



FROM INSIGHT TO INFLUENCE

PRIVATE RENTED SECTOR BARRIERS TO ENERGY MARKET ENGAGEMENT

Research findings report

Final version

Prepared for Citizens Advice

Prepared by Steve Morley

21st June 2021

Project No. 1173

The Citizens Advice logo, which consists of a dark blue speech bubble shape containing the words "citizens" and "advice" in white, lowercase, sans-serif font, stacked vertically.

**citizens
advice**

All projects are carried out in compliance with the ISO 20252 international standard for market, opinion and social research and GDPR.

Table of contents

1. Executive summary	3
Project background	3
Scope and Objectives	3
Method	4
Key findings and conclusions	4
2. Background	8
3. Scope and objectives	11
4. Methodology	13
Who did we engage with?	14
Project launch workshop	14
Pre-task	14
Deliberative events	15
In-depth interviews with tenants in vulnerable circumstances	16
Post-task	16
Reconvened focus groups	17
5. Results	18
Engagement with the energy market and awareness of tenant’s rights	18
Solutions to improve tenants’ engagement with energy suppliers	22
Solutions to improve awareness of tenants’ rights around energy supply, metering and efficiency measures	23
New energy models: Time of Use tariffs	24
New energy models: Energy-as-a-Service	26
New energy models: Bundled services	28
Which models were preferred by tenants and landlords?	29
Looking into the future	31
Acceptability of solutions	31
6. Conclusions	35
Tenant and landlord engagement with the energy market	35
Knowledge of tenants’ rights	35
Solutions to improve engagement and knowledge of rights	36
Key barriers – new energy models	36
Solutions for barriers to uptake of new energy models	37
7. Recommendations	38
8. Appendix	39

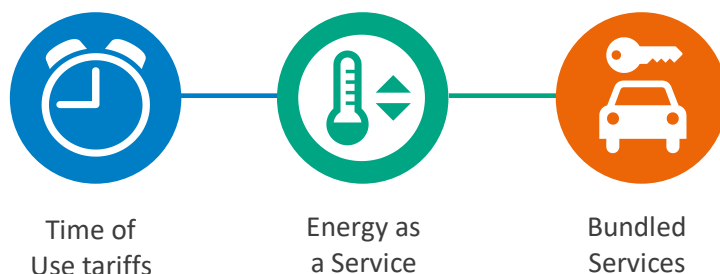
1. Executive summary

Project background

There are unique barriers tenants in the private rented sector (PRS) face in engaging with the energy market. These include the following:

- Choice (i.e., a perceived inability to choose supplier)¹
- Length of tenancy and energy supply contracts
- Living situations
- Funding for new appliance and technology

The 2019 project for Citizens Advice² (also conducted by Impact) explored consumer perceptions of a range of future energy models among a broad group of participants. The new research seeks to build on that understanding and fill in knowledge gaps around the private rented sector. To this end, three energy models from the 2019 project were carried forward for further evaluation. These energy offerings were selected due to their potential to provide choice and cost saving to consumers, and because they have characteristics thought to be particularly impactful for those in the PRS, and are as follows:



Scope and Objectives

This research builds on current understanding of current and potential barriers to engagement with energy supply offers by focusing specifically on private renters and landlords. Citizens Advice will use the results to feed into a number of ongoing policy initiatives related to reform of the energy market and support for people in vulnerable circumstances with regards to their energy. It will also help inform its wider work on issues facing people in the rented sector.

The overall objective of this research is:

To identify the barriers to accessing energy offerings that consumers in the private rental sector face and how these barriers can be overcome. This includes energy offerings currently available and expected future innovations.

¹ Guardian, Aug 2012, One in 10 tenants barred from changing energy supplier

² Future Energy Models, Impact Research, 2019

<https://www.citizensadvice.org.uk/Global/CitizensAdvice/Energy/915%20Citizens%20Advice%20Future%20Energy%20Models%20Report%20Final%20v2.pdf>

Method

To achieve this objective, Citizens Advice commissioned Impact to conduct in-depth exploratory research with private renters and landlords /managing agents across England and Wales. An overview of the method is given below:



PRE-TASK

- Before the events, participants were given an online pre-task as a 'warm up' to enable them to confidently contribute to the research.



DELIBERATIVE EVENTS

- 4 x online deliberative events were held in February: 2 with tenants, 2 with landlords
- Each deliberative event covered all three new energy models.
- These events lasted 2.5 hours and included breakout groups, comfort breaks and live voting.



IN-DEPTH INTERVIEWS

- 10 x 45-minute in-depth interviews in February-March with tenants with vulnerabilities.
- These were completed either online or via telephone, according to digital engagement.
- These interviews covered the same content as the deliberative events.



POST-TASK

- After the events, participants were asked to complete a short online post-task to capture their thoughts upon reflection, as well as their satisfaction with the event.



RECONVENED FOCUS GROUPS

- 2 x 90-minute focus groups were conducted in March with a mixture of landlords and tenants from the deliberative events reconvening online to explore CA's proposed solutions to barriers previously discussed

Key findings and conclusions

Engagement with the energy market and awareness of tenants' rights

Tenants in privately rented properties who participated in the study were most likely to manage their energy themselves. In most instances, the energy supplied to their home was in their name and they were expected to manage the account and pay the bill themselves. In some cases, the landlord managed the supplier on behalf of the tenant, and included the energy bill as part of the rental payment. Both tenants and landlords were generally happy with their current set-up.

Most tenants were aware that they could change supplier if they wanted to, and many had switched supplier in the past. The exception to this was tenants that were new to renting, who were overall less knowledgeable about their rights to switch. Price was often the key motivating factor when choosing a supplier, followed by reputation.

The rights of tenants to choose their own meter type was understood by some, but not by all tenants. Interest in energy meters was low across the board, and tenants admitted that even if this choice was made explicit to them,

they would be unlikely to give it full consideration. Knowledge of the right for tenants to request energy efficiency measures was lower than rights to switch supplier or meter type. Tenants agreed that their landlord and future tenants would be the long-term beneficiaries of efficiency improvements, and, therefore, it should be the landlords' responsibility to pay.

Landlords generally felt that energy supply is not something they needed to be involved in, beyond transferring the existing supplier's account into the tenant's name at the start of the tenancy. They considered that anything else requiring their attention would need to be requested directly from the tenant. A minority of landlords had experience of managing their tenant's energy supply for them. This could be because the building has a communal boiler and so energy costs were included in the service charge that the landlord pays. It could also be because the tenant requested that their energy bills were included in their rent.

Solutions to improve tenant engagement and knowledge of rights

After analysing the insights generated during the deliberative workshops and in-depth interviews, Impact and Citizens Advice worked together to propose solutions to help improve tenants' engagement with their supplier and knowledge of their rights. These solutions were tested with tenants and landlords in the reconvened focus groups.

The first solution presented to respondents was an obligation on the part of energy suppliers to collect information on the tenancy situation as tenants did not see any benefit to energy suppliers knowing that they rented the property. Some tenants were happy for suppliers to know this information whereas others were more cautious. Tenants were also against being sent targeted information from their supplier, suggesting they already received too much "junk mail" and that they would be unlikely to read it unless the information very clearly conveyed a benefit for them.

The second solution was for the Government to prioritise tenants for trials and implementation of collective switching. Because tenants were motivated by the idea of saving money on their bills, there was some positive sentiment here. However, the majority felt that it would reduce the control they had over their energy supply and would therefore be unlikely to sign up for this reason. The idea of a standard lease where landlords explain that tenants have the right to choose their meter type/supplier, was explained to respondents, as well as an information portal for both landlords and tenants which could be accessed to read up about their rights and responsibilities. Including energy information in the tenancy contract, or on a portal, was appealing to both tenants and landlords as it could provide everyone with the same baseline level of information. Tenants especially like the idea of a portal as they thought it would give them clear information about what to do and who to contact if they had any issues or questions.

The final solution proposed was to introduce a landlord register, which would help ensure landlords were informed of any changes to legislation that could affect them. Tenants agreed this was a good idea as long as they could see who was registered on there and that the information given was clear and up to date. Landlords were also happy for this to be introduced, but stressed they would expect registration to either be completely free or available at a low cost.

New Energy Models

There was an initial broad level of support for each of the new energy models discussed, but once discussed in more detail, both tenants and landlords started to question exactly how these would work.

Time of Use tariffs

Tenants		Landlords	
Pros	Cons	Pros	Cons
Reduced bills	Unfair on those working 9-5	Happy for tenants to sign up	Wouldn't want to have to buy new appliance to make it work
	Not flexible enough to fit with lifestyle	Could work with more technologies in the future	Many properties don't have space for EV chargers, so these couldn't be tied in
	Would like proof that bills are lowered		

Energy-as-a-Service

Tenants		Landlords	
Pros	Cons	Pros	Cons
Certainty around comfort level	Would like proof that bills are lowered	Insulation would be added to the property	Not flexible enough to fit with tenant lifestyle
Help with budget and planning of bills	Not flexible enough to fit with lifestyle	Could work in new build flat built with this energy model in mind	Would be complicated when changing tenant
	Contract length too long		Contract length too long
			Would need to be more involved than currently are

Bundled Services

Tenants		Landlords	
Pros	Cons	Pros	Cons
Everything covered under one bill	Contract length too long	Simple for tenant to manage	Contract length too long
Could work with more technology in the future	Not flexible enough to fit with lifestyle	Could work in new build flat built with this energy model in mind	Wouldn't want to have to buy new appliance to make it work
	Would landlords need to be more involved than are currently?		Would need to be more involved than currently are

Solutions to barriers to uptake of new energy models

Again, after analysing the insights generated during the deliberative workshops and in-depth interviews, Impact together with Citizens Advice, proposed solutions to the barriers suggested around uptake of new energy models. These solutions were tested with tenants and landlords in the reconvened focus groups.

In response to the contract length barrier, tenants and landlords agreed that an extended cooling off period would be preferable to the statutory 14-day period. However, six months would be more useful than three months as that would allow the energy model to be tested over a couple of different seasons, with related fluctuations in temperature. That said, for most tenants, an extended cooling off period wouldn't solve the contract length barrier as it was the end of their tenancy that concerned them, rather than the start of their energy contract. Buy-out clauses were also suggested as a potential solution, but these really didn't appeal to tenants who assumed they would be somehow penalised for breaking the contract and that there would be charges even if the landlord was able to sell it on.

With regards to equipment, both tenants and landlords felt that incentives would have a much greater effect than disincentives/penalties. Grants were the most popular suggested incentive, although tenants commented that they would want to be sure that any appliances or products bought with a grant were fully owned by the landlord, as this would be more reassuring in the event of breakdown or issues. Landlords were generally open to purchasing new equipment, assuming they would be given some kind of incentive. Although grants were preferred, landlords were also interested in tax incentives.

One solution that was very well received by both tenants and landlords was a tool that would allow them to predict savings on their energy bill, prior to signing up to a new contract or model. Tenants were very positive about the concept of being able to find out in advance how much they could save on their energy bills, but they were not willing to change their energy usage behaviour in advance of signing up (i.e., if smart meter data or likely off-peak behaviour was required).

Finally, data sharing and privacy was discussed and it was suggested that it would be solely down to tenants to have control of their own energy usage data. Tenants would like clear guidance on how they will keep control of their data and how it is shared. Landlords would welcome the setting of responsibilities so that they were not expected to be more involved in a tenant's energy supply than they wanted to be.



Background

The changing energy landscape

The structure of the energy sector has traditionally been a relatively straightforward supplier hub model with a chain of regulated players from suppliers, to distribution networks, to transmission operators, to generators. From the consumer's point of view, although the supply chain hasn't changed, there is a certain amount of complexity in the market in terms of the range of suppliers and tariffs on offer, and consumer engagement in the domestic energy market remains, on the whole, poor. Survey data in 2019 shows the proportion of consumers who recalled never switching supplier or switching just once was 49%³.

Engagement is higher amongst particular social groups – those in social grade ABC1 and households on higher incomes, owner occupiers, and the digitally engaged – and therefore lower amongst the less well off, renters, and those who are digitally disenfranchised⁴.

Digital and technological innovation and the need to decarbonise heat and travel has resulted in the development of new products and services. These offer commercial opportunities to the companies that provide them and the possibility of lower bills, cleaner consumption, reduced effort, integration of electric vehicles into the home energy system, and more possibilities to consumers who use or purchase them. These include:

- 'Bundled' services which integrate energy offers with smart technology. These range from electric vehicle chargers to smart appliances and heating controls, such as Centrica's Hive products or EDFs GoElectric EV tariffs.
- Energy as a service models that develop ongoing relationships with consumers. These provide the use of a product as a continued service offering rather than a one-off purchase, and/or by focusing on managing the household's existing equipment to improve the delivery of an outcome – selling comfort rather than kilowatts per hour. For example, in a 2019 trial offered by Bristol Energy and Energy System Catapult, households could buy a "Heat Plan" tailored to their individual home and lifestyle.
- Time of Use tariffs that leverage value from energy-use flexibility (e.g., electricity demand shifting) through the cost of energy usage varying throughout the day. Economy 7 tariffs with day/night rates are a familiar concept to many consumers, but future tariffs may change prices with increasing frequency, even as much as every half hour (for example Octopus Agile).

Other innovation examples include trading platforms (e.g., price comparison websites, auto-switchers, bill-splitter apps and trading platforms which allow partnering with local generators or smart markets) as well as efficient consumption (commercial arrangements to help consumers lower their energy consumption and ultimately reduce their bills, e.g. audits and building efficiency).

³https://www.ofgem.gov.uk/system/files/docs/2019/11/20191030_state_of_energy_market_revised.pdf

⁴https://www.ofgem.gov.uk/system/files/docs/2018/10/consumer_engagement_survey_2018_report_0.pdf

All of this adds considerable complexity to the market: electricity storage means that consumption is no longer synchronous with supply. An individual may in future have contracts with separate companies to supply energy to their home and to their (electric) car and a third to whom they export energy from their PV panels. Some of the infrastructure equipment involved is now owned or leased by the customer, and services may even cover a group of properties (e.g., a local area heat networks) or vehicles. At the same time, some aspects of supply and export may be managed autonomously according to demand and half-hourly settlement prices. All of this requires the collection of a significant amount of customer data, which many customers are resistant to⁵. There is also the risk that the potential benefits of these innovations becomes inaccessible to many in society, including those who rent their home, or who cannot understand the options available; those who are not online, or who live in areas with poor internet or mobile signals, those who are time-poor (such as small businesses) and those who cannot afford the required capital outlays (even though the cost of reinforcing the network to support some of these privately-owned technologies is socialised through all bills).

Challenges to accessing the energy market for private renters and landlords

There are particular barriers to private renters in engaging with the current energy supply model. These include a reported inability for some tenants to choose supplier⁶ (despite this not being a legal contract term) and the disparity between short tenancy contracts and energy tariffs, which often require a 2-year minimum commitment for the most cost competitive deals and can prohibit take up of energy models that require a longer contract.

Already there are signs that private renters may be left behind in the uptake of future energy supply offers. In the private rental sector, there is lower uptake of smart meters (21% of homes in private rented sector had an electricity smart meter in 2019, compared with 32% of owner occupied or socially rented homes⁷). Financial considerations may also prohibit engagement in future energy supply offers, many of which rely on purchasing and in some cases installing new technologies (which may be discouraged by landlords). Latest data from the ONS shows that for the three-year period 2015 to 2017, 42% of privately rented households were in relative income poverty (household income below 60% of the UK median household income after housing costs are paid), compared with 13% of owner occupiers. A higher proportion of households in private rented homes are identified as being fuel poor compared with all English households⁸. In addition, home ownership is lower among non-White ethnic groups and households led by someone born outside the UK are less likely to own their home and more likely to rent privately⁹.

Covid-19 has exacerbated financial concerns for many, but especially renters. Research by The Resolution Foundation in October 2020 found almost one in eight private renters are unable to meet their housing costs in full¹⁰: Private and social renters are bearing the brunt of redundancies during the Covid-19 recession and are more likely to have fallen behind with their housing costs than owner occupiers.

Aside from short-term letting considerations and financial constraints, there are additional practical concerns faced by consumers in the private rental sector, one of which being energy efficiency. Despite initiatives such as Minimum Energy Efficiency Standards, the sector still has the largest proportion of properties with the worst energy performance ratings and oldest heating systems. Many tenants are unlikely to discuss such topics with their

⁵ 51% are not comfortable sharing real-time energy data. Citizens Advice – Zero Sum: How to prioritise consumer protections to ensure nobody is left behind on the path to net zero (2020).

⁶ Guardian, Aug 2012, One in 10 tenants barred from changing energy supplier

⁷ English Housing Survey, Ministry of Housing, Communities and Local Government, 2019-20

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/945013/2019-20_EHS_Headline_Report.pdf

⁸ Ofgem State of the Market 2019

⁹ House of Commons: Home ownership and renting: demographics, 2017 <https://commonslibrary.parliament.uk/research-briefings/cbp-7706/>

¹⁰ Coping with housing costs, six months on..., Resolution Foundation, 2020

<https://www.resolutionfoundation.org/publications/coping-with-housing-costs-six-months-on/>

landlords, and therefore may end up living in a property with poor energy efficiency measures installed, or an inefficient boiler (or alternative heating system). Not only will this be impacting on the tenants' living conditions, but the property will require more energy to heat than should be needed, increasing its negative impact on the environment.

Finally, other barriers exist associated with increased complexity of living situations faced by many tenants. These include, but are not limited to, multiple occupants in rental properties all with separate tenancy agreements, or the issue of who funds installation of technology to the property (the landlord or the tenant?) when the main beneficiary is the tenant with reduced bills.

The 2019 project for Citizens Advice 'How do consumers feel about future energy business models?' (also conducted by Impact) explored consumer perception of a range of future energy models. This research seeks to build on this understanding and fill in knowledge gaps around the private rented sector.

Scope and objectives

This research builds on current understanding of current and potential barriers to engagement with energy supply offers by focusing specifically on private renters and landlords. Citizens Advice will use the results to feed into a number of policies initiatives and consultations.

The overall objective of this research is:

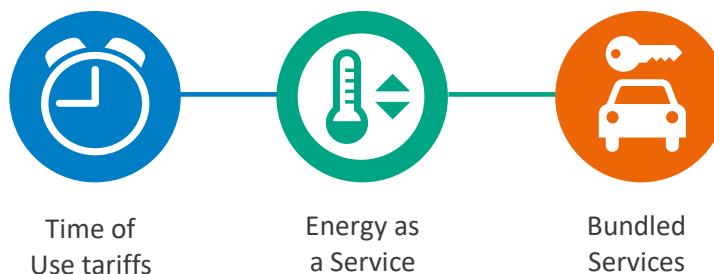
To identify the barriers to accessing energy offerings that consumers in the private rental sector face and how these barriers can be overcome. This includes energy offerings currently available and expected future innovations.

The research also provides insights into the following objectives:

- Identify the frustrations and barriers to tenant engagement in current energy market and issues that landlords have faced
- Gain an understanding of the extent to which landlords and tenants are aware of their rights and obligations towards each other in the energy space (including measures relating to energy efficiency)
- Explore what needs to change to enable tenants and/or landlords to take up new energy supply models
- Understand the impact this has on communications, advice, regulatory change, and rules on data privacy
- Test a framework/toolkit of changes that landlords and tenants agree to, to enable tenants to take part in the future retail energy market

To achieve this objective, Citizens Advice commissioned Impact to conduct in-depth exploratory research with private renters and landlords /estate agents across England and Wales. Scotland was excluded from the scope due to different regulatory requirements.

Three models were selected for this piece of research and were as follows:



They were selected specifically as they each have features which could prohibit take-up amongst the private rental sector. They are, therefore, good indicators to understand which barriers to uptake exist.

The three models were assessed against a range of criteria that produced a broad and deep picture of the barriers and enablers for private rented consumers accessing these energy offers. Positive and negative experiences of accessing energy market offerings – for both tenants and landlords – were sought in order to frame respondents' reactions to the new models of engagement.

While this research specifically looked at energy models and how to increase uptake in the private rental sector, any findings relating to wider issues facing the energy market, such as energy efficiency, barriers to engagement and data sharing, were also captured.

Methodology

In order to fully answer the objectives and gain a 360-degree evaluation of the three energy offerings, the research used a mixture of pre-task activities, deliberative workshops, depth interviews, post-event surveys and reconvened focus groups. Citizens Advice was involved in all stages of the project which enabled insights to be co-developed and expanded throughout the programme of research. Insights and barriers identified in the initial workshops and depth interviews were evaluated by Citizens Advice and Impact and potential solutions were co-created. The renter and landlord respondents were then reconvened to evaluate the proposed solutions. This multi-stage approach maximised the value of the consumer engagement, and the results presented in this report are the cumulation of this.

An overview of the method is given below:



PRE-TASK

- Before the events, participants were given an online pre-task as a 'warm up' to enable them to confidently contribute to the research.



DELIBERATIVE EVENTS

- 4 x online deliberative events were held in February: 2 with tenants, 2 with landlords
- Each deliberative event covered all three new energy models.
- These events lasted 2.5 hours and included breakout groups, comfort breaks and live voting.



IN-DEPTH INTERVIEWS

- 10 x 45-minute in-depth interviews in February-March with tenants with vulnerabilities.
- These were completed either online or via telephone, according to digital engagement.
- These interviews covered the same content as the deliberative events.



POST-TASK

- After the events, participants were asked to complete a short online post-task to capture their thoughts upon reflection, as well as their satisfaction with the event.



RECONVENED FOCUS GROUPS

- 2 x 90-minute focus groups were conducted in March with a mixture of landlords and tenants from the deliberative events reconvening online to explore CA's proposed solutions to barriers previously discussed

Due to coronavirus restrictions, all fieldwork was conducted online using Zoom (or telephone for the less digitally engaged and tenants in vulnerable circumstances).

