

# Research Report

Living without mains  
gas: *GB overview  
report*



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## Executive summary

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### Background and objectives

Citizens Advice and Citizens Advice Scotland are the statutory consumer watchdogs for energy consumers in Great Britain. These 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 consumers without access to mains gas to heat their homes ('off-gas' consumers); in particular, whether the off-gas market (comprising of electricity, heating oil, liquid petroleum gas [LPG] and solid fuel) is working in their best interests. Consumers not connected to mains gas face a number of possible disadvantages compared with those who are; 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 need evidence about these consumers to develop policy and advocacy.

### Method

Consequently, Beaufort was commissioned to carry out a telephone survey of consumers without access to mains gas in Wales, England and Scotland, supplemented by a series of follow-up depth interviews. In addition, mystery shopping assessments of a cross-section of non-metered fuel suppliers in Wales, England and Scotland were conducted, to examine consumer payment options, suppliers' trade association membership and adherence to voluntary codes of practice. Analysis of data was also carried out on surveys by local Citizens Advice in Wales and England with clients in off-gas households.

Fieldwork was conducted between 5 January and 17 March 2016.

This report provides an overview of the key findings across all three GB nations: England, Scotland and Wales, and focuses on the core telephone survey results and mystery shopping assessments. Separate reports which provide more detailed results from all four research elements are available for each nation.

## Key findings

- **Payment in full on delivery of fuel is by far the most common payment method used by non-metered off-gas consumers in all three GB countries:** off-gas consumers in England are more likely to pay in full on delivery and less likely to use direct debit payments than their counterparts in Wales and Scotland, although no differences in suppliers' payment options were evident by nation in the mystery shopping calls
- **Satisfaction with payment methods is high in the market:** while only a small minority of off-gas consumers is dissatisfied with the choice of payment options offered by suppliers, dissatisfaction is higher in England than in other GB nations
- **Estimated fuel costs are higher in Scotland than for other GB nations:** off-gas consumers in Scotland estimate they spend £105 a month on fuel, compared with monthly averages of £86 in England and £95 in Wales
- **Suppliers' prices vary a good deal in the market:** prices quoted for heating oil in each nation differ by as much as 30-40%; in general, prices for heating oil in Scotland are higher than those quoted in England or Wales
- **Over 80 per cent of off-gas consumers in each country regard their current method of heating their home to be affordable, but only a minority feel it is 'very affordable':** those living in Scotland (who currently pay the most for fuel) are most likely to say their current heating system is not affordable
- **The great majority of non-metered fuel consumers in each GB nation is satisfied with their suppliers' delivery options:** but England has the lowest proportion of consumers saying they are very satisfied with delivery methods, and the highest minority expressing dissatisfaction with them
- **Satisfaction with their method of heating their home is generally high and is higher in Wales than in other GB countries:** levels of dissatisfaction are low and are consistent across the three nations
- **Most off-gas consumers consider their heating system to be easy to use:** no real differences by country are evident
- **Satisfaction with the quality of service provided by fuel suppliers is high across all GB nations:** dissatisfaction is low, but higher in England and Wales (at 7 per cent) than in Scotland (3 per cent)
- **The proportion of off-gas consumers that has ever made a complaint about their supplier's service is small, ranging from 8 per cent (in Wales) to 13 per cent (in England):** the great majority have never made a complaint nor wanted to make one
- **Between 33 per cent and 49 per cent of off-gas consumers in each country have switched fuel supplier:** switching is highest in England and lowest in Scotland

- **Although switching levels are low, the great majority of off-gas consumers in each country perceive it to be easy to change fuel supplier:** only around one in ten feels it is difficult to do so
- **Awareness of supplier trade association membership is low across all three GB nations:** but lowest overall in Scotland, where only 18 per cent of non-metered fuel users know their supplier is a member of a trade association
- **Non-metered fuel suppliers in Scotland are less likely than suppliers in England and Wales to say they belong to a trade association:** just over half of those contacted in England and Wales say they have some sort of accreditation or membership compared with only 4 of the 24 approached in Scotland
- **None of the fuel suppliers contacted in any GB country made any specific reference to a vulnerable persons' protocol:** many of those approached offered some informal help or service provision which took the customer's age and circumstances into account, however
- **Familiarity with oil clubs varies markedly by country:** only 35 per cent of heating oil users in Scotland has heard of oil clubs, compared with 55 per cent in England. Membership of oil clubs is lower in Scotland than in England or Wales, while those in Scotland are also least likely to be interested in the idea of joining an oil club
- **Around eight in ten off-gas consumers in each GB nation say they know something about the use of renewable (green) technologies for heating homes:** those living in England and Wales are more likely to consider using such methods in future than those living in Scotland
- **Knowledge of any grants or financial help available for people who don't have mains gas to heat their home is low across all GB countries:** when prompted, familiarity with energy efficiency schemes is highest in Wales and lowest in England
- **Around one in five off-gas consumers in England and Wales has applied to a scheme to help improve the energy efficiency of their home, but Scotland has the highest level of applications (at 27 per cent)**

## Conclusions and recommendations

Non-metered off-gas consumers in England are more likely to pay in full on delivery and less likely to spread fuel payments than their counterparts in Scotland and Wales. It is perhaps, therefore, unsurprising that dissatisfaction with payment methods is higher in England than in other GB countries (albeit only a minority are dissatisfied). Likewise, although satisfaction with delivery options offered by non-metered fuel suppliers is generally high, consumers in England are less satisfied with delivery methods than consumers in Scotland or Wales. There is nothing in the mystery shopping assessments that suggests any differences in the payment options or delivery service offered by suppliers in England to explain this.

Off-gas consumers in Scotland are paying more for their fuel than off-gas consumers in England and Wales (around 20% more on average than England and around 10% more than Wales). This may have contributed to the finding that Scottish off-gas consumers are most likely to say their current heating system is not affordable, yet they are also less likely to have changed supplier than those living in other GB countries and less likely than English off-gas consumers to have made a complaint to their energy supplier. This implied inertia or lack of engagement with energy suppliers is perhaps a factor in their higher fuel costs and suggests that efforts should continue to be made to encourage consumers in Scotland to shop around for the best fuel deals.

Also contributing to the higher fuel prices being paid by consumers in Scotland could be the low awareness and membership of oil clubs displayed in the survey among heating oil users there. No difference was evident in the research in the proportion of heating oil suppliers in Scotland saying they worked with oil clubs, however. At the same time, interest in joining an oil club is lower among heating oil users in Scotland than in England or Wales, suggesting that more publicity and information about oil clubs and their benefits would be useful to help consumers there make an informed choice and overcome possible reservations about joining one.

Off-gas consumers in England are much more likely to have made a complaint to a supplier and to have switched energy supplier than counterparts in Scotland and Wales. Heating oil users in England also display the highest awareness and membership of oil clubs of any country. The higher levels of engagement, switching and shopping around by consumers in England could partly explain the lower prices being paid for fuel there.

While trade associations have a low profile in the non-metered fuel market across all three GB nations, their profile is lower in Scotland than in England or Wales – fewer suppliers in Scotland say they are accredited and fewer consumers there are able to say whether their supplier is a member of a trade association than is the case in the other two countries. This suggests that accreditation has a lower perceived value in Scotland than in other GB nations.

Knowledge of any grants or financial assistance available for people who don't have mains gas to heat their home is very low across all GB countries, but particularly so in England, where 57 per cent of off-gas consumers have not heard of any energy efficiency scheme. Applications for financial help from such schemes are, however, at a similar level in England to Wales (where awareness is highest). This indicates that there is no difference in demand and suggests that more marketing and promotion of energy efficiency schemes and their eligibility criteria would be beneficial in helping those in need of assistance in England to apply. Scotland has the highest proportion of applicants to energy efficiency schemes, so this does not appear to be an issue here.



## 1. Background and objectives

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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 of 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 to 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;<sup>1</sup> 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-only or LPG are more likely to live on low incomes. They also tend to have fewer, less flexible payment options

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<sup>1</sup> 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:

<b>Table 1: Breakdown of off-gas market</b>	
Fuel type	% of off-gas market
Kerosene heating oil	54
Electricity	27 <sup>2</sup>
Solid fuel (wood chips, pellets or logs; coal; coke)	10
Liquid Petroleum Gas (LPG) supplied in bulk and in cylinders	9 <sup>3</sup>

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 schemes<sup>4</sup>
- 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 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.

<sup>2</sup> UKLPG: *Review of Current Regulatory Framework for LPG in Great Britain* (June 2014), p.1

<sup>3</sup> Data taken from Off-Grid Energy Market Study (Office for Fair Trading, October 2011) [http://webarchive.nationalarchives.gov.uk/20140402142426/http://www.oft.gov.uk/shared\\_offt/market-studies/off-grid/OFT1380.pdf](http://webarchive.nationalarchives.gov.uk/20140402142426/http://www.oft.gov.uk/shared_offt/market-studies/off-grid/OFT1380.pdf)

<sup>4</sup> 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.

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 programme of consumer research involving a telephone survey and follow-up depth interviews, supplemented by a series of mystery shopping assessments and the analysis of data from interviews conducted by Citizens Advice.

