checkbox"/> 9

→ GO TO SECTION G

ONLY ASK IF BOXES 1-7 CROSSED AT Q21 AND HOME HEATED BY ELECTRICITY

Q22 Has your electricity supplier made you aware of the Priority Services Register?

Please cross one box only

(62)

Yes	<input type="checkbox"/> 1
No	<input type="checkbox"/> 2
Don't know	<input type="checkbox"/> 3

ONLY ASK IF BOXES 1-7 CROSSED AT Q21 AND HOME HEATED BY KEROSENE, LPG OR SOLID FUEL

Q23 Has your heating fuel supplier made you aware of its protocol for vulnerable persons?

Please cross one box only

(63)

Yes	<input type="checkbox"/> 1
No	<input type="checkbox"/> 2
Don't know	<input type="checkbox"/> 3

SECTION G: SEEKING ADVICE AND HELP WITH HEATING

Moving on to seeking advice and help with heating your home.

Q24 Have you ever sought any advice relating to the following?

Read out options – please cross as many boxes as apply

(64-65m)

Your heating system	<input type="checkbox"/> 1	How to reduce your energy bills	<input type="checkbox"/> 5
How to use your heating controls	<input type="checkbox"/> 2	No – none of these	<input type="checkbox"/> 6
How to heat your home	<input type="checkbox"/> 3	Don't know	<input type="checkbox"/> 7
Improving the energy efficiency standards of your home	<input type="checkbox"/> 4	Not answered	<input type="checkbox"/> 8

Q25 **Have you ever applied for help with your heating costs using any of the following?** (70-73m)
Read out options – please cross all boxes that apply

A grant for insulation, boiler or heating system, or other energy efficiency improvements (***please give details of other improvements in the box below***) ☐ 1

A grant towards paying a fuel bill from a charitable trust ☐ 2

A loan towards paying a fuel bill, for example from a bank, loan company or credit union ☐ 3

Any other help with heating costs (***please give details in the box below***) ☐ 4

IF TICKED ANY BOXES ABOVE, GO TO Q26

No – none of these ☐ 5

Don't know ☐ 6

Not answered ☐ 7

→ GO TO SECTION H

ONLY ASK IF APPLIED FOR HELP AT Q25

Q26 **Was your application for help successful?** (74)
Please cross one box only

Yes **→ GO TO Q27** ☐ 1

No ☐ 2

Don't know / can't remember **→ GO TO SECTION H** ☐ 3

Not answered ☐ 4

ONLY ASK IF YES AT Q26

Q27 **Please can you tell me about the help you received? PROBE FOR DETAILS**

Please write comments in the boxes provided

Please give details of the help you received from a fuel company scheme (usually referred to as Affordable Warmth or Energy Company Obligation), Nest, Arbed (75-78m)

Please give details of the charitable trust that gave you help (79-82m)

Please give details of the loan provider you used (83-86m)

SECTION H: RENEWABLE TECHNOLOGIES

Now a quick question about renewable technologies.

Q28 Have you ever considered using renewable (green) technology to heat your home? For example, solar panels on the roof (for hot water or electricity), biomass heaters / boilers, heat pumps?

Please cross one box only

(90)

Yes	<input type="checkbox"/>	1
No	<input type="checkbox"/>	2
Don't know	<input type="checkbox"/>	3
Never heard of renewable technology	<input type="checkbox"/>	4
Not answered	<input type="checkbox"/>	5

SECTION I - ABOUT YOU AND YOUR HOUSEHOLD

Finally, some questions about you and your household.

Q29 Gender

Please cross one box only

(91)

Male	<input type="checkbox"/>	1
Female	<input type="checkbox"/>	2
Not answered	<input type="checkbox"/>	3

Q30 What is your age?

Please cross one box only

(92)

16-24	<input type="checkbox"/>	1	55-64	<input type="checkbox"/>	5
25-34	<input type="checkbox"/>	2	65-74	<input type="checkbox"/>	6
35-44	<input type="checkbox"/>	3	75+	<input type="checkbox"/>	7
45-54	<input type="checkbox"/>	4	Not answered	<input type="checkbox"/>	8

Q31 What is your employment status?

Please cross one box only

(93)

Working full time (30+ hours per week)	<input type="checkbox"/>	1	Wholly retired	<input type="checkbox"/>	6
Working part time (less than 30 hours per week)	<input type="checkbox"/>	2	Looking after the home	<input type="checkbox"/>	7
Self-employed	<input type="checkbox"/>	3	Carer	<input type="checkbox"/>	8
Unemployed / seeking work	<input type="checkbox"/>	4	Other permanently not working	<input type="checkbox"/>	9
Full-time student	<input type="checkbox"/>	5	Prefer not to say	<input type="checkbox"/>	A

Q32 Can you please tell me the occupation of the Chief Income Earner in your household? The Chief Income Earner is the member of the household with the largest income, whether from employment, pension state benefits, investments or any other source, The person can be of either sex.

Please write in below

Actual job:

Position:

OFFICE
USE
ONLY

AB

☐ 1

C2

☐ 3

C1

☐ 2

DE

☐ 4

Prefer not to say

☐ 5

(99)

Q33 Do you, or does somebody else in your house have any long term illness, health problem or disability that limits your / their daily activities or the work that you / they do?
Please cross as many boxes as apply

(100m)

Yes - customer

☐ 1

Yes – other member/s of the household

☐ 2

No

☐ 3

Prefer not to say

☐ 4

Q34 For analysis purposes, could you please tell us your postcode?
Please write in below

(101)

(102)

(103)

(104)

(105)

(106)

(107)

Q35 Do you have any other comments you would like to make about any issues you might have with heating your home?
Please write in comments in the box below

(108-111m)

SECTION J - FUTURE CONSULTATION

Would you be willing to be re-contacted by Citizens Advice in future to discuss your answers in more detail? By saying yes now, you are not committing yourself to taking part in any future research. Please be assured that your name and contact details will not be passed on to any third parties.

(112)

Happy to be contacted again

Yes

☐

1 → complete all contact details below

No

☐

2 → complete postcode only (for analysis)

Full Name:					Address:												
(Miss/Mrs/Ms/Mr/Dr)					Postcode:												
Tel. No:																	
Mobile:																	

NOTES ON CONTACT DETAILS: Please remove this sheet of the questionnaire before sending to Beaufort Research – they are not to receive contact details of customers.

NOTES ON HOW TO COMPLETE Q32:

In order for Beaufort to be able to determine a customer's social class, we need to look at a combination of their working status, their job role and their responsibilities within that role (i.e. their level of responsibility).

So, for example:

If someone is a manager – how many staff do they manage?

If someone is self-employed – do they employ any other staff?

If someone is retired – what was their previous job or are they only receiving state benefits?

Basically – we need as much information as possible to determine whether a customer is working in a high level professional job, a skilled job, a semi-skilled job or an unskilled job.

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