Who did we engage with?

A demographic and geographical cross-section of private renters and landlords/estate agents¹¹ across England and Wales took part in the research, including consumers in vulnerable circumstances and consumers who are engaged and disengaged with the current energy market.

Tenants	Landlords
<p>We spoke to 49 tenants in total representing different:</p> <ul style="list-style-type: none"> • Gender • Age • Social Grade • Ethnicity • Rural/Urban Location • Household status • More or less engaged with energy market • Energy meters • Vulnerable circumstances (including those with physical or mental health conditions, those with English a second language, and consumers who are digitally disengaged) 	<p>We spoke to 34 landlords and 5 letting agents (3 current landlords also had experience working for a letting agent) in total representing different:</p> <ul style="list-style-type: none"> • Roles (landlords or estate agents) • Number of properties • Level of involvement with property portfolio • Level of management of energy bills

Project launch workshop

Prior to the primary research, a workshop was held online with Citizens Advice and the Impact project team. This ensured that the research objectives were fully understood, and provided confidence that the proposed methodology and content would meet said objectives.

The workshop was an opportunity to review previous research on the future energy models and identify the gaps in understanding barriers and solutions for consumers in the private rented sector. The stimulus and methodology used in the previous future energy models research was also reviewed to carry over any learnings into this new project.

Pre-task

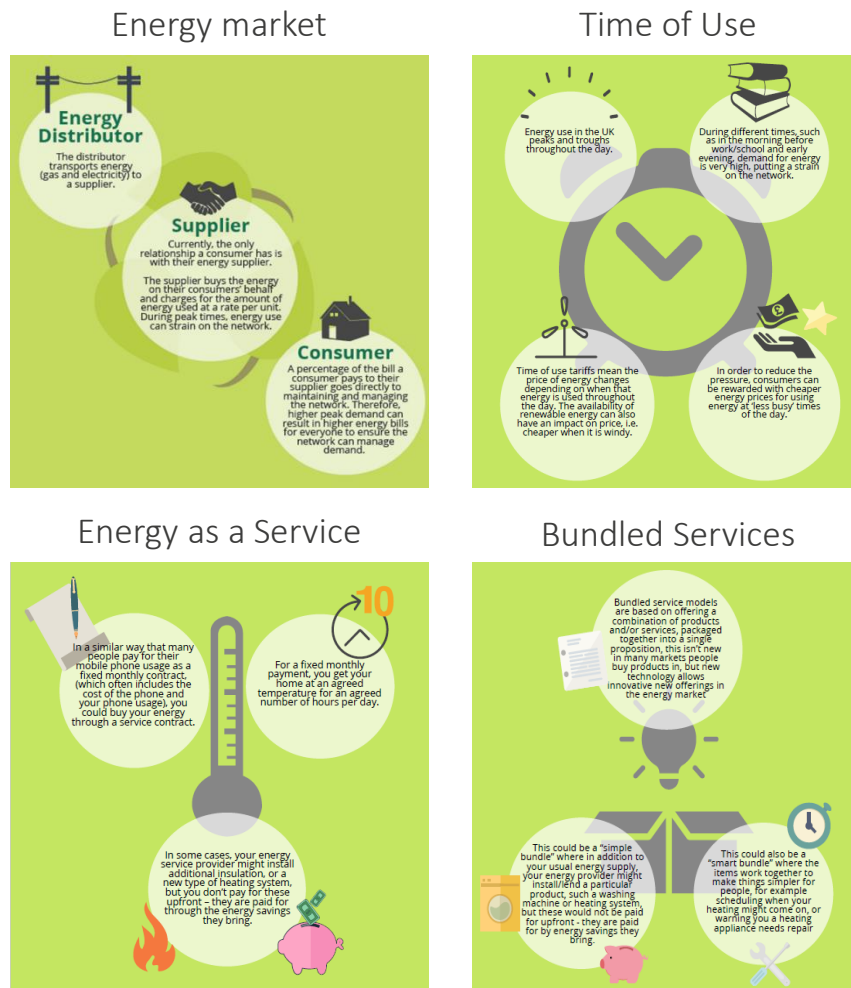
The inclusion of a task before the deliberative workshops allowed participants to spend some time getting to know the topic, and to build their own awareness and understanding ahead of the events. Pre-tasks are very effective in maximising the outputs of workshops, especially when the topic is energy, a subject many consumers give limited consideration to.

A few days before the deliberative events, respondents were emailed a document containing information about the current energy system (to educate respondents not familiar with how energy is supplied to homes) and information about one of the three energy models. They were asked to complete some simple questions about their interaction with energy suppliers, and to give their initial reactions to the selected energy model.

¹¹ Defined as an employee of an estate agent, managing properties on behalf of a landlord/landlords

This approach did not overwhelm respondents with information before the deliberative workshop, but it ensured that respondents arrived at the workshop with the same baseline level of understanding about the energy market. It also meant that respondents were familiar with one of the models prior to the workshop, with all models distributed across the workshop.

The information in the pre-task was presented in a simple, visual style in order to maximise engagement:



The completed pre-tasks were analysed by the Impact team before the workshops started, so that all moderators had a good understanding of participants' experiences and familiarity with the energy market. Moderators used this information during the workshops to ensure that every respondent felt comfortable and that their input was valued.

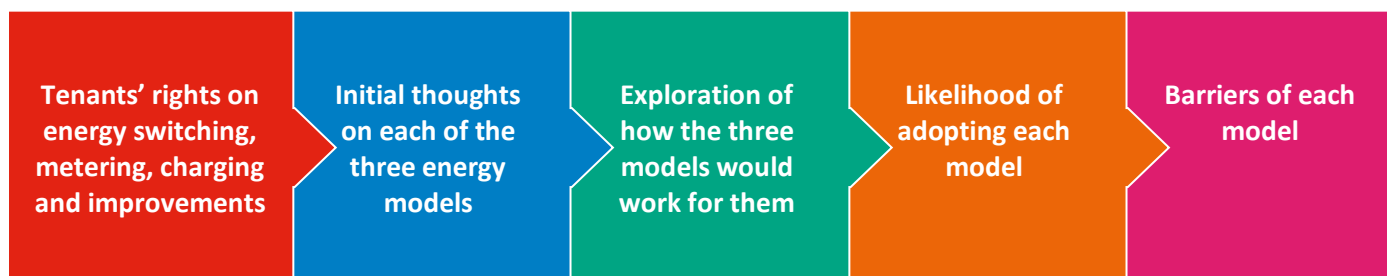
Deliberative events

The deliberative events provided an opportunity for tenants and landlords to join together and (virtually) share experiences and evaluate the energy models.

There were four workshops in total: two with landlords and two with private tenants. The workshops each lasted 2.5 hours and 20 respondents took part in each workshop. Due to the restrictions associated with the COVID-19 pandemic, the events were conducted online and three moderators from the Impact team were on hand to help run

each event. This allowed for large group discussions, break out rooms for smaller group engagement, and a researcher available to address any technical difficulties arising without affecting the wider group.

The discussion guide was tailored to the tenant and landlord groups as appropriate, with both audience types being asked to discuss and explore the following areas:



Facilitating workshops online brings its own challenges versus in-person events. Every effort was made to ensure participants were fully engaged, including use of live online polling, clear, visual stimulus (video, images and 'live' examples of each energy model in action), and provision of regular breaks. Full details of the discussion guide and stimulus material are provided in Appendix 3 and 4.

Respondents participated in two live polls during each workshop using Slido (a free polling platform that they could access from their phone or other device). The polls were used so participants could anonymously choose which energy model they preferred (either with or without the current model as an option) to measure preference amongst tenants and landlords.

In-depth interviews with tenants in vulnerable circumstances

In engaging with tenants in the private rental sector, Citizens Advice was keen to ensure that all tenant groups were included. Whilst the deliberative events covered a broad range of tenants and landlords, 10 in-depth interviews were conducted to ensure inclusion of tenants in vulnerable circumstances who may not have felt comfortable in a larger group session. Reasons for being considered vulnerable included physical / mental disability, being disengaged with technology (and unable to participate online), and having English as a second language.

Three of the in-depth interviews were conducted over the telephone, and seven on Zoom. The discussion covered the same topics and used the same stimulus material covered in the deliberative workshops, but in a shorter 45–60-minute timeframe. Respondents were encouraged to have a carer or family member join the interview call as appropriate.

The results from the in-depth interviews have been integrated into the deliberative workshop analysis to provide a full exploration of the enablers and barriers to the energy market for all private tenants.

Post-task

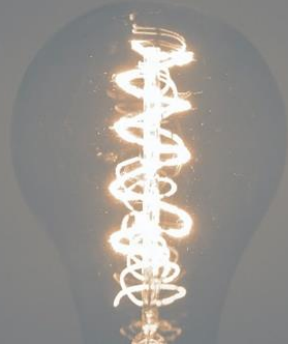
The deliberative events provided a safe and engaging environment to focus on the pros and cons of the different energy models. However, this very focused environment cannot replicate the real world, where decisions are made and opinions are formed within the "noise" of different external stimulus. To sense check the findings of the workshops in the real world, participants were sent a link to a short survey that they could fill out in their own time, once they were back in their usual environment. The post-task survey was sent out two weeks after the workshops to allow time for reflection.

The survey asked respondents to choose their favourite energy model (from the three new models tested, and again, with the current model included as a fourth option), as they did during the workshop. They were also asked other qualitative and quantitative questions to fully understand their individual barriers to the different models.

Reconvened focus groups

Once the deliberative workshops, in-depth interviews and post-task were completed, the results were analysed and a list of barriers to the three energy models identified. Impact worked with Citizens Advice to design a range of solutions to overcome these barriers for both private rented tenants and landlords. The solutions were tested in two, 90-minute focus groups. The groups were made up of participants from the original deliberative events and each group contained a mix of landlords and tenants.

During the groups, the findings were shared with the tenants and landlords, providing an opportunity to further validate the insights. The previously identified solutions were then tested and developed in conjunction with the tenants and landlords. This gave Citizens Advice confidence that the proposed solutions were appealing and workable from a tenant/landlord point of view.



Engagement with the energy market and awareness of tenant's rights

Information on tenants' rights was presented to participants in the workshops and depth-interviews in the following areas. A full copy of the stimulus material is included in Appendix 4.

Switching energy supplier

- If the tenant pays the supplier, they have the right to switch to whoever they want. If a landlord has a 'preferred supplier', the tenant should inform the landlord that they are switching. They may be asked to return to original supplier at the end of the tenancy.
- If the landlord pays the supplier, the tenant does not have the right to switch, but they can ask their supplier to do so.

Metering

- If a payment meter is installed in a property, the tenant can change this without the landlord's permission. If an energy supplier requests a pre-payment meter is installed, the landlord cannot stop them from doing so.
- If a pre-payment meter is installed during a tenancy, the tenant might have to change it back to the original meter at the end of the tenancy

How much a landlord can charge a tenant for energy

- If a landlord pays the supplier, they can charge the tenant a 'maximum resale price' for their energy. This includes costs of the units of energy used, the standing charge and VAT at 5%.

Installation of energy efficiency measures in the property

- Tenants can request energy efficiency improvements to be made to the property (e.g. installation of draught proofing measures, cavity wall insulation), when there is no cost to the landlord. These measures must be funded by any of, or a combination of the tenant, central government, a local authority or any other person.

The tenant perspective

Tenants in privately rented properties who participated in the study were most likely to manage their energy themselves, although this did vary: In some blocks of flats, energy might have been included in the rent (via the service charge landlords paid to the managing agent) if there was a communal boiler for hot water, heating or both. In this instance, tenant engagement with the energy supply was low as they have no control over how much they paid for energy or who it was supplied by. These tenants generally had no contact with the supplier at all. The exception to this was if there was a problem and the landlord was not contactable. In such cases the tenant would then contact the supplier directly.

For the majority of tenants however, the energy supplied to their home was in their name and they were expected to manage the account and pay the bill. In most instances the landlord (or managing agent) changed the account with the existing supplier into the tenant's name(s) when the tenant moved in. This ensured the tenant was liable for the energy they used from the first day of the contract and that the landlord or previous tenant would not be erroneously charged. Yet it also meant that tenants were not given the choice of which energy supplier to use at the start of the contract. There was generally no encouragement or support from landlords or managing agents to check whether a different supplier could have saved the tenant money.

"Mine was already set up when I moved in so the landlord, so obviously I've been in the property for a few years and he's always been with British Gas so just stuck with it." Tenant

Monthly direct debit was the most common way tenants paid their energy bills. Some tenants claimed they regularly inputted meter readings through either an app or their suppliers' website to ensure they were only charged for the energy they used. Other ways tenants communicated with their energy supplier was over the phone or via email, but this was often only when they received a bill or when setting up a new contract.

Tenants were generally happy with the way their energy supply was set up, whether they paid for their own energy or whether it was included in the rent. Those that paid for their own supply did appreciate having control over which supplier they used (and how much energy they used). The exception to this were tenants in vulnerable circumstances. They were less confident about the process of switching and preferred to stick with the easiest/ most familiar situation.

Tenants in vulnerable circumstances faced additional barriers to switching, but these were more due to their vulnerability status, rather than them being a tenant. These included factors such as finding the prospect of switching daunting, especially if English was not their first language, and being more wary of scams, and therefore unlikely to use the internet for this purpose. Findings from the previous research, which included supporting customers in vulnerable circumstances to access the energy market, would therefore be applicable to this group¹².

Most tenants were aware that they could change supplier if they wanted to, and many had switched supplier in the past. Tenants that were new to renting, e.g., students living away from home / student halls for the first time, were least knowledgeable about their rights to switch energy supplier. Tenants on short term contracts were least likely to have switched or to have considered switching supplier, but most of them were aware that they could switch if they wished to.

"I think in a year I've switched four times. One of them was just the fact that I had registered online with something and I had a phone call one day and they offered me a thirty pounds a month difference, so I took it." Tenant

The most motivating reason to switch supplier for tenants was to save money. Energy often makes up a significant proportion of a tenant's fixed costs each month, and most were aware that switching supplier can result in cost savings. Reputation is also an important factor in choosing a supplier. Tenants had asked family and friends (and/or searched online) for recommendations and trusted anecdotal evidence of particularly good or particularly bad experiences. In general, tenants felt they were as able to switch supplier as homeowners, and that they had the same level of supplier choice available to them.

Tenants in vulnerable situations found the prospect of switching particularly daunting, especially those with English as a second language, and the digitally disengaged. Both groups were concerned about not understanding the information presented to them and were worried about the risk of signing up for a contract that might not suit their needs. Digitally disengaged tenants had typically not switched supplier for years (if ever) and believed the

¹² Future Energy Models, Impact Research, 2019

<https://www.citizensadvice.org.uk/Global/CitizensAdvice/Energy/915%20Citizens%20Advice%20Future%20Energy%20Models%20Report%20Final%20v2.pdf>

only way to switch was to phone a supplier. They felt the phone channel would leave them more open to scams and / or sales pressure to pay for something they didn't need and that could get them into debt.

The rights of tenants to choose whether to have a **pre-payment meter** or not was understood by some, but not all tenants. Interest in energy meters was low across the board, and tenants admitted that even if this choice was made explicit to them, they would be unlikely to give it full consideration. Some tenants thought that their landlord may have provided them with documentation about energy supplier switching and meters in a welcome pack, but they had not necessarily read through the detail.

That said, some tenants had requested installation or removal of a pre-payment meter, and the process had gone well. One tenant had been refused permission to install a pre-payment meter by the landlord but had not looked into it any further. Another tenant had been put onto a pre-payment plan by their energy supplier and the landlord was happy to accommodate this.

On prepayment meter: "My landlord said that if I want to change it I can, but it's nothing to do with me [the landlord]" Tenant

Knowledge of the right for tenants to request **energy efficiency measures** was lower than rights to switch supplier or meter type. Tenants agreed that their landlord and future tenants would be the long-term beneficiaries of efficiency improvements (e.g., double glazing, insulation, newer appliances or boiler) and therefore it should be the landlord's responsibility to pay. Tenants were not aware that they could request such measures and would like to be better informed. No tenants interviewed had direct experience of requesting energy efficiency improvements from their landlords.

"I wasn't aware of it either.... I'm renting for the short term... my minimum is six months but really depends on my work. And if they would say that there's no cost for landlords and I would have to pay for it not knowing what the improvements would be, selfishly I don't think I would. But it might be different if they would improve energy and if it was my own property or something like that, perhaps I would look into it" Tenant

The landlord perspective

Landlords generally felt that the energy supply is not something they needed to be involved in, beyond transferring the existing supplier's account into the tenant's name at the start of the tenancy. Anything else requiring the landlord's attention would need to be requested directly from the tenant. Landlords were unlikely to proactively suggest switching supplier, meter type, or improving energy efficiencies, but were happy for tenants to switch supplier as long as they were informed.

"All I do know is when we change tenants is that tenants have to fill out a form for energy suppliers. We take readings on the exit and the entrance of a new tenant" Landlord

Most landlords preferred their tenants to manage the energy supply. It requires less effort from the landlord, and means the channel for communication is open between the tenant and energy supplier directly so the landlord doesn't need to be involved in supply issues or billing disputes. Landlords believed that all liability for paying for energy used during the contract term belonged to the tenant, and so they preferred to stay at arm's length. For instance, a number of landlords had tenants that had left the property with outstanding energy bills. As the tenants had a direct relationship with the supplier, the landlords did not consider themselves to be responsible for the unpaid bills. Some of these landlords knew who the supplier was but others explained they only found out at the end of the tenancy. Few suggested they had a preferred supplier and often tenants were set-up with the same supplier used in the previous tenancy at the property. These landlords were happy to let the tenant choose their own energy supplier.

"I had a tenant who didn't pay any electricity for two years, which did cause quite a bit of a problem, but because they managed it themselves the debt was transferred to them. The electricity company tried to get it out of me, but I hadn't signed a contract so it was all fine in the end, it was just a bit of hassle as you can imagine." Landlord

"The couple in my flat have got it included in all the bills just because they wanted that one payment every month rather than all the other bits and pieces going out." Landlord

A minority of landlords managed their tenant's energy supply for them, often because the building had a communal boiler and so energy costs were included in the service charge that the landlord paid, or because the tenant requested that their energy bills were included in their rent. Having energy bills included in the rent can help with budgeting for lower income households, and it can also benefit students who like the simplicity of one rent payment covering all bills. Landlords managing their tenant's energy supply generally found the experience straightforward with no barriers mentioned.

Landlords were generally happy to agree to tenants' requests for a new meter (pre-payment or smart) as they felt it was simply an aspect of the tenant managing their energy supply. There was some reticence around pre-payment meters as the need for one could suggest to the landlord that the tenant's financial situation was precarious. Landlords were also concerned that changing to a pre-payment meter constituted a material change to the property. They felt that it would be the tenant's responsibility to remove the pre-payment meter at the end of the tenancy, to meet the contractual obligation to return the property to its original state. However, landlords felt legislation on this was unclear and were therefore unsure whether they could insist on this.

Like tenants, landlords had little awareness of the tenant's rights to request energy efficiency measures. Some landlords had paid for tenant requests but these were not always for thermal insulation reasons (for example, one tenant requested draught excluders to keep noise out rather than keeping heat in).

Landlords did not feel it was their responsibility to inform tenants of their rights regarding energy supply, metering and efficiency. Instead, they expected the estate agent that organised the tenancy to do this. As a minimum landlords expected the estate agent to inform the landlord about tenant's rights but this isn't a conversation that landlords usually have with agents.

"Tenants wanted new windows in the whole flat and we thought we should really because it was all starting with condensation, we didn't want it to ruin the flat either. So, we did that sort of pushed us to do it sooner rather than later" Landlord

Solutions to improve tenants' engagement with energy suppliers

After analysing the insights generated during the deliberative workshops and in-depth interviews, Impact together with Citizens Advice, proposed two solutions to help improve tenants' engagement with their supplier. These solutions were tested with tenants and landlords in the reconvened focus groups.



Information solution

Obligation on energy suppliers to collect information on the tenancy situation. This would allow targeted communications (e.g., advice that tenants can switch) and would allow targeting of support (e.g., access to Priority Services Register or Warm Home Discount even if they are not the billpayer)

Tenants did not see any benefit to energy suppliers knowing that they rented the property. Some were happy for suppliers to know this information, whereas others were more cautious. Some tenants were concerned that this would result in contact from other departments, or exposure to sales pressure to take out a certain energy contract. Tenants preferred to engage with their energy supplier as little as possible and to change this they would need to be convinced it could be advantageous.

Nor did they like the idea of targeted communications. Tenants felt they already received too much "junk mail" and would be unlikely to read information sent from an energy supplier unless it very clearly conveyed a benefit for them.

One way to improve appeal of this solution would be to find a way to inform tenants of their rights in simple, passive way and show tenants how to request more information should they want it. This could be done on their bill or when signing up to a new supplier and would put the control firmly in the hands of the tenant as they would have the choice of whether to engage or not.

"Yeah, I don't like the idea of it. I think actually targeting it just feels a bit much. And also, if you're getting that communication from several different people, we already get enough junk mail, I hardly read it. I wouldn't like it."
Tenant

Policy solution

Tenants are prioritised for trials/implementation of collective switching. BEIS will consult on how to introduce opt-in collective switching over the next year and previous Ofgem¹³ trials showed a record numbers of consumers saved money after participating in a trial

"I'm anything for a discount if I'm honest." Tenant

Tenants are motivated by saving money on their bills, so the idea of collective switching did have appeal to some tenants. However, the majority felt that it would reduce the control they had over their energy supply and they would be unlikely to sign up for this reason. There is a clear need for

better education about the benefits and details of collective switching here. Tenants felt this would be more appropriate for homeowners as it felt like more

"Surely it would be better targeting the landlords. Because the tenant, at the end of the day, is going to move on." Tenant

¹³ Prompting engagement in energy tariff choices, Ofgem, 2019, <https://www.ofgem.gov.uk/consumers/household-gas-and-electricity-guide/how-switch-energy-supplier-and-shop-better-deal/prompting-engagement-energy-tariff-choices>

of a long-term commitment. They were also unsure what would happen if they moved out and therefore thought it should perhaps be aimed at landlords who could make a longer-term decision.