Specific objectives of the telephone survey element of the project were as follows:

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, as well as whether they were successful

Objectives of the mystery shopper calls were 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
- The extent to which suppliers offer flexible payment options to customers, such as direct debits

**This report compares key results from the telephone survey and mystery shopper calls across England, Scotland and Wales. Separate reports detail results from all four research elements for each nation individually.**

## 2. Methodology overview

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### 2.1 Overview of approach

The project consisted of three distinct audiences: firstly, consumers living in off-gas households in England, Scotland and Wales; secondly, suppliers of non-metered fuels in England, Scotland and Wales; lastly, a sample of enquirers/clients of local Citizens Advice offices in England and Wales. 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.

This GB overview report focuses on the results from the telephone survey and mystery shopping assessment across the three nations. Detailed findings from all research elements are provided for each country in the individual nation reports.

## 2.2 Consumer telephone survey of off-gas households

For the consumer survey a total of 1,004 adults living in off-gas households in England, Scotland and Wales were interviewed by telephone. All lived in areas 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 each nation with a high penetration of off-gas consumers. The geographic area used for sampling was Lower Layer Super Output Area (LSOA)<sup>5</sup> in England and Wales, and Data Zone<sup>6</sup> in Scotland, with sample (Random Digit Dialling or RDD telephone numbers) purchased at LSOA or Data Zone 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.

Interviews in each nation lasted for 12-13 minutes on average and were based on a structured questionnaire (see Appendix I). Survey fieldwork ran from 5 January to 24 February 2016, with an initial pilot phase to test questionnaire length and participant comprehension in late December 2015.

## 2.3 Follow on depth interviews

Following the completion of the quantitative survey, a total of 60 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.

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<sup>5</sup> 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.

<sup>6</sup> The data zone is the key small-area statistical geography in Scotland. The data-zone geography covers the whole of Scotland and nests within local authority boundaries. Data zones are groups of 2011 Census output areas and have populations of between 500 and 1,000 household residents. Where possible, they have been made to respect physical boundaries and natural communities. They have a regular shape and, as far as possible, contain households with similar social characteristics.

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 depth interviews 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 across all nations took place between 16 February and 17 March 2016.

## **2.4 Supplier mystery shopping**

A series of mystery calls were made by telephone to a sample of 72 non-metered fuel suppliers in England, Scotland and Wales, with callers using 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 Appendices II and III).

The 72 assessments were broken down by fuel type as follows:

- 30 with heating oil suppliers
- 30 with solid fuel suppliers (half coal and half wood)
- 12 with LPG suppliers

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.

## **2.5 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 England and Wales. Interviews were administered face-to-face by Citizens Advice staff and were based on a structured questionnaire. A total of 193 questionnaires were completed and analysed.

The methods used for the recruitment of consumers for the survey varied but often involved prior contact with a local Citizens Advice office, so this sample cannot be described as representative of all off-gas consumers.

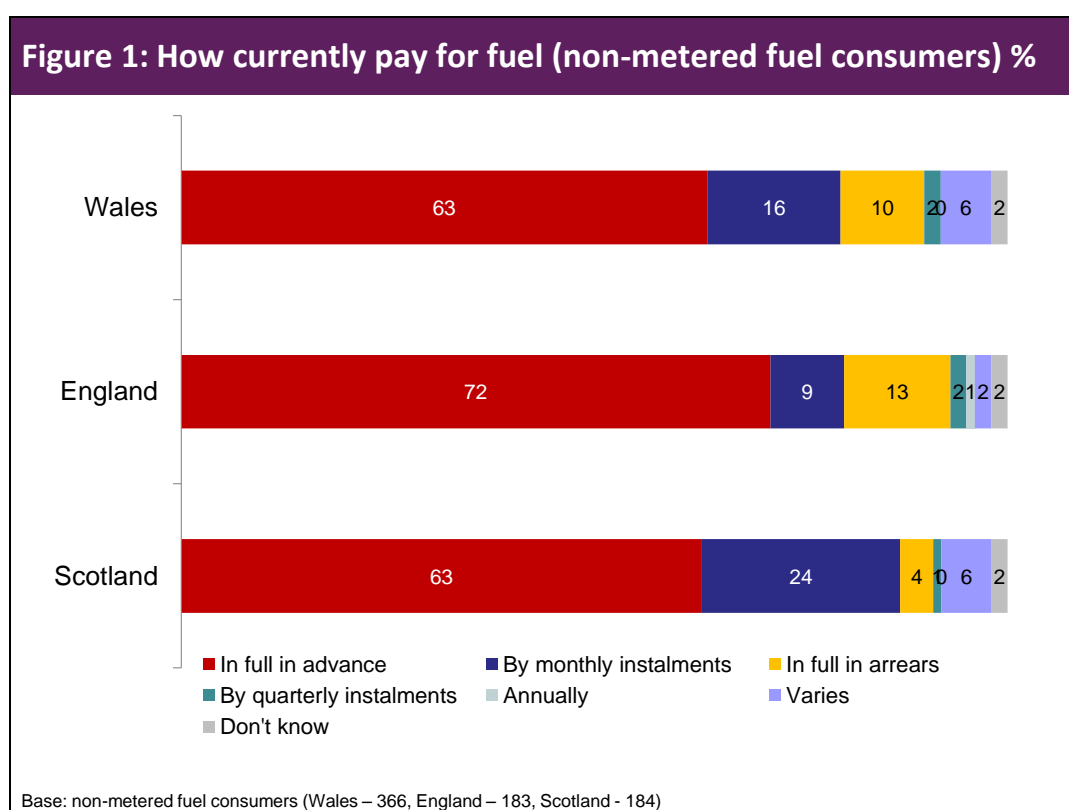
Questionnaires across both nations were completed between late December 2015 and late February 2016.

### 3. Key research findings

#### 3.1 Payment and payment issues

Payment in full on delivery of fuel is by far the most common payment method used by non-metered off-gas consumers across all GB countries. Only a small minority spread their fuel payments using monthly or quarterly direct debit plans (see figure 1 below).

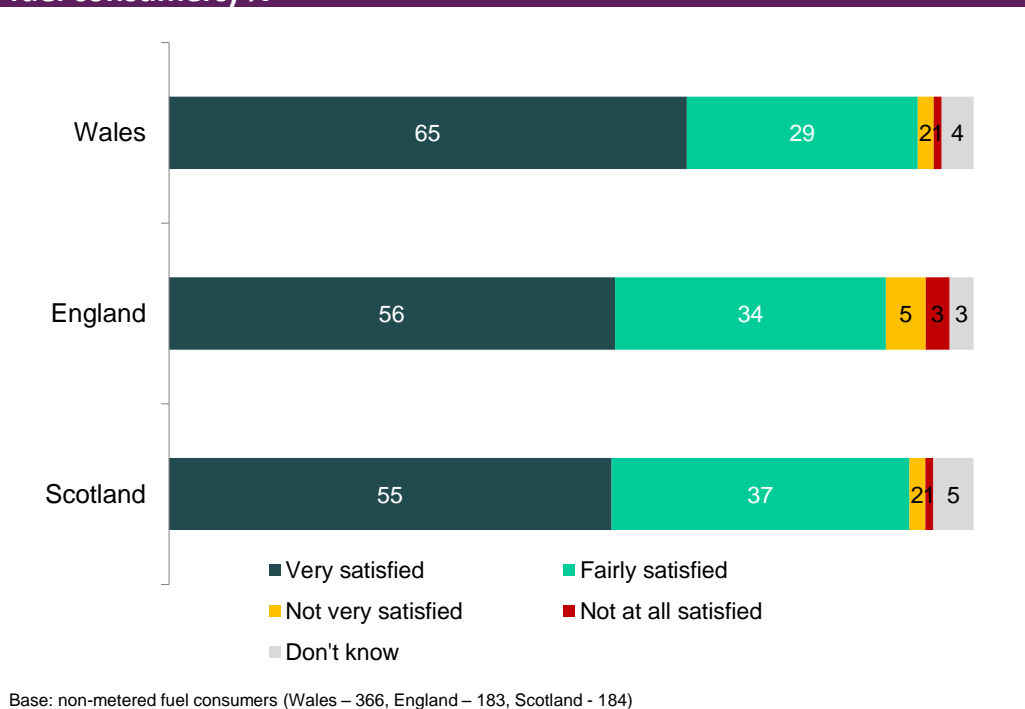
Off-gas consumers in England are most likely to pay in full on delivery (72 per cent compared to 63 per cent in Wales and Scotland) and are less likely than those living in Wales and Scotland to use direct debits.



The great majority of non-metered fuel consumers across all three GB nations are satisfied with the payment methods available to them – satisfaction ranges from 94 per cent in Wales (with 65 per cent ‘very satisfied’) to 90 per cent in England (with 56 per cent ‘very satisfied’).

Although levels of dissatisfaction are generally low, they are higher among non-metered off-gas consumers in England (where 8 per cent are either ‘very’ or ‘fairly’ dissatisfied with fuel payment options) than in Wales or Scotland (at 3 per cent respectively).

**Figure 2: Satisfaction with payment methods available (non-metered fuel consumers) %**



### **Mystery shopping – payment options**

Non-metered fuel suppliers were asked whether the customer would have to pay in full when the order was placed or if the cost could be spread. No differences in payment options were evident by nation, although they varied markedly by fuel type.

