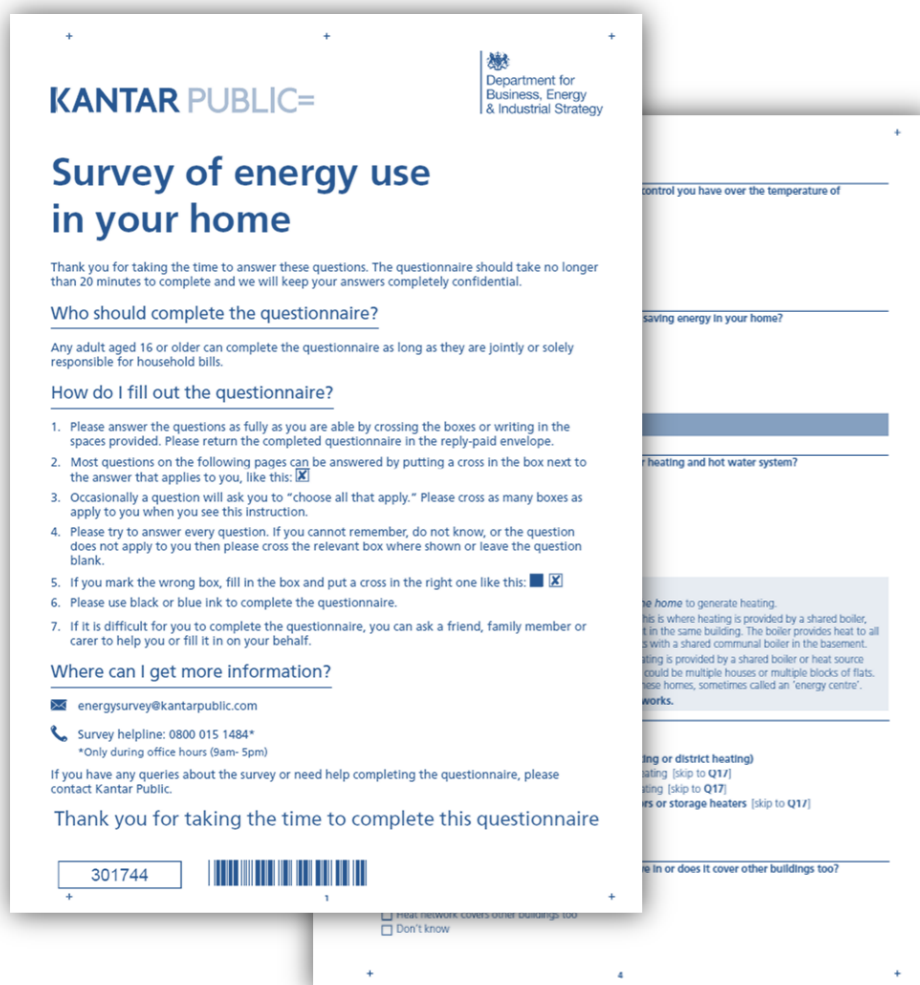

Protecting the Customer - BEIS Customer Survey

Phil Cole



Heat Networks Consumer Survey



Aims of research:

- To understand the experience of Heat Network (HN) consumers compared to non-HN consumers.
- To provide a definitive source of evidence on heat network consumer experience.
- To understand how consumer experiences differ within the HN population.¹

Who responded?

- **3,716** heat network consumers from **2,218** different heat networks in England and Wales.
- **1,786** non-heat network consumers as a comparison.

Topics covered:

Technical Service:

- Overall satisfaction
- Reliability
- Overheating and under-heating.
- Service interruptions and time taken to fix
- Level of control over heating and satisfaction.



Billing and Pricing:

- Receipt of separate heating bill and billing information.
- How bill is calculated.
- Average price paid and whether price is fair.



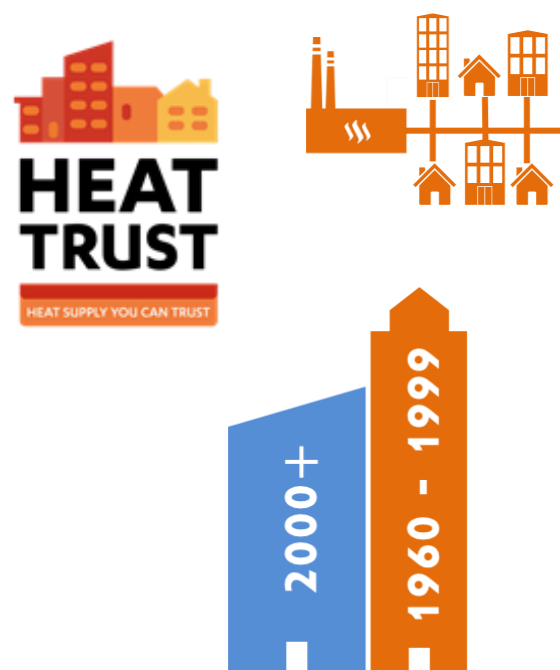
Information and Customer Service:

- Information received.
- Complaints and satisfaction with complaint outcome.