Some landlords were aware of collective switching projects but didn't think their tenants would necessarily see the appeal as these require a certain level of engagement in the energy supply.

It was felt that the greatest opportunity was for landlords with large portfolios who could encourage a greater number of tenants to sign up at once, or for landlords that included energy in their rental payments and who could partially manage the process.

Solutions to improve awareness of tenants' rights around energy supply, metering and efficiency measures

Information solutions



Introduce a standard lease where landlords set out that people are allowed to choose their meter type/supplier etc. if they pay own bills

An information portal for both landlords and tenants where they can understand their rights/responsibilities

"Yeah, definitely [it would be helpful to have in a portal]. And then you'd know if you've got issues with anything, you know exactly where to turn. You know who to speak to." Tenant

Including energy information in the tenancy contract or on a portal was appealing to both tenants and landlords. It was felt this would ensure that everyone was provided with the same baseline level of information and put the onus on tenants to find out more / take further steps to switch supplier if they wanted to. This standardised information

sharing was also felt to reduce confusion by clearly defining which roles and responsibilities sit with the landlord and which sit with the tenant. Tenants felt a portal would give them clear information about what to do and who to contact if they had any issues or questions.

Some tenants referred to a "how to rent" guide they had received, which contained information on switching energy supplier, but had not necessarily read it. Landlords were also concerned tenants would not read information provided in a document at the beginning of the tenancy. Some landlords found that tenants often asked questions that were addressed in written information already provided to them. Moving into a new home is a busy time and it may be more appropriate to signpost tenants to an information portal after they have settled in.

"I would put it in a much more obvious or stronger document, your rights and whatever, it's again in the right to rent booklet, because I don't think, and the landlords in the room may well take the same view as I do. After fifty odd years of signing tenancy agreements with tenants, tenants don't read the tenancy agreement." Landlord



Policy solution

Obligation on landlords that they have to be registered – this would ensure they are informed of any changes to legislation that could affect them

Tenants and landlords both agreed with the proposal for some form of registration for landlords. The groups discussed how this registration should be managed, e.g., what size of landlord portfolio, and agreed that all landlords should be required to register. It was felt to be beneficial to landlords who would be notified of any changes to legislation in regards to their properties' energy supply and efficiency, thereby providing peace of mind to them and their tenants. Those representing managing agents also agreed with the proposal.

"I think so. Because we get a lot of landlords that ring up that we that we let only, and they don't know when legislation's change, they don't know. They'll ring up and they'll say, oh, we've got this problem with our tenant. And they've not done a lot of stuff they should have done. And they look to us, it's that, well, we're not managing your property, we found your tenant and then we've sent you on your way. So, I think this would be really, really, really helpful." Landlord (agent)

"I think it's always important to know what the current legislation is. Because I know they've brought in this like, you know, you have to get your electricity checked. And this new... what is it EICR certificate or whatever it's called? And I wasn't totally aware of it... So yes, you need to be up to date with legislation that can affect yourself as a landlord. Definitely." Landlord

However, landlords would expect registration to be free or very low cost. Local authorities are starting to bring in registration requirements for landlords in certain areas, and landlords considered this to be very expensive (c. £1,000 in some London boroughs) without providing any benefits to them.

Some tenants thought that this service would already be provided by Citizens Advice and that there wasn't a need for a separate channel. Instead, Citizens Advice should work on improving awareness of the advice that is already available to tenants and landlords.

"I think Citizen's Advice does that. Going back to before to what someone was saying, the online portal, I think only when people run into some sort of trouble or difficulty, they start looking to see what their rights are." Tenant

New energy models: Time of Use tariffs

Respondents were shown details of the Time of Use energy model. This included:

- Brief description of the model
- The challenge the model aims to overcome (currently no incentive for consumers to use energy at off-peak times or avoid peak times)
- What it means for tenants and landlords



The stimulus used is shown in Appendix 4.

Overall, the reaction to Time of Use Tariffs was positive, although it was felt to be too time intensive for many respondents.

Tenant reactions

When asked about Time of Use tariffs in the pre-task, tenants were initially very positive it would help the industry become more sustainable, by incentivising consumers to use energy at off-peak times of the day. They liked that it

could save them money on their bills, especially those whose lifestyle meant their energy usage was most likely to be at off-peak times anyway.

When discussed in more detail during the workshops, most were familiar with the concept of Time of Use tariffs through knowledge of off-peak heating (e.g., Economy 7 heaters). Appeal was driven by the potential to have lower energy bills and save money. Energy bills often make up a significant proportion of a tenant's monthly outgoings and so any opportunity to reduce this cost would be welcomed.

Time of Use was seen to have particular appeal and relevance to tenants working shift patterns or those that are retired or not working. These groups would have more opportunity to use energy at off-peak times. It was seen as an unfair model for tenants working away from home during standard working hours as they would not be able to benefit from the cost savings as easily.

Tenants were in principle open to changing their behaviour to use more energy at off-peak times but this is dependent on their living situation. Those living in flats were concerned about bothering neighbours with noise if they used their washing machine at night (and the same concern applied should their neighbours start using appliances at night time). Tenants were not willing to be flexible in other areas e.g., no-one was willing to eat meals at different times just to cook using off-peak energy.

"If you want to watch the television, you're going to watch it six, seven to eight to nine in the evening. I mean you're not going to put it on hold and watch it in the early hours of the morning. So, I think it's asking a bit much. You've really got to box your life around for this haven't you really." Tenant

Tenants wanted to be able to plan their outgoings and would want evidence that their bills would reduce before signing up to a Time of Use tariff. Further to this, they wanted reassurance that the parameters of the contract wouldn't change over time. For instance, if a large proportion of consumers started to use more energy at off-peak times, would that shift in demand change the timings of peak and off-peak charging bands? Tenants did not want to be having to change their behaviour multiple times during a particular tenancy or supplier contract period.

Tenants in vulnerable circumstances were potentially less able to easily change their routines, but were more likely to be at home during the day and already doing household activities at off-peak times. They were concerned about being expected to change behaviour and would want very clear information on what actions they could take and how each action would reduce their energy bill.

Those tenants that are digitally disengaged were the most financially conscious. While they would benefit from reducing bills, the risk of having an increased bill was a particular barrier for this group and so they would want to retain full control over usage. They were open to the idea of buying new technology to benefit from Time of Use (e.g., smart appliances) as long as the energy savings could justify it.

Landlord reactions

Landlords could see the appeal of tenants being incentivised to use energy in the most responsible way, and would be happy for tenants to sign themselves up to Time of Use tariffs. That said, they shared tenants' concerns over exactly how it would work and the level of behaviour change that would be required. Landlords wouldn't want the extra complexity of a Time of Use tariff in instances where they managed the tenant's bills for them.

Any Time of Use contract should be straightforward to start and stop: Landlords are used to phoning energy suppliers to transfer energy accounts into new tenant names but wouldn't want this process to become more onerous by having to set up new contracts or arrange anything complex with smart meters.

Landlords are often asked to intervene in disputes between tenants and neighbours. While there is generally little they can do, they were as concerned as tenants about issues with households using noisy appliances at night.

“So now, if one of my tenants leave I just call up British Gas, for example. Call them up, tell them my tenant's left... I wouldn't know where to start with a smart meter. How it would work with transferring it from one to another. That's my major concern because I don't have three hours a day to call up energy providers to continually swap and change” Landlord

The greatest potential for Time of Use tariffs was felt by landlords to be charging EVs in off-peak hours. Yet most tenanted properties in the research group did not have off-street parking and therefore most tenants would not be able to benefit from this.

While smart appliances and other technology could help tenants to save on their energy bills with a Time of Use tariff, landlords did not want to have to buy

expensive new technology if a replacement wasn't already required. Some landlords also raised the potential issue of a tenant buying their own smart technology, then taking it with them when they moved out. This could leave the landlord with the unexpected cost of buying a new appliance for the next tenant moved in.

New energy models: Energy-as-a-Service

Respondents were shown details of the Energy as a Service energy model. This included:



- Brief description of the model (fixed monthly payment to achieve a set level of temperature)
- The challenge the model aims to overcome (the customer doesn't have to deal with the complexity of engaging with energy efficiency, everything is taken care of by the supplier)
- What it means for tenants and landlords

The stimulus used is shown in Appendix 4.

Overall, the reaction to Energy as a Service was positive, although both tenants and landlords were concerned about long contract lengths.

Tenant reactions

When first introduced to Energy-as-a-Service in the pre-task, Energy-as-a-Service divided tenants, with some being very positive about the concept, but others raising concerns from the outset. Those that were in favour liked the idea that energy bills could decrease as a result of signing up to an Energy-as-a-Service tariff and liked that they would know what their energy bills would be each month. The key concerns raised by others included whether they would actually see a reduction in price, how it would work for older properties and whether it was something that consumers would find too complicated to manage.

A similar pattern was followed in the workshops as tenants liked the idea of Energy-as-a-Service in principle and thought it would help with budgeting as their monthly energy cost would be fixed. They also appreciated the concept of “guaranteed level of comfort” as an aspirational vision (e.g., they wouldn't need to worry about being cold in the winter).

That said, tenants, including tenants in vulnerable circumstances, weren't sure that Energy-as-a-Service would actually save them money and they would want proof of this. The benefits of a fixed monthly cost for an agreed level of warmth aren't a strong enough driver on their own if their energy bills don't reduce in real terms.

Contract length was the biggest barrier for tenants. Whilst tenants might stay in a property for five years or more, they generally did not start a new tenancy expecting it to last that long. Tenants also liked to have the control of being able to move if they wanted to, or if circumstances dictated that they needed to.

Previous work conducted by Delta-EE on the subject of new energy models¹⁴ suggested an Energy-as-a-Service contract could last up to five years, and that this would be too long for most tenants to be able to commit to, so tenants thought Energy-as-a-Service would be better suited to homeowners.

“No-one can guarantee that I’m going to stay in the same property and then basically what will happen is that on the other side, landlords would see that as a peace of mind. For five years he can’t move” Digitally disengaged tenant

The idea of a fixed payment was appealing, but tenants would also like some level of flexibility without being penalised. For instance, what would happen if they wanted to change the agreed temperature / warmth level at different times of year? Or what would happen if they needed to put the heating up higher than agreed for a short period, or needed to stay up at night using energy when they wouldn’t usually do so?

Tenants were generally in favour of the energy supplier making home improvements for them, but questioned how it would work in the long term if they didn’t stay at the property and the new tenant wanted a different energy contract.

Tenants in vulnerable circumstances were particularly favourable about home improvements being made. These tenants also said that it would be a selling point to move to a property that had an Energy-as-a-Service contract, if the landlord was managing it as it provided a guaranteed level of service.

Landlord reactions

Landlords were equally split initially on the idea of Energy-as-a-Service, giving similar reasons to tenants, but generally suggested they would be happy for their tenant to sign up to this model, if, again, it best suited the tenants’ needs.

Landlords concurred with tenants, however, that a five-year contract would be too long, and that tenants rarely stay in one property for that long. Landlords would not want to manage the contract themselves as that would mean having to continue to make payments if the property was empty between tenants, but they also wouldn’t want complications if the tenants needed to move out and break the contract. Even being able to transfer the contract from one tenant to the next could be difficult if one tenant required more / less energy or a higher / lower level of warmth than the other. Some landlords also raised concerns that tenants might be put off signing up for a property if it meant they had to take on an existing Energy-as-a-Service contract.

“You’re enforcing that set fee, whatever that’s going to be, on your tenants, so there’s no choice for them. If they want that property, they’re obligated to have what you’ve signed up for, aren’t they? And that may not be the cheapest option for them.” Landlord

The greatest appeal for landlords was in the potential to have their properties improved for “free” e.g., if the energy supplier arranged to install insulation. However, landlords wouldn’t want to be liable for any costs should the tenant move out and break the contract.

Landlords suggested that the greatest potential for Energy-as-a-Service could be in new build properties which would already have improved levels of insulation and energy efficiency measures in place. It was thought that energy suppliers / DNOs could work with property developers directly to include Energy-as-a-Service functionality into new build properties.

¹⁴ How accessible are future energy supply business models, Delta-EE, 2019, https://www.citizensadvice.org.uk/Global/CitizensAdvice/Energy/How%20accessible%20are%20future%20energy%20supply%20business%20models_Citizens%20Advice_FINAL.pdf

New energy models: Bundled services



Respondents were shown details of the Bundled Services energy model. This included:

- Brief description of the model (a bundle of energy related services for a fixed monthly payment)
- The challenge the model aims to overcome (the energy supplier manages the different services, providing the customer with desired outcomes without complexity)
- What it means for tenants and landlords

The stimulus used is shown in Appendix 4.

Overall, Bundled Services does hold some appeal but there are concerns over how transparent it would be and exactly how it would work in a private rented household.

Tenant reactions

As with Energy-as-a-Service, tenants that were asked about a Bundled services tariffs in the pre-task were divided on whether they liked the idea, although the majority did appreciate it could help makes things simpler. They liked that it could lead to reduced energy bills and that it also appeared to be more future focussed, with technologies such as Electric Vehicles being considered as part of the bundle. They were wary of overpriced products being included in a bundle, especially ones that they did not want or need. Tenants did suggest it could work well for them as tenants in a rental property, provided they had control of the products included in the bundle and knew in advance what the price of the bundle.

These mixed reactions from tenants continued during the workshops, as most could see the potential to simplify their bills and save them money. Many tenants were very positive about including different services under one bill, including technology costs.

Concerns around transparency are a barrier to Bundled Services: with one monthly payment covering a number of different services, tenants were concerned they wouldn't know what they were paying for each service, making it difficult to ascertain value for money. They were also concerned that they would be encouraged to sign up for additional services that they didn't need in order to maximise bundling cost savings.

As with Energy as a Service, the contract length was difficult to commit to for private rented tenants, who would not be able (or want) to guarantee they would be in a particular property for five years or more. They also wanted reassurance that there was some level of flexibility built into their monthly payments (as with Energy-as-a-Service), for instance if they needed to use more energy one month.

"It does sound nice, just the idea of having something that's simplified. I know the thing about, you mentioned electric cars wasn't it? Maybe that's what it's sort of anticipating, down the line that people are using electric cars and it's going to cost a lot, the energy usage is going to really go up quite a lot, I imagine." Tenant

Tenants wanted clarification on the required involvement level of the landlord. Would the tenant be able to manage the bundle themselves or would the landlord have access to data on how many times the shower / washing machine is used etc.?

The potential of having a Bundled Service including EV charging costs was appreciated by tenants, but this was seen as a long-term benefit as most did not have off-street parking and / or had not yet considered switching to an EV.

Bundled Services had least appeal for tenants in vulnerable circumstances, who found the complexity of the model a barrier, and who were concerned that a high, ongoing level of engagement would be required from them. They, along with other tenant groups, were unwilling to commit to a long contract length.

Landlord reactions

Once again, landlords were generally happy for their tenants to sign up to a Bundled services tariff if there were benefits to them doing so. They agreed with tenants that the simplicity of bundling services together under one monthly payment was appealing, but also had concerns with contract length. They wanted clarification on the need to buy new appliances, and what would happen to these if the tenant left or if a new tenant didn't wish to keep the same energy contract / supplier. Buying new smart appliances for tenants also felt wasteful (both in terms of cost and environmentally) if the current appliance was still working. It was suggested that the Bundled Services model could create a white goods waste issue if the pace of smart technology kept increasing, leading to a need for regular upgrades.

Ultimately, landlords felt that the Bundled Services and Energy-as-a-Service models would require more engagement and time than they wanted to invest and most landlords would prefer to be as hands off as possible.

Either of these models would need to come with clear expectation of what the responsibilities of the tenant versus the landlord is.

“You’d have to either sell them [appliances] or store them somewhere, wouldn’t you? And then what are you going to do, what everyone else has said, when that tenant then moves out are, they going to take that washing machine and dishwasher with them and then you’ve then got to replace the white goods again because the next lots of tenants might not want to do the same thing? It sounds like a minefield, to be honest.” Landlord

Which models were preferred by tenants and landlords?

Following the workshops, each participant was sent a post-event survey to see how their opinions might have changed since attending their workshop.

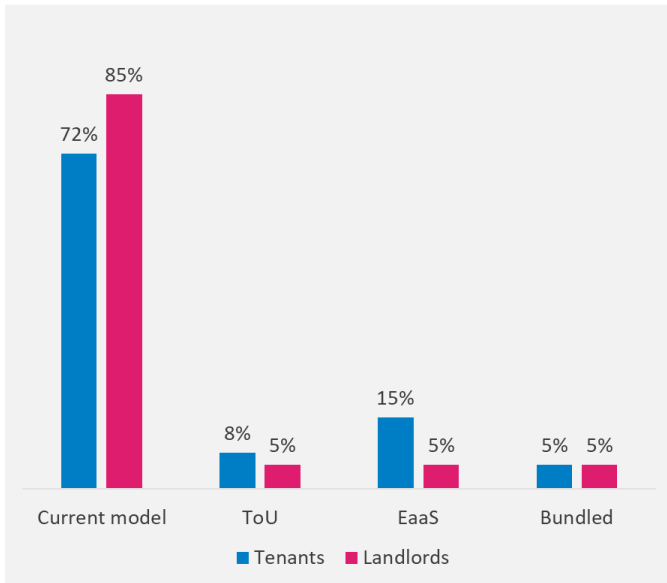
Respondents were asked which of the three energy models they preferred at the end of the workshop they attended, and this question was repeated during the post-event survey. It was asked twice, firstly with the current energy model available as an option, and secondly without, forcing the respondents to choose from one of the new models.

The key finding from this exercise was that the current energy model was the most preferred, amongst both landlords and tenants, but that the number of tenants and landlords selecting the current model reduced after the workshop. When forced to choose between the new models, Time of Use was the most preferred by both landlords and tenants in the post-event survey, which was a slightly different result to during the workshops, as tenants had suggested Energy-as-a-Service would be their most preferred.

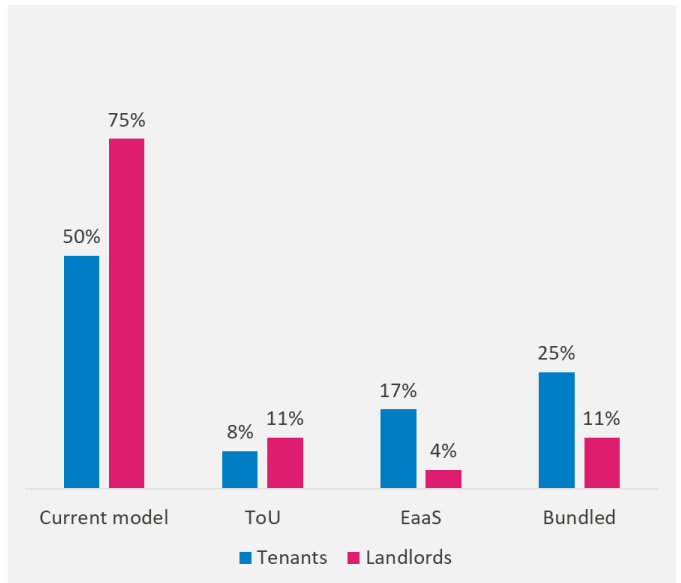
It is also worth noting that the percentage of both tenants and landlords selecting Bundled Services as their preferred model increased after the workshops, both when the current model was an option, and when the current model was excluded, though it did remain least preferred by landlords, albeit by a smaller margin.

The graphs below show the comparison in results for the most preferred energy model during the workshop and after, in the post-event survey.

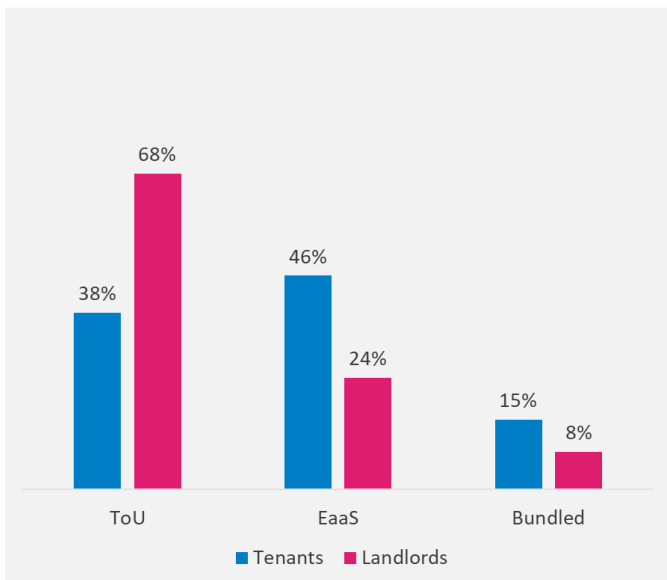
Deliberative workshops



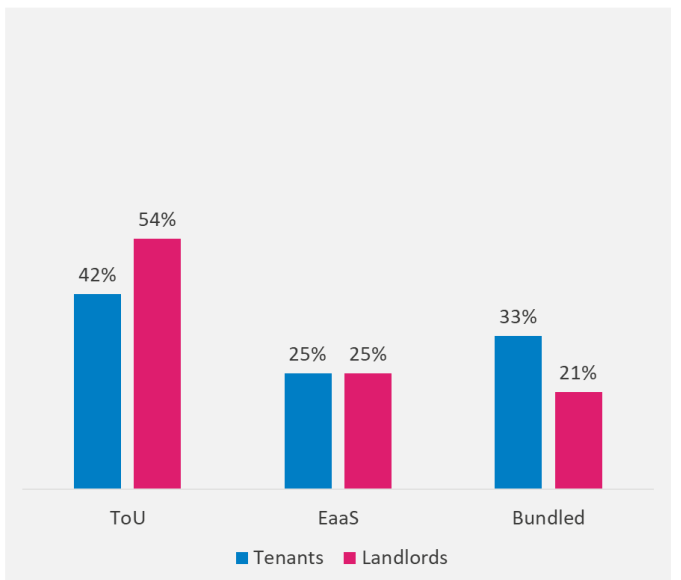
Post-event survey



Deliberative workshop



Post-event survey



When asked the reasons why they selected the model that they did, the responses from both tenants and landlords largely echoed those sentiments given in the workshops. Many liked the familiarity of the current energy model and felt there was no need to move from away from the way the industry currently works. They often didn't see a real advantage in moving to one of the new models, and saw moving as too much of a hassle.