Payment in full on ordering is the norm among heating oil suppliers across all three GB nations, although a proportion in each country do offer more flexibility in payment methods on subsequent orders. In contrast, the great majority of LPG suppliers across all three countries (who often require customers to sign up to a contract) said it is possible to spread the cost of the fuel, offering payment plans with fixed or variable direct debits. Less flexibility in terms of payment options is offered by solid fuel suppliers – almost all of those contacted in each nation require payment in full on ordering or delivery of the fuel. Only a small minority (higher in Scotland than in England or Wales) give customers the option of paying monthly or quarterly after the first order, either via direct debit or by an invoice at the end of the month.



### 3.2 Expenditure on fuel and affordability

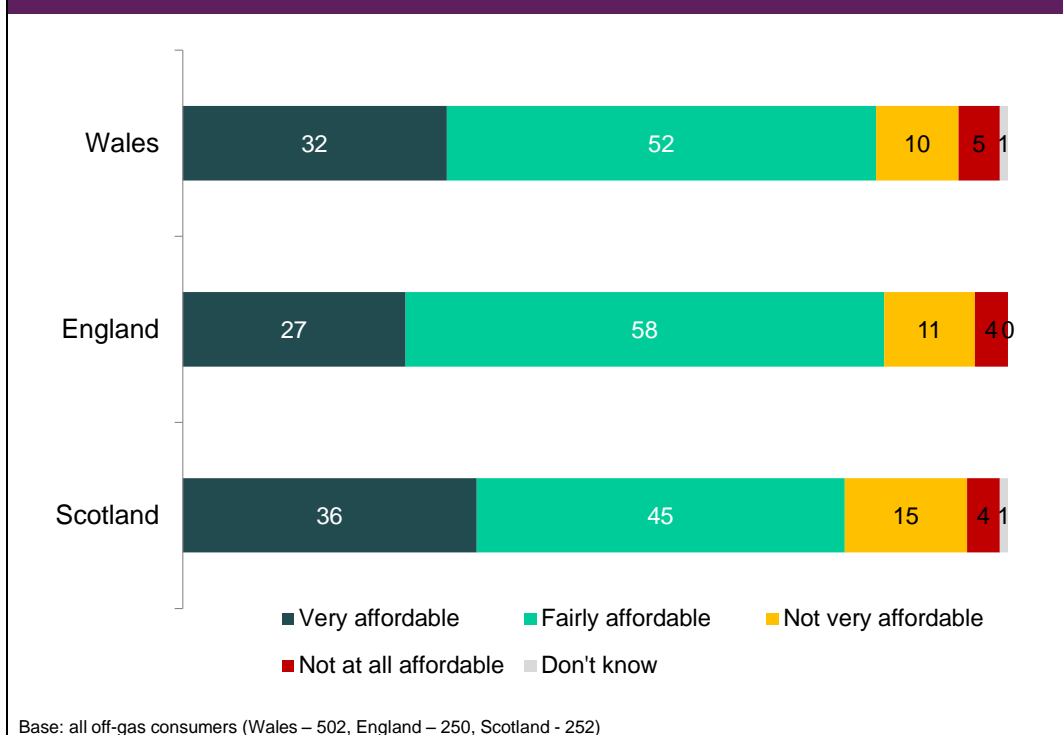
Estimates of average monthly fuel costs given by off-gas consumers interviewed in each country ranged from £86 per month (in England) to £105 per month (in Scotland) (see table 1 below):

Table 1: Estimates of fuel costs by nation		
Mean cost (rounded to nearest £)	Monthly cost £	Annual cost £
Wales (base: 502)	95	1,138
England (base: 250)	86	1,036
Scotland (base: 252)	105	1,254

Looking at perceptions of affordability, while over 80 per cent of off-gas consumers in each GB nation regard their current method of heating their home to be affordable, only a minority feel it is ‘very affordable’.

Those in England are least likely to regard their current fuel system to be ‘very affordable’, with 27 per cent saying this, compared with 32 and 36 per cent in Wales and Scotland. At the same time, off-gas consumers in Scotland are most likely to feel their current method of heating their home is not affordable (at 19 per cent, compared with 15 per cent in the other two nations). This reflects the higher estimates of fuel costs given by those interviewed in Scotland.

**Figure 3: Affordability of current method of heating home %**



### **Mystery shopping – pricing and variations in the market**

Wide variations in prices are quoted by fuel suppliers in each GB nation. While most suppliers have a minimum order, how this is defined also varies between suppliers.

#### **Heating oil suppliers**

Prices quoted by heating oil suppliers varied more than costs quoted for other types of fuels. The quotes (including VAT) for 1,000 litres of kerosene ranged from £240 to £305 in England, £256 to £341 in Scotland, and £230 to £315 in Wales. All assessments were made within 2-3 weeks of each other<sup>7</sup>.

All prices quoted included delivery and all had a minimum order quantity. This was most commonly 500 litres of heating oil across all three countries, although a few smaller suppliers had minimum orders of 100, 200 or 250 litres. Some pointed out that prices for smaller quantities would be higher, with discounted rates available for orders of 800 or 1,000 litres or above.

<sup>7</sup> Pilot fieldwork was conducted on 13 January 2016, with main fieldwork between 25 January to 1 February 2016

## **LPG suppliers**

Information on LPG prices varied but no pattern was evident by nation – some companies mentioned the requirement to take out a contract and provided information on the cost of tank hire and other details, while others did not. Those who mentioned contracts commonly offered the customer fixed prices in year one, with a price increase (sometimes capped) in year two of the contract. Others quoted flat rates per litre of fuel that ranged between 32p plus VAT (in England and Wales) to 39p plus VAT (in Scotland and Wales).

Charges quoted for tank rental varied between £40 and £67 per annum or between £13 and £16 per quarter. No differences in prices were evident by GB nation.

A few suppliers in Scotland and Wales mentioned promotions available to new customers, for example £250 worth of fuel for switching or £100 worth of credit to be spent on fuel in their first twelve months. No price promotions or incentives were mentioned by the companies contacted in England.

All prices quoted for the scenario amount of 2,000 litres included delivery, but some suppliers said a delivery charge of £50 would be incurred on smaller orders of less than 900 or 1,000 litres.

## **Solid fuel suppliers**

Prices for coal varied considerably by supplier across each nation and were sometimes provided in varying weights, making price comparisons very difficult, especially for England. In Scotland prices quoted for half a tonne of coal ranged between £130 to £160 including VAT (for Scottish coal) to £160 to £182 including VAT (for other types of coal), while in Wales quotes for this quantity of household coal ranged between £150 to £193 including VAT.

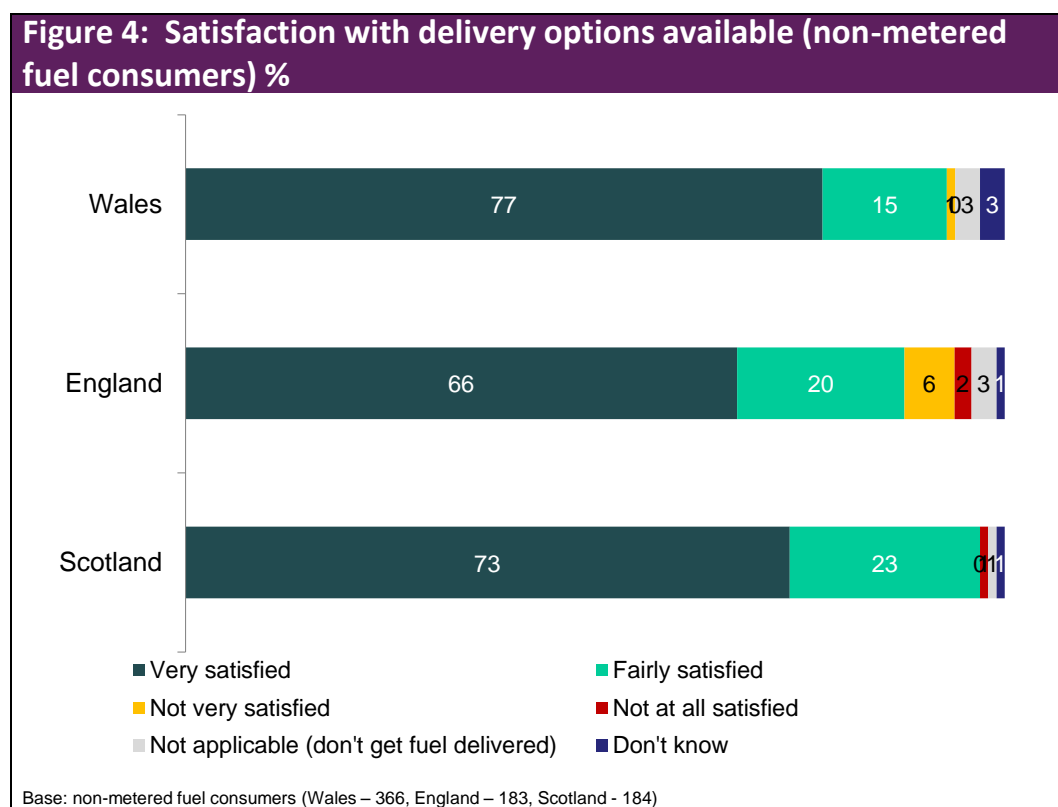
Comparing prices for wood is even more difficult, as the quantities, and metrics, included in the price often differ. For example, prices in Wales ranged from c£45 (for a large builder's bag of mixed wood) up to £130 (for a trailer load). Many suppliers offered discounts on buying larger quantities of wood (eg in Scotland, £279 was quoted for two cubic meters compared with a price of £179 for one cubic metre).