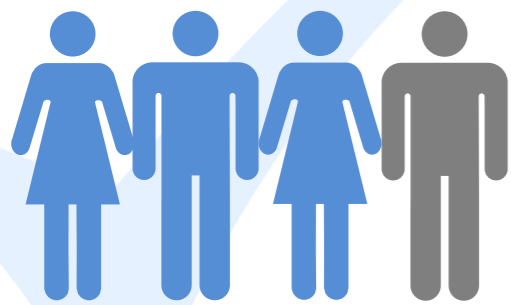


Consumer groups compared:

- Type of network: District vs communal systems.
- Heat operator: Private vs Local Authority vs Housing Association.
- Heat Trust registered vs not registered networks.
- Older vs newer networks (age of building used as a proxy).
- Flat rate billing vs estimated and actual usage.



Heat Networks Consumer Survey



Three in four heat network consumers were satisfied overall with their heating system. This is comparable with non-heat network consumers.



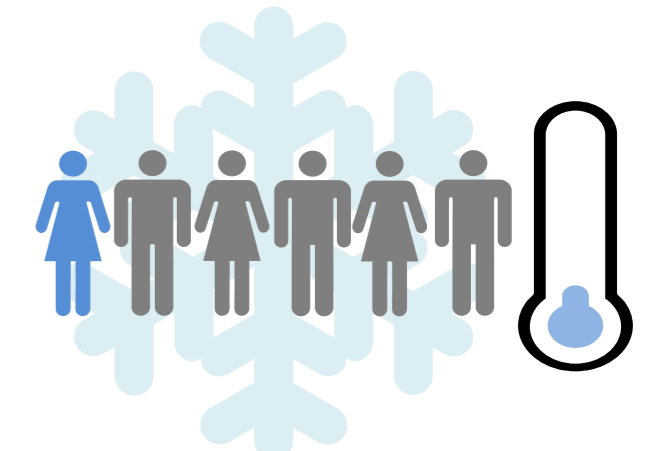
Almost **two in five** heat network consumers experienced **overheating** compared with around one in five non-heat network consumers.



Heating prices varied greatly among heat network consumers, with some consumers paying over £2000 per year.

Median annual prices were **£100 lower** for heat network consumers.

In comparison around **one in six** heat network consumers experienced **under-heating** compared with around three in ten non-heat network consumers.



Six in ten heat network consumers felt they paid a **fair price**. This is comparable with non-heat network consumers.



37% of heat network consumers had experienced **loss of heating** in the last 12 months compared with 24% of non-heat network consumers.



Only 34% of heat network consumers who received a bill had a description of **how their bill was calculated** compared with 58% of non-heat network consumers.

However **74%** of consumers on Heat Trust registered networks received this information.

Whilst more common, heating outages in heat networks were more likely to be resolved within 24 hours.

Seven out of ten heat network and non-heat network consumers were **satisfied with the level of control**. However heat network consumers were less likely to have devices to control their heating.



One in three heat network consumers had made a complaint or had reason to compared with one in four non-heat network consumers.



Heat Networks Consumer Survey

NOTE: Results in table indicate that the result is statistically significantly **higher** for mentioned group. Green=higher is good: Red=higher is bad.
Only key results discussed in the report are covered in the table - therefore blanks do not necessarily mean no difference, just that it wasn't reported.
For example: HN consumers on Communal systems had higher overall satisfaction than consumers on District systems (Row 1).

Topic		HN or non-HN		HN scheme		Operator			Age of building		Heat Trust or not	
		HN consumers	non-HN consumers	Communal	District	Housing Association	Local Authority	Private	Older buildings (built before 1999)	Newer buildings (built after 2000)	Heat Trust	Not Heat Trust
Technical Service	Overall Satisfaction - p26			Communal		HA						
	Reliability of system - p31			Communal		HA						
	Experienced overheating - p32	HN						Private		post 2000		
	Experienced under-heating - p34		Non-HN						pre 1999			
	Heating available at all times - p37		Non-HN							post 2000		
	Service interruption in last 12 months- p38	HN					LA					
	Service recovered within 24 hours - p38	HN									Heat Trust	
	Level of control - p39		Non-HN					Private				
	Satisfied with control - p40									post 2000		
Billing and pricing	Receive separate bill for heating - p45		Non-HN					Private		post 2000		
	Bill based on actual or estimated usage - p46		Non-HN					Private		post 2000		
	Receive information in bill - p47		Non-HN								Heat Trust	
	Want more billing info - p50											non-HT
	Price paid (median annual cost) - p51		Non-HN		District		LA					
	Price paid is fair - p54											
	Price is higher than expected - p57	HN										
Information and customer service	Receive information about system - p60		Non-HN								Heat Trust	
	Satisfied with level of information - p62											
	Raised a complaint or had reason to - p63	HN			District					post 2000		
	Satisfied with complaint outcome - p64		Non-HN			HA						