Those for whom Bundled Services was most preferred, suggested it was due to its simplicity and having everything covered in one bill. However, they did also explain that they would need assurances around contract length, i.e., it would need to be short enough to allow them to exit if they moved out of their current property.

Respondents were also asked if they had had the opportunity to discuss any of the topics with family/housemates or estate agents/business partners, and if so, whether this had had any effect on their preference. The majority said they had done so briefly, but not in enough detail to cause a significant change in opinion. Some respondents did suggest that they were warming towards the new models a little more, perhaps explaining why overall preference for the current model did drop slightly in the post-task.

Looking into the future

During the post-event survey, respondents were also asked questions relating to the future of the energy market. When asked more generally what would need to change to make new energy models more appealing to tenants, the key theme that came out was contract length. This, again, echoed the sentiment given in the workshops as contract length was identified as a key barrier to uptake. Both tenants and landlords suggested they would like to see overall contract length be reduced to 6-12 months, which matched the length of tenancy contracts they often signed up to. This would ensure there were no exit fees or penalties for moving out of a property before the contract term and also stopped the landlord getting penalised, if they were unable to fill the property quickly after their tenant moved out.

Finally, both landlords and tenants were asked how ideally, they would engage with the energy market in the future, and again short contract lengths were mentioned, ideally keeping them down to 6-12 months so they would match the tenancy contract.

In addition, tenants explained how they might like to see a combination of two or more models implemented, potentially including the current model, which would help keep things relatively simple. Tenants also suggested increased use of technology would be beneficial, with use of smart data to help identify which supplier was cheapest or which model(s) they would most benefit from. Landlords explained that they are mostly happy with how it worked at the moment and reiterated that they like to leave all matters relating to energy to the tenant, where possible, but some suggested it would help if energy contracts could be moved across priorities easier, which would help solve the issue around contract lengths.

"I think ensuring the contracts lengths are small (between 9-12 months), would help market these energy services to an age group of people (between 18-29) that generally only stay in a flat/apartment/house for the maximum of a year." Tenant

"If smart meters could be fitted more easily in shared accommodation. It's not possible where I live now. If I were able to monitor my use more continually, I would perhaps choose another energy model."

Tenant

"The contract would need to be moveable to a new address as I would not be prepared to be obligated to something that a tenant had signed up for. This works with sky and broadband phone services so it shouldn't be a problem" Landlord

Acceptability of solutions

Evaluation of the three energy models in the deliberative workshops and in-depth interviews raised a number of barriers. These barriers make it difficult for private rented tenants to fully benefit from the energy models. Whilst some barriers are common across all consumers, there were some barriers identified that are specific to the private rental sector.

The Impact and Citizens Advice team collaborated to propose solutions to overcome these barriers and the solutions were tested in reconvened groups containing a mix of tenants and landlords in each group.



Length of contract with supplier: Extended cooling off period

Cooling off periods do exist for new energy contracts but are generally limited to statutory 14 days. An extended cooling off period, of three months for instance, would give tenants longer to evaluate whether the new energy model is compatible with their lifestyle and routine.

Tenants and landlords agreed that an extended cooling off period would be preferable to the statutory 14-day period. However, six months would be more useful than three months as that would allow the energy model to be tested over a couple of different seasons, with related fluctuations in temperature.

An extended cooling off period would be beneficial for the Time of Use energy model as it would enable customers to assess whether changing their behaviour / being more aware of when they use energy did genuinely reduce their energy bills. It would also mean they could test whether the required behaviour change would be sustainable for their given lifestyle.

That said, for most tenants, an extended cooling off period wouldn't solve the contract length barrier as it is the end of their tenancy that concerned them, rather than the start of their energy contract. If tenants or landlords wanted, or needed to end a tenancy after a 12-month AST (Assured shorthold tenancy) contract, then clarity is needed over what would happen to any longer-term energy contract that the tenant had signed.

Tenants were also wary of hidden costs and would need reassurance that they could genuinely leave the contract at the end of the cooling off period without having any penalties or additional charges.

"It still doesn't overcome the point that a lot of tenancies and some of our tenants, often just take a tenancy for six months. So you sign up for that, if you don't cancel in the cooling off period of three months, you've missed that deadline, you're potentially locked in to a three year contract or whatever it may be, but your tenants are moving out in three months' time." Landlord



Length of contract with supplier: Buy-out clauses

Tenants that want, or need, to end their tenancy before the end of the energy contract could have the remainder of their contract bought out by the next tenant or the landlord.

The idea of buy-out clauses didn't appeal to tenants. They assumed that they would somehow be penalised for breaking the contract and that there would be charges, even if they did sell it on. Questions were also raised about what would happen if the next tenant didn't want to continue with this contract. Landlords did not want to be liable for taking on the tenant's contract and did not want to be responsible for persuading the new tenant to take it on.

Tenants starting a new tenancy could see it as a positive to take on an existing contract but the cost savings would need to be proven and the benefits clearly communicated. This also opened a discussion of who would be responsible for communicating these benefits to the new tenant (the old tenant? The landlord? The lettings agent? The energy supplier?).

The possibility of the landlord managing the contract was also discussed, but landlords were not keen on this. They did not want to be legally responsible for an energy contract, nor liable for paying a monthly bill in the event of a tenancy void period.

“And so that would be my biggest concern is if you leave it up to them to give you a solution. Yeah, is there anything, you know, that if there is issues with the property having to be empty for a while, the landlord being stuck with the bill for it.” Landlord

Equipment solution: Encouragement to invest in new technology or heating

The way that we consume energy is going to drastically change over the next decade. Electric Vehicles (EVs) are going to make up a greater proportion of our cars as ICE car manufacturing is phased out. Fossil fuelled heating systems are also being phased out, starting with all new build properties from 2025. This shift towards renewable energy will require homes to invest in new charging and heating technologies as well as engaging in the development in smart technologies to fully exploit new energy models. It is expected that landlords will be required to give permission for any technology (e.g., smart thermostats) that the tenant would like to install.

Incentives to landlords to invest in new technology:

- Low-interest loans
- Grants
- Tax incentives for installing smart technology

Disincentives to landlords to not invest:

- Energy Performance Certification to require installation of smart meters (from 2025) and EV chargers (from 2030)
- Landlord to pay compensation (i.e., to pay for tenant to charge at public charge points) if no EV charger installed at property

Unsurprisingly, incentives were much better received than disincentives (by both landlords and tenants). Grants were the most popular alternative suggested, although tenants commented that they would want to be sure that any appliances or products bought with a grant were fully owned by the landlord as this would be more reassuring in the event of breakdown or issues.

Tenants also emphasised their preference for landlords purchasing white goods / appliances rather than the tenants buying them as it is not always possible to take these when moving to a new property. Tenants did not feel that the disincentives tested solved the issue of ownership and would rather landlords were encouraged to install energy efficiency measures.

“I think grants which are available [are good] if you can find them, [along with] low interest rate loans and tax incentives. I think the tax incentives is particularly interesting because government in the past, over the last few years, have been hitting private landlords and taking away tax benefits from us.” Landlord

Landlords were generally open to purchasing new equipment, assuming they would be given some kind of incentive. Although grants were preferred, landlords were also interested in tax incentives. These were particularly pertinent at the moment as there was a feeling that the current Government were steadily reducing the tax benefits available to landlords (i.e., reducing amount of mortgage interest deductible against a tax bill).

These tax changes, coupled with other market and mortgage disincentives, were reported as making it more difficult for private landlords, especially those with smaller portfolios. Further disincentives around energy efficiency would be a problem for many landlords, with some saying it might encourage them to sell up. Landlords wanted

clarification on the requirements to install EV chargers as this would not be practical for many rental properties. Charging infrastructure for properties without a private driveway or a garage would require the involvement of local authorities, building management companies, freeholders and energy suppliers / DNOs, as well as landlords.



Cost solution: Proving that new energy models will result in savings on energy bills

Tenants are unlikely to commit to a new energy contract (particularly one with a fixed or minimum term) unless they can be reassured that the energy model will result in cost savings for them. An online tool could be developed that would enable customers to put in their details and energy use and show them their likely cost savings. This is currently in development for Time of Use tariffs using customers' smart meter data.

This solution was received favourably in the main. Tenants were very positive about the concept of being able to find out in advance how much they could save on their energy bills, but they were not willing to change their energy usage behaviour in advance of signing up (i.e., if smart meter data or likely off-peak behaviour was required).

Tenants reiterated wanting to know if they would be penalised for peak energy use as many were unwilling or unable to change their energy routine. Examples cited included making a cup of tea when getting in from work and putting the washing machine on in the evening so clothes were ready for the next day.



Data solution: Keeping control of data and sharing

The relationships between tenants and landlords vary although most prefer to have little contact with each other once the tenancy has started and the tenant is settled in. Tenants are particularly concerned about how their energy usage data (e.g., from a smart meter or smart appliances) might be shared with their landlord when using future energy models.

Any energy models put to market should ensure that tenants are in full control of their contracts, data, and any sharing of data. Smart meters should be controlled by the tenant, and where this isn't possible, half hourly data sharing should be turned off by default. Tenants should be made aware of other ways they can keep control of their energy contracts. E.g., Time of Use contracts should only be used where the tenant (not the landlord) is able to control when to use appliances, such as using an app that can turn a washing machine on at a certain time. For Energy as a Service and Bundled Services, the outcomes (level of warmth, additional technology required) should be set by the tenant and not by the landlord.

Tenants and landlords agreed with these solutions. Tenants welcomed clear guidance on how to keep control of their data and how it is shared. Landlords welcomed the setting of responsibilities so that they were not expected to be more involved in a tenant's energy supply than they wanted to be.

Data sharing was not a concern for most of the tenants in the reconvened groups although a couple of people were more wary about who would have access to their energy data. Tenants weren't generally worried about their landlords having access to their data, more third parties.

Tenants were appreciative of guidance on ensuring they would have full control over appliances and when energy would be used. They were wary about required behaviour change required to take full advantage of new energy models, and wanted to ensure they had full control to fit energy use around their lifestyle.



Conclusions

Tenant and landlord engagement with the energy market

The findings from this research suggests that levels of engagement with the energy market on the whole is relatively low among tenants and landlords. Choosing a supplier for gas and electricity is often not something a tenant will look to do straight away when moving into a new property. They will often prioritise other areas initially, but will perhaps start to engage more the longer than are in a tenancy. If they decide to switch, it was often price that was the factor that most determined which supplier they would choose to go with, followed by reputation. The exception to this is tenants who are in vulnerable circumstances or those who are digitally disengaged, as they were the least likely to have switched supplier. The reasons given, however, were not specific to them being a tenant in the private rental sector; rather because they either don't have access to the internet so cannot search around for the best deal, or they found it daunting to ring up their supplier and say they'd like to switch.

The majority of landlords leave it to the tenant to manage their own energy supply and feel it is not something they need to be involved in. There were some landlords who manage the supply on behalf of their tenant and often this was at the request of the tenant, to help with budgeting and keep things simple, i.e., paying as few bills as possible.

Knowledge of tenants' rights

Tenants generally had some knowledge of their rights, though their level of knowledge did vary. Tenants knew they were able to switch supplier, and many had done so, as part of their current or a past tenancy. Similarly, some tenants had requested a meter change in the past, though there were also others who didn't know. Knowledge of measures relating to energy efficiency was lower, but tenants did explain it was something they'd like to have known about. Generally, engagement on metering and energy efficiency was low, so despite tenants wanting to know the legislation, they suggested they might be unlikely to act upon it. Tenants had the view that as long as they weren't losing out as a result of not exercising their rights, then there was no need to take action. Other things, such as sorting out equipment and appliances, were often more of an issue for tenants in rental properties, so they would prioritise their efforts into getting these sorted, rather than engaging more with the energy market initially.

Landlords often relied on their agents (if they used one) to inform their tenants of their rights, but like tenants, they did have some knowledge of these themselves. The majority knew that the tenant had the right to change their meter, but did request a tightening up of the legislation on informing the landlord of such a change.

Both tenants and landlords agreed that a balance of responsibility exists between the two parties, though the finer points did cause some division between the groups. They all agreed that day-to-day decisions should be made by tenants, such as deciding the supplier, and that landlords need to have a say when material changes need to be made to the property. It was often cost that caused some disagreement, with neither party being willing to solely responsible for paying for something the other would benefit from too.

Solutions to improve engagement and knowledge of rights

The idea of an information portal was well received by tenants and landlords, as long as it was easy to access and it contained all the relevant information needed. Some tenants suggested they would like to see information on rights included in the contract, but landlords didn't think this would be effective as, in their experience, documents like this are often not fully read by tenants.

Both tenants and landlords also liked the idea of a landlord register, as this could benefit both parties. Tenants could use it to check a possible landlord is abiding by the relevant laws and has the appropriate safety features installed in a property, but would like reassurance that it is kept up-to-date, and isn't simply a name on a list. Landlords could use their registration to ensure they are kept up to date with relevant updates to legislation, although they would not expect to pay a large sum to become registered.

Key barriers – new energy models

Contract length was identified as a key barrier that could stop tenants from engaging with any of the new energy models, especially as Bundled Services and Energy-as-a-Service indicated the contract may need to be a minimum of two years. Many tenants stay in properties for less than two years, or at very least, don't expect themselves to stay that long when starting a tenancy, so would be very reluctant to sign up to an energy contract lasting that long. For many, contract length was the main barrier to uptake of new energy models. Tenants would be much more likely to consider a new energy model if the contract length was reduced.

A second barrier identified by both tenants and landlords was flexibility, and specifically, whether these new energy models would allow them to make small day-to-day changes to their behaviour without being restricted by rules around fixed energy usage. An example given that best describes this was in relation to Energy-as-a-Service and if a tenant wanted to stay up later one night, how could they ensure the heating was left on for an extra couple of hours. Cost was mentioned, with tenants wanting further assurance that heating 'hours' additional to what is in their contract, wouldn't be charged at an extortionate rate. Without assurances that a model would allow them to be flexible with their needs, it is unlikely that either a tenant or landlord would consider uptake of a new energy model.

Cost continued to be a key point of concern for tenants, which many suggesting that they needed to see proof that signing up to one of the new models would not result in an increase to their bill. Specifically for Time of Use tariffs, they questioned whether they would be unfairly penalised for using energy during peak hours if unable to change their behaviour to use more energy during off-peak hours. These concerns also link with the point above regarding contract length, as tenants would like assurance that they would not have to pay large exit fees if leaving a contract early. If these concerns were addressed, their likelihood to consider a new energy model would increase, but only if contract length and other worries, were allayed too.

The final barrier, which could end up being more of an issue for landlords, was equipment in the property. In the majority of instances, the white goods in the property were owned by the landlord who wanted to know who would be expected to pay for updated products if needed to best utilise the benefits of a particular tariff (e.g., a smart washing machine that could be switched on via an app when electricity is at its cheapest). A similar concern was raised in relation to charging points for Electric Vehicles, as some tenants thought the new models could work best if they had one. Many rental properties don't have the capacity for off-street parking, so the question was asked whether it would be possible for a tenant to have a charging point installed, and even if it was, then who would pay for it. As with cost, while it is important for there to be clear guidance on who should own equipment, or on what should be available for tenants in their rental agreement, it is unlikely to be a deciding factor in whether they decide to consider a new energy model. Other factors, such as contract length and flexibility, would likely take priority in the decision making process.

Solutions for barriers to uptake of new energy models

In response to the contract length barrier, the idea of introducing a longer cool-off period (e.g. three months), was welcomed by tenants, though they did not feel this solved the problem. They felt a cool off period of six months would be better, as this would increase the likelihood of seasonal variations in temperature being covered. Buy-out clauses were also suggested as a potential solution, but tenants and landlords were wary of this idea, perceiving them to come with hidden exit fees. If they were to be introduced, assurances would be needed that exit fees did not exist.



One solution that was very well received by both tenants and landlords was a tool that would allow them to predict energy bill savings, prior to signing up to a new contract or model. There were still some concerns from tenants about how accurately the model would work (e.g. if using Time of Use data, what would happen if peak times were to change year on year), but overall, they thought this would definitely help reassure them on cost. This would also help address some flexibility concerns, as it would use data based on current behaviour and show consumers what is possible, without the need to be more flexible with their energy usage.

With regards to equipment, both tenants and landlords felt that incentives would have a much greater effect than disincentives/penalties. Tenants were keen that landlords owned the majority of the appliances in the property, as they themselves would be unlikely to be able to take them with them when moving house, and landlords suggested they would be happy to buy new appliances if there were incentives available for them to use. The idea of disincentives, on the other hand, was not welcomed by landlords with some even suggesting they may sell their properties if such measures were introduced.

Finally, data sharing and privacy was discussed, along with the idea that it was solely down to tenants to have control of their energy supply. Some tenants did not feel that data sharing was as much of an issue as others, as so much data is shared online anyway, but all agreed that it should be tenants that have full control over their energy usage.

Given the diversity in demographic profile of the rental sector (i.e., different housing types, living situations, demographics of particular tenant), it is unlikely that one or two solutions aimed at the sector on the whole will truly help increase uptake of new energy models. While general opinions around the four key barriers (contract length, flexibility, cost and equipment) were consistent, it is likely that the potential weighting of these factors could differ among demographic groups. An area to therefore explore could be quantifying each barrier and solutions among a broad range of customers, with segments created and policies suggested to target certain groups specifically.

Considerations for policy makers

What would work 	What wouldn't work 
Introducing an information portal for both tenants and landlords to access information relevant to them	Enforcing tenants to disclose their situation when signing up to a new contract. Allow them to do so, but do not make it mandatory
Enforcing landlords to sign up to a register and allowing tenants to access this information	Asking supplier to send targeted information to tenants. Instead make it available for them to access themselves
Giving incentives (grants or low interest loans) to landlords to buy equipment which allow tenants to best utilise new energy models	Extending the contractual cool off period by a short amount. To be effective, this would need to be six months or more, though this still doesn't solve the problem of overall contract length
Introducing a tool to allow tenants to estimate savings if using a new energy model, based on behaviour and usage over the last year	Penalising landlords for not installing new technologies in their properties
Ensuring it is tenants that have full control of energy usage in the properties they live in, not landlords	

8. Appendix

Appendix 1: Technical Appendix

Overview of how each stage of the project was conducted

Pre-task

How the energy market operates in the UK is largely unknown to consumers. There are some consumers in the private rental sector that engage with the energy market, either when paying a bill or switching supplier, but many do not know as much as they could. Therefore, in order to ensure maximum participation during the fieldwork, there was a need to 'warm up' both tenants and landlords the topic of the energy market and usage.

Impact has found the use of pre-tasks in previous research to be very effective in maximising the outputs of workshops, especially when the topic is energy, a subject many consumers give limited consideration to.

How the pre-task worked

Recruited consumers were provided with a short task to complete online before fieldwork started, answering questions on their energy supplier, whether or not they know who it is, how their energy bill is paid and how else they interact with them. As part of the pre-task, consumers were also provided with information about how the energy market works currently and introduced to a new energy model.

Pre-tasks were sent out and completed in the week before the deliberative event. Those received prior to the workshop were then analysed by the Impact team and summaries discussed amongst moderators prior to the event starting. This allowed the team to gather consumers' initial perceptions and opinions before exposing them to additional information about the current market and future energy models, as well as ensure that topics/ideas of interest were captured and explored at the events.

The pre-task was only completed by those who attended the workshops, not by those who participated in the in-depth interviews.

Fieldwork

The key engagement was conducted through the deliberative events, in-depth interviews (pre and post tasks supplemented information gained during the events and depths interviews) and reconvened focus groups. Qualitative workshops were conducted in over zoom during February 2021, with 39 tenants and 39 landlords attending. This was supplemented by 10 in depth interviews to ensure consumers less able to attend workshop events (for example due to not being able to access the internet or not having English as their first language) had the opportunity to provide feedback. Seven of these were conducted over zoom and three over the telephone.

Deliberative workshops

One of the key advantages of deliberative events is the ability to introduce consumers to a series of concepts by starting with a basic top-level overview, then providing increasing levels of detail and information. This enabled the team to probe and understand why consumers express the perceptions they do and make the choices they make. Each event was 2.5 hours long and used a combination of large group discussions where consumers were given introductions to topics and tasks, and smaller group discussions where the models were talked about in greater detail. The workshops were designed to be informative but highly engaging to get the most out consumers.

The events were run by professional and experienced moderators from the Impact team, with the lead moderator responsible for keeping to the schedule and ensuring that the workshops ran smoothly. There was also a third member of the Impact team on hand to answer any technical enquiries relating to use of zoom.

The full discussion guide is given in Appendix 3.