Almost all the prices quoted by suppliers included delivery and at least half the companies in each nation had a minimum order for delivery, either expressed in bags (eg five bags of coal) or price (eg £50).

### 3.3 Delivery and delivery issues

As with the payment methods offered, the great majority of non-metered fuel consumers in each GB nation are satisfied with the delivery options available to them when ordering their fuel.

Although 86 per cent of those in England are satisfied to some extent, England has the lowest proportion of off-gas consumers of all three nations prepared to state that they are very satisfied with delivery options (at 66 per cent), and the highest minority expressing dissatisfaction with delivery options (at 8 per cent).



#### Mystery shopping – delivery service

##### Heating oil suppliers

Most suppliers across all three GB nations offer a flexible delivery service and deliver Monday to Friday, although some companies have specific delivery slots or deliver less often (eg once a fortnight).

Most have provision for providing customers with fuel outside normal delivery patterns in an emergency, if a customer is running out of fuel – only two suppliers (one in Wales and one in Scotland) explicitly stated they do not offer emergency delivery.

The lead time for deliveries varies from next day delivery (not usually the standard service, however) through to delivery within ten working days. No differences were evident by country.

### **LPG suppliers**

Some suppliers 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. The top-up service (where mentioned) was free of charge.

Where no top-up service was mentioned, deliveries are often Monday to Friday and Saturday mornings, with some suppliers offering delivery every day of the week (except bank holidays). Delivery response time was not mentioned very often, but where it was, it ranged from 5 to 7 days.

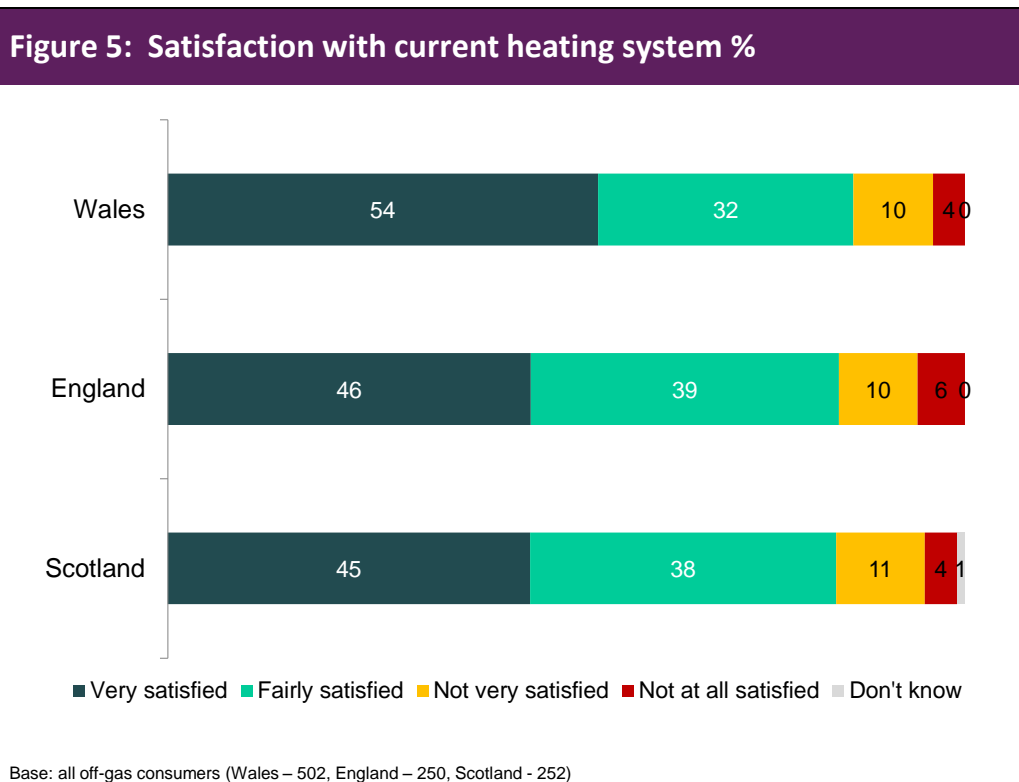
### **Solid fuel suppliers**

Some variation was evident in delivery times and flexibility among coal and wood suppliers. Some of the smaller businesses have established rounds, calling at certain locations once a week or once a fortnight, so new customers would have to fit into these rounds. Other larger companies offer more flexibility with delivery and deliver fuel Monday to Friday, particularly for bigger quantities. This was the case across all three GB nations.

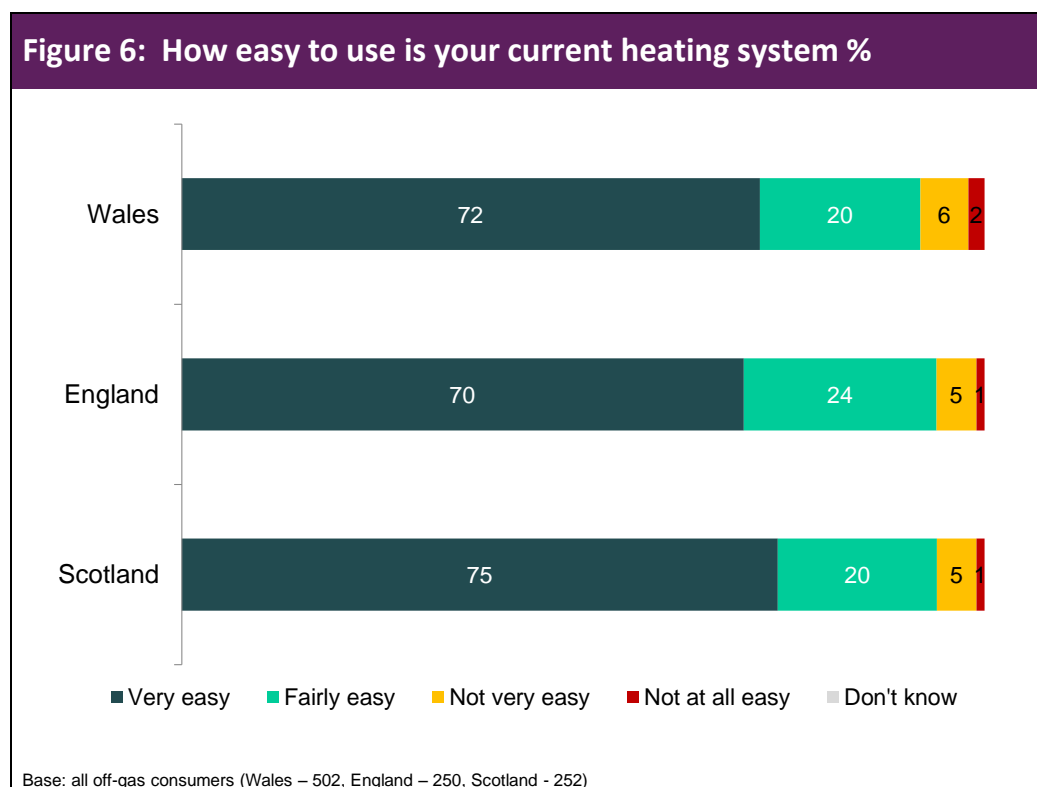
## **3.4 Satisfaction with heating system and supplier**

Satisfaction with their current method of heating their home is higher in Wales than in other GB countries. In Wales, more than half of off-gas consumers interviewed (54 per cent) are very satisfied with their current heating system, compared with 45 per cent and 46 per cent in Scotland and England.

Levels of dissatisfaction are relatively consistent across all three nations, ranging between 14 per cent (in Wales) to 16 per cent (in England).



Perceptions of ease of use of their current heating system are also broadly consistent across all GB countries: the great majority of off-gas consumers in each country consider their system to be easy to use, while only a small minority (of between 6 to 8 per cent) are of the opposite opinion.



Satisfaction with the quality of service provided by fuel suppliers is generally high among off-gas consumers across all GB nations. Over 90 per cent of off-gas consumers in each country say they are satisfied with their supplier's service and most are very satisfied (see figure 7 below). Dissatisfaction is highest (at 7 per cent) in England and Wales, while in Scotland only 3 per cent of off-gas consumers say they are unhappy with their fuel supplier's service.