The workshops begun with discussion around engagement with the energy market and knowledge of right regarding what a tenant in a property in the private rental sector can and can't do, with regards to their energy supply. There was then discussion around three new energy models: Time of Use tariffs, Energy-as-a-Service and Bundled Services. Due to the similarity between Energy-as-a-Service and Bundled Services and the complexity of each one, the primary example used to explain Energy-as-a-Service was heating.

In addition to the above, each event also contained the following:

- Information relating to tenants' rights on the following topics:
 - Switching supplier
 - Metering
 - What a landlord can charge for energy
 - Tenants request for energy efficiency improvements
- Infographics to help explain the current energy market and future energy models
- Videos explaining each future energy model
- Live examples of each energy model 'in action'

For respondents' comfort, there were two short breaks, each lasting five minutes during the 2.5-hour session.

Live polls

There were two polls put to respondents at the end of the workshop, using the online polling tool Slido. This is a free tool that consumers could access via their mobile phones either through Wi-Fi or their 3G/4G services.

The first question asked both tenants and landlord to choose their most preferred energy model, if all were available to them, and the current energy model was included as an option. The second question was worded the same as the first, but the current model was not given as an option to respondents, therefore forcing them to choose between the three new energy models.

Time and location of the events

Due to the restrictions associated with the Covid-19 pandemic, the workshops were conducted online. This allowed the recruit to be done nationwide as it was not necessary to ensure respondents lived or worked nearby to the location of the workshop.

The dates and time for each of the workshops were:

- Thursday 4th February @ 6-8.30pm – tenants
- Tuesday 9th February @ 6-8.30pm – landlords
- Wednesday 10th February @ 6-8.30pm – tenants
- Thursday 11th February @ 6-8.30pm – landlords

In-depth interviews

Impact conducted in-depth either over zoom or over the telephone with tenants that were not able to attend the workshops. It is essential that Citizens Advice hear from all different types of tenant, when informing policy around the steps that should be taken to ensure tenants are able to engage with the energy market as much as homeowners.

These were conducted by the lead moderator of the deliberative events, for consistency of approach and knowledge, at a time and place suitable for the consumers. Any consumer who wished to have a family member present or a close friend for reassurance was permitted to do so.

Each interview ran between 45 and 60 minutes, covering the same key topics as the deliberative events though in less detail during the time allowed. The infographics and additional stimulus used were the same, with each

interview covering current engagement with the energy market and knowledge of rights along with the 3 proposed future models: Time-of-Use tariffs, Energy-as-a-Service and Bundles Services.

The interviews were recorded and the moderator passed on key learning after each in-depth interview, if necessary. Consumers provided their consent to be recorded prior to starting the interviews.

Seven out of the ten interviews were conducted over zoom and the remaining three over the telephone, if their level of digital engagement prevented a respondent from using zoom. While respondents were not asked to complete the pre-task, they were sent information to read prior to the interview, either via email or by post.

Post-task

Research in its very nature can take place in a 'bubble', where consumers can hypothesise about what they need and desire within a safe environment. Opinions can sometimes change when going back to 'real-life' and discussing the research with family and friends. To check if perceptions and opinions changed, and/or if new ideas/questions formed, consumers were asked to complete a post-event survey. Consumers were told they would receive the survey at the end of the workshop, but were given no further instruction.

The post-task was available online to be self-completed. To access the survey, a link was sent via email by Impact to those who attended the workshops. To allow time for reflection following the workshops, the link was sent approximately two weeks after the event had taken place.

The survey consisted of a mix of quantitative and qualitative questions, including the polls asked at the deliberative event for direct comparison. The survey took around 10 to 15 minutes to complete and some questions were tailored to the respondent depending on whether they are a tenant or a landlord. For the post-task survey, please see Appendix 4.

Results from the post-task were analysed and compared to the results from the workshops. These can be found in section 1.

Reconvened focus groups

The final piece of research for this project was the reconvened focus groups. Both tenants and landlords that attended the workshops were invited to attend a follow up focus group, approximately 4 weeks after the workshops had taken place. These groups lasted 90 minutes each were also conducted online. The same lead moderator was used as for the deliberative workshops and interviews, to ensure continuity across the entire research project. The groups took place on the following dates:

- Thursday 4th March @ 6-7.30pm
- Tuesday 9th March @ 6-7.30pm

Each group had a 50/50 split of landlords and tenants and covered the following topics:

- Recap of findings from workshops and interviews
- Acceptability of solutions proposed by Citizens Advice in response to barriers identified in the workshops and interviews

Recruitment and engagement

Impact commissioned a recruitment partner to recruit consumers for this study. The partner used a recruitment screening questionnaire, designed by Impact and signed off by Citizens Advice, to capture relevant demographic, lifestyle and attitudinal information, specific to both tenants and landlords. The aim was to ensure that the respondents recruited were suitable and that the research covered a wide range of respondents. The 5-minute questionnaire asked questions to capture relevant information, as well as secure their permission to use their comments in reports, to audio record them, to take photographs of them and to collect their data. In line with the

General Data Protection Regulation (GDPR), consumers' participation in the study was not contingent on their providing permission for all of the above. At each stage of the research, confirmation to continue with collecting consumers' data was sought, and all data has been collected, used and stored under strict data protection regulations and rules in full compliance with GDPR. Consumers had the right to withdraw from the research at any time and have their personal details removed from the research's database. For the recruitment screeners, see Appendix 8.

Sample of respondents recruited

To be eligible for this research, consumers were not allowed to be working within marketing, journalism, electricity or gas supply/distribution, or market research. Nor were they allowed have taken part in another workshop or in-depth interview within the last 6 months. Those who had taken part in research about the energy industry within the last 6 months were excluded to ensure that views were not biased and that consumers were interested to learn about the topic and engaged fully.

Minimum quotas were in place to ensure a wide representation of eligible respondents and were agreed with Citizens Advice prior to the events. Quotas for were set for tenants, which included the following:

- Age
- Gender
- Social grade
- Ethnicity
- Household location
- Household status
- Engagement with energy market
- Meter type
- Vulnerability status

Quotas were set for landlords which included the following:

- Role in managing the property
- Number of properties
- Level of involvement with property portfolio
- Level of management of energy bills

Numbers of respondents engaged in each stage of the research

A breakdown of the number of respondents who engaged with the individual stages of the research can be found below:

	Tenants	Landlords	Total
Pre-task	36	38	74
Deliberative events	39	39	78
In-depth interviews	10	n/a	10
Post-task	23	28	51
Reconvened focus groups	8	8	16

Incentivisation

Respondents received incentives either paid via BACS or a via an Amazon voucher, for participating in each stage of the project. The amounts they received were as follows:

	Tenants	Landlords
Pre-task	£10	£10
Deliberative events	£75	£75
In-depth interviews	£40	n/a
Post-task	£10	£10
Reconvened focus groups	£50	£50

Appendix 2: Pre-task

Tenants

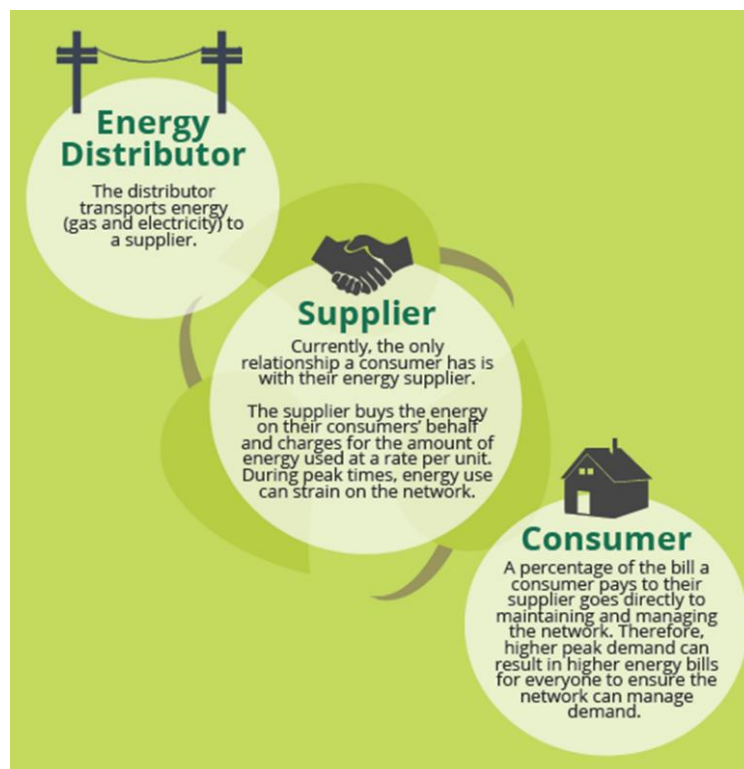
Thank you for agreeing to participate in the upcoming workshop. We are very thankful for this chance to receive your valuable opinions. I work for Impact Research, who have partnered with Citizens Advice to hold and run the workshops (I'll also be at the workshop). We would love for you to participate in the pre-task. This will consist of three short tasks/questions and should take no longer than 10 minutes to complete. Participation will be rewarded with an additional £10 at the event. You do not have to participate and please let us know if you do not wish to, or if you have any questions about Impact Research.

Citizens Advice would like to understand the specific issues facing landlords and tenants in private rented households regarding their energy supply and how this might change in future.

1. Are aware of who your current energy supplier is? If your energy bills are included as part of your rent, you may not know who this is, so please indicate this below.

If you pay for your energy yourself, how often do you make a payment to your energy supplier?

Currently, the way you are charged for your energy supply will depend slightly on who your supplier is, what meter you have and which tariff you are on, but is largely the same for everyone. The graphic below shows you how this happens.



2. Please describe how you interact with your current energy supplier. (e.g., do you communicate online, via telephone, etc.?)

Again, if your energy bills are included as part of your rent, you may not have any interaction with your energy supplier, so please also explain this below.

3. The way you are charged for your energy in the future could change and we will be exploring these new ideas as part of the workshop. Before that, though, we would like your immediate reaction to one of these ideas. Please read the information below and the questions below.

NOTE: Tenants were only shown one of the below, either a, b or c.

a) Time of Use Tariffs



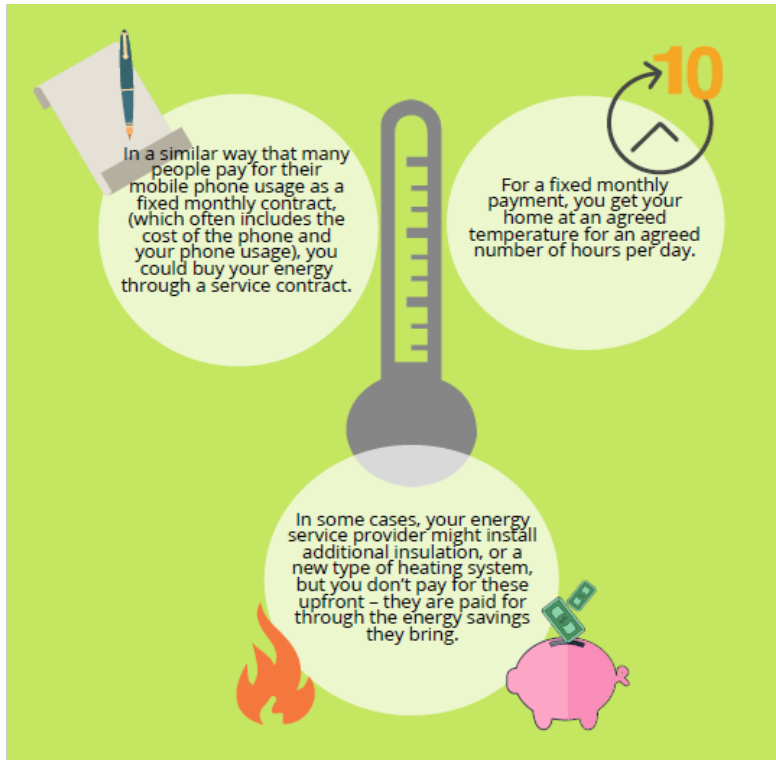
A live example of a Time of Use Tariff is Octopus Energy's 'Agile Octopus'. Please click on the link below to familiarise yourself with it.

<https://octopus.energy/agile/>

- i. What are your initial thoughts on Time of Use tariffs?
- ii. Do you think it could work for yourself as a tenant in a rented property? Why is this?
- iii. What concerns would you have about signing up to a tariff such as this?

b) Energy as a service

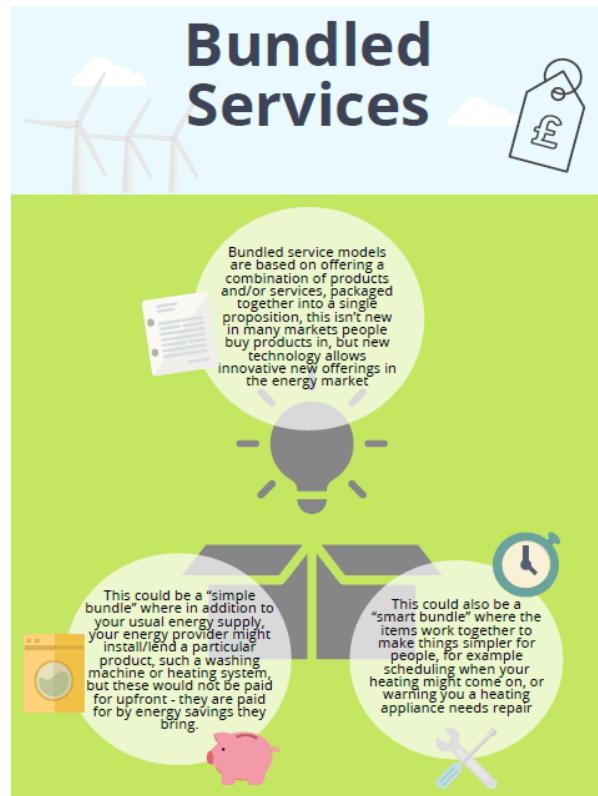
An example where this has been trialled recently was Bristol Energy's 'heat as service' bundle. Please click on the link below to familiarise yourself with it.



<https://www.bristol-energy.co.uk/bristol-energy-first-uk-supplier-trial-heat-service>

- i. What are your initial thoughts on Energy as a Service tariffs?
- ii. Do you think it could work for yourself as a tenant in a rented property? Why is this?
- iii. What concerns would you have about signing up to a tariff such as this?

c) Bundled services



An example of a bundled service is British Gas's Hive Plan. Currently there is a service that bundles together heating, lighting and security, with a discount for existing British Gas customers. But in the future, such services could be extended to include e.g., Electric Vehicle charging. Please click on the link below to familiarise yourself with it.

<https://www.britishgas.co.uk/smart-home/welcome-home-plan.html>

- i. What are your initial thoughts on a bundled service tariff?
- ii. Do you think it could work for yourself as a tenant in a rented property? Why is this?
- iii. What concerns would you have about signing up to a tariff such as this?

Landlords

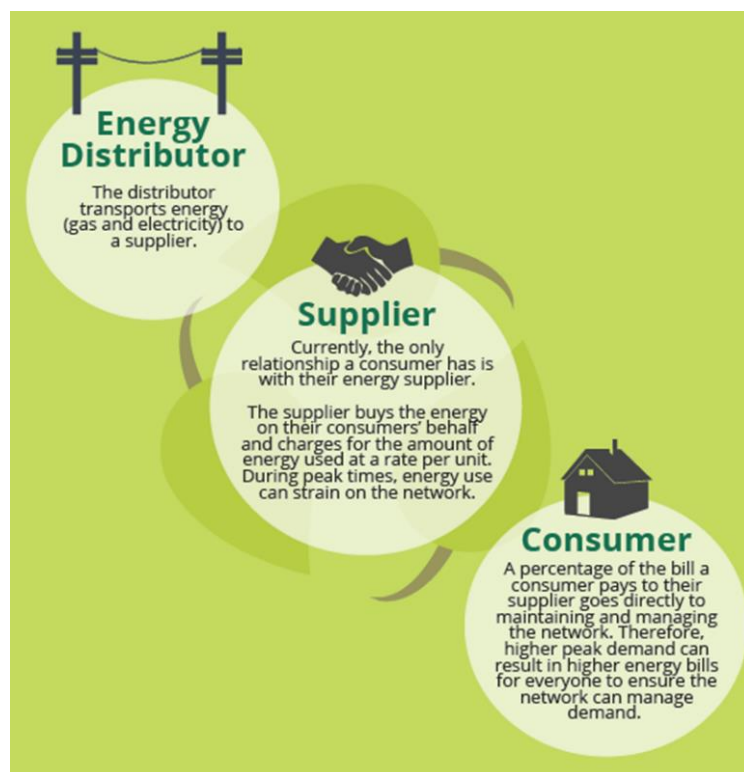
Thank you for agreeing to participate in the upcoming workshop. We are very thankful for this chance to receive your valuable opinions. I work for Impact Research, who have partnered with Citizens Advice to hold and run the workshops (I'll also be at the workshop). We would love for you to participate in the pre-task. This will consist of three short tasks/questions and should take no longer than 10 minutes to complete. Participation will be rewarded with an additional £10 at the event. You do not have to participate and please let us know if you do not wish to, or if you have any questions about Impact Research.

Citizens Advice would like to understand the specific issues facing landlords and tenants in private rented households regarding their energy supply and how this might change in future.

1. Are aware of who the current energy supplier is the properties you have in your portfolio? If the tenants pay for the energy themselves, you may not know who this is, so please indicate this below.

If you pay for your energy on behalf of your tenant, how often do you make a payment to the energy supplier?

Currently, the way you are charged for your energy supply will depend slightly on who your supplier is, what meter you have and which tariff you are on, but is largely the same for everyone. The graphic below shows you how this happens.



2. Please describe below how the energy is managed in the properties in your portfolio?

(e.g., Do you let the tenant manage everything themselves? Do you have a preferred supplier? Are tenants automatically put on a particular tariff at the beginning of the tenancy?)

3. The way customers are charged for their energy in the future could change and we will be exploring these new ideas as part of the workshop. Before that, though, we would like your immediate reaction to one of these ideas. Please read the information below and the questions below.

NOTE: Landlords were only shown one of the below, either a, b or c.

a) Time of Use Tariffs



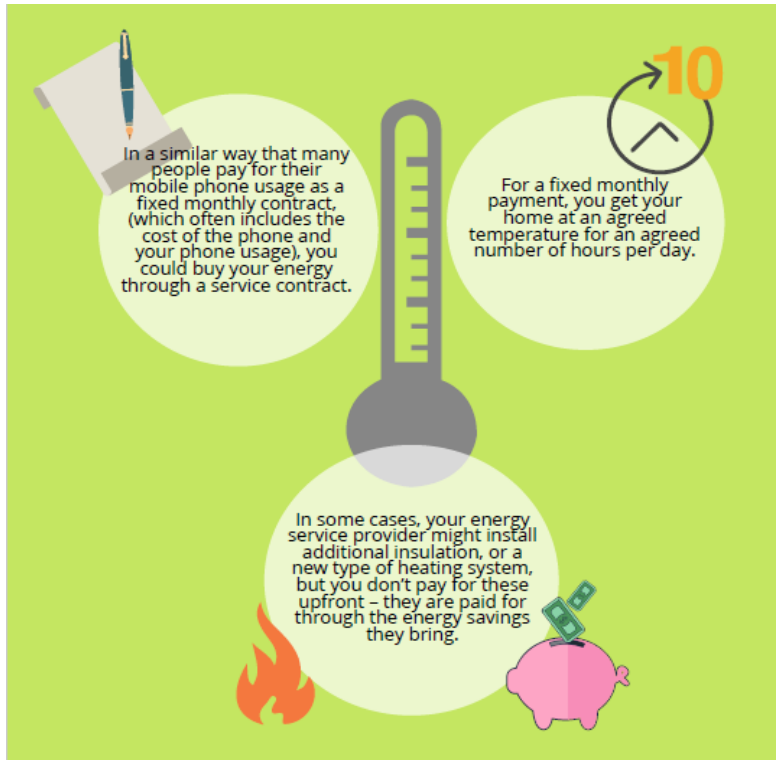
A live example of a Time of Use Tariff is Octopus Energy's 'Agile Octopus'. Please click on the link below to familiarise yourself with it.

<https://octopus.energy/agile/>

- i. What are your initial thoughts on Time of Use tariffs?
- ii. Do you think it could work for tenants in the properties that you manage? Why is this?
- iii. What concerns would you have about a tenant of yours signing up to a tariff such as this?

b) Energy as a service

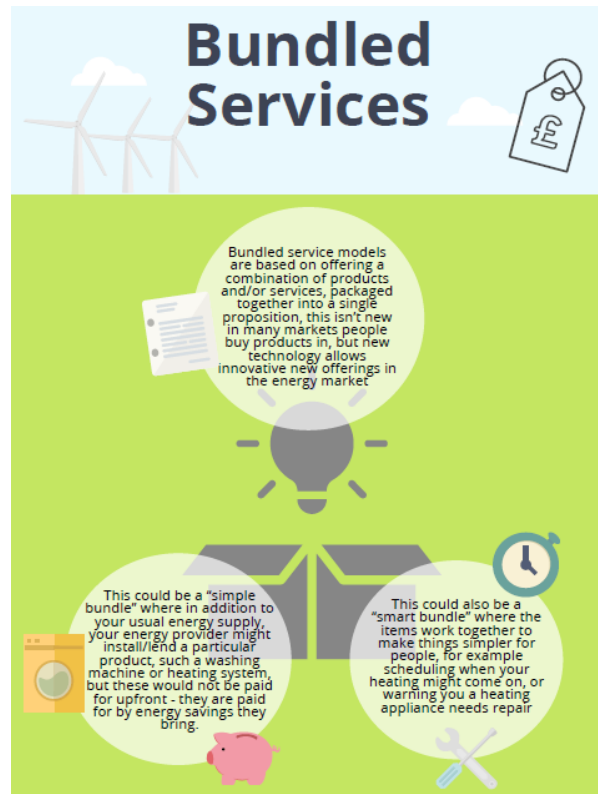
An example where this has been trialled recently was Bristol Energy's 'heat as service' bundle. Please click on the link below to familiarise yourself with it.



<https://www.bristol-energy.co.uk/bristol-energy-first-uk-supplier-trial-heat-service>

- i. What are your initial thoughts on Energy as a Service tariffs?
- ii. Do you think it could work for tenants in the properties that you manage? Why is this?
- iii. What concerns would you have about a tenant of yours signing up to a tariff such as this?

d) Bundled services



An example of a bundled service is British Gas's Hive Plan. Currently there is a service that bundles together heating, lighting and security, with a discount for existing British Gas customers. But in the future, such services could be extended to include e.g., Electric Vehicle charging. Please click on the link below to familiarise yourself with it.

<https://www.britishgas.co.uk/smart-home/welcome-home-plan.html>

- i. What are your initial thoughts on a bundled service tariff?
- ii. Do you think it could work for tenants in the properties that you manage? Why is this?
- iii. What concerns would you have about a tenant of yours signing up to a tariff such as this?

Appendix 3: Discussion Guides – workshops

Tenants

Moderator Introduction (5 minutes):

- Introducing the research team
- Housekeeping
- Explain that the research is being conducted on behalf of Citizens Advice
- Explain purpose of the discussion
- Explain moderator's role and set out 'rules' (speak loudly/clearly/not all together)
- Explain audio and video recording, and presence of observers (if appropriate)
- Any questions?

Citizens Advice introduction (5 minutes):

- Member of CA team explain role of CA with regards to energy, give introduction to the research and explain what it will be used for

First breakout session (40 mins)

Respondents will be split into three pre-defined groups, one led by lead moderator and the other two by other members of the Impact team.

- Each respondent will be asked to introduce themselves to the group

Moderator to walk through the current energy market and explain how it impacts consumers – using the information sheet/ poster to check understanding.

Ask 1-2 participants to talk through questions 1 and 2 of the pre-task and see if it differs to others in the group

If not covered in pre-task explanation, ask the following:

- How does everyone use energy now?
 - What energy do you use in your property? (i.e., gas, electricity, oil)
 - What do you use energy for?
 - What appliances do you have in your home?
 - What times of day do you use energy?
- What is most important to you when it comes to using and purchasing energy?
- What is seen as must have/nice to have when it comes to accessing energy from suppliers?
 - Contract length?
 - Brand reputation/customer service?

- Renewable/green energy?
- Price?
- **Why are they must haves?**
- What would you choose to do differently regarding your energy supply if you owned your property instead of living in a rented property?
 - Different contract length?
 - Switching/choosing supplier?
 - Price?
 - Heating method? (i.e., electric heating over gas boiler)
 - Payment method/meter type (economy seven in line with heating?)
 - Energy efficiency
 - Control over usage/paying a fair share (particularly for house sharing renters)
 - Appliances (boiler, cooker, power shower etc not working properly/not v good)
- At what point did you think about energy supply when moving into your current property?
 - Was it part of your moving-in process?
 - Did anyone switch supplier straight after moving in?
 - Did you leave it a little while then look into your energy supply?
 - Would you do anything different if moving into another rented property?
- Have you ever felt pressured into going with a particular supplier at the beginning of a tenancy?
 - Who did this pressure come from?
 - Did you speak to your landlord about it? Or the agent?
- Has anyone experienced any problems around the change of tenancy?
 - Have you been sent bills, or been chased by a supplier, for a previous tenants' energy usage?
 - Have you found it easy to close an account and pay a final bill when leaving a tenancy?
- Has Covid-19 had any impact on your energy supply?
 - Have you been using more or less energy?
 - Have your bills changed?
 - Have they gone up or down?
 - Have you found it easy to contact your energy supplier during lockdown?
 - Have you need any assistance from your supplier or your landlord/agent during lockdown?
- Does anyone here have their energy bills included in their rent?
 - Do you have any control of your energy supply?
 - i.e., did you choose your supplier?
 - What type of energy do you use for heating? (e.g., gas, electricity or other)
 - What appliances are used in the property?
 - Do you have a smart meter?
 - Do you monitor your energy use at all?
 - Do you submit meter readings for the property?
 - Does your rent differ each month in line with energy usage?
 - Have you ever been contacted by your landlord/agent regarding your energy use?

We are now going to talk about tenants' rights when it comes to their electricity supply

- Are you aware of the rights you have as a tenant?
 - Do you think you have the right to select your energy supplier?
 - Are you able to install a smart meter?
- Who would you speak to if you had a problem with your energy supply?
 - Would you go direct to your supplier or contact your landlord/agent first?
- Has anyone ever looked into the rights they have as a tenant?
 - Where did you look?
 - Did you find the information you were looking for?

Moderator to share information on switching

<https://www.citizensadvice.org.uk/consumer/energy/energy-supply/get-a-better-energy-deal/switching-energy-supplier-if-youre-a-tenant/>

- What are your immediate reactions to these rights?
- Does anything displayed here surprise you?
- Specifically looking at if you If you pay your energy supplier, were you aware you could change your energy supplier?
- Were you aware you could change the meter type in your property?
- Has anyone tried to do either of these things?
 - How did it go?
 - Was the landlord happy with you doing either of these?
 - If they were unable, how was it resolved?
 - Were you able to do what you wanted?
- Would knowledge of these rights have the way you engage with your energy supplier?
 - How so?
- Will it change the way you engage with your energy supplier from now on?
- Those that have their energy bill included in their rent, were you aware you could ask your landlord to change supplier?
- Has anyone tried to do either of these things?
 - How did it go?
 - Did the landlord allow you to change supplier?
 - If they did not wish to, what did you do?
 - Did you contact anyone to ask for assistance?

Moderator to share information on what your landlord can change for energy

<https://www.citizensadvice.org.uk/consumer/energy/energy-supply/problems-with-your-energy-supply/what-your-landlord-can-charge-for-energy/>

- Were you aware there are rules around what a landlord can charge you for your energy?
- Had you previously heard of the maximum resale price?
 - What is your opinion of it?
 - Does anyone believe their landlord has been overcharging them?
 - What makes you say that?

Moderator to share information on energy efficiency

https://england.shelter.org.uk/legal/housing_conditions/energy_performance_certificates/requests_for_energy_efficiency_improvements

- Were you aware you could ask your landlord for energy efficiency improvements?
 - Has anyone ever asked their landlord for these improvements?
 - What did you ask for?
 - Did they do as you asked?
 - Will anyone ask their landlord to make improvements as a result of finding out this information?
- Do you think there are any barriers to tenants exercising these rights?
 - What are they?
 - Are they specific to each right? (i.e., switching, energy efficiency)
- How could tenants be supported to enable them to exercise their rights further?
 - Who would you like to see support from?

First comfort break (5 minutes)

Second breakout session (45 minutes)

We are now going to talk about three new potential ways in which you could be charged for your energy in the future. They are called new energy models.

You should have been introduced to one of these in your pre-task, and we will talk about them one at a time.

Rotate order in which groups discuss each energy model

Ask the following for the first two models:

- Those who were asked about it in their pre-task, what were your first thoughts on this?

Ask those respondents to go through the answers they gave to question 3 in the pre-task

- Do you think it could work for yourself as a tenant in a rented property?
 - Why is this
- What concerns would you have about signing up to a service such as this?

Moderator share information on energy model and give respondents time to read through infographic

- What are your initial thoughts on it?
 - What elements do you like about it?
 - What elements do you dislike?
- Do you think it could work for yourself as a tenant in a rented property?
 - Why is this?
 - Would certain elements work better for you?
 - How do you think these would differ to someone that owned their property?
- How likely would you be to use this energy model if it were available to you?
 - Why is this?
 - What information or assurance would you need from your supplier if you decided to follow this model?
 - What information or assurance would you need from your landlord if you decided to follow this model?
 - Would you feel comfortable doing this yourself? Or would you need to talk to your landlord/agent?
- How would you feel if your landlord chose this model for you/required you to use this model?
- What barriers are there to adoption for you as a tenant in a rented property?
 - Probe for:
 - Contract length?
 - Ability to switch between suppliers?
 - Price?
 - Lifestyle (i.e., it wouldn't fit with how you live your life)
 - Not owning the appliances to make it work best
 - Smart technology in the home
 - Note for technology/appliance, not owning these/wanting them to be installed might leave you being and not likely to best utilities the benefits of the energy model

- Are these barriers different to those faced by those that own their property?
 - How is this?

- What could be done to help overcome these barriers?

Moderator: Ask the above question separately for each of the barriers identified. If low on time, select the two or three biggest barriers and focus on them.

- Probe for:
- Who would you need support from?
 - Government? Landlord? Independent finance? Consumer advice?
- What would need to change in each model?
- Would you like to see elements of the current model applied to the new model?
- Would a combination of models work better?
- Would it work better if energy usage was included in your rent?
- Would you need different appliances in the property for it to work better?

- Would it concern you if your landlord had increased levels of your data regarding your energy usage?
 - Why is this?
 - Does your landlord have usage data already?
 - What data would you be happy for your landlord to have?

- Would you use more or less energy do you think than with the current model?
 - Why is this?

- How would using this model impact the way you use electricity in the home?
 - For Time of Use, would you try (and be able to) shift when you use gas or electricity in your home?
 - Would you be able to?
 - For Energy-as-a-Service and Bundled services, would you need additional appliances in the home to make it work?
 - Would you be happy installing these?
 - Would you expect your landlord to be involved in installing these?

- Do you have any final thoughts or comments regarding these energy models?

Second breakout session (25 minutes)

Repeat above section for final energy model.

Ensure focus is on understanding and overcoming barriers to adoption.

If time, cover in final session, which energy model would work best for three 'personas'

1. Elderly couple, retired, not regular switcher of energy but open to saving money
 2. Young single person, renting on their own, owns a bunch of smart technology and like the idea of one bill for everything
 3. Middle aged parents with children ending school/starting university, children own some smart technology and parents open to mor smart appliance in the home
- Which model would work best for each persona and why?

Wrap up and thank you (15 minutes)

Respondents to return to overall group session for final wrap up

Each sub-group moderator summarise findings form the group and explanation as to which model, overall, was preferred

Ask respondents to vote (via sli.do poll), which of the energy models they would be most likely to adopt.

Do vote twice, firstly with current energy model included, and secondly without.

- Thank you very much for your time. To finish, I'd like to recap on the most important things that came out from today
- Any final comments from respondents?
- Explain post-event survey will be mailed out to respondents within a week of finishing the event, additional incentive for completion. All incentives will be paid on together, approx. two weeks after the event.

Landlords

Moderator Introduction (5 minutes):

- Introducing the research team
- Housekeeping
- Explain that the research is being conducted on behalf of Citizens Advice
- Explain purpose of the discussion
- Explain moderator's role and set out 'rules' (speak loudly/clearly/not all together)
- Explain audio and video recording, and presence of observers (if appropriate)
- Any questions?

Citizens Advice introduction (5 minutes):

- Member of CA team explain role of CA with regards to energy, give introduction to the research and explain what it will be used for

First breakout session (30 mins)

Respondents will be split into three pre-defined groups, one led by lead moderator and the other two by other members of the Impact team.

- Each respondent will be asked to introduce themselves to the group

Moderator to walk through the current energy market and explain how it impacts consumers – using the information sheet/ poster to check understanding.

Ask 1-2 participants to talk through questions 1 and 2 of the pre-task and see if it differs to others in the group

If not covered in pre-task explanation, ask the following:

- Does anyone manage the energy supply on behalf of their tenants? I.e., is it included in the rent?
 - What energy is used in the property? (i.e., gas, electricity, oil)
 - Do you know what the energy is used for?
 - What appliances are in the property?
 - Did you choose the current supplier?
 - What were you looking for when choosing the supplier?
 - Contract length?
 - Brand reputation/customer service?
 - Renewable/green energy?

- Price?
 - **Were any must haves, and if so why are they must haves?**
- Do you monitor the energy use any of your properties at all?
- Do you ask the tenant to submit meter readings for the property?
 - Is there a smart meter installed in the property?
- Does the rent you charge differ each month in line with energy usage?

- For those that allow the tenant to manage their energy supply, do you have any input into the energy supply in the property?
 - What energy is used in the property? (i.e., gas, electricity, oil)
 - Do you know what the energy is used for?
 - Do you monitor energy usage in the property?
 - Who owns the appliances in the property?
 - Do you allow the tenants to freely choose their energy supplier?
 - Have you ever encouraged your tenants to use a bill-splitting service? (e.g., glide <https://glide.co.uk/>)
 - Do you have a preferred supplier for tenants to choose?
 - Why is this?
 - Did any tenant request to bring any appliances with them when beginning the tenancy?
 - Have any tenants requested a change of appliance for any reasons aside from it breaking?
 - What did they ask?
 - Did you grant their request?
 - Have any tenants requested a change of meter in the property?
 - Has a tenant ever requested a smart meter is installed?
 - Did you allow them to make the change they requested?

- Those that use an agent, do they have any input in the energy supply?
 - Do they help set the tenant up with an energy supplier?
 - Why is this?
 - Do they have a contract with any suppliers?
 - Do they have a preferred supplier list that tenants are encouraged to use?

- At what point did tenants think about the energy supply when moving into your property?
 - Is it part of your moving-in process?
 - Are tenants automatically put onto a certain supplier or tariff when they move in?

- Has anyone experienced any problems around the change of tenancy?
 - Have you been left with unpaid bills once a tenant has moved out?
 - Have you been chased by a supplier after a tenant has moved out?
 - Have you ever had any issues managing void properties?
 - Have you found it challenging to sort everything out with a tenant, regarding their energy supply, when it comes to moving out?

- Has Covid-19 had any impact on your relation with your tenant?

- Do you know if they have been using more or less energy?
- Those that included energy as part of the rent, have the bills changed?
 - Have they gone up or down?

We are now going to talk about tenants' rights when it comes to their electricity supply

- Are you aware of the rights tenants have?
 - Do you think they have the right to select their energy supplier if they pay for their energy use?
 - Are they able to install a smart meter?
- Who would you expect them to speak to if they had a problem with their energy supply?
 - Would you expect them to contact their supplier themselves or contact you first?
- Has anyone ever looked into the rights that tenants have?
 - Where did you look?
 - Did you find the information you were looking for?

Moderator to share information on switching

<https://www.citizensadvice.org.uk/consumer/energy/energy-supply/get-a-better-energy-deal/switching-energy-supplier-if-youre-a-tenant/>

- What are your immediate reactions to these rights?
- Does anything displayed here surprise you?
- Specifically looking at if you leave tenants to manage their energy supply themselves, were you aware they could change their energy supplier?
- Were you aware they could request to change the meter type in your property?
- Has anyone had a tenant ask to do either of these things?
 - Did you accept or reject the tenants' request?
 - Why is this?
 - How did it go?
 - Did the agent need to be involved?
- Would knowledge of these rights change the way you manage the energy supply in your property?
 - How so?
- Those that include the energy bill in the rent, were you aware the tenant could ask you to change supplier?
 - Has anyone been asked either of these things?
 - Did you allow them to?
 - Why is this?

Moderator to share information on what your landlord can charge for energy

<https://www.citizensadvice.org.uk/consumer/energy/energy-supply/problems-with-your-energy-supply/what-your-landlord-can-charge-for-energy/>

- Were you aware there are rules around what a landlord can charge a tenant for their energy?
- Had you previously heard of the maximum resale price?
 - What is your opinion of it?
 - Does anyone believe they have been charging their tenant incorrectly?
 - What makes you say that?

Moderator to share information on energy efficiency

https://england.shelter.org.uk/legal/housing_conditions/energy_performance_certificates/requests_for_energy_efficiency_improvements

- Were you aware the tenant could ask for energy efficiency improvements?
 - Has anyone ever been asked to make these improvements?
 - What was asked for?
 - Did you do as they asked?
- Are there any barriers, faced by yourself or your agent, to implementing changes that are within a tenant's right to request?
 - What are these?
 - Are they specific to each right? (i.e., switching, energy efficiency)
 - Have you ever faced any of these barriers yourself?
- How could tenants be supported to enable them to exercise their rights further?
 - Who would you like to see support from?

Note to moderator: there are standards for landlords to follow re. energy efficiency:

<https://www.gov.uk/guidance/domestic-private-rented-property-minimum-energy-efficiency-standard-landlord-guidance>

First comfort break (5 minutes)

Second breakout session (45 minutes)

We are now going to talk about three new potential ways in which consumers could be charged for their energy in the future. They are called new energy models.

You should have been introduced to one of these in your pre-task, and we will talk about them one at a time.

Rotate order in which groups discuss each energy model

Ask the following for the first two models:

- Those who were asked about it in their pre-task, what were your first thoughts on this?

Ask those respondents to go through the answers they gave to question 3 in the pre-task

- Do you think it could work for tenants in your properties?
 - Why is this
- What concerns would you have about your tenants signing up to a service such as this?

Moderator share information on energy model and give respondents time to read through infographic

- What are your initial thoughts on it?
 - What elements do you like about it?
 - What elements do you dislike?
- Do you think it could work for tenants in your properties?
 - Why is this?
 - Would certain elements work for tenants?
- Would you allow a tenant to take up a model like this?
 - Why is this?
 - What information or assurance would you need from the tenant if they decided to take up this model?
- What are the barriers for you allowing your tenants to take up a model like this?
 - Probe for:
 - Need for new appliances
 - Contract length?
 - Landlord involvement (i.e., would need to be more or less involved day to day with the tenant if they used this model)
 - Ability to make changes to the property (e.g., level of insulation)

- Are the barriers faced by tenants different to the barriers someone would face if they own their property?
 - What barriers do you think a homeowner would face?
 - What barriers wouldn't a homeowner face?

Moderator: Ask the below questions separately for each of the barriers identified. If low on time, select the two or three biggest barriers and focus on them.

- What would make you more willing to allow your tenants to take up this model?
 - How would it help them?
 - Have you looked in to doing this already?

- What support could you be given to help overcome the barriers already mentioned and allow your tenant to take up this new model?
 - Where would you like this support to come from?
 - How would it help?

- Those landlords that manage energy supply on behalf of their tenant, how likely would you be to use this energy model if it were available to you?
 - Why is this?
 - What information or assurance would you need from your supplier if you decided to follow this model?
 - What information or assurance would you need from your tenant if you decided to follow this model?
 - How would your tenant feel if you were to require them to use this model?

- Would any consider changing the way they charge for energy if this model becomes available?
 - Would you consider adding energy bills to the rent?
 - Why is this?

- Would you willing to additional technologies for a tenant to better access the benefits of using this energy model? (e.g., battery storage, EV charger, heat pumps)
 - Why is this?
- Would you be willing to let a tenant install an appliance or equipment they would need to get the most benefit from this energy model?
 - Why is this?

- Do you have any final thoughts or comments regarding these energy models?

Second breakout session (25 minutes)

Repeat above section for final energy model.

Ensure focus is on understanding and overcoming barriers to adoption.

Wrap up and thank you (15 minutes)

Respondents to return to overall group session for final wrap up

Each sub-group moderator summarise findings from the group and explanation as to which model, overall, was preferred

Ask respondents to vote (via sli.do poll), which of the energy models they would be most likely to adopt.

Do vote twice, firstly with current energy model included, and secondly without.

- Thank you very much for your time. To finish, I'd like to recap on the most important things that came out from today
- Any final comments from respondents?
- Explain post-event survey will be mailed out to respondents within a week of finishing the event, additional incentive for completion. All incentives will be paid on together, approx. two weeks after the event.

Appendix 4: Stimulus - workshops

Tenants rights– switching supplier

You can usually change energy supplier if you rent your home. The exception is if your landlord pays your supplier for the energy you use.

If you pay your energy supplier

- You have the right to switch supplier if you pay your energy supplier directly for your gas or electricity. This includes if you have a prepayment meter
- You should check your tenancy agreement to see if the landlord has a 'preferred supplier'. This won't stop you from switching supplier, but you should tell your landlord or letting agent
- You may have to return the account to the original supplier at the end of your tenancy

If your landlord pays your energy supplier

- You don't have the right to switch supplier if your landlord pays the energy company directly and then charges you
- If you want to change supplier, you'll need to ask your landlord to do it - but they don't have to.

Produced by Impact Research Ltd in strict confidence 2 **IMPACT**

Tenants rights– metering

Having prepayment meters removed or installed

- Your landlord can't stop you replacing a prepayment meter with a normal meter that lets you pay after using energy rather than in advance. You don't need your landlord's permission to do this
- If you get behind on your gas or electricity bills, your energy supplier might want to install a prepayment meter. Your landlord can't stop this, and you don't need their permission

Returning the original meters at the end of your tenancy

- If you install or remove prepayment meters, you might have to put the original meters back at the end of your tenancy. This is because the change will count as an alteration to the property. You'll have to pay any fee your energy supplier charges for changing the meters back
- Most people's suppliers don't charge a fee for installing or removing meters. If yours does, think about switching supplier. Or tell your current supplier you'll switch to another one they might remove the fee if you stay with them

Produced by Impact Research Ltd in strict confidence 3 **IMPACT**

Tenants rights– what your landlord can charge you

Your landlord can only charge you for gas or electricity if your tenancy agreement says they can.

Check your tenancy agreement to find out if you have to pay your landlord for energy
Your landlord can't charge you for gas or electricity if you pay your supplier directly

How much your landlord can charge

Your landlord can only charge you for:

- the units of energy you've used (for example, the kilowatt hours you've used for electricity)
- your share of the standing charge (a flat fee charged on every energy contract)
- the VAT owed (5% for energy)

This is called the 'maximum resale price' - your landlord can't charge you more than this

If your home doesn't have an energy meter that records how much energy you've used, your landlord must estimate as accurately as possible how much you should pay.