### 3.5 Complaints

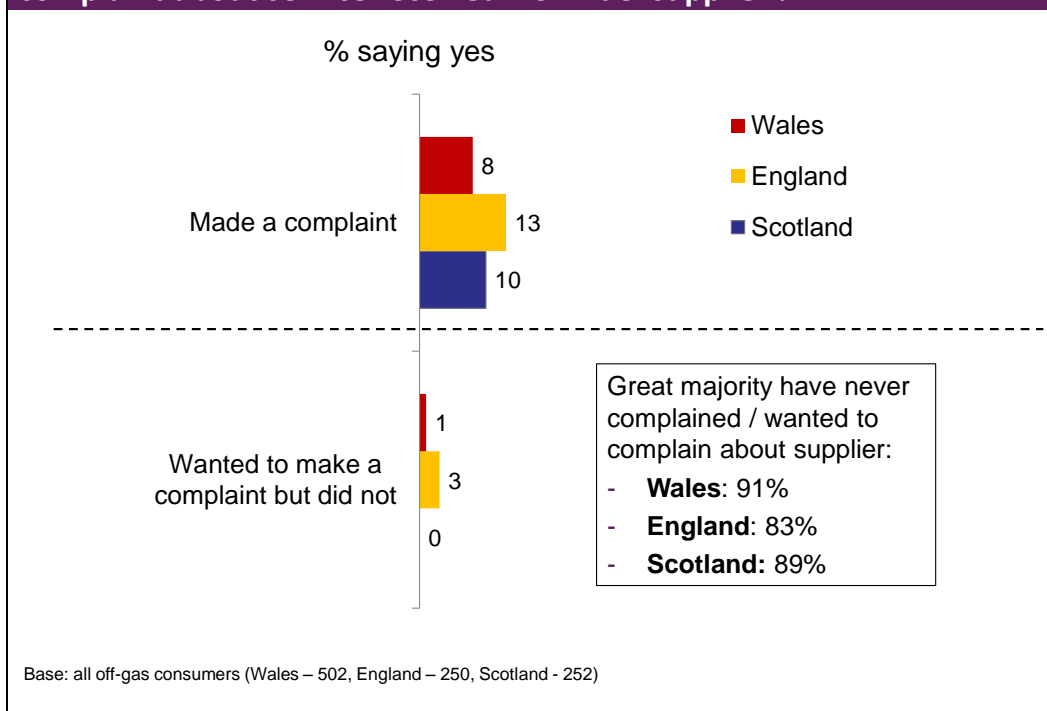
The proportion of off-gas consumers in each GB country that has ever made a complaint about their supplier's service is small, ranging from 8 per cent (in Wales) to 13 per cent (in England).

As well as the proportion of actual complainants being highest in England, the proportion of those who have not made a complaint but would like to have done so is also highest there (at 3 per cent).

The great majority of off-gas consumers (between 83 per cent in England and 91 per cent in Wales) have never made a complaint nor have wanted to make a complaint to their fuel supplier, however.



**Figure 8: Whether ever made a complaint or wanted to make a complaint about service received from fuel supplier %**



### **Mystery shopping – suppliers’ complaints process**

Companies were asked what the caller’s mother (keeping in mind the scenario outlined earlier) should do if something were to go wrong with her heating supply, 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.

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

Similarly, none of the LPG suppliers in England and only one in Wales mentioned their company having a formal complaints procedure. Most suggested that customers should ring the depot or office to speak to the manager to resolve the issue. In contrast, all four companies approached in Scotland referred to a formal complaints system.

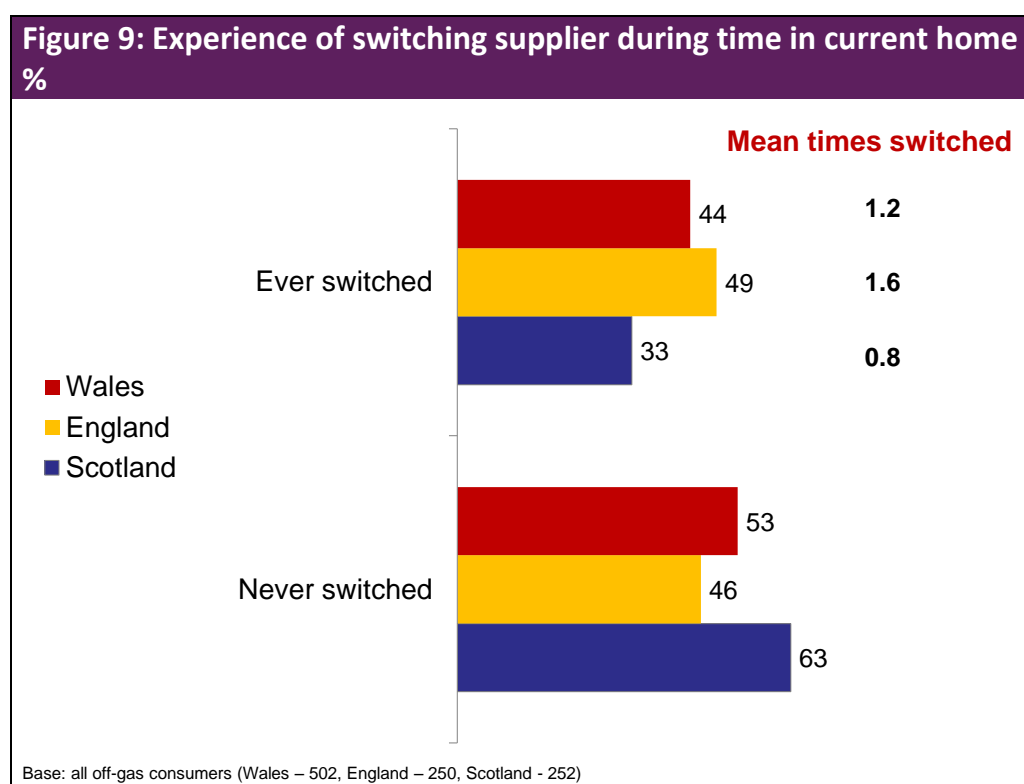
No formal complaints procedure was mentioned by the great majority of the solid fuel suppliers contacted in England, Scotland or Wales, with only a few saying they had such a procedure, sometimes referring the customer to their website. The most common response was that the customer could give the company a ring in the unlikely event there were any problems.

### 3.6 Switching supplier

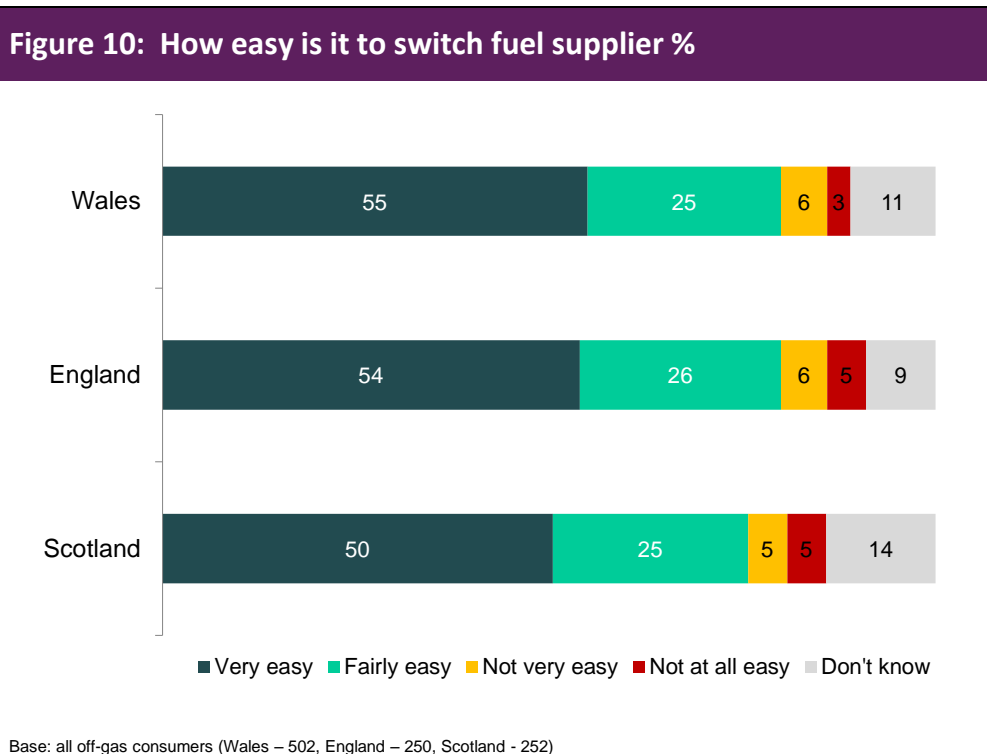
Between 33 per cent and 49 per cent of off-gas consumers interviewed in each country have switched fuel supplier during the time they have lived in their current home. The incidence of switching supplier is highest in England (where 49 per cent of those living in off-gas households have done so) and lowest in Scotland (where this applies to only 33 per cent). Wales lies somewhere in the middle (at 44 per cent).

England is the only GB nation where more off-gas consumers have switched supplier than have not switched (46 per cent). In Scotland and Wales, most of those living in off-gas households have stayed with the same supplier since moving to their current home (at 63 per cent and 53 per cent respectively in each country).

Looking at frequency of switching, those living in England who have changed supplier have done so an average of 1.6 times since moving to their current home. This compares with an average switching level of 1.2 for such consumers in Wales and just 0.8 in Scotland.