Produced by Impact Research Ltd in strict confidence 4 

Tenants requests for energy efficiency improvements

Tenants can request consent for the relevant energy efficiency improvements where there is no cost for landlords.

These energy efficiency improvement includes:

- Draught proofing
- Cavity wall insulation
- Installation of heating and hot water controls such as timers and thermostats
- Replacement glazing

These measures must be funded by any of, or a combination of the tenant, central government, a local authority or any other person.

There are some exceptions:

- tenant had served a notice to quit
- landlord had served a notice to end the tenancy and possession proceedings may be brought.

A landlord can also refuse consent if the improvements would result in a reduction of more than five per cent in the market value of the property

Produced by Impact Research Ltd in strict confidence 5 

Time of use tariffs



Energy use in the GB peaks and troughs throughout the day.

During different times, such as in the morning before work/school and early evening, demand for energy is very high, putting a strain on the network.

Time of use tariffs mean the price of energy changes depending on when that energy is used throughout the day. The availability of renewable energy can also have an impact on price, i.e. cheaper when it is windy.

In order to reduce the pressure, consumers can be rewarded with cheaper energy prices for using energy at 'less busy' times of the day.

Challenge this model aims to overcome

Currently, there is little incentive for consumers to use energy outside of peak times.

It is more expensive for the network at these times as it needs to cope with maximum usage. But most consumers pay a fixed price, regardless of when energy is used. Time of use tariffs could reduce the cost of the network, by getting consumers to shift their usage.



What this means for you?



Pricing:

If you are able to change the times you use energy, you could save money. If you primarily use energy during the peak and cannot be flexible, it is likely your bills will increase.



Data:

Your supplier will need half-hourly usage data from your smart meter to accurately bill.



Contract Type:

Same options as the current model.



Consumer effort to engage with this model:

Medium if trying to use energy outside peak times, but interaction with suppliers is similar to the current model.



Control over energy usage:


You could allow your supplier to turn some appliances on or off automatically, to help avoid expensive peak times.

Be aware that:


Bills could increase if you don't engage/ adapt when you use energy at all, and to benefit most you may need to invest in further technology to change usage.



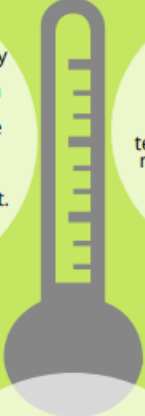
Energy as a Service



In a similar way that many people pay for their mobile phone usage as a fixed monthly contract, (which often includes the cost of the phone and your phone usage), you could buy your energy through a service contract.



For a fixed monthly payment, you get your home at an agreed temperature for an agreed number of hours per day.



In some cases, your energy service provider might install additional insulation, or a new type of heating system, but you don't pay for these upfront - they are paid for through the energy savings they bring.



Challenge this model aims to overcome

Reducing carbon emissions can be complicated, requiring a change in the way we use energy, and the introduction of new, perhaps unfamiliar, technologies.

Energy as a Service makes it easy for the household as the complexity is left to someone else (the energy service provider), and the household just has to define the outcomes they want.



What this means for you?



Pricing: A fixed amount rather than paying for exactly the energy that is used. The amount will depend on the outcomes you want.



Data: Increased data sharing is required to allow the service to be best matched to individual household needs or preferences.



Contract Type: Longer term (e.g. 5 years or more) than the current model and more difficult to leave, especially if new heating technologies or insulation measures are included.



Consumer effort to engage with this model: Higher to begin with as the terms of the service are agreed (number of hours of heating, definition of comfortable temperature, etc.) but after that the customer needs only minimum engagement.



Control over energy usage: Energy service provider optimises your energy use, but household can override. This may be within agreed 'fair usage' limits, e.g. you can't heat your home above 22 degrees without paying an additional charge.

Be aware that:

In a longer contract changes to your preferences or lifestyle might mean the service is no longer suitable.



Bundled Services



Bundled service models are based on offering a combination of products and/or services, packaged together into a single proposition, this isn't new in many markets people buy products in, but new technology allows innovative new offerings in the energy market



This could be a "simple bundle" where in addition to your usual energy supply, your energy provider might install/lend a particular product, such a washing machine or heating system, but these would not be paid for upfront - they are paid for by energy savings they bring.



This could also be a "smart bundle" where the items work together to make things simpler for people, for example scheduling when your heating might come on, or warning you a heating appliance needs repair



Challenge this model aims to overcome

Bundling Services makes it easy for the household as the complexity is left to someone else (the energy service provider), and the household just has to define the outcomes they want.

This model can be an effective way of overcoming accessibility barriers. By packaging products and services together in a single offering, accessibility for consumers can be improved through:

- ✓ **Convenience & simplification** of ever-growing choices, both within energy, but also with other household services (e.g. via multi-service offerings)
- ✓ **Improved peace of mind & long term satisfaction** via tailored offers, fixed price contracts or flexible contracts depending on consumer circumstances.
- ✓ **Engagement with novel and useful technologies** which consumers might not otherwise engage with, which is required for access.

What this means for you?



Pricing: Potential value for money by providing additional products and services at a lower price than accessing them separately



Data: Increased data sharing across sectors and devices is required to allow the service to be best matched to individual household needs or preferences.



Contract Type: If energy supply is bundled with new technology, the contract is likely to be longer than the usual 1-2 years



Consumer effort to engage with this model: Initially consumers could benefit from simplification from buying multiple upgrades in one. But things could be complicated if your energy supplier failed.



Control over energy usage: Energy service provider and partners optimises your energy use, but household can override

Be aware that:

In a longer contract, changes to your preferences or lifestyle might mean the service is no longer suitable.



Appendix 5: Post task

Thank you for taking part in our workshop/ interview and agreeing to be re-contacted, your opinions are greatly valued.

This is a short survey about your experiences and opinions following the workshop/ interview, and should take approximately 10 minutes to complete. As a thank you for completing the survey, you will receive £10, which will be paid alongside the incentive you are due to receive from the workshop.

By completing the survey, you are consenting to have your data collected. This data will be used for research purposes only and no personally-identifiable information will be shared with third parties.

S1 Are you happy to continue with the survey and have your data collected?

- a) Yes
- b) No (**close survey**)

S2 First, please can you tell us which event you attended?

- a) Tenant workshop Thursday 4th February
- b) Landlord workshop Tuesday 9th February
- c) Tenant workshop Wednesday 10th February
- d) Landlord workshop Thursday 11th February

INFO: We are now going to ask a few questions relating to the workshop/interview.

1. How satisfied were you with the event/interview overall?

- a) Very dissatisfied
- b) Somewhat dissatisfied
- c) Somewhat satisfied
- d) Very satisfied

2. How satisfied were you with each of the following?

	Very dissatisfied	Somewhat dissatisfied	Somewhat satisfied	Very satisfied
The tasks				
The moderator(s)				
The posters/ information provided				

The communication in the lead up to the workshop				
The online setting over Zoom				

3. If you wanted to take part in future workshops post-COVID 19, would you prefer these to be online or in person?
- a) Online
 - b) In person
 - c) No preference

INFO: Now we would like to ask a few questions about the different energy models that you discussed. As a reminder, there was:

The current model (the energy market we use today), Time of Use, Energy as a Service and Bundled Services.

- **Time of Use:** Time of use tariffs mean the price of energy changes depending on when that energy is used throughout the day. This is because energy is cheaper to use when there is excess energy available (e.g., overnight) and more expensive when it is in high demand (e.g. in the evening around dinner time).
 - **Energy as a Service:** In a similar way that many people pay for their mobile phone as a fixed monthly contract, you could buy your energy through a service contract, such as heat where you could set a temperature for your house to be heated to.
 - **Bundled services:** A model based on offering a combination of products and/or services, packaged together into a single proposition. This could be a “simple bundle” where in addition to your usual energy supply, your energy provider might install/lend a particular product, such a washing machine or heating system.
4. Which - if any - of the energy models do you like and why?
5. **Tenants wording:** If all of these models were available in the next 10-20 years, on a scale of 1-10, where 0 is actively resist and 10 is extremely likely to use, what is the likelihood you will use each model in the future?

Landlords wording: If all these models were available in the next 10-20 years, on a scale of 0-10, where 0 is actively resist and 10 is extremely likely to use, what is the likelihood of you assisting your tenants to use any of these models in the future (assuming they requested to do so)?

	0 – would actively resist using this model	1	2	3	4	5	6	7	8	9	10 – extremely likely to be using this model
--	--	---	---	---	---	---	---	---	---	---	--

Current model											
Time of Use											
Energy as a Service											
Bundled services											

6. Thinking about the opinions you had at the workshop/ interview regarding all of the energy models, do you think you've changed your opinion/view at all since the event? If so, what has changed and why? Was there anything at the event itself that has made you change your view?
7. **Tenants wording:** Have you discussed the content of the workshop/interview with family and/or flatmates at all? If so, what was their reaction? Were they positive or negative about the current energy model and the proposed new energy models?
- Landlords wording:** Have you discussed the content of the workshop with other landlords/business partners or estate agent colleagues? If so, what was their reaction? Were they positive or negative about the current energy model and the proposed new energy models?
8. Thinking about all the energy models that were discussed, do you have any thoughts as to what would need to change in order to allow more tenants in rented properties to take them up? For example, is there anything around contract length, data privacy, pricing that would need to be considered?
9. We would like to ask you to vote on your preferred model, similar to how you may have done in the workshop. You don't have to vote the same way as you did in the workshop. You may have had time to reflect on the energy models and we are interested if you still have the same opinion as in the workshop, or if you have changed your preference.

Tenants wording: Which of the energy models would you be most likely to adopt if given the choice?

Landlord wording: Which of the energy models would you be most happy with a tenant in your property adopting, if given the choice?

- a) Current model
- b) Time of Use
- c) Energy as a Service
- d) Bundled services

Please give the reason for your choice

ASKED TWICE, FIRST WITH CURRENT MODEL THEN WITHOUT

10. Tenants wording: Finally, what would be the ideal way you engage with the energy market in the future? This could include aspects of the current model, any of the new models or a combination of two or more.

Landlord wording: Finally, what would be the ideal way the energy is managed in your properties in the future? This could include how managed the contract and any aspects of the current model, the new models or a combination of two or more.

We'd like to give you the opportunity to record a short video of yourself explaining what you discussed as part of the workshop and your feedback overall. You would receive an additional £5 incentive for doing this.

If you would like to do this, please record and send your video to sarah.warbis@impactmr.com

Please write your name in the box below so that we can reward you for completing this survey.

Thank you very much for participating

Appendix 6: Discussion Guide – Reconvened Focus Groups

Moderator Introduction (5 minutes):

- Introducing the research team
- Housekeeping
- Explain that the research is being conducted on behalf of Citizens Advice
- Explain purpose of the discussion – explain previous research spoke to tenants and landlords separately, this group is now a mixture of both to recap on findings and some possible solutions
- Explain moderator’s role and set out ‘rules’ (speak loudly/clearly/not all together)
- Explain audio and video recording, and presence of observers (if appropriate)
- Any questions?

Overview of key findings – engagement and tenants’ rights (10 minutes)

First, we would like to talk you through the key themes from the workshops relating to tenant and landlord engagement with the energy market and the rights that tenants have.

Moderator: show stimulus ‘Tenants’ Rights – Findings’

- Are these findings largely in line with what was discussed in your group/your own experience?
 - If not, how were they different?
- Has anyone done anything differently since they attended the workshop?
 - What have you done?
 - Probe for: switch supplier, switch meter, contacted their landlord about anything, contacted their tenant about anything?

Potential solutions for engagement and tenant's rights (15 minutes)

Citizens Advice have suggested some potential solutions that could help aid both landlords and tenants with respect to engagement with the energy market and awareness of rights. The aim is to provide assistance to both landlords and tenants, not encourage them to take a certain action.

Moderator: share information on solutions for engagement first

- What are your thoughts on these?
- How would they affect you as a landlord or tenant?
- As a landlord or tenant, would you be happy for this to be implemented?
 - Why is this?
 - Would you have concerns about these being implemented?
- Do you think they would help increase engagement?
 - Why is this?
- Do you think there is more that could be done?
 - What could be done?
 - Who do you think should do this?
- Who do you think should be involved in the implementation of these solutions?
 - Do you think there is a role for an organisation such as Citizens Advice in helping to implement these solutions?
 - What do you think their role in this should be?

Moderator: share information on solutions for awareness of rights

- What are your thoughts on these?
- How would they affect you as a landlord or tenant?
- As a landlord or tenant, would you be happy for this to be implemented?
 - Why is this?
 - Would you have concerns about these being implemented?
- Do you think they would help increase a tenant exercising their rights?
 - Why is this?
- Do you think there is more that could be done?

- What could be done?
- Who do you think should do this?
- Who do you think should be involved in the implementation of these solutions?
 - Do you think there is a role for an organisation such as Citizens Advice in helping to implement these solutions?
 - What do you think their role in this should be?

Overview of key findings – new energy models (30 minutes)

Now we are going to recap findings from the workshops and understand whether opinions have changed, at all, since the groups. Again, these are key themes, not specific to individual.

Moderator: share stimulus on ‘Time of Use Tariffs’

- Are these findings largely in line with what was discussed in your group/your own experience?
 - If not, how were they different?
- Has your opinion on Time of Use tariffs changed since the workshop?
 - How so?
 - Are you more positive and negative about it now?
- Tenants, have you discussed Time of Use tariffs with friends/family/housemates at all?
 - What did they think of it?
- Landlords, have you discussed with business partners, family, estate agents at all?
 - What did they think of it?

Citizens Advice have suggested some potential solutions to aid both landlords and tenants with respect to each model, but we will discuss these at the end, as they may apply to more than one.

Moderator: share stimulus on ‘Energy as a Service’

- Are these findings largely in line with what was discussed in your group/your own experience?
 - If not, how were they different?
- Has your opinion on Energy as a Service changed since the workshop?
 - How so?

- Are you more positive and negative about it now?
- Tenants, have you discussed Energy as a Service with friends/family/housemates at all?
 - What did they think of it?
- Landlords, have you discussed with business partners, family, estate agents at all?
 - What did they think of it?

Moderator: share stimulus on ‘Bundled Services’

- Are these findings largely in line with what was discussed in your group/your own experience?
 - If not, how were they different?
- Has your opinion on Bundled Services changed since the workshop?
 - How so?
 - Are you more positive and negative about it now?
- Tenants, have you discussed Bundled Services with friends/family/housemates at all?
 - What did they think of it?
- Landlords, have you discussed with business partners, family, estate agents at all?
 - What did they think of it?

Potential solutions for increasing uptake of new models (25 minutes)

Citizens Advice have suggested the following to aid both landlords and tenants with respect increasing uptake of new energy models.

Moderator to share information on solutions one by one:

- **Contract length**
- **Equipment**
- **Need to guarantee savings**
- **Data/control**
- What are your thoughts on this?
- Do you think it will solve the issues specified?
 - Why is this?
 - What more could be done?
 - What could be done differently?

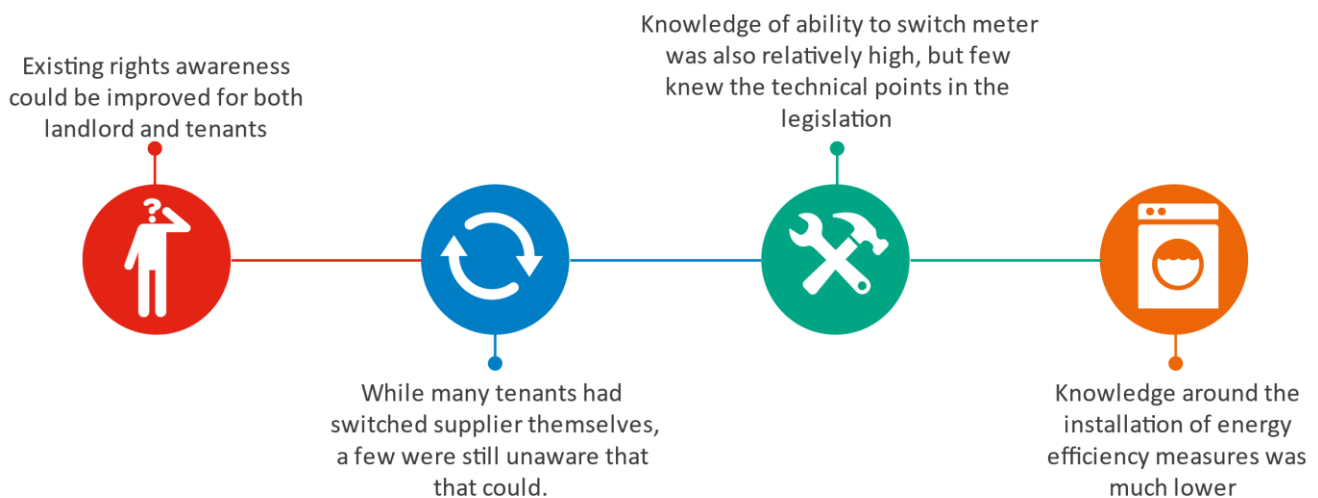
- Would it help new energy models become more appealing or less appealing?
 - Why is this?
 - How would it need to change to make it more appealing?
- How would it affect you as a landlord or tenant?
- What issues could you see arising if legislation like this was implemented?
- As a landlord or tenant, would you be happy for this to be implemented?
 - Why is this?
 - Would you have concerns about these being implemented?
- Do you think it would help tenants and landlords such as yourselves engage with the energy markets more?
 - Why is this?
- Do you think there is more that could be done in this area?
 - What could be done?
 - Who do you think should do this?
- Who do you think should be involved in the implementation of these solutions?
 - Do you think there is a role for an organisation such as Citizens Advice in helping to implement these solutions?
 - What do you think their role in this should be?

Wrap up and thank you (5 minutes)

- Thank you very much for your time. To finish, I'd like to recap on the most important things that came out from today
- Any final comments from respondents?
- Explain if any respondents would like to record a voxpop, please email either Steve or Sarah they will get explain how it can be done.

Appendix 7: Stimulus – Reconvened Focus Groups

Tenants' Rights- findings



Produced by Impact Research Ltd in strict confidence 2 **IMPACT**

Potential solutions

Engagement

Information solution

- Obligation on energy suppliers to collect information on the tenancy situation. This would allow targeted communications (e.g. advice that tenants can switch) and would allow targeting of support (e.g. access to Priority Services Register or Warm Home Discount even if they are not the billpayer)

Policy solution

- Tenants are prioritised for trials/implementation of collective switching. Government looking at how to introduce opt-in collective switching over the next year and an Ofgem trial showed record numbers of consumers saved money after participating in a trial

Rights awareness

Information solutions

- Introduce a standard lease where landlords set out that people are allowed to choose their meter type/supplier etc. if they pay own bills
- An information portal for both landlords and tenants where they can understand their rights/ responsibilities
- Obligation on landlords that they have to be registered –this would ensure they are informed of any changes to legislation that could affect them

- How broad should this be? E.g. defined by portfolio size? Any other measure?

Further research could be done with tenants into the following:




- What would make them feel more confident asking for improvements/changes?
 - Is it broader than energy?
 - Is it linked to security of tenure?

Produced by Impact Research Ltd in strict confidence 3 **IMPACT**

Findings - Time of Use Tariffs

A tariff where energy prices can change throughout the day, based on level of demand. Consumers could be rewarded with using energy at 'less busy' times of the day

Tenants

-  Cheaper energy bills
-  How would it fit with tenants' everyday lifestyle?
-  Tenants want proof that it lowers bills before signing up. Would peak time just shift?

Landlords

-  Landlords happy for tenants to sign up
-  Landlords have similar concerns about how it works
-  Landlords fear offstreet parking for electric vehicles won't be possible for all rented properties
-  Landlords less keen to buy other, new technology, e.g. smart washing machine








Produced by

Findings - Energy as a Service

For a fixed monthly payment, you could get your home at an agreed temperature for an agreed number of hours per day.

Tenants

-  Positive about concept
-  Liked certainty of guaranteed heat
-  Would need to know it would actually save them money
-  Contract length too long
-  Want to be able to change the temperature, or increase usage, without being penalised

Landlords

-  Wary of contract length
-  Concern over paying for an empty property
-  Tenants would want different temperatures
-  Better for newer builds with insulation.



Produced by

Findings - Bundled Services

Services such as heating, lighting, EV charging are bundled together and for a monthly payment, the user gets a fixed numbers of uses for each appliance/technology.

Tenants



Positive sentiment, could work in future with advancing tech



Contract length concern



How involved would the landlord need to be?

Landlords



Contract length concern



Reluctance to buy new appliances if old ones still work



Who would old new machines? What happens to old ones



This (and EaaS) would mean they'd need to be more involved with tenant



Produced by t

Potential solutions

Contract length

Rights solutions

- Contractual cooling-off period exists but limited to 14 days - could this be longer, e.g. up to 3 months?

Market solutions

- Should it be left to the market to come forward with solutions? E.g options of buy-out clause where another tenant/landlords could take on a contract?

Equipment

- Given move to electric vehicles from 2030, and no new homes being connected to the gas grid from 2025, new equipment or heating systems may be needed.
- Given permanent connection with the property, it seems likely landlords will be most likely to install significant new equipment. Certain incentives and disincentives could be implemented, if action is not taken. These could include:
 - Incentives:
 - Low-interest loans
 - Grants
 - Tax incentives for installing smart tech
 - Disincentives:
 - Requirement under Energy Performance Certificates for installation of smart meters (2025) and EV chargers (2030)
 - Compensation for not installing. E.g. if a landlord don't provide an EV charger, need to provide credit for a public charging system to the tenant
- Allow tenants to install equipment themselves if they don't significantly affect the fabric of the home e.g. smart thermostat

Produced by Impact Research Ltd in strict confidence 7 **IMPACT**

Potential solutions

Need to guarantee savings

Information solutions

- Ahead of purchase, being able to estimate savings and audit outcomes.
 - E.g. with Time of Use government have asked someone to build a tool to take smart meter data over the last year and automatically tell you if you could save money with a TOU tariff

Data/control

- Ensure smart meters are operated by energy user (e.g. tenant), and where this isn't possible, the halfhourly data sharing is switched off
- Tenants the right to control their energy supply overall
 - E.g. ToU products only available where the tenant has control of when they are switched on and off (washing machine connected with an app to come on at a certain time)
 - E.g. Amount of heating or other technology needed dictated by tenants' needs, not the landlord

Appendix 8: Recruitment screener – workshops

RESPONDENT CONTACT DETAILS	
RESPONDENT NAME	
TELEPHONE	
EMAIL ADDRESS [Mandatory as respondents will be emailed login info to read before the meeting]	

EXACT DATES AND TIME TO BE AGREED WITH RECRUITER

INTRODUCTION

Good morning/afternoon/evening. My name is ... from ... on behalf of Impact Research, an independent market research company. We are looking for people to take part in workshops to help Citizens Advice understand their opinions on the way they currently get their energy supply, and how it could possibly change in the future. The research is specifically looking at the opinions of tenants and landlords in the private rented sector.

We would like to invite you to participate in a **2.5-hour online workshop** in an evening on the weeks commencing the 1st or 8th February.

RECRUITER INCENTIVE INFO:

You will be paid £75 after the focus group for taking part.

A1. Are you willing to take part?

1. Yes – **CONTINUE**
2. No – **THANK AND CLOSE**

Thank you, I just need to ask you a few questions to check that you are eligible to attend the event.

QUOTA REQUIREMENTS

EXCLUSIONS SECTION

S ASK ALL

E1 Can you tell me if you, or any of your close friends or family members work in any of these professions?

1	Marketing	YES	NO
2	Market Research	YES	NO
3	Journalism	YES	NO
4	Electricity or Gas supply/distribution	YES	NO
5	None of the above	YES	NO
EXCLUDE ANY RESPONDENT WHO SAYS YES TO ANY 1 – 4			

S ASK ALL

E2 Have you taken part in a market research group or depth interview in the past?

1	Yes, within the last 6 months	CLOSE
2	Yes, over 6 months ago	
3	No, I have never taken part in research	

S ASK IF E2 = 2

E3 Can you tell me how many discussions you have taken part in during the last 3 years?

1	1 – 3	
2	4 or more	CLOSE

S ASK IF E2 = 2 AND E3 = 1

E4 Have you participated in any energy related (e.g., for a gas or electricity company) market research group or in-depth interview in the last year?

1	Yes	CLOSE
2	No	

S ASK ALL

E5 Do you own, manage or have responsibility for housing properties, as a landlord or agent?

1	Yes	GO TO LANDLORD SECTION
2	No	GO TO E6

ASK ALL

E6 Please describe your current living situation.

1	Own house, flat or apartment	CLOSE
2	Private rented house, flat or apartment	
3	Social rented house, flat or apartment	CLOSE
4	Other	CLOSE

ASK ALL

E7 Are you responsible for paying for your energy bills.

1	Yes – sole responsibility	GO TO TENANT SECTION
2	Yes – joint responsibility	
3	No	CLOSE
4	Don't know	CLOSE

DEMOGRAPHIC INFORMATION

Tenants only

We would like to ask a small number of questions to find out a little more about you.

S ASK ALL

D1a Which, if any, of the following terms best describes your gender?

1	Male	QUOTA: MINIMUM 7
2	Female	QUOTA: MINIMUM 7
3	Non-binary	
4	Intersex	
5	Prefer another term [open text]	
6	Prefer not to say	
7	Don't know	

Transgender is an umbrella term that refers to people whose gender identity, expression or behaviour is different from those typically associated with their assigned sex at birth. Other identities considered to fall under this umbrella can include non-binary, gender fluid, and genderqueer – as well as many more.

S ASK ALL

D1b Do you identify as transgender?

1	Yes	
2	No	
3	Prefer not to say	

S ASK ALL

D2 Please record your age.

1	18-24	QUOTA: MINIMUM 10
2	25-34	
3	35-44	
4	45-54	QUOTA: MINIMUM 4
5	55-64	
6	65+	
7	Prefer not to say	

S ASK ALL

D3 Which of the following categories best describes the employment status of the highest income earner in your household?

1	Semi or unskilled manual worker (e.g., caretaker, non-HGV driver, shop assistant, etc.)	QUOTA C2DE: MINIMUM 7
2	Skilled manual worker (e.g., bricklayer, carpenter, plumber, painter, bus driver, HGV driver, pub/bar worker, etc.)	
3	Supervisory or clerical/ junior managerial/ professional/ administrative (e.g., office worker, salesperson, etc.)	QUOTA ABC1: MINIMUM 7
4	Intermediate managerial/ professional/ administrative (e.g., newly qualified (under 3 years) doctor or solicitor, middle manager in large organisation, principal officer in civil service/local government, etc.)	
5	Higher managerial/ professional/ administrative (e.g., doctor, solicitor, board director in a large organisation, top level civil servant/public service employee, etc.)	

6	Student	QUOTA C2DE: MINIMUM 7
7	Casual worker – not in permanent employment	
8	Housewife/husband or homemaker	
9	Retired	
10	Unemployed or not working due to long-term sickness	
11	Full-time carer of other household member	
12	Prefer not to say	

S ASK ALL

D4 In which location do you currently live.

1	England	QUOTA: MINIMUM 5
2	Wales	

S ASK ALL

D5 In which type of location do you currently live.

1	City location	QUOTA: MINIMUM 7
2	Other urban location	
3	Semi-rural location	QUOTA: MINIMUM 7
4	Rural location	

S ASK ALL

D6 What is your ethnic group? Choose one option that best describes your ethnic group or background

Please note, this information will not be passed back to Citizens Advice. We intend to use this information to ensure we are speaking to a range of different consumers in your area.

1	White: English/Welsh/Scottish/Northern Irish/British	
---	--	--

2	White: Irish	QUOTA: MINIMUM 7
3	White: Gypsy or Irish Traveler	
4	Any other White background, please describe	
5	Mixed/Multiple ethnic groups: White and Black Caribbean	
6	Mixed/Multiple ethnic groups: White and Black African	
7	Mixed/Multiple ethnic groups: White and Asian	
8	Any other Mixed/Multiple ethnic background, please describe	
9	Asian/Asian British: Indian	
10	Asian/Asian British: Pakistani	
11	Asian/Asian British: Bangladeshi	
12	Asian/Asian British: Chinese	
13	Any other Asian background, please describe	
14	Black/ African/Caribbean/Black British: African	
15	Black/ African/Caribbean/Black British: Caribbean	
16	Any other Black/African/Caribbean background, please describe	
17	Other ethnic group: Arab	
18	Any other ethnic group, please describe	

The Equality Act 2010 defines a person as disabled if *"they have a physical or mental impairment, which has a substantial and long term (has lasted, or is expected to last, for at least 12 months) adverse effect on their ability to carry out normal day to day activities"*.

Citizens Advice follows the social model of disability. We believe that society's barriers and negative attitudes cause people to be disabled, not a person's impairment or long-term health condition.

S **ASK ALL**

D7a Do you consider yourself to be disabled?

Please note, this information will not be passed back to Citizens Advice. We intend to use this information to ensure we are speaking to a range of different consumers in your area.

1	Yes - physical health condition / disability	
2	Yes - mental health condition / disability	
3	Yes - mental and physical health condition(s) / disability	
4	No	
5	Prefer not to say	

S ASK IF D7a=1, 2 OR 3

D7b Does your disability reduce your ability to carry out day-to-day activities?

1	Yes – a lot	QUOTA: MINIMUM 7
2	Yes – a little	
3	No	
4	Prefer not to say	

VULNERABLE – QUOTA: MINIMUM 7 VULNERABLE

- 1 Vulnerable: IF D7b = 1 OR 2
- 2 Not currently vulnerable: IF D7a=4 OR 5, OR IF D7b=3 OR 4

We now have a few questions relating to the property that you live in

S ASK ALL

D8 In which type of property do you currently live?

1	House or bungalow	QUOTA: MINIMUM 5
2	Flat or apartment	QUOTA: MINIMUM 5
3	Other (please specify)	

S ASK ALL

D9 Approximately how long have you been at your current property?

1	Less than 6 months	QUOTA: MINIMUM 7
2	6-12 months	
3	1-2 years	
4	2 years or more	QUOTA: MINIMUM 7

S ASK ALL

D10 Which of the following best describes who you live with?

If multiple options apply to you, please select the option covers the highest number of people you live with.

1	I live on my own (single occupancy)	QUOTA: MINIMUM 5
2	I live with a partner	
3	I live with family	QUOTA: MINIMUM 5
4	I live with friends	QUOTA: MINIMUM 5
5	I live in a house/flat-share	

S ASK ALL

D11 Which type of meter do you have in your house for your electricity supply?

1	Traditional meter (records electricity usage and is manually sent to supplier on a regular basis)	QUOTA: MINIMUM 5
2	Smart meter (records electricity usage and can be monitored daily for peaks and troughs, automatically sends data to supplier. Usage is shown on an In-Home Display Screen)	QUOTA: MINIMUM 5
3	Pre-payment meter (a meter that is topped up by the user by inserting a key or card into the meter with funds paid onto it)	QUOTA: MINIMUM 5*

*expecting difficult to fill this quota – to be closely monitored throughout recruitment

S ASK ALL

D12 Have you ever switched energy supplier?

1	Yes	
2	No	

S ASK IF D12=1

D13 When did you last switch energy supplier?

1	Within the last year	
2	Within the last two years	
3	Not within the last two years	

Quotas: MINIMUM 7 IN EACH

Engaged IF D12=1 AND D13=1 OR 2

Disengaged IF D13=2 OR IF D13=3

M ASK ALL

D14 Which of the following do you own?

Please select all that apply

1	Electric Vehicle	QUOTA: MINIMUM 5
2	Smart Meter	
3	Smart TV	
4	Smart watch	
5	Smart speakers	
6	Smart heating control	
7	Coffee machine	
8	Games console	
9	Streaming device (e.g., Now TV stick, Amazon Fire TV stick)	

10	Laptop/desktop computer	
11	Smart Phone	

Landlords only

We would like to ask a small number of questions to find out a little more about you.

S ASK ALL

L1 Which of the following best describes your role?

1	I am a landlord	
2	I work for an estate agent that handles properties on behalf of a landlord/landlords	QUOTA: MINIMUM 5

S ASK IF L1=1

L2 Which of the following most applies to you?

1	I manage my property portfolio	QUOTA: MINIMUM 5
2	I let an agent or management company manage my property portfolio	QUOTA: MINIMUM 7

S ASK ALL

L3 How many rented properties do you own/manage?

1	One	QUOTA: MINIMUM 7
2	Two to three	QUOTA: MINIMUM 7
3	Four to ten	
4	11-24	

5	25 or more	CLOSE
---	------------	--------------

S ASK ALL

L4 Which of the following best describe how the energy bills are managed in the properties you own/manage?

1	I let the tenant manage the energy bills themselves	QUOTA: MINIMUM 7
2	I manage the energy bills and include them in the rent I charge	QUOTA: MINIMUM 5*
3	I let the tenant manage the bills in some properties I own/manage and include them in the rent in others	

*expecting difficult to fill this quota – to be closely monitored throughout recruitment

RECRUITER CHECK:

- Ensure respondent meets the full recruitment profile
- Check that you have provided the respondent with an invitation and that you have a contact number for reminder calls to be made
- Please ask respondents if they wear glasses – if so, they must have them ready for the group
- Please ask respondents about any further requirement they have, e.g., logging on to zoom and joining the group, so they can be arranged prior to the groups
- Please tell the respondents that they will be asked to turn off their mobiles prior to the discussion
- Please advise all respondents that the interviews will be audio and / or video recorded.
- Respondents should not know other members of the group – please do not snowball or recruit in friendship pairs.

PLEASE ENSURE THE RESPONDENT READS AND UNDERSTANDS THE FOLLOWING LITERATURE

The group discussion or interview you take part in will be

- a. Audio recorded
- b. Video recorded
- c. Observed by Impact and Citizens Advice staff via zoom

Use of Quotations, audio and video clips

Focus group discussions will be audio and video recorded. The Data Protection Act requires that we collect and use the information you provide to us in a manner that respects and protects your confidentiality. Your personal details (name, address, phone number) will not be disclosed to anyone else without your permission other than the company carrying out the research.

We would like to ask your permission to use quotes, soundbites and/ or video footage from the group session in presentation materials about the project. This may range from anonymized sounds bites of what people at the groups were saying to actual clips from the video recording.

You will not be identified by name. However, it will **not be possible** to protect the anonymity of those who can be seen or heard in the video footage e.g., by blurring out people’s faces.

The tapes will **not be used** for commercial purposes, such as promotion or direct sales activities.

The tapes will be dated and deleted at the latest two years after the research is completed.

Are you happy for us to use **[ALL RECRUITED CUSTOMERS MUST ANSWER YES]** the following?

Quotations of your comments	Yes	No
Audio clips of your comments	Yes	No
Video clips of your comments	Yes	No

Appendix 9: Recruitment screener – In-depth interviews

RESPONDENT CONTACT DETAILS	
RESPONDENT NAME	
TELEPHONE	
EMAIL ADDRESS IF POSSIBLE, IF NOT ACTUAL ADDRESS SO WE CAN SEND STIMULUS MATERIAL TO THEM	

EXACT DATES AND TIME TO BE AGREED WITH RECRUITER

Respondent must be either of the following:

Those with disabilities – mobility, mental health or other disability, that would stop them attending the workshops

Where English is not their first language – Even though English is not their first language, we would only expect interviews with participants where they could speak reasonable English

Digitally disengaged – do not have access to the internet or own any smart devices (*we will need actual address for these respondents, unless they are able to participate in the research with assistance online e.g., with a family member*)

INTRODUCTION

Good morning/afternoon/evening. My name is ... from ... on behalf of Impact Research, an independent market research company. We are looking for people to take part in some in-depth interviews to help Citizens Advice

understand their opinions on the way they currently get their energy supply, and how it could possibly change in the future. The research is specifically looking at the opinions of tenants and landlords in the private rented sector.

We would like to invite you to participate in a **45-60 minute online/telephone interview** during the week commencing 22nd February.

We would be looking for a good spread of respondents fitting into the above categories.

The interview would ideally be conducted over zoom, but if the respondent does not have access to a computer then they can be conducted over the phone. If any interviewee would like to have a carer or family member present with them (to e.g., help work the computer), they are welcome to, but they would not be paid or be expected to participate

RECRUITER INCENTIVE INFO:

You will be paid £40 after the interview for taking part.

A1. Are you willing to take part?

1. Yes – **CONTINUE**
2. No – **THANK AND CLOSE**

Thank you, I just need to ask you a few questions to check that you are eligible to attend the event.

EXCLUSIONS SECTION

S ASK ALL

E1 Can you tell me if you, or any of your close friends or family members work in any of these professions?

1	Marketing	YES	NO
2	Market Research	YES	NO
3	Journalism	YES	NO

4	Electricity or Gas supply/distribution	YES	NO
5	None of the above	YES	NO
EXCLUDE ANY RESPONDENT WHO SAYS YES TO ANY 1 – 4			

S ASK ALL

E2 Have you taken part in a market research group or depth interview in the past?

1	Yes, within the last 6 months	CLOSE
2	Yes, over 6 months ago	
3	No, I have never taken part in research	

S ASK IF E2 = 2

E3 Can you tell me how many discussions you have taken part in during the last 3 years?

1	1 – 3	
2	4 or more	CLOSE

S ASK IF E2 = 2 AND E3 = 1

E4 Have you participated in any energy related (e.g., for a gas or electricity company) market research group or in-depth interview in the last year?

1	Yes	CLOSE
2	No	

ASK ALL

E6 Please describe your current living situation.

1	Own house, flat or apartment	CLOSE
---	------------------------------	--------------

2	Private rented house, flat or apartment	
3	Social rented house, flat or apartment	CLOSE
4	Other	CLOSE

ASK ALL

E7 Are you responsible for paying for your energy bills.

1	Yes – sole responsibility	WOULD LIKE SOME BILL PAYERS (THOSE WITH DISABILITIES MAY NOT BE RESPONSIBLE WHICH IS FINE)
2	Yes – joint responsibility	
3	No	
4	Don't know	

DEMOGRAPHIC INFORMATION

We would like to ask a small number of questions to find out a little more about you.

The Equality Act 2010 defines a person as disabled if "they have a physical or mental impairment, which has a substantial and long term (has lasted, or is expected to last, for at least 12 months) adverse effect on their ability to carry out normal day to day activities".

Citizens Advice follows the social model of disability. We believe that society's barriers and negative attitudes cause people to be disabled, not a person's impairment or long-term health condition.

S ASK ALL

D1a Do you consider yourself to be disabled?

Please note, this information will not be passed back to Citizens Advice. We intend to use this information to ensure we are speaking to a range of different consumers in your area.

1	Yes - physical health condition / disability	
2	Yes - mental health condition / disability	
3	Yes - mental and physical health condition(s) / disability	

4	No	
5	Prefer not to say	

S ASK IF D1a=1, 2 OR 3

D1b Does your disability reduce your ability to carry out day-to-day activities?

1	Yes – a lot	QUOTA: MINIMUM 3
2	Yes – a little	
3	No	
4	Prefer not to say	

S ASK ALL

D2 What would you consider to be your first language?

1	English	
2	Other – please record what their first language is	QUOTA: MINIMUM 3

S ASK ALL

D3a Using the below scale, how would you rate your digital skills?

A smart device is an electronic device that is able to connect, share and interact with its user and other smart devices. Examples include a smart watch and a smart lightbulb.

1	I do not use the internet or any smart devices	QUOTA: MINIMUM 3
2	I use the internet but do not own any smart devices and do not plan to soon	IDEALLY HAVE COVERAGE IN ALL OPTIONS
3	I do not own any smart device but plan to buy some soon	
4	I own a few smart devices	
5	My house is fully connected with smart devices	

S ASK ALL

D4a Which, if any, of the following terms best describes your gender?

1	Male	QUOTA: MINIMUM 3
2	Female	QUOTA: MINIMUM 3
3	Non-binary	
4	Intersex	
5	Prefer another term [open text]	
6	Prefer not to say	
7	Don't know	

Transgender is an umbrella term that refers to people whose gender identity, expression or behaviour is different from those typically associated with their assigned sex at birth. Other identities considered to fall under this umbrella can include non-binary, gender fluid, and genderqueer – as well as many more.

S ASK ALL

D4b Do you identify as transgender?

1	Yes	
2	No	
3	Prefer not to say	

S ASK ALL

D5 Please record your age.

1	18-24	ENSURE SPREAD ACROSS AGES, BUT MINIMUM 3 65+
2	25-34	
3	35-44	
4	45-54	
5	55-64	
6	65+	
7	Prefer not to say	

S ASK ALL

D6 In which location do you currently live.

1	England	QUOTA: MINIMUM 3
2	Wales	

S ASK ALL

D7 What is your ethnic group? Choose one option that best describes your ethnic group or background

Please note, this information will not be passed back to Citizens Advice. We intend to use this information to ensure we are speaking to a range of different consumers in your area.

1	White: English/Welsh/Scottish/Northern Irish/British	QUOTA: MINIMUM 3
2	White: Irish	
3	White: Gypsy or Irish Traveler	
4	Any other White background, please describe	
5	Mixed/Multiple ethnic groups: White and Black Caribbean	
6	Mixed/Multiple ethnic groups: White and Black African	
7	Mixed/Multiple ethnic groups: White and Asian	
8	Any other Mixed/Multiple ethnic background, please describe	
9	Asian/Asian British: Indian	

10	Asian/Asian British: Pakistani	
11	Asian/Asian British: Bangladeshi	
12	Asian/Asian British: Chinese	
13	Any other Asian background, please describe	
14	Black/ African/Caribbean/Black British: African	
15	Black/ African/Caribbean/Black British: Caribbean	
16	Any other Black/African/Caribbean background, please describe	
17	Other ethnic group: Arab	
18	Any other ethnic group, please describe	

RECRUITER CHECK:

- **Ensure respondent meets the full recruitment profile**
- **Check that you have provided the respondent with an invitation and that you have a contact number for reminder calls to be made**
- **Please ask respondents if they wear glasses – if so, they must have them ready for the group**
- **Please advise all respondents that the interviews may be audio recorded**

PLEASE ENSURE THE RESPONDENT READS AND UNDERSTANDS THE FOLLOWING LITERATURE

The group discussion or interview you take part in will be

- a. **Audio recorded**

Use of Quotations and audio clips

Interviews audio recorded. The Data Protection Act requires that we collect and use the information you provide to us in a manner that respects and protects your confidentiality. Your personal details (name, address, phone number) will not be disclosed to anyone else without your permission other than the company carrying out the research.

We would like to ask your permission to use quotes and soundbites from the group session in presentation materials about the project. This may range from anonymized sounds bites of what people at the groups were saying to actual clips from the video recording.

You will not be identified by name. However, it will **not be possible** to protect the anonymity of those who can be seen or heard in the video footage e.g., by blurring out people's faces.

The tapes will **not be used** for commercial purposes, such as promotion or direct sales activities.

The tapes will be dated and deleted at the latest two years after the research is completed.

Are you happy for us to use **[ALL RECRUITED CUSTOMERS MUST ANSWER YES]** the following?

Quotations of your comments	Yes	No
Audio clips of your comments	Yes	No