Although switching levels are relatively low across the three nations, the great majority of off-gas consumers (around 75 per cent or more in each country) perceive it to be easy to change fuel supplier. Only around 10 per cent in each nation feel it is difficult to do so, but around the same proportion (9 per cent to 14 per cent) answered 'don't know'.



### 3.7 Trade associations, codes of practice and vulnerable persons' protocol

A small proportion of off-gas consumers using unmetered fuels in each nation say their fuel supplier is a member of a trade association (ranging from 18 per cent in Scotland up to 27 per cent in Wales). More commonly, consumers either say their supplier is not or aren't able to give an answer.



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

### **Trade association membership and accreditation**

Just over half of the non-metered fuel suppliers in England and Wales said they have some kind of accreditation or are members of a trade association, that is 15 of the 24 approached in England and 13 of the 24 approached in Wales. In Scotland the level was much lower, however (at just 4 of the 24 contacted). Nobody volunteered this information before being asked.

In England, all 15 who said they are accredited mentioned a specific trade association by name, as did all four in Scotland, while only around half those referring to membership or accreditation in Wales were able to do so (that is, seven suppliers). Where trade organisations were named, those most commonly mentioned were the Federation of Petroleum Suppliers (FPS) (by heating oil suppliers), UK Liquid Petroleum Gas (UKLPG) (by LPG companies) and the Approved Coal Merchants Scheme (by solid fuel suppliers).

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, mentioning things such as conforming and adhering to the scheme rules, rather than giving any specific customer benefits.

### **Vulnerable persons’ protocol**

When asked what, if any, special provisions they have in place for older 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 in any country 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.

No specific references to a vulnerable persons’ protocol were made by heating oil suppliers in any country. Most said they would not need to go into the house or bother the caller’s mother if the tank was unlocked and payment had been received. Some suppliers did offer to make special provision to accommodate the elderly customer though, for example phoning in advance of delivery.

None of the LPG suppliers across any of the three GB nations made any specific reference to the UKLPG Vulnerable Persons' Protocol, although some had said they were members of a trade association. Nearly all offered reassurance about their service to vulnerable people, however, which included calling the day before delivery to let the older person know the delivery was due; stressing that their drivers wore uniforms and tankers were branded with the company name; and emphasising that there is no need for drivers to go near the house as long as there is access to the tank.

Neither did any of the solid fuel suppliers contacted in England, Scotland or Wales mention a vulnerable persons' protocol.

### **Customer code of practice**

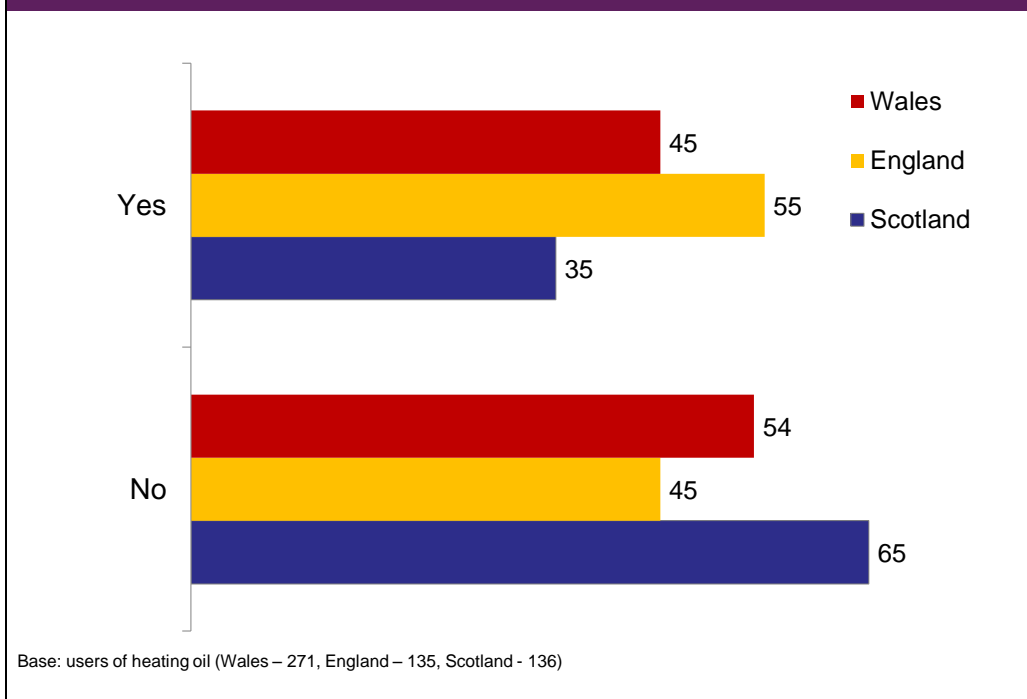
When a customer code of practice was mentioned by the caller in the context of wanting to make sure his/her elderly mother did not run out of fuel in the winter or when the weather is bad, none of the heating oil suppliers who had said they were members of a trade association mentioned a customer code or charter, but a few suggested the customer should check their website. None of the coal or wood suppliers in England, Scotland or Wales mentioned having such a code of practice.

In contrast, some LPG suppliers across GB did mention having their own customer charter. None of them offered to send out a copy but instead referred customers to their website, saying they could 'check it out there'.

## **3.8 Awareness and experience of oil clubs**

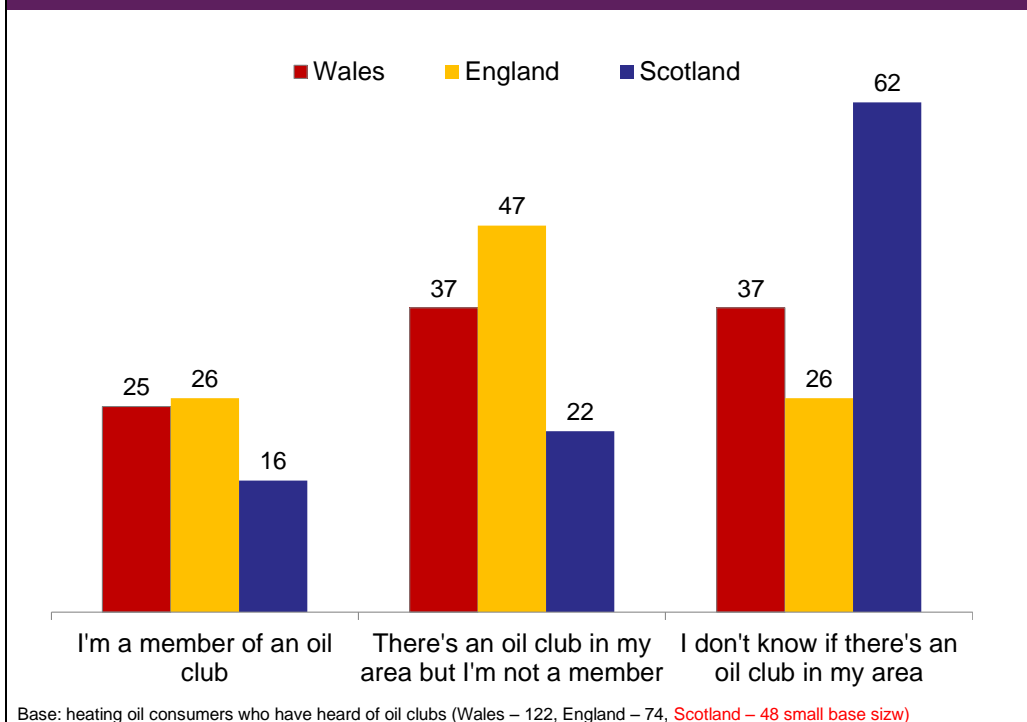
Awareness of oil clubs varies quite considerably between kerosene heating oil users in each nation. 35 per cent of heating oil users in Scotland have heard of oil clubs, compared with 55 per cent of users in England and 45 per cent in Wales.

**Figure 12: Awareness of oil clubs (heating oil consumers) %**

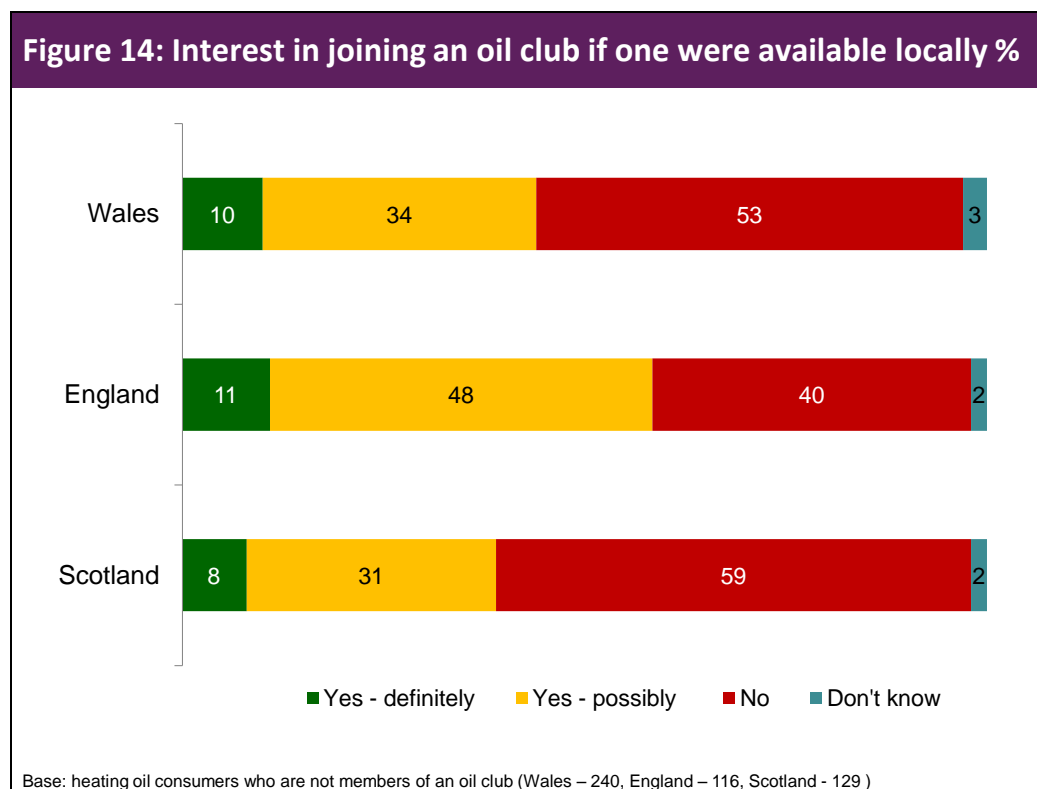


Around a quarter of heating oil users in Wales and England aware of oil clubs say they belong to one, but the proportion in Scotland is lower (at 14 per cent). Heating oil users in Scotland are least likely to have heard of oil clubs and are also least likely to be members of one, in contrast to England.

**Figure 13: Experience of oil clubs (heating oil consumers) %**



Reaction to the idea of joining an oil club if one were available in their area is mixed – while around 10 per cent in each nation is very interested in the idea, a sizeable proportion in each country say they are not interested. In fact, England is the only nation where a majority of heating oil users is interested in membership of an oil club (59 per cent).



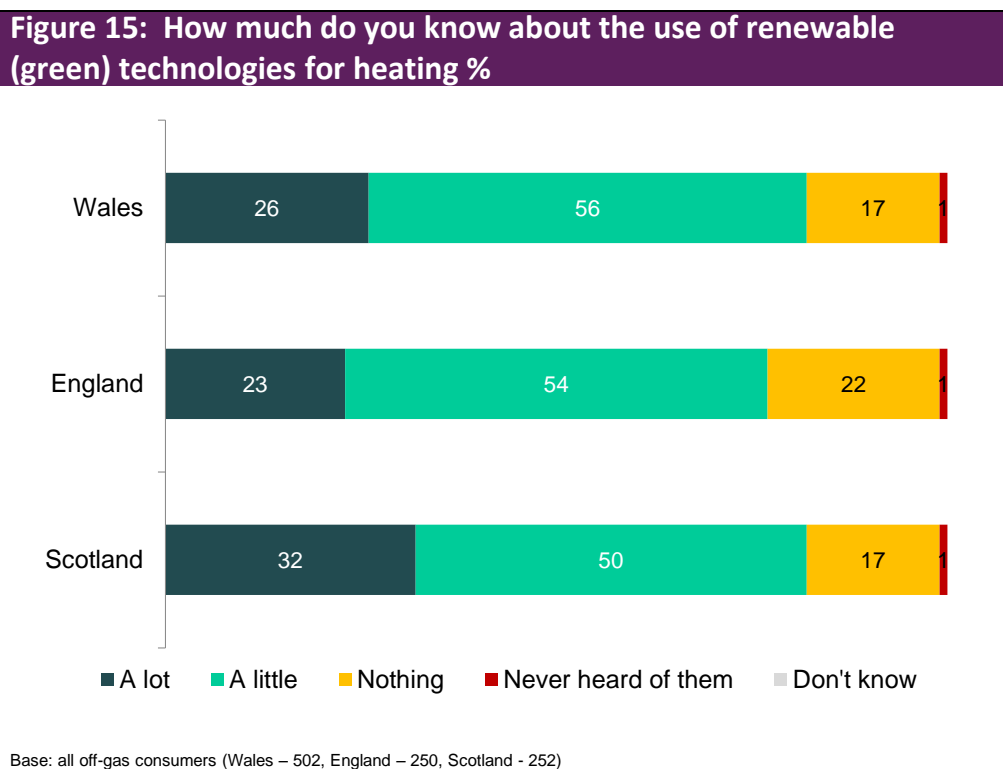
### **Mystery shopping – oil clubs**

Heating oil suppliers were asked whether they worked with oil clubs in the area. Between 3 in 10 (in Wales) to 4 in 10 (in England and Scotland) said they did. Most suppliers in each nation either said they did not work with oil clubs or could not answer the question, however.

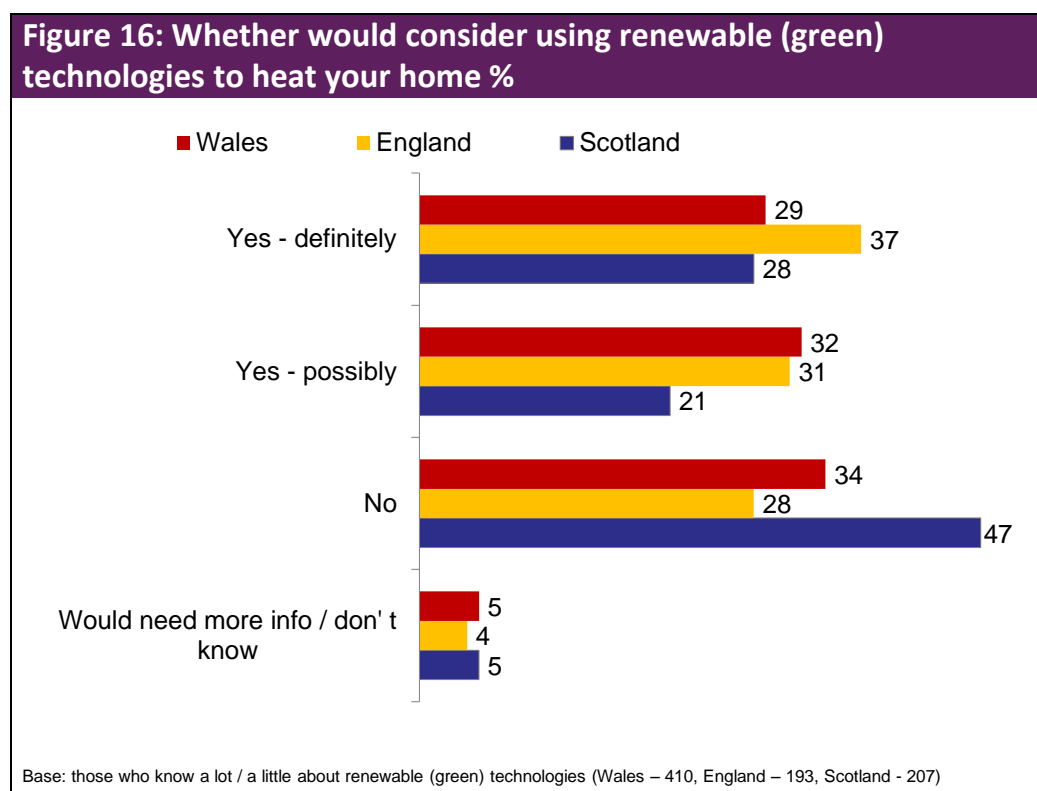
## **3.9 Knowledge and interest in renewable technologies**

Around 80 per cent of off-gas consumers in each GB nation 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. Those in Scotland are most likely to say they know a lot about the subject, while, in contrast, England has the highest minority of those who say they know nothing about renewable technologies (22%) (see figure 15 below):





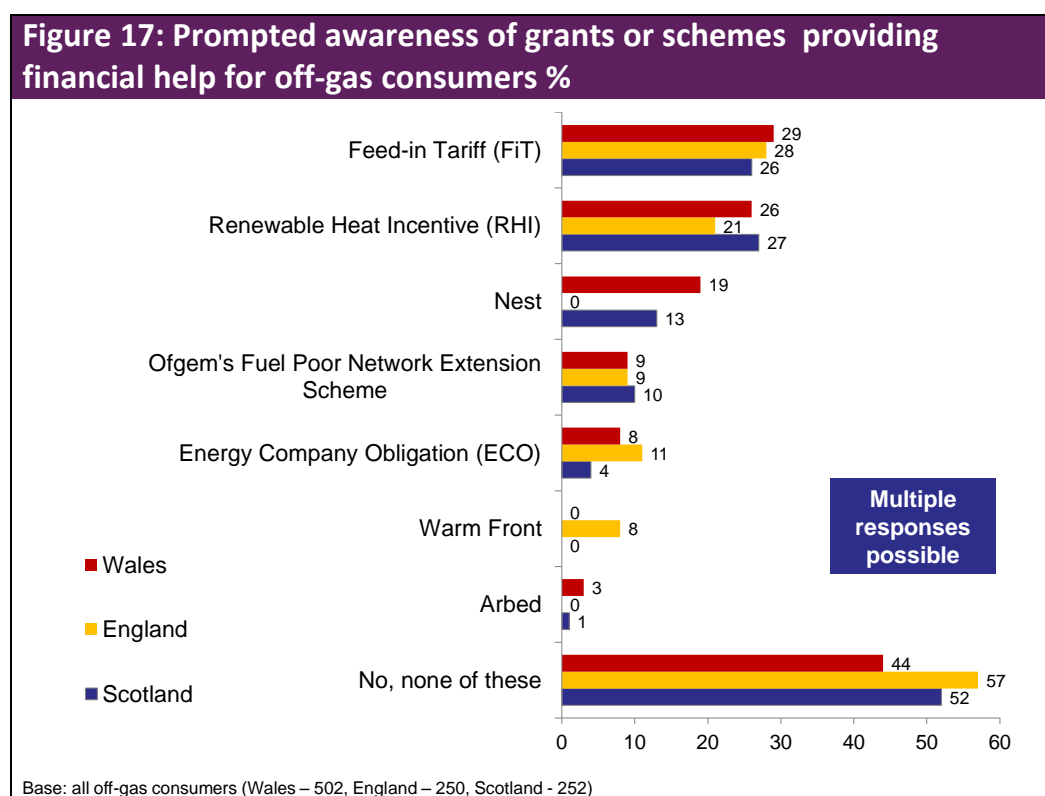
Those living in England who had heard a lot or a little about renewable technologies were most likely to say they would definitely consider such methods to heat their home. In contrast, those living in Scotland were most likely to say they would not consider doing so.



### 3.10 Grants / financial assistance for off-gas consumers

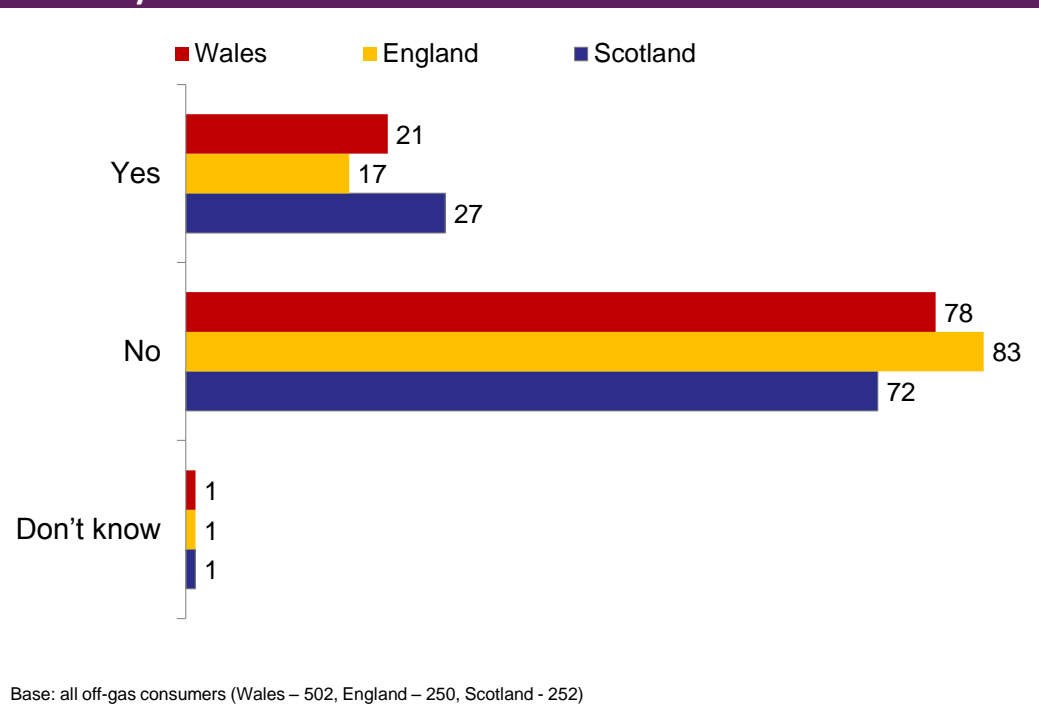
Knowledge of any grants or financial help available for people who don't have mains gas to heat their home is low across all GB countries. When prompted with a list of grants or schemes providing financial help to people who don't have access to mains gas, between 44 to 57 per cent of off-gas consumers in each country did not recognise the names of any.

Familiarity with energy efficiency schemes is highest in Wales (where 56 per cent of off-gas consumers had heard of at least one scheme) and lowest in England (where this applied to 43 per cent). The schemes with the highest recall in all three countries are the Feed-in Tariff (FiT) and the Renewable Heat Incentive (RHI), both recognised by around 20 to 30 per cent of consumers in each nation. Not all schemes are available in each GB nation, however, so one would expect some differences by country.



Around 20 per cent of off-gas consumers in Wales and England has applied to a scheme to help improve the energy efficiency of their home, for example providing financial assistance with improvements such as a boiler replacement, loft insulation, cavity wall or solid wall insulation. Scotland has the highest proportion of applicants to energy efficiency schemes, at 27 per cent.

**Figure 18: Whether ever applied to scheme to improve energy efficiency of home %**



## 4. Conclusions and recommendations

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Non-metered off-gas consumers in England are more likely to pay in full on delivery and less likely to spread fuel payments than their counterparts in Scotland and Wales. It is perhaps, therefore, unsurprising that dissatisfaction with payment methods is higher in England than in other GB countries (albeit only a minority are dissatisfied). Likewise, although satisfaction with delivery options offered by non-metered fuel suppliers is generally high, consumers in England are less satisfied with delivery methods than consumers in Scotland or Wales. There is nothing in the mystery shopping assessments that suggests any differences in the payment options or delivery service offered by suppliers in England to explain this.

Off-gas consumers in Scotland are paying more for their fuel than off-gas consumers in England and Wales (around 20% more on average than England and around 10% more than Wales). This may have contributed to the finding that Scottish off-gas consumers are most likely to say their current heating system is not affordable, yet they are also less likely to have changed supplier than those living in other GB countries and less likely than English off-gas consumers to have made a complaint to their energy supplier. This implied inertia or lack of engagement with energy suppliers is perhaps a factor in their higher fuel costs and suggests that efforts should continue to be made to encourage consumers in Scotland to shop around for the best fuel deals.

Also contributing to the higher fuel prices being paid by consumers in Scotland could be the low awareness and membership of oil clubs displayed in the survey among heating oil users there. No difference was evident in the research in the proportion of heating oil suppliers in Scotland saying they worked with oil clubs, however. At the same time, interest in joining an oil club is lower among heating oil users in Scotland than in England or Wales, suggesting that more publicity and information about oil clubs and their benefits would be useful to help consumers there make an informed choice and overcome possible reservations about joining one.

Off-gas consumers in England are much more likely to have made a complaint to a supplier and to have switched energy supplier than counterparts in Scotland and Wales. Heating oil users in England also display the highest awareness and membership of oil clubs of any country. The higher levels of engagement, switching and shopping around by consumers in England could partly explain the lower prices being paid for fuel there.

While trade associations have a low profile in the non-metered fuel market across all three GB nations, their profile is lower in Scotland than in England or Wales – fewer suppliers in Scotland say they are accredited and fewer consumers there are able to say whether their supplier is a member of a trade association than is the case in the other two countries. This suggests that accreditation has a lower perceived value in Scotland than in other GB nations.

Knowledge of any grants or financial assistance available for people who don't have mains gas to heat their home is very low across all GB countries, but particularly so in England, where 57 per cent of off-gas consumers have not heard of any energy efficiency scheme. Applications for financial help from such schemes are, however, at a similar level in England to Wales (where awareness is highest). This indicates that there is no difference in demand and suggests that more marketing and promotion of energy efficiency schemes and their eligibility criteria would be beneficial in helping those in need of assistance in England to apply. Scotland has the highest proportion of applicants to energy efficiency schemes, so this does not appear to be an issue here.

## Appendix I

### Consumer telephone survey questionnaire

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**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	}	<b>Check quotas and continue</b>
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*

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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*

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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 II

### Mystery shopping pen portraits

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**BBQ01542 Citizens Advice / Citizens Advice Scotland**

**Off-Gas Households Research**

**Mystery Shopping Pen Portraits FINAL**

<b>Category:</b>	<b>LPG</b>
<b>Type of Fuel:</b>	LPG (Propane)
<b>Device:</b>	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)
<b>Type / Quantity of Fuel Required:</b>	Price for 2,000 litres to fill tank
<b>Usage:</b>	For heating home and cooking
<b>Delivery vehicle:</b>	Standard tanker fine – no access issues
<b>Background</b>	
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	

<b>Category:</b>	<b>Heating Oil</b>
<b>Type of Fuel:</b>	Heating Oil (Kerosene)
<b>Device:</b>	Above ground steel tank – 2,000 litre capacity – located in garden
<b>Type / Quantity of Fuel Required:</b>	1,000 litres
<b>Usage:</b>	For heating home and cooking
<b>Delivery vehicle:</b>	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 III

### Mystery shopping assessment form

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**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) ☐

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**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

[enquiries@beaufortresearch.co.uk](mailto:enquiries@beaufortresearch.co.uk)  
[www.beaufortresearch.co.uk](http://www.beaufortresearch.co.